

South Bristol Link
Major Scheme Business Case

4

The Delivery Case

An explanation of how we propose to deliver the South Bristol Link



4 The Delivery Case

4.1 INTRODUCTION

This Chapter describes how we propose to deliver the South Bristol Link. It covers:

- **Governance** – roles and responsibilities for delivering the project, project organisation and decision-making structure;
- **Project Planning**- stages in project delivery with timescales and key dependencies
- **Risk Management** – development of risk register and quantified risk assessment
- **Stakeholder Management** – communications principles and plan, and consultation undertaken to date
- **Evaluation** – evaluation plan and timetabled reports
- **Assurance** – Gateway Review procedures

The South Bristol Link is one of several major transport projects and programmes being progressed in the West of England. The project is a key component of the wider integrated programme of major schemes in the Sub-Region.

The Link combines Rapid Transit and Highway, with a segregated cycle and pedestrian route alongside, connecting the A370 Long Ashton Bypass with Hartcliffe roundabout and Hengrove Park in South Bristol. Its design combines current guidance with best practice and takes on board public and stakeholder views so as to provide a scheme that is deliverable in the local context. The risk register has identified elements of the scheme that may present obstacles to delivery and these are considered below.

The programme for delivery has been drawn up to allow adequate time for completion of activities that lie on the critical path. Activities are generally carried out in sequence rather than in parallel; this allows for some leeway in the event of unplanned delay.

4.1.1 Relevant Local Experience

The West of England authorities have a proven track record in the delivery of transport schemes and major projects. We thus have practical experience of delivering schemes and good understanding of the major pitfalls that can occur and, through risk management, have circumvented these.

Examples of projects delivered and in the pipeline include:

- A4174 Avon Ring Road Stage II – opened to traffic in September 2001. The scheme completed the strategic link between M32 and A4. Cost £33.2 million. Evaluation has shown that the project successfully removed through-traffic, particularly HGVs, from unsuitable routes and

provided opportunities to enhance facilities for pedestrians, cyclists and public transport.

- Greater Bristol Bus Network (GBBN) – comprises a series of Showcase Routes; project granted Full Approval in May 2008 and the ten bus showcase corridors (nine of the ten entering Bristol including two in North Somerset) are now being delivered across the sub-region;
- Portway Park and Ride – Phase 1 of this Park and Ride scheme was opened in April 2002, providing a reliable 10 minute service into Bristol city centre, and including 280 car parking spaces for phase 1 and a further 250 spaces in September 2008
- Cycling City - In June 2008 DfT appointed Bristol as the UK's first official Cycling City, Bristol City and South Gloucestershire Councils are working together to deliver this scheme.
- Weston Sea Defences – an ongoing £30m project to bolster defences along the sea front in Weston
- The Bath Transportation Package has also now secured Programme Entry for a total investment of £54 million.
- A bid for Programme Entry for Rapid Transit Ashton Vale to Temple Meads was submitted to DfT in March 2009; and North Somerset Council submitted a bid in April 2009 for the Weston Package.

4.2 GOVERNANCE

4.2.1 The West of England Joint Governance Arrangements

The West of England authorities have been progressing joint working arrangements, which were strengthened significantly in 2009 and are summarised below.

West of England Partnership Board

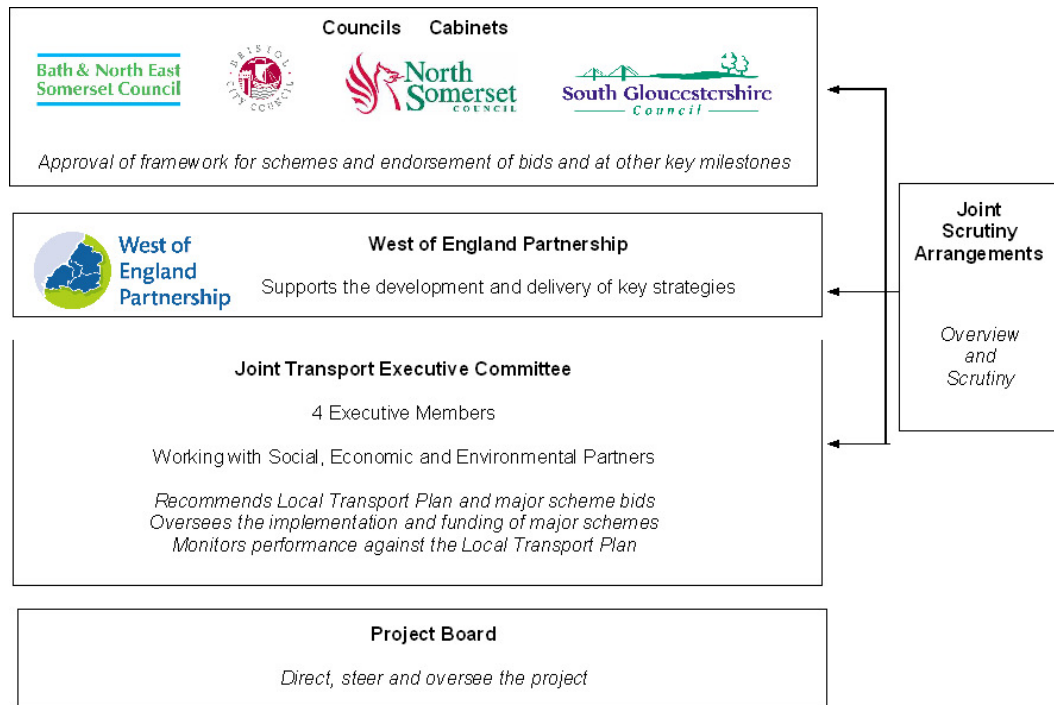
The West of England Partnership Board (the Partnership) is a cross-party member and strategic partner board. The purpose of the Partnership is to:

- Realise the potential of the West of England and improvements in its economy, public infrastructure, environment and quality of life for all its residents;
- Set clear long-term direction to support the development and delivery of key strategies for the West of England;
- Promote the interests of the West of England regionally, nationally and in Europe;
- Add to the confidence that attracts and retains public and private investment;
- Work holistically involving local authorities, public agencies and social, economic and environmental partners;
- Provide the leadership and strategic capacity to secure the well-being of the West of England;

- Ensure appropriate delivery arrangements and vehicles, and a performance management framework.

