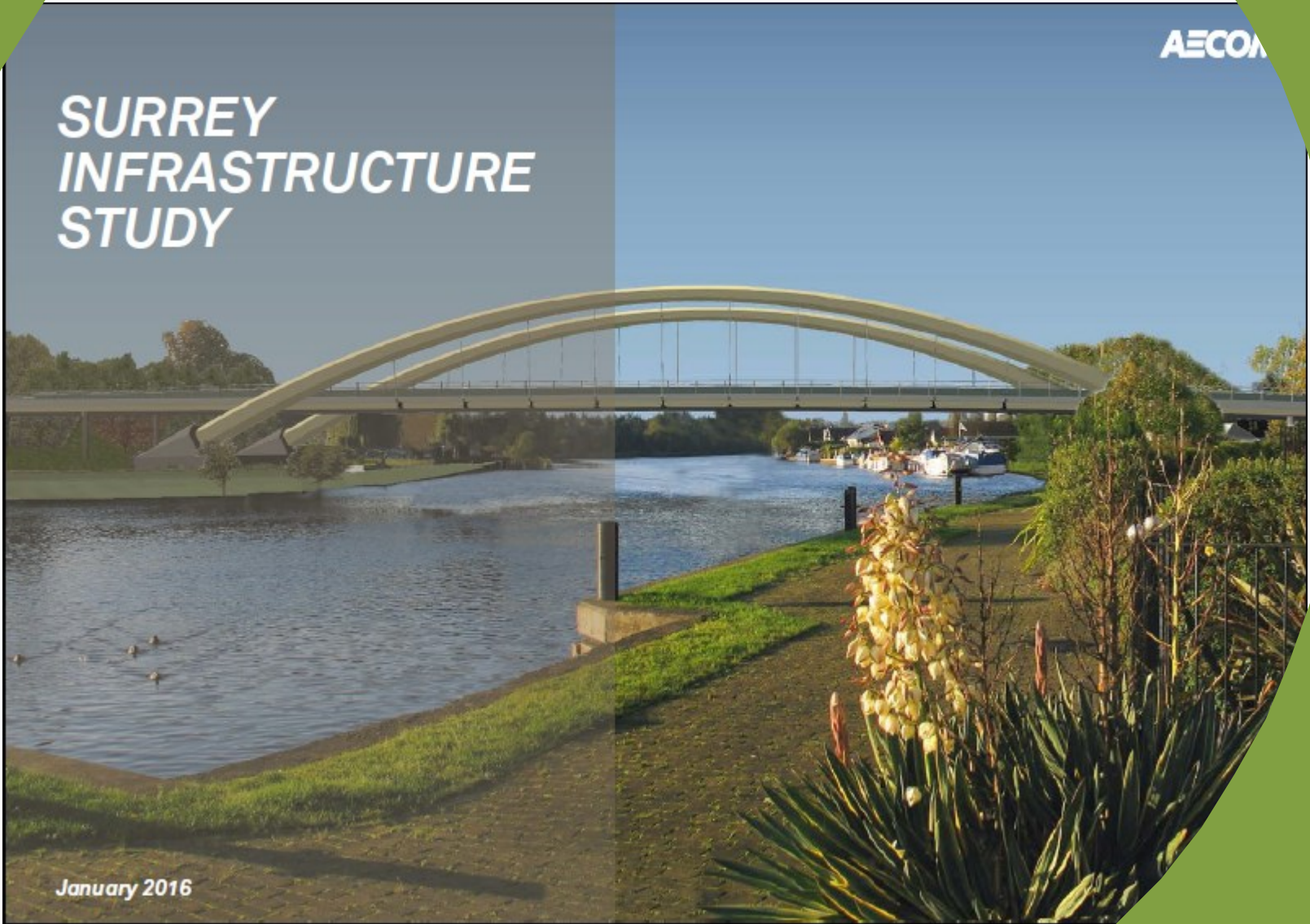


Surrey Infrastructure Study

AECOM

**SURREY
INFRASTRUCTURE
STUDY**




January 2016



SURREY INFRASTRUCTURE STUDY

Study Overview

- Introduction
- Growth requirements
- Understanding infrastructure requirements
- Next steps

A scenic view of rolling green hills under a clear sky. In the foreground, a large, leafy tree stands prominently. The hills are covered in lush green grass, and a utility pole is visible in the distance. The overall atmosphere is peaceful and rural.

