

PROJECTS AND STRATEGY PERFORMANCE REPORT

1 INTRODUCTION

- 1.1 This report updates the Board on the performance of the Partnership's strategy and project workstreams in Quarter 3 of 2025/26. This report was presented to the Project and Strategy Delivery Oversight Subgroup (PaSDOS) on 30 January 2026 and to the Performance and Audit Committee on 27th February 2026.

2 PROJECTS AND STRATEGY Q3 REPORT

- 2.1 Appendix 1 provides a breakdown of progress of each project within Q3, including against budget and milestones. The risk register and issues log is subject to a separate report on this agenda.

- 2.2 Most projects are on course to utilise their full budgets by the end of 2025/26. 4 projects are expected to carry an underspend over £5,000 (in addition to those reported to the Board in December):

- Freight Strategy Delivery: Work to date has prioritised freight tram funding and SCOT-ZED delivery and therefore strategy work has not been progressed. The departure of the Senior Partnership Manager means that this work will not be progressed in Q4.
- Regional Bus Strategy: Work package 5 (initial set up of the action plan for the Strategy) is being delivered in a reduced format and a decision on the remainder of this in 2026/27 will be taken in due course, including how much of this can be delivered in house.
- Data Strategy: Ongoing and developing work on the RTS Delivery Plan, SEStran and workforce mobility resulted in this work being put on hold until there is clearer understanding of how the data strategy will tie into these workstreams.
- Regional Bike Share: Lack of resource at Scotrail meant that it was not possible to progress the install of a locker at Haymarket Station. An alternative site was identified but it will not be coming forward until 2026/27

- 2.3 Generally, projects are on timeframe. 3 projects have major delays. These are:

- Multi –modal hubs: as reported to the December Board, this work will be included within the SEStran project and so this work is now paused as a separate work package
- Regional Cycle Network: no budget was allocated to this project as the plan was to carry out work internally, however work has been slower than expected due to issues with data. A funding bid was submitted in Q2 to Innovate UK with a private sector partner to examine an innovative approach to mapping active travel routes, but this was unsuccessful. The plan is to submit a funding proposal to the Transport Scotland Active Travel Infrastructure Fund for 2026/27 to take forward this work with external

support, and fit it within the wider SEStran work to support multi modal journeys.

- Freight Strategy Delivery: this delay primarily relates to the updating of the strategy. This work has been delayed due to prioritising work on Project SEStran during Q3, delivery work having to be prioritised on the successful funding bid for SCOT-ZED project, and the departure of the Senior Partnership Manager who led this work

3 projects currently have minor delays, 27% of milestones are currently complete and 8% are delayed, with the remainder on track.

2.4 Some key project and strategy updates over the quarter include:

2.4.1 Thistle Assistance was Highly Commended in the 2025 National Transport awards in London in the Campaign of the year category. A new dashboard has also been developed to better track card and app usage and capture anonymised user data. A 4 week follow up campaign was delivered, resulting in 1,171 new card requests.

2.4.2 For Transport to Health (TtH), Q3 has concentrated on stakeholder engagement. A public consultation was undertaken with around 1500 responses received. Meetings have been held with health boards to take them through the public consultation and focus group outcomes. Meetings have been held with all RTPs on TtH with a further meeting arranged for January 2026.

2.4.3 The *SEStran at 20* event was held in December with representation from across the transport sector and from all our partner local authorities. Feedback from the event has been very positive with 80% of respondents rating it as excellent.

2.4.4 The Regional Bus Strategy was signed off by the SEStran Board on 28 November 2025 and launched at the *SEStran at 20* event on 4 December 2026. The strategy has been very well received and the RBS Action Plan will be presented to the Partnership Board on 13 March 2026.

2.4.5 Stantec and Stuart Turnbull were brought on as consultants to progress the work on Project SEStran. Both contracts are being funded through an award from the Transport Scotland Bus Infrastructure Fund awarded to and managed by the City of Edinburgh Council on behalf of the region. The project was presented to the Edinburgh and South East City Region Deal Directors group and the Forth Green Free Port infrastructure committee for information and engagement. Local authority transport and planning teams continued to meet regularly with SEStran officers and the consulting team to develop the work. This work has been identified in the recent Scottish Budget as part of the Infrastructure Delivery Pipeline – Development Pipeline which shows clear government ambition for future funding of this business case work.

2.4.6 For work on freight, the SCOT-ZED project team is in place and survey design for questionnaires and workshop formats was completed and circulated. SEStran also submitted an unsuccessful bid for funding through the Edinburgh and South East City Region Deal to focus on a freight tram innovation pilot.