The Partnership structure is shown in Figure 4.1.

Figure 4.1 West of England Joint Governance Arrangements



Joint Transport Executive Committee

In 2009 a Joint Transport Executive Committee (JTEC) was established comprising the four Executive Members of the Unitary Authorities with responsibility for transport. This arrangement has been legally constituted via a Joint Working Agreement. The JTEC is responsible for:

- developing and recommending sub-regional policy, investment and financial frameworks;
- specific and continuing political decision-making and oversight essential to the successful implementation of major transport strategies and investment Projects;
- seeking authority from Cabinets where any variation to a policy and financial framework is recommended;
- producing periodic progress reports and receiving monitoring reports from major contractors;
- Working with cross-party members and strategic partners serving on the relevant Joint Transport Advisory / Scrutiny Board of the Partnership;
- overseeing relationships with the DfT, bus and rail operators, the Highways Agency and Network Rail; and

- ensuring the delivery of the transport elements of the Multi-Area Agreement.

JTEC Members exercise their executive powers collectively, within the relevant sub-regional policy and financial frameworks determined by individual authorities, subject to any decisions reserved by individual authorities.

For the South Bristol Link, JTEC has considered and endorsed the scheme on two occasions in the past six months. First, in October 2009, when members considered the shortlisting process and endorsed progressing to development of the preferred scheme. Second, in February 2010, when members discussed and unanimously endorsed the scheme that is the subject of this submission.

Joint Scrutiny Committee

The Joint Scrutiny Committee supplements the cross-party member and strategic partner engagement and contribution made at the Partnership. The role of the Joint Scrutiny Board is to:

- provide specialist advice and recommendations to the Partnership; and
- scrutinise proposals under consideration, and the implementation of proposals approved.

The Joint Scrutiny Committee considered the South Bristol Link in January 2010 and made a number of recommendations that were subsequently addressed in the February report to JTEC.

Proposed Joint Delivery Vehicle

With the JTEC now in place it is the West of England's intention to establish a Joint Delivery Vehicle [JDV]. The purpose of the JDV is:

- to provide consultancy services to the West of England authorities on the best means of specifying individual major infrastructure projects - transport, municipal waste management and homes and communities - once they are financed and approved;
- once specified, to ensure the delivery of major infrastructure projects within the agreed timescales, specification and budget, by effective commissioning; and
- to ensure high quality project management.

Independent legal and financial advisers have been advising the authorities on the formation of this vehicle

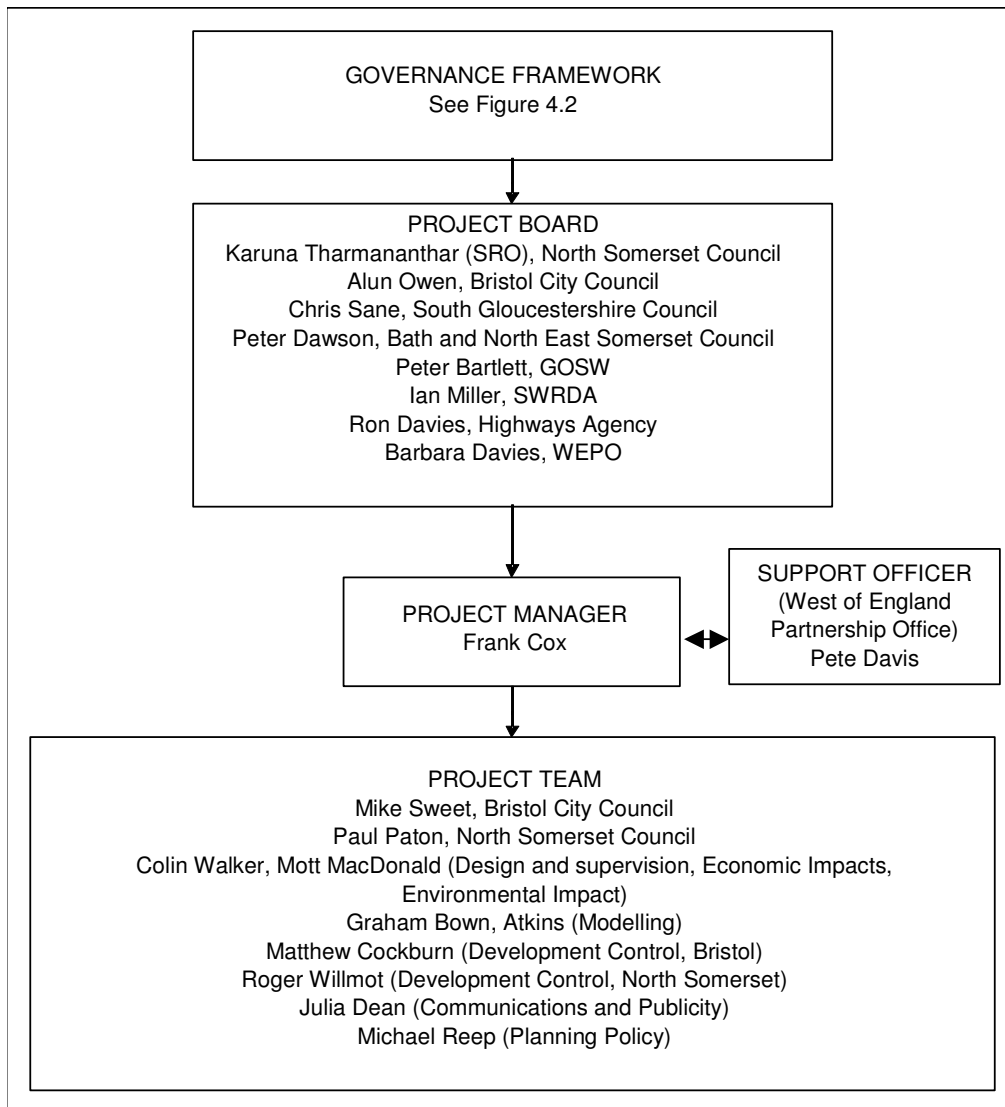
The move to a JDV is a significant step in the evolving shared governance arrangements in the West of England. This vehicle would be the preferred option for delivery of major transport schemes in the sub-region; however, given that the JDV is not yet in existence, the proposed governance for delivery of the South Bristol Link is set out below.