The Surrey Infrastructure Study has been developed to demonstrate to Government, infrastructure providers, local communities and business the challenges being faced across Surrey in funding the infrastructure required to support growth and enhance the lives of existing and future residents.

BASIS OF THE STUDY

AECOM commissioned by the Surrey local authorities to prepare a desk-based assessment:

- Work with the Local Planning Authorities and service providers
- Present population and housing growth requirements to 2030 based on existing and emerging Local Plans
- Understand infrastructure capacity issues
- Identify projects required to support growth
- Establish cost of delivering infrastructure to support growth
- Establish funding secured and potential contributions
- Understand funding gap

INFRASTRUCTURE CATEGORIES



EDUCATION



Primary Education



Secondary Education



AE/ FE/ HE



Early Year Facilities



HEALTH & SOCIAL CARE



Primary health care



Acute Healthcare



Mental Healthcare



Adult social Services



COMMUNITY



Libraries



Youth Services



Community Centres



Indoor Sports



GREEN INFRASTRUCTURE



Outdoor Sport & Recreation



Strategic Green Infrastructure



UTILITIES



Electricity & Gas



Water & Sewage



Waste



Broadband



TRANSPORT



Motorways



Highways



Public Transport



Rail



Other Transport



FLOOD DEFENCES



Flood Defences



EMERGENCY SERVICES



Ambulance Service



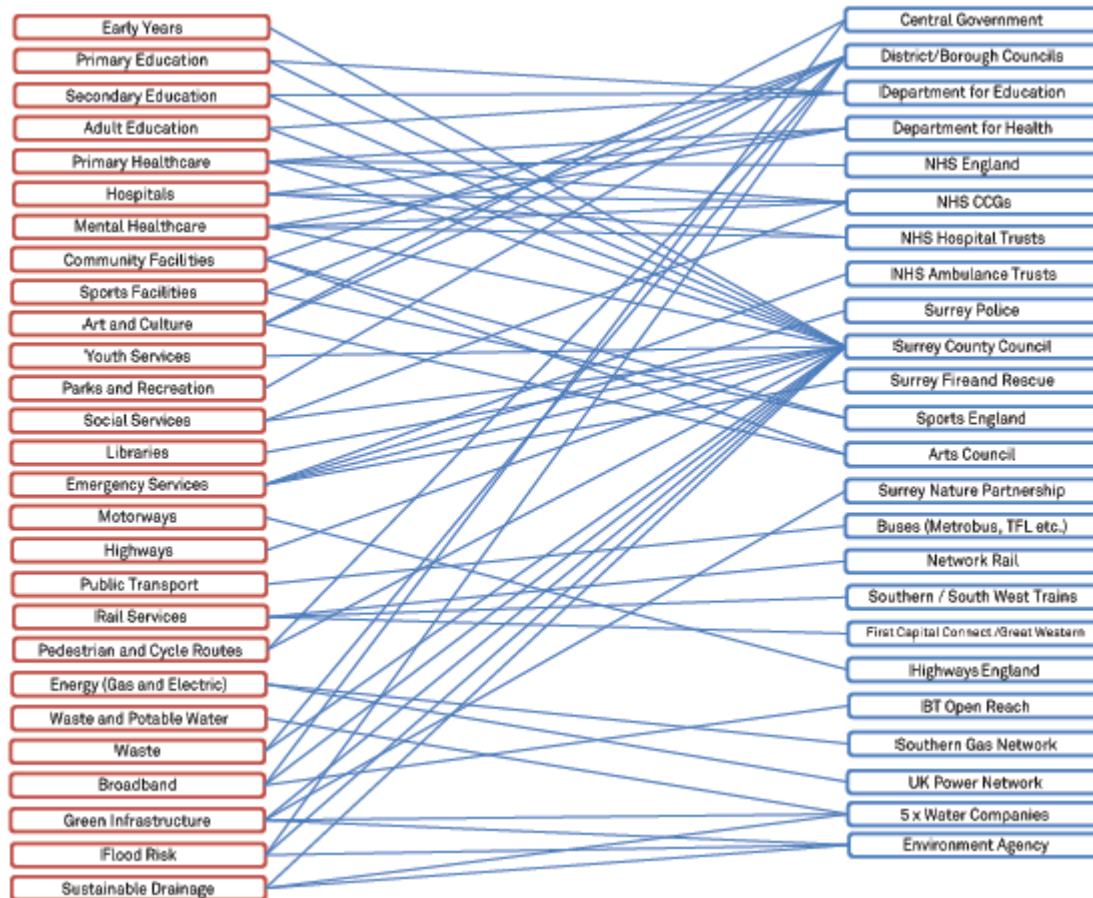
Police



Fire Service

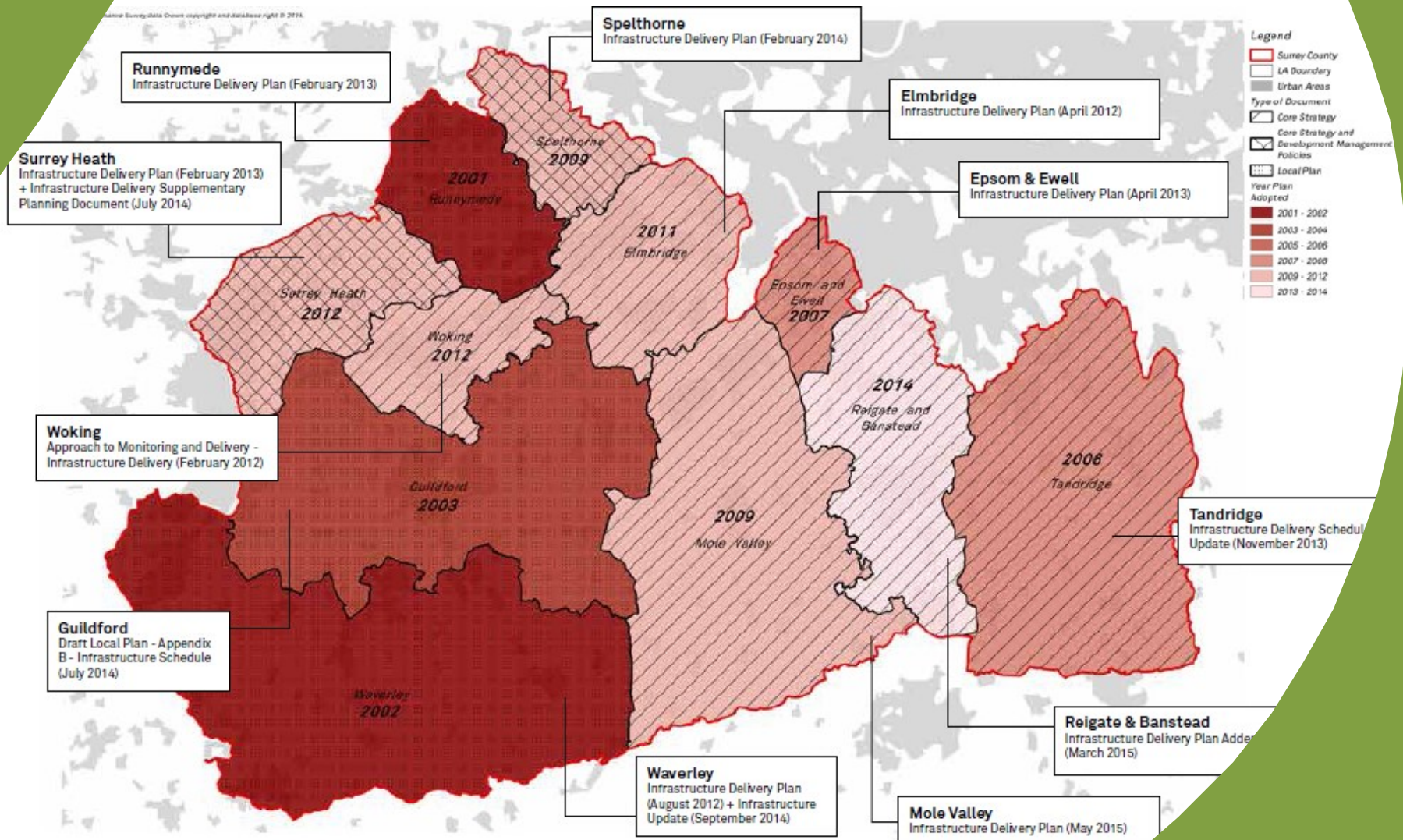
COMPLEX RELATIONSHIPS

Infrastructure requirements and providers



PLANNING CONTEXT

Local Plan and Infrastructure Delivery Plan status July 2015

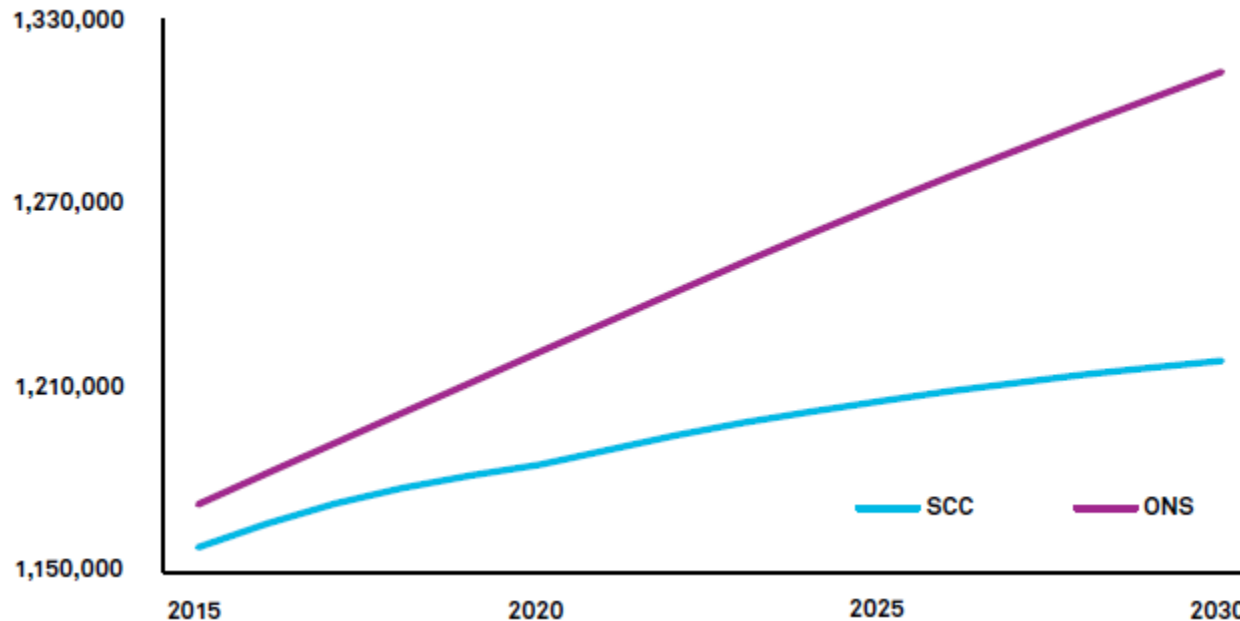


STUDY SCOPE

The report is a **snapshot at July 2015** and presents :