2.5 People and Place

2.5.1 The key project progress under the 5 themes (plus access to cycles and the community grant fund) has been as follows:

2.5.2 As part of our **access to cycles** programme, cycle storage schemes across most LAs are well underway and delivery is underway for workplaces, residential and school sites. Midlothian Council have cycle storage being installed in 4 community locations. The Cycle Access Fund run by Cycling UK is continuing to support repair and recycling organisations across the region, with 11 organisations funded through these two strands. The Bike Station Wee Bike Library loaned out 110 bikes to kids and 12 loans of cargo bikes. Transition St Andrews have loaned out 90 bikes to students since the term started.

2.5.3 With **schools and young people**, CEC delivered a school bike maintenance project that has serviced 667 bikes across 46 schools. CEC purchased 10 new bikes to the support the Bike4Ever project in SIMD and ASN schools. The Scottish Cycling Rock up & Ride project has been working with young people in Glenrothes and Dunfermline. Fife pupil support identified 8 young people to be trained as coaches to then support delivery in local primary schools. The Bike Station Kids Bike Life project has delivered 111 sessions with 553 attendances. Follow up surveys have demonstrated a positive impact, with 88% feeling more confident, 15% now cycling to school and 45% cycling more outside of school. The Bike Station Wee Bike Library project has loaned a total of 306 kids bikes. The cargo bike loan scheme has had 21 users, supporting families to replace short car journeys. User feedback shows positive impact, with 47% reporting driving less. FEL has supported a wide range of inclusive, engaging and progressive Active Travel activities at Linlithgow Academy. FEL have also engaged with the wider community through buggy walks organised by Linlithgow Community Development Trust that have seen good attendance and positive feedback. For the FEL schools project, 30 S4 learning centre pupils completed Walk Leader training, 14 pupils completed basic bike maintenance training, and 19 pupils completed the SQA course in Bike maintenance. The WOW programme saw 10,520 pupils recording journeys across the region in Q3. The I-Bike project continues, in CEC delivering bike servicing to 180 young people, in West Lothian 200 pupils took part in scooter sessions and in SBC, road safety skills were delivered to over 200 young people.

2.5.4 Under the **workplaces** theme, Clackmannanshire Council held a Step Count Challenge for staff, with 50 participants recording 10,852,804 steps. Midlothian Council have ordered 2 secure e-bike lockers to enable them to promote the staff e-bike fleet and support staff travel between council sites. Forth Valley College completed and analysed their annual staff and student survey, identifying key barriers on which to focus future interventions. They also supported pop-up active travel hubs and re-introduced a programme of walking and cycling activities.

2.5.5 **Accessibility and inclusion** consists of a range of projects, which includes work in East Lothian, Fife, and SBC continuing with the street audits that were begun in 2024/25. Progress has been made on scheduling and delivery of works, with resurfacing and handrail works carried out. SBC are continuing audits in two towns to develop a pipeline of delivery. Midlothian have started production of materials for

their new active travel mascot and have a community event planned for October. Midlothian have been promoting the Community Step Count Challenge that will commence in February. FEL Scotland continue their referral project with NHS Rheumatology clinicians, patient feedback continues to be positive. CEC have delivered 13 well attended weekly themed walks that are receiving strong engagement and delivering health benefits. Transition St Andrews delivered 40 public bike maintenance sessions with over 300 attendees. The Connecting Communities in Midlothian and East Lothian continue to engage with local residents to support access to cycling. A case study from the Midlothian project: Growing up in Kurdistan, Goran loved early-morning rides to buy bread for his family. But in Scotland, busy roads, congestion and the daily struggle to find a parking space at Edinburgh's Royal Infirmary made travelling to work by car exhausting. Through Connecting Communities, Goran was able to borrow an e-bike and try cycling to work from his home in Danderhall "Cycling to work takes around 10–15 minutes, whereas before it took longer in the car because of congestion. I feel happier and healthier when I cycle to work. I've also saved money by not taking the car."