At the highest level governance rests with the councils supported by the challenge and advisory roles provided by the Joint Scrutiny Committee and the West of England Partnership Board

South Bristol Link Governance Structure

North Somerset would be the lead authority, working in a close contractual relationship with Bristol City Council and with support from the sub-region; both at Project Board and Delivery Team level (see Figure 4.2). North Somerset’s Project Management Method is based on the Office of Government Commerce’s (OGC’s) project management method PRINCE2 (PROjects IN Controlled Environments 2) which forms the basis of management methods used by all the West of England Authorities.

Figure 4.2 Project Management Structure for South Bristol



Project Board

The Project Board guides and steers the progress of the scheme and is responsible for its delivery. The Board authorises the project plan and will authorise strategic decisions or seek the authority of the JTEC. It includes representatives of the West of England authorities, the Government Office for the South West (GOSW), South West Regional Development Agency (SWRDA)

and the West of England Partnership Office (WEPO) and the Highways Agency (HA). The Board was formed at the start of the project in October 2006 and has met approximately every three months.

The main responsibilities of the Project Board are as follows:

- approving the Project Initiation Document (including Project Plan);
- agreeing and overseeing the implementation of the necessary actions to secure submission of the required MSBC processes;
- supporting and taking part in, where appropriate, the necessary Gateway Reviews;
- reviewing the Project Plan and approving any changes necessary;
- approving any changes to the risk log and any additional mitigating actions;
- approving periodic Progress Reports for the JTEC, Joint Scrutiny, Directors, DfT and the West of England Partnership;
- approving the budget plan and any changes to this plan via regular highlight reports from the Project Manager;
- approving any changes to the Project Plan recommended by the Project Director via highlight reports;
- considering any exception reports that may arise during the life of the project and requesting exception plans where appropriate;
- approving any exception plans that may arise.

The Project Board would seek authority for strategic decisions from the JTEC when required. Meetings of the Project Board will continue as necessary to meet key milestones.

Senior Responsible Owner

The Senior Responsible Owner [SRO] for the South Bristol Link is the North Somerset Council Assistant Director, Development and Environment, Karuna Tharmananthar. The SRO has overall responsibility for ensuring that the project meets its objectives and delivers the projected benefits within the time, cost and quality parameters. The SRO is the Chair of the Project Board. The SRO is empowered to manage the overall Project to deliver the required products within the constraints agreed with the Project Board and to approve changes to Project, tasks and work packages within the agreed tolerances set by the JTEC. Parts of the project within Bristol will be managed and progressed, in liaison with the SRO, through Bristol's Head of Major Projects, Alun Owen.

The Project Manager (PM)

The PM is responsible for delivering the Project in line with the agreed controls and procedures set out in the Project Initiation Document. The PM is responsible for the highest possible level of compliance with the relevant investment and project management approaches including third parties' processes.

The primary focus of the PM is to define the Project Plan and to ensure that the Project is delivered on time and within specification and budget, seeking additional authorities as necessary. This will involve development, monitoring, progress chasing and co-ordination of the Project as a whole and ensuring that all elements of the Project are delivered with the appropriate technical competency. In particular the role will be:

- to obtain approval from the Project Board for the Project Plan;
- to recommend to the Project Board and then implement the necessary actions to secure the required MSBC processes;
- to plan for and co-ordinate the necessary Gateway Reviews;
- to account for the delivery of the Project, on time and within specification and budget;
- to secure the approval of the JTEC for key strategic decisions;
- to lead a Project Team and ensure adherence to the Project Plan;
- to produce periodic Progress Reports for the JTEC, Joint Scrutiny, Directors, the Department for Transport, and the West of England Partnership;
- to carry out day-to-day communication role between the DfT and the four authorities.

Project Delivery Team

The PM would be supported by a Project Delivery Team, which includes the requisite range of experience required to take the South Bristol Link to Full Approval and then to implement it. The Team would consist of Bristol and North Somerset Council officers and term transport planning and design consultants, selected from Mott MacDonald, Halcrow, Atkins. At the end of the agreements enabling the Authorities to engage these firms, others on the emerging sub-regional consultancy frameworks for major schemes would be employed as necessary. These consultancy frameworks are expected to be in place by May 2010 and cover the following three areas of expertise:-

- Major Transport Scheme Project Management
- Major Transport Scheme Infrastructure Procurement
- Major Transport Scheme Infrastructure Design

The composition of the Project Delivery Team would vary as the scheme moves from preparation to implementation.