- 2.5.6 Work around **capacity and capability building** has included the delivery of three shared learning events in October. The events brought together local authorities, community groups and third sector partners to share their experiences and learn more about the people and place programme across the region. We are also planning to hold a local authority shared learning event in early February 2026 to share best practice and support planning and collaboration in 2026/27. Following a CyclingUK event in Midlothian, Midlothian Council are piloting the hosting of a new Active Travel Forum. Staff from Midlothian were invited to similar forums in East Lothian, West Lothian and SBC to learn from the different approaches. The behaviour change strategy officer concluded work with Falkirk Council and has progressed work with West Lothian Council.
- 2.5.7 On **sustainable transport** projects, CEC carried out a Car Club promotion campaign that led to 119 new members and the introduction of 3 new EVs. TravelKnowHow continue to support NHS Lothian with development of their staff travel plan and at Fife College, survey work has been completed and a summary report delivered. In East Lothian, work continues on development of improved signage for 9 journey hubs.
- 2.5.8 The 15 funded **community projects** are delivering a range of activities across the region, with a good mix of support for walking and cycling initiatives. Walk it continues in the Scottish Borders, with classes delivered in 4 locations for 11 weeks. In Falkirk, Recycle-a-Bike have been working with 3 schools supporting them with bike maintenance and support to deliver learn to ride sessions and Bikeability Scotland training. Bikes for Refugees exceeded its distribution targets, providing refurbished bikes and support to New Scots while generating over 400 volunteer hours—demonstrating both need and community capacity. Party Community Energy expanded local access to active travel through its bike library, adult cycle confidence lessons, and inclusive initiatives such as Equal Footing Portobello, supporting disabled residents and improving accessibility in local businesses. Meanwhile, Bridgend Farmhouse's Community on the Move continued to strengthen grassroots engagement by refurbishing bikes, running led rides, and delivering tailored cycle coaching for young people and families, including VIP sessions for children with additional support needs. Collectively, these projects show clear increases in

participation, confidence and community led delivery, contributing directly to sustained behaviour change and widening access to active and sustainable travel across the region.

2.5.9 The processing of Q3 grant claims is underway, currently we are anticipating a slightly lower value compared to the forecasted total claim for this quarter.

3 COMMUNICATIONS AND MARKETING UPDATE

3.1 Communications and marketing achievements include:

- Successful promotion of our transport to health public consultation across all channels, including paid Meta and local media coverage, which helped contribute to 1,500 responses.
- Working with Wheelhouse (a software company) to produce a new dashboard and card ordering system for Thistle Assistance
- A four-week digital ad campaign promoting Thistle Assistance cards – leading to almost 1,200 new card requests.
- Launching our new, digital, version of our vision at the transport summit
- Producing all collateral for the transport summit, including the programme, asks for the Scottish elections and new pull up banner stands.
- Monthly newsletters and blog posts produced and distributed.
- Regular posts on LinkedIn, leading to increased engagement and followers.

4 OTHER AREAS OF WORK

4.1 Monthly attendance at Winchburgh Station Steering Group and South of Scotland EV Steering group. Discussions continue with Transport Scotland around the Newburgh station options appraisal. Both of these stations have been identified in the recent Scottish Budget as part of the Infrastructure Delivery Pipeline – Future Pipeline. Involvement with the City of Edinburgh Community Planning Partnership delivery team on a trial basis, with a project officer spending one day a month as part of the team looking at the development of the Local Outcome Improvement Plan.

5 RECOMMENDATIONS

5.1 The Board is asked to note the contents of this report

Beth Harley-Jepson

Project Officer

13th March 2026

Appendix 1: 2025/26 Q3 Projects and Strategy Report

Policy Implications	Outlined project work contributes to the objectives identified within the SEStran Regional Transport Strategy.
Financial Implications	All project work is delivered within confirmed budgets.
Equalities Implications	There are no adverse equalities implications arising from SEStran projects. Several projects actively work to reduce inequalities.
Climate Change Implications	There are no negative climate change implications arising from SEStran projects. Several projects actively work to tackle climate change through the creation of, or support for more sustainable transport options.

APPENDIX 1

Budget	Income	Expenditure	SEStran Spend
Original Budget	£70,500.00	£534,500.00	£464,000.00
Current Budget	£33,500.00	£407,974.43	£374,474.43
Current Actual	£0.00	£163,234.72	
Current Remaining	£33,500.00	£244,739.71	
Predicted Future Spend	£33,500.00	£233,262.91	
Predicted total spend	£33,500.00	£396,497.63	£362,997.63
Predicted Variance	£0.00	£11,476.80	£11,476.80

	Count	Current Exp Budget	% Exp Budget
Major Delay	3	£50,000	12.3%
Minor Delay	3	£116,921	28.7%
On Target	8	£241,054	59.1%
Underspend >£5k	4	£181,921	44.6%
Underspend <£5k	1	£40,000	9.8%
On Budget	9	£186,054	45.6%
Overspend <£5k	0	£0	0.0%
Overspend >£5k	0	£0	0.0%
Total	14	£407,974	