4.3 PROJECT PLANNING

4.3.1 Project Plan

The South Bristol Link is managed through the Project Plan, which is updated and reviewed on a regular basis. It includes the following components:-

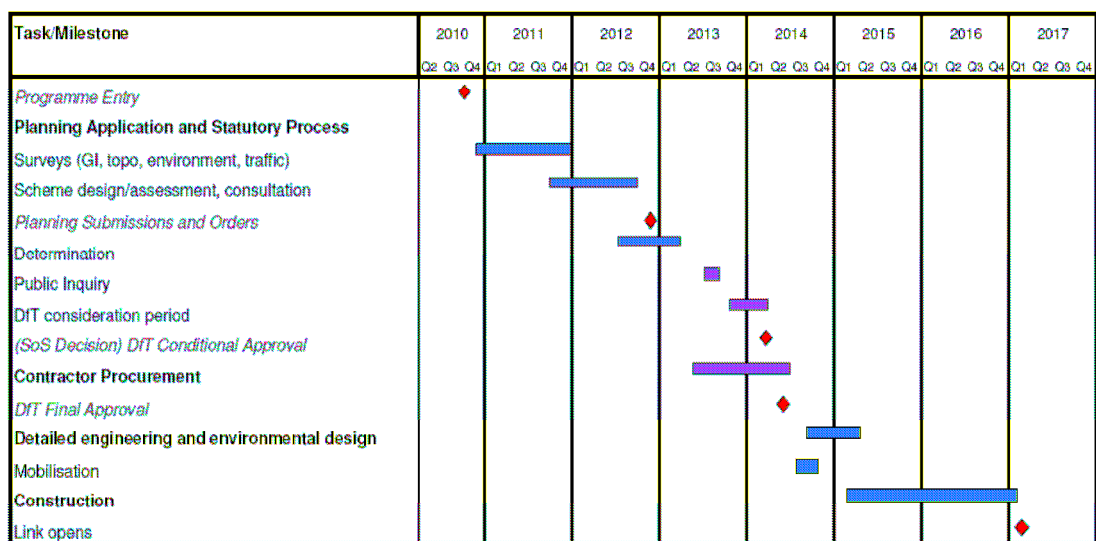
- Scheme description.
- Scheme objectives.

- Project – summary and detailed.
- Team structure and management.
- Risk register.
- Communications strategy.
- Procurement strategy.
- Budget and funding.

4.3.2 Project Programme

The full programme for the South Bristol Link is provided in Appendix 4.1, and a summary of the main stages is shown below. This has been drawn up with advice from consultants with recent relevant experience of other comparable projects. The main stages are based on DfT’s approval stages as well as the planning application and approval stage and shown in Figure 4.3.

Figure 4.3 Summary Programme and Key Milestones



Subject to achieving Programme Entry before the end of 2010, work will start on ground investigations, preparation of design, and environmental impact documentation in the current financial year, leading to submission of planning applications to Bristol and North Somerset Councils in 2012 after a further round of public and stakeholder consultation. A Public Inquiry is anticipated and this is programmed for mid-2013, with Inspector’s report and Secretary of State decision at the start of 2014. Subject to a favourable decision, a contractor would be appointed and final detailed designs would be carried out in 2014, enabling site clearance and construction to commence at the start of 2015. A two-year construction period, together with award of operating contracts for rapid transit, will lead to scheme opening and operating at the beginning of 2017.

4.3.3 Key Dependencies

Consideration has been given to progressing the scheme using Transport & Works Act powers, partly because this is the approach being adopted for the Temple Meads Ashton Vale rapid transit scheme. There appear to be advantages of TWA in terms of controlling operation of a rapid transit service and possibly speeding the delivery programme. However, after seeking advice from legal advisers and considering that the guided rapid transit element of the scheme forms only a small part of the overall SBL, it is proposed that the South Bristol Link is the subject of planning applications that will be submitted to both Bristol and North Somerset Councils, for consideration under relevant Town & Country Planning Acts. Separate powers will be used to enable use of Common Land on Highridge Common and, should it be necessary, Compulsory Purchase powers may be needed for land currently in private ownership.

Key programme dependencies include:-

- DfT Programme Entry
- Approval of Planning Applications by Bristol and North Somerset Councils
- Acquisition of land needed for scheme
- Secretary of State approval following Public Inquiry, followed by Conditional Approval and release of tenders for construction and operation;
- Final agreements with contractor and service providers and Final Approval submission;
- Final DfT approval and commencement of works; and
- Completion of works and start of operational data collection for scheme evaluation.

Tasks on the Critical Path

- Significant tasks on the critical path include:
- Achievement of Programme Entry from the DfT;
- Achievement of Conditional Approval from the DfT including successfully completing OGC
- Gateway 2; and
- Achievement of Full Approval from the DfT including successful completing OGC Gateway3.

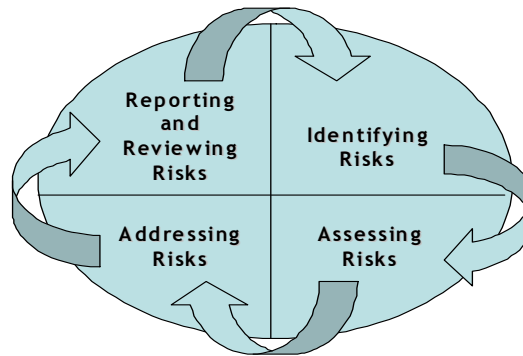
4.4 RISK MANAGEMENT

The strategy adopted for managing risk is described in full in Appendix 4.2. A summary is set out below.

Risk management is the process of identifying risks, evaluating their potential consequences and determining the most effective methods of controlling and/or responding to them. It is not an end in itself. Rather, risk management is a

means of minimising the costs and disruption to the project caused by undesirable events. The risk management process is shown in Figure 4.4 below:

Figure 4.4 Risk Management Process



The aim of risk management is to reduce the frequency of risk events occurring (wherever this is possible) and minimise the severity of their consequences if they do occur. Even when the likelihood of an event occurring cannot be controlled, steps can be taken to minimise the consequences.

The purpose of the risk management is to:-

- ensure risk management is an integral part of project management decision making, planning and implementation;
- ensure risks are managed in accordance with good practice, as part of good project governance;
- respond to risk in a balanced way, mindful of the risk level, risk reduction potential, cost/ benefit and particular resource constraints; and
- provide guidance on the following areas: aims and objectives of Risk Management; roles and responsibilities for managing risk; risk financing; and risk management process.

Risk management includes:-

- identifying and assessing risks;
- reassessing the impact and likelihood after controls have been implemented (the 'residual risks');
- responding to risks through agreed controls; and
- monitoring and reviewing progress.

Three risk workshops have been held for the Scheme to date. Each has involved a range of expertise, including representatives of consultants, other authorities and the Highways Agency. The first of the workshops was held soon after project inception in 2006 when the nature of the scheme was not well defined. It was at this risk workshop that the risk log was first produced. Subsequent workshops have updated the risk log, which is also reviewed at

monthly progress meetings. Key (red) risks are reported to the Project Board quarterly.

In preparation for production of a Quantified Risk Assessment (QRA), a further risk workshop was held for the Preferred Option in September 2009. At this workshop, the risk log was converted to a register that included predicted direct costs and delays. A QRA was then undertaken for the Preferred Scheme to support this bid for Programme Entry. Subsequently, a risk workshop was held for the Lower Cost Option in February 2010 and a QRA prepared.

Each risk was assessed in terms of the potential delay cost and the cost of additional project management associated with the cost of mitigating measures as appropriate. Not all risks have both these elements, and the risk registers describe which do and which do not. The delay costs are derived from the cost of the delay to the scheme as a whole based on the construction inflation cost used in calculating the outturn costs.

These QRAs are therefore based on capital cost elements of the project and the construction programme from the present day to the opening year. The programme for delivery has been carefully developed allowing adequate timescales for completion of statutory processes and construction. The councils are confident that the Preferred Scheme can be delivered on time and within budget and that sufficient work has been carried out to ensure that the costs quoted are robust. The QRAs exclude risks to operational costs or revenues. The Risk Registers with QRA costs are included in Appendix 4.2.

The assessment has resulted in quantified estimates of the potential risks associated with both the Preferred Scheme and the Lower Cost Option. The QRA has resulted in a total risk allowance of £5.29 m for the Preferred Scheme and £5.67 m for the Lower Cost Option, both at the 50% confidence level. The risk exposure has been included in the economic analyses to determine the BCRs for Preferred and Lower Cost Options. These allowances for risk have been added to the base costs as part of the Quantified Cost Estimate (QCE) for each option.

To-date the main risks and mitigation measures are considered to be:

- crossing under mainline railway because of delayed approvals of procedures – early and detailed discussions with Network Rail
- difficulties obtaining funds for initial, pre-construction development costs leading to delay or suspension – securing developer contributions, involvement of council members and other funding sources.
- uncertainty about extent of contaminated ground – site surveys programmed and incorporation into risk assessment.
- need for unanticipated utility diversions (increased cost and potential delay) – increased budget and incorporation into risk assessment;
- adverse weather during track possession Network Rail) leading to penalties – aim to transfer risk to contractor to ensure all sensible mitigation measures are adopted

The risk log and register will be used throughout the preparation and delivery of the Scheme to manage project risks and mitigate them wherever possible. It will be regularly reviewed and updated in order to ensure actions necessary to mitigate risks are being implemented. The risk management process will enable risks to be set to zero when they are no longer a threat, and any new potential risks to be added to the log. Risks that cannot be mitigated will be escalated to the SRO, and if needed, the Project Board for action on whether they can be eliminated, reduced, or accepted by the project team, and if needed the involvement of other parties.

4.5 STAKEHOLDERS

4.5.1 Communication Plan

A Communication Plan was drawn up at the start of the project and this has been developed as the preparation work has progressed. Stakeholders have been identified and the West of England Partnership has developed its communications strategy with an up-to-date website that includes details of all the sub-regional major schemes. The current version of the SBL Communication Plan can be seen in Appendix 4.3.

The objectives of the communications plan are to:

- inform stakeholders, including the public, businesses and other interested parties of the objectives, nature and progress of the South Bristol Link;
- help achieve the support of local people, businesses and others;
- ensure the support of key decision-makers and stakeholders;
- establish ways of providing information in an appropriate and timely way.

4.5.2 Internal Communication

Internal communication within the Project Team is being achieved through regular project team meetings, generally monthly, and presentations to internal staff at meetings of different internal interest groups

The Bristol and North Somerset Executive Members with responsibility for transport are briefed regularly on progress. Regular reports and updates are also provided to the Joint Transport Executive Committee meetings and for regular meetings of the four authority Heads of Transport. Members of both authorities have been briefed prior to public consultation exercises. The submission of the bid was endorsed at the Joint Transport Executive Committee meeting on 4 February who recommended approval to Bristol and North Somerset. This approval of the Major Scheme Bid was provided at a Cabinet meeting of Bristol City Council and an Executive meeting of North Somerset Council both in March 2010.

4.5.3 External Communication

Audiences and stakeholders include: statutory and other partners, parish councils, transport operators, interest groups, businesses and other employers,

and the general public. Current communication methods are summarised in Table 4.1 below.