Projects Programme and Financial Summary

Project	Finance Status	Change Since Last Quarter	Programme Status	Change Since Last Quarter	Current Inc Budget	Current Inc Prediction	Current Inc Variance	Current Exp Budget	Current Exp Prediction	Current Exp Remaining	Current Exp Variance
Multi Modal Interchanges	On Budget	↔	Major Delay	↔	£0	£0	£0	£0	£0	£0	£0
Freight Strategy Delivery	Underspend >£5k	↓	Major Delay	↓	£0	£0	£0	£50,000	£50,000	£50,000	£0
Regional Cycle Network	On Budget	↔	Major Delay	↓	£0	£0	£0	£0	£0	£0	£0
RTPI & Ticketing	On Budget	↔	On Target	↔	£9,500	£9,500	£0	£19,500	£19,500	£0	£0
Regional Bus Strategy	Underspend >£5k	↓	Minor Delay	↔	£0	£0	£0	£56,921	£62,843	£25,465	£-5,923
RTS Delivery Plan	On Budget	↔	Minor Delay	↔	£0	£0	£0	£10,000	£9,410	£590	£590
SEStran at Twenty	Underspend <£5k	↓	On Target	↔	£0	£0	£0	£40,000	£35,999	£4,281	£4,001
Rail Strategy	On Budget	↔	On Target	↔	£0	£0	£0	£13,500	£13,500	£13,500	£0
Data Strategy	Underspend >£5k	↓	Minor Delay	↓	£0	£0	£0	£50,000	£50,000	£50,000	£0
Thistle Assistance	On Budget	↑	On Target	↔	£24,000	£24,000	£0	£62,531	£62,214	£32,888	£317
Transport to Health Strategy	On Budget	↔	On Target	↔	£0	£0	£0	£50,523	£50,523	£34,600	£0
Regional Bike Share	Underspend >£5k	↓	On Target	↔	£0	£0	£0	£25,000	£12,509	£21,214	£12,491
Sustainable Travel Awareness	On Budget	↔	On Target	↔	£0	£0	£0	£10,000	£10,000	£5,665	£0
Project Consultancy Support	On Budget	↔	On Target	↔	£0	£0	£0	£20,000	£20,000	£6,536	£0
Total					£33,500	£33,500	£0	£407,974	£396,498	£244,740	£11,477

Project Name	Thistle Assistance
Current Exp Budget	£62,531
Project Code	92077
SEStran Lead	Sandra Lavergne
SEStran Manager	Michael Melton
Project Partners	All RTPs
Lead Partner	SEStran
Last Updated	05/01/2026

Finance Status	On Budget
Programme Status	On Target

Budget	Income	Expenditure	SEStran Spend
Original Budget	£24,000.00	£32,000.00	£8,000.00
Current Budget	£24,000.00	£62,531.00	£38,531.00
Current Actual	£0.00	£29,643.50	
Current Remaining	£24,000.00	£32,887.50	
Predicted Future Spend	£24,000.00	£32,570.96	
Predicted total spend	£24,000.00	£62,214.46	£38,214.46
Predicted Variance	£0.00	£316.54	£316.54

Milestone Status	Count	Percentage
On Track	3	15%
Delayed	2	10%
Overdue	0	0%
Complete	15	75%

Source of Any Income: Other RTPs

Project Summary

Thistle Assistance (card and app) is a national scheme that provides support to users that may face additional barriers to access public transport. It eases the communication between users and transport staff to make the experience more accessible and enjoyable.

RTS Actions	Project Objectives	Project Outcomes
Deliver improved public transport information in a variety of formats, supported by appropriate wayfinding infrastructure on the transport network,	Increase distribution of the Thistle Assistance programme Raise awareness of the scheme nationally and locally Increase engagement with transport providers	Improve the journey experience in public transport for people with disabilities and mobility challenges. Improve feeling of safety for people with disability and mobility challenges when taking public transport. Contribute to making public transport seen as more accessible by people with disability and mobility challenges, Thistle Assistance embedded into transport providers' staff induction and training programme.

Q1 Project Progress and RAG status update

The digital campaign delivered with Republic of Media ran for 6 weeks and was completed at the end of April 2025. The learning will help shape the next campaign, which is aimed to be delivered from September/October for 2 to 3 months, budget dependent. This campaign has been shortlisted as part of the National Transport Awards in the Campaign of the year category. Winners will be announced in October 2025. 5,000 cards / leaflets were ordered from current supplier to meet high demand during promotional campaign. All RTPs have been contacted to share highlights of 24/25. Meeting held with TS on 28/05/2025 to discuss progress to date. Printing and card distribution supplier appointed.