Table 4.1: Communication methods

Who/how	Presentations/ informal meetings	Formal meeting	Report	Media (via releases)	e-news	Website	Leaflet/ letter
Councils' Executive	✓	✓	✓	✓	✓	✓	
Councils' Scrutiny	✓	✓	✓	✓	✓	✓	
Statutory Stakeholders	✓					✓	✓
Local residents	✓			✓	✓	✓	✓
Community and Environment Groups	✓	✓			✓	✓	
Business Interests	✓				✓	✓	
Transport Operators	✓				✓	✓	
Bristol Partnerships	✓					✓	
Project Board		✓				✓	
Project consultants	✓					✓	

A key part of the Communication Plan is consultation with statutory bodies, particularly the Environment Agency, Natural England and English Heritage. Appendix 4.7 includes responses from these and other external stakeholders.

4.5.4 Establishing a 'brand' for transport in the West of England

The Authorities have developed the 'Travel+' brand to represent the four Authorities working together providing added value and a change in approach to delivering sustainable transport improvements for the future.

The theme approach allows promotion of a vision whilst identifying all parts of the package as building towards the vision of the Joint Local Transport Plan (JLTP) - mode specific improvements within an integrated transport vision. It quickly, easily and simply explains the reason for the works and allows various

schemes to be separate but linked, identifying all schemes as part of the joint vision to demonstrate unity of purpose.

Certain key messages are linked to the Travel+ identification and are repeated at every opportunity. These are:

- Travel+ projects sit at the core of the local authorities' vision for change;
- Together these projects will deliver realistic, integrated, sustainable and equitable travel choices for all our communities across the area;
- Travel+ offers real alternatives to the private car for local journeys and should help encourage us to change our travel behaviour; and
- Travel+ projects will help manage congestion and maintain our quality of life, delivering real choice and supporting future economic growth.

An example of the branding work is included in Appendix 4.4.

4.6 RESPONSES TO CONSULTATION

4.6.1 Public Consultation

There have been two rounds of public consultation prior to preparation of this bid.

The first aimed to engage people in identifying the nature of the scheme. At that time, whilst it was established that a new transport link was needed to address the project objectives, there were no pre-conceptions as to the modes of transport or precise route that should be employed. The consultation took place between November 2008 and March 2009. The report of the consultation was published on the web in June 2009, and is reproduced in Appendix 4.5. One of the important conclusions of the first consultation exercise was that there was significantly more support for a combined rapid transit/highway scheme than for either on its own. This was one factor that was taken on board in moving to develop the Preferred Option.

The second round of public consultation sought people's views on the Preferred Scheme. In particular it sought to understand whether people and businesses would benefit from the scheme and aimed to establish people's concerns, and how they might improve the scheme. Design has since been refined to take account of some of the issues that were raised. This second round of consultation lasted from 2 November to 31 December 2009. The report of the consultation is included as Appendix 4.6.

In summary there is significant support for the scheme from businesses, with over 60 separate companies writing to point out the advantages, perceived as including:-

- improved access for employees and deliveries;
- promotion of South Bristol;
- reduced costs through reduced congestion.

There is further support for the scheme from some community groups and households in the area.

Objection to the link comes mainly from those living in locations that would experience an increase in traffic; and also from groups with environmental reasons for opposing road building in general. There are several well organised groups that harness and organise objection to the scheme, including both local and nationally recognised bodies. Objectors have noted their concerns through the consultation exercises, through statements and questions at council meetings and in various on-line discussion groups.

Further public consultation is included in the project plan as part of the planning process.

4.6.2 Stakeholder Consultation

In addition to public consultation when all stakeholders have been engaged, there has been ongoing consultation with particular parties potentially affected by the proposals.

The views of different stakeholders are outlined below, and letters are included at Appendix 4.7.

4.6.3 Business Community and major Employers

GWE Business West represents over 2,000 businesses in the West of England and is the principal business organisation in the sub-region. GWE Business West “welcomes the preferred South Bristol link option and the progress being made, as a project vital to the future economic development of South Bristol.” They have stated that “ the business community has been waiting for a South Bristol Link Road to be delivered for years with many doubting it will ever happen.....It is essential that the current preferred option is delivered in some shape or form, sooner rather than later.”

The Cater Business Park, which has ‘Business Improvement District’ status and is located close to the line of the scheme in South Bristol, is representative of businesses in its view that “this Transport Link scheme is an absolute must for the continuing regeneration of our South Bristol locality and a necessity if we are to continue to maintain a healthy environment for business to thrive and provide employment for the area.”

The Bristol Primary care Trust operating as NHS Bristol strongly support the development of public transport services and improved infrastructure for walking and cycling, but oppose the building of road infrastructure, which they consider increases Bristol’s dependency on individual motorised transport.

4.6.4 Bristol International Airport (BIA)

BIA is the major regional airport for the south west of England and ninth largest in the country. It supports the scheme and considers its delivery will considerably improve the airport’s surface accessibility, particularly by public transport. BIA anticipates that the scheme will route passengers away from areas that are currently very congested and enable an improved public transport link, using the rapid transit to provide an enhanced ‘Bristol Airport Flyer’ service. Links to South Bristol communities and beyond would enhance connectivity for passengers and provide attractive and accessible employment for local residents.

4.6.5 Utilities

Bristol City Council chairs the New Roads and Street Works Act Co-ordination Group which is an existing group of utility companies, service providers and emergency service groups who meet quarterly to co-ordinate works affecting the public highway. The group has been used to inform companies of the South Bristol Link proposals, including plans, timetables and design standards. In addition, as part of the preliminary design and for costing purposes, utilities companies have been contacted to help ascertain the nature of their installations. Further information will be exchanged as the scheme progresses. Bristol Water, whilst supportive of the proposals, has identified major supply pipelines that may need relocation; and initial discussions have been held.

4.6.6 Developers

Potential developers include Bristol Airport and land interests in North Somerset, which have major planning applications under consideration, and landowners in Bristol. These are generally supportive of the scheme in principle but have issues concerning aspects such as the proposed alignment, junction arrangements or potential capacity.

4.6.7 Statutory Stakeholders

Natural England has referred to the environmental appraisal that formed part of the options appraisal process and made a number of recommendations to mitigate the impacts of the scheme. They regard any increase in greenhouse gas emissions as undesirable and seek further investigations to assess the impacts on national and international biodiversity sites. They also recommend further investigations and surveys of aspects such as impact on local sites, notably Highridge Common and Colliter's Brook. Avon Wildlife Trust is opposed to the loss of ecological and green infrastructure value, and repeats Natural England's concerns regarding these sites and Hanging Hill Wood, and recommends further site assessment as the scheme progresses.

The Environment Agency refers to the scheme's potential impact on flooding and will require a Flood Risk Assessment. This will enable better understanding, which will be needed before the Agency would be able to give consent for works or structures within eight metres of the designated 'main rivers', Longmoor Brook, Old Colliters Brook, the Malago and Pigeonhouse Stream. They will also require appropriate investigations of historic landfills.

The Highways Agency is represented on the Project Board and has provided support through the option appraisal process and Preferred Scheme development.

4.6.8 Transport Groups

Discussions have been held with Network Rail as part of the process of promoting a scheme that crosses a mainline railway. They have no objections to the scheme in principle subject to clearing normal Network Rail procedures, and have issued a Certificate of Approval for Territory Clearance.

The Cyclist Touring Club has responded with references to appropriate design standards to ensure the safety and convenience of cyclists and others. CTC

seeks further involvement as the scheme proceeds and more detailed designs are developed. The CTC has subsequently also written to object to the scheme on environmental grounds, regarding it as running counter to policy objectives that seek to reduce congestion and encourage modal shift from car to bicycle.

Bristol International Airport is supportive of the scheme, as summarised in 4.7.4.

The two local bus operators, First and Wessex, have each written in support of the South Bristol Link. First consider that the opening of the scheme would help alleviate traffic congestion issues and open the opportunity for new public transport links, both with rapid transit and also for more conventional networks. Rotala, the parent group of Wessex Connect, who run the Park and Ride site at Long Ashton, consider the link will improve connectivity offering time savings and adding to the attractiveness of Park and Ride.

4.7 MONITORING & EVALUATION

4.7.1 Introduction

Given the long lead-in time up to scheme construction it is considered to be premature to establish a detailed monitoring plan at this stage. This section therefore outlines the proposed approach to monitoring and evaluation, which will be reviewed and finalised following Programme Entry.

Monitoring of the scheme will involve a combination of existing procedures currently undertaken by the Councils, supplemented by specific additional monitoring, established primarily for the South Bristol Link.

The aim of the evaluation will be to cover both the positive and negative outcomes and to assess the performance of the scheme in achieving the original objectives. The core evaluation objectives will be to:-

- measure the contribution of the scheme towards regeneration and growth in South Bristol;
- assess changes in congestion in South Bristol and other locations experiencing changes in traffic as a result of the scheme; and
- measure changes in accessibility using accessibility data to compute changes in times for journeys by different modes for journeys along specific routes and corridors.

4.7.2 Local and National Indicators

The current Joint Local Transport Plan (JLTP2) contains a number of relevant indicators and targets for the West of England that focus on various elements of the transport system. The next Joint Local Transport Plan (JLTP3) for 2010/11 – 2015/16 is currently being prepared and it is anticipated that these or similar targets and indicators will be in place when the scheme is constructed.

The indicators currently cover the following:-

- public transport patronage;
- passenger transport user satisfaction;
- changes in peak period traffic flows;

- highway congestion; and
- changes in area wide traffic mileage.

The single set of National Indicators (NI), published as part of the New Performance Framework for Local Authorities, will also be reviewed to establish which of these are most appropriate to act as potential proxy measures against the scheme objectives. These NIs will be utilised within JLTP3 and as such, this work will be undertaken once Programme Entry for the scheme is granted to ensure the timely identification of appropriate indicators.

4.7.3 Scheme Specific Monitoring

An amount equivalent to 0.5% of the capital cost estimate (in accordance with DfT guidance) has been set aside to ensure the scheme can be monitored effectively. Use of existing data from operators and the Councils, as part of the regular data gathering process, will be utilised where possible to ensure the best use of resources.

It is likely that the baseline data will comprise the following:

- environmental data;
- existing patronage on routes that are likely to be affected by the introduction of the scheme;
- traffic levels on key highways;
- junction performance including queues at critical junctions;
- mode choice surveys; and
- safety and accident records.

4.7.4 Outline Evaluation Plan

The Evaluation Plan will present the key stages and timescales covering the range of monitoring and evaluation processes. The Evaluation Plan will follow the guidance contained in “The Evaluation of Major Local Transport Schemes (December 2006)” in terms of the purpose and scope of the evaluation process.

The Evaluation Plan will represent the framework for monitoring and evaluation of the South Bristol Link and, as part of the process, seeks to:-

- identify the elements of the South Bristol Link to be evaluated;
- clearly set out the methodology for evaluation including inter-relationships with existing monitoring activities and contribution to JLTP targets;
- ensure a timely and cost effective process; and
- ensure a process consistent with existing and developing requirements, i.e. taking into account development of emerging assessment frameworks and targets (such as the further development of targets being established for Developing a Sustainable Transport System).

The objectives of the Evaluation Plan will be a combination of the scheme objectives (set out in this MSBC) and key relevant NATA objectives. Other

impacts of significance that will be included in the Evaluation Plan are less suited to quantitative assessment and will therefore be considered qualitatively.