Q1 Objectives & RTS Actions Progress

The digital campaign has been extremely successful and has contributed to increasing awareness of the scheme as well as increasing its uptake; it saw a total of 3,376 cards requested (up 2,477%) requested and 1,784 apps downloaded (up 5,147%). The project plan has been revised based on the lessons learned from the campaign and previous initiatives.

Q2 Project Progress and RAG status update

Minor amendments have been made on the card request form based on Lessons learnt. Further development work is currently being undertaken to collect personal information from card requests and app. This will be finalised by the end of October, after which the next campaign will be taking place (from November). Privacy notice being updated. Procurement exercise started to appoint a media agency for future promotional campaigns. Progress on stakeholder engagement: met with TS and all the RTPs for progress update. Transport operators survey distributed.

Q2 Objectives & RTS Actions Progress

Update of the privacy policy and amendment on the types of personal data collected in line with data policies will enable:
- distribution of future surveys directed at existing users
- collection of additional user data
Collection and analysis of this information from both card and app usage, will lead to a better understanding of the current audience of the scheme, and potential gaps, as well as use and impact of the scheme in the overall passenger experience. Transport operators survey will provide a more robust baseline on current awareness and engagement with the scheme by the operators.

Q3 Project Progress and RAG status update

The Thistle Assistance digital campaign was Highly Commended as part of the National Transport Awards 2025. New dashboard and development works on the request a card / app to capture personal data of users were finalised early November. Procurement exercise has been carried out for a media agency (work will include TA campaigns). New digital campaign has been carried out for 4 weeks replicating previous successful campaign. A total of 1,171 cards have been requested. Low uptake on transport operator survey remains low; identified opportunities to work with CPT to increase uptake, which will take place in Jan. Initial chat on card printing and distribution procurement done.

Q3 Objectives & RTS Actions Progress

With the new 'Request a card' / App format allowing for collection of personal information, we will aim to distribute a follow-up survey in Q4, targeting existing users, to better understand usage of the scheme and potential impact on journey experience. This milestone has been pushed to Q4 to allow enough time for people to reflect on usage of the card/app. Results from the transport operator survey will help shape future engagement initiatives to ensure that the scheme is widely known and understood by operators. This is delayed due to a low uptake.

Q4 Project Progress and RAG status update

Q4 Objectives & RTS Actions Progress

Milestones

Name	Due Date	Revised Date	Completed Date	Status	Last Updated
App quarterly maintenance Q1	30/06/25		05/05/25	Complete	05/05/25
Printing brief circulated to 3 potential suppliers	01/06/25		08/05/25	Complete	08/05/25
Printing supplier appointed	30/06/25		09/06/25	Complete	09/06/25
Provide key updates to the Board	20/06/25		20/06/25	Complete	20/06/25
POD laying out plans for 25/26 approved and signed off	30/09/25		01/08/25	Complete	01/08/25
First RTP Thistle Assistance meeting	30/09/25		01/09/25	Complete	01/09/25
Update privacy policy prior to any new marketing initiative	30/09/25		30/09/25	Complete	30/09/25
App quarterly maintenance Q2	30/09/25		03/07/25	Complete	30/07/25
Update card request form prior to any new marketing initiative	30/09/25	10/11/25	10/11/25	Complete	10/11/25
Plan next digital marketing campaign	30/09/25	31/10/25	30/10/25	Complete	30/10/25
Transport operator survey created and distributed	30/09/25		25/09/25	Complete	25/09/25
App quarterly maintenance Q3	19/12/25		01/10/25	Complete	30/10/25
Results from transport operator survey collected and analysed	19/12/25	31/03/26		Delayed	19/12/25
Digital marketing campaign done	19/12/25		12/12/25	Complete	19/12/25
User survey created and distributed	19/12/25	31/03/26		Delayed	19/12/25
Procurement exercise started to appoint a printer/distributor on a multi-year contract	19/12/25		19/12/25	Complete	19/12/25
App quarterly maintenance Q4	31/03/26		05/01/26	Complete	05/01/26
User survey analysed	31/03/26			On Track	05/01/26
High level project plan for 26/27 based on all data collected and recommendations	31/03/26			On Track	05/01/26
Procurement exercise finalised with a supplier appointed	31/03/26			On Track	05/01/26