4.7.5 Summary

The following table shows the type of measures and indicators that could be used to assess each of the scheme objectives. Consideration will be required to isolate causes and effects since there are many local initiatives and investments that will also contribute to the scheme objectives.

Table 4.2 Summary of Impacts and Monitoring Proposals

Impacts	Indicator/monitoring
<i>Objective: Facilitating regeneration and growth in South Bristol</i>	
Increased number of jobs in South Bristol	Record number of people employed by businesses in South Bristol before, during and after implementation of the scheme Existing
Increased number or size of businesses in South Bristol	Record number of new businesses that setup in or leave South Bristol each year (Economic Regeneration team) Existing Record the annual change in the area of floorspace allocated for employment purposes (B1, B2, B8) Existing
Increased housing numbers	Record number of new households built in South Bristol Existing
<i>Objective: Reducing congestion in South Bristol and adjacent areas of North Somerset</i>	

Impacts	Indicator/monitoring
Shorter average journey times	Measure changes in person travel times on orbital and radial routes through South Bristol, e.g. Hengrove Park to Parson Street, A38 Castle farm to Parson Street, Winterstoke Road, Bishopsworth Road, A370 Yanley to Brunel Way, Hengrove Way to Castle Farm. (Data received from TrafficMaster and evaluation using Strat-e-gis) Existing and New
Changes in queuing at congested junctions	Measure queue lengths before and after construction of scheme at key junctions including Parson Street gyratory, Bishopsworth Road/A38, Ashton Road/A370 New
Reduction in accidents	Measure change in recorded all injury accidents Existing
Objective: Improving access between South Bristol and the city centre and to strategic transport links	
Improved access between South Bristol and the City Centre by public transport	Measured change in accessibility of Broadmead, Temple Meads station and the bus station by public transport for people in South Bristol Accession
Improved access to Bristol International Airport by public transport	Measure changes in Flyer Journey Times between Bristol International Airport and Temple Meads station New
Improved access by bicycle between South Bristol and the city centre	Automatic counts of cycle numbers on Hartcliffe way, and manual counts of cycle numbers on Hengrove Way corridor New

Impacts	Indicator/monitoring
Improved walking infrastructure	Measure number of pedestrians and cyclists using King George's Road and public rights of way in Ashton Vale New
Reduced traffic on residential rat-runs	Measure numbers of cars and heavy vehicles on Bishopsworth Road and Kings Head Lane New
<i>Negative Impacts</i>	
Increased accidents	Measure changes in number of all injury accidents on routes in and adjacent to South Bristol Existing Measure change in traffic speeds at selected sites in South Bristol Existing and New
Displacement of congestion downstream	Will be reflected in journey time monitoring
Release of latent demand for travel (induced traffic)	Annual traffic growth using selected ATCs in South Bristol Existing
Noise	Record number of complaints received regarding the noise generated following implementation New

4.8 MANAGEMENT AND REPORTING

The management and reporting for the evaluation process will be coordinated by the Project Manager. The timescales for this will be set out following the detailed design stage.

4.9 ASSURANCE

An arrangement has been established across the West of England sub-region to provide Quality Assurance (QA). QA is defined here as a system for ensuring that quality is built into, and being followed by, the project management

processes of the scheme. The approach for SBL Quality Assurance arrangements will operate in the form of:

- Individual investigation by the Project Board's QA nominee. For SBL this is Chris Sane, South Gloucestershire Council;
- A Strategic Review Group reporting to the West of England Partnership Joint Transport Executive Committee;
- An internal 'challenge' by a Peer Review Group convened at the discretion of the Project Board's QA nominee;
- External Quality Reviews convened at the discretion of the Project Board.

More widely, scrutiny in the West of England has been established through a scrutiny body that comprises three non-Executive Members with responsibility for overview and scrutiny for the functions and actions of the West of England Partnership. The group meet in joint session on a regular basis to:

- Scrutinise any relevant proposals from the West of England Partnership in relation to its activities of transport, planning, housing, waste management, skills and employment, economic development and culture and rural affairs
- Review actions taken and decisions made by the Executive Committees and other Executive Bodies
- Make reports or recommendations to the Executive Committees and other Executive bodies as appropriate and/or the constituent Authorities' respective Overview and Scrutiny Committees.

Meetings are open to the public and members of the public have the opportunity to make or present statements. Details of meeting and membership can be found at:

<http://www.westofengland.org/meetings/joint-scrutiny-committee>.

For the South Bristol Link, the Joint Scrutiny Committee has been presented with regular progress reports and scrutinised the draft report that was submitted to the Joint Transport Executive Members. The scrutiny function ensured that additional detail was provided for Executive Members prior to their recommending that the bid should be taken forward.

The project is also subject to review through the scrutiny procedures that are in place for both Bristol and North Somerset Councils. In these procedures, key decisions made by the Councils are subject to scrutiny by a different set of elected members to those who consider decisions in the executive bodies.

DfT guidance recommends that Gateway Reviews be undertaken for schemes with a total cost of £50m or more. Gateway Reviews will therefore supplement these QA activities as appropriate.

The 4PS Gateway Review 1 is planned to take place after submission of this bid in early summer 2010.

The 4PS Project assessment Spreadsheet has been completed and is included as Appendix 4.8. The SBL has an allocated risk score of 123, putting it clearly in the High Risk category.

4.10 APPENDICES TO CHAPTER 4

Appendix 4.1 Project Programme

Appendix 4.2 Risk Register

Appendix 4.3 Communication Plan

Appendix 4.4 West of England – Developing a system brand

Appendix 4.5 Public Consultation: Scheme Options (a-d)

Appendix 4.6 Public Consultation: Preferred Scheme

Appendix 4.7 Letters from Statutory Bodies & Stakeholders (a-h)

Appendix 4.8 4Ps Project Assessment Spreadsheets