- An examination of social and economic drivers and the potential distribution of planned development in Surrey
- An overview of the current situation across the county for a range of infrastructure provision covering transport, education, health and social care, green infrastructure, utilities and flood defences
- An analysis for each district and borough of planned development and proposed infrastructure investment
- Commentary on delivery and funding issues affecting growth and infrastructure across Surrey

POPULATION PROJECTIONS – *‘housing constrained’ and ONS*

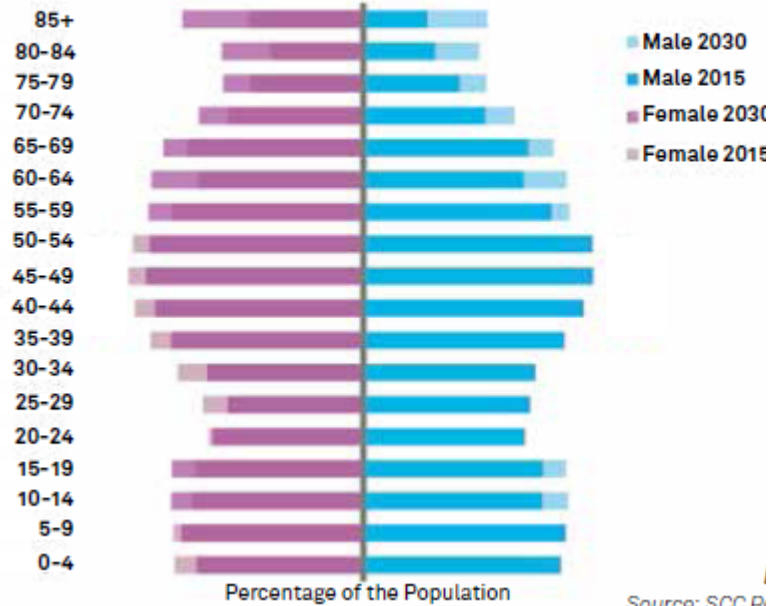


Source: SCC PopGroup Model Forecasts, ONS 2012 based Sub National Population Projections

**Surrey will grow by at least 61,000 people
(5% increase) by 2030**

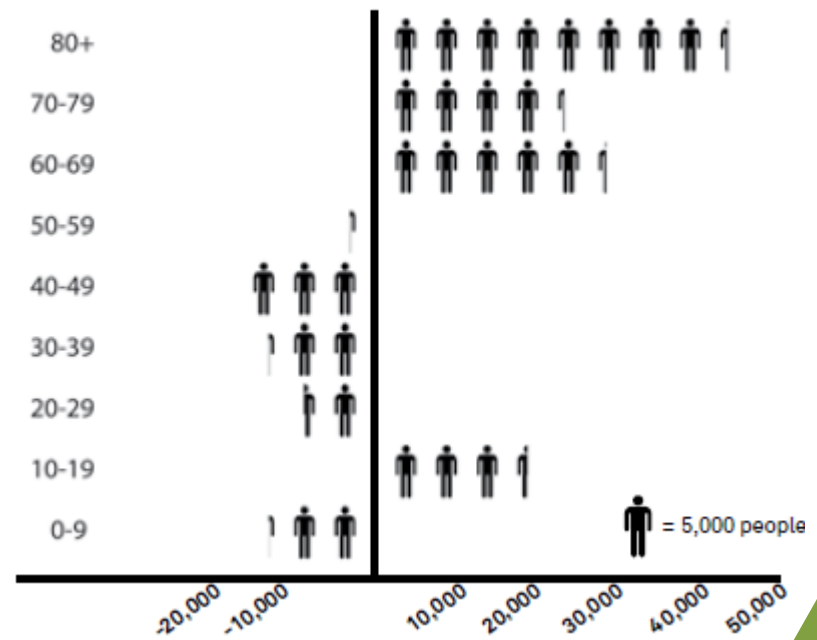
KEY DEMOGRAPHIC CHANGES

Forecast Change in Age Profile 2011 -2030



Source: SCC P

NEW PERSON BY AGE BRACKET



EXISTING AND PROPOSED HOUSING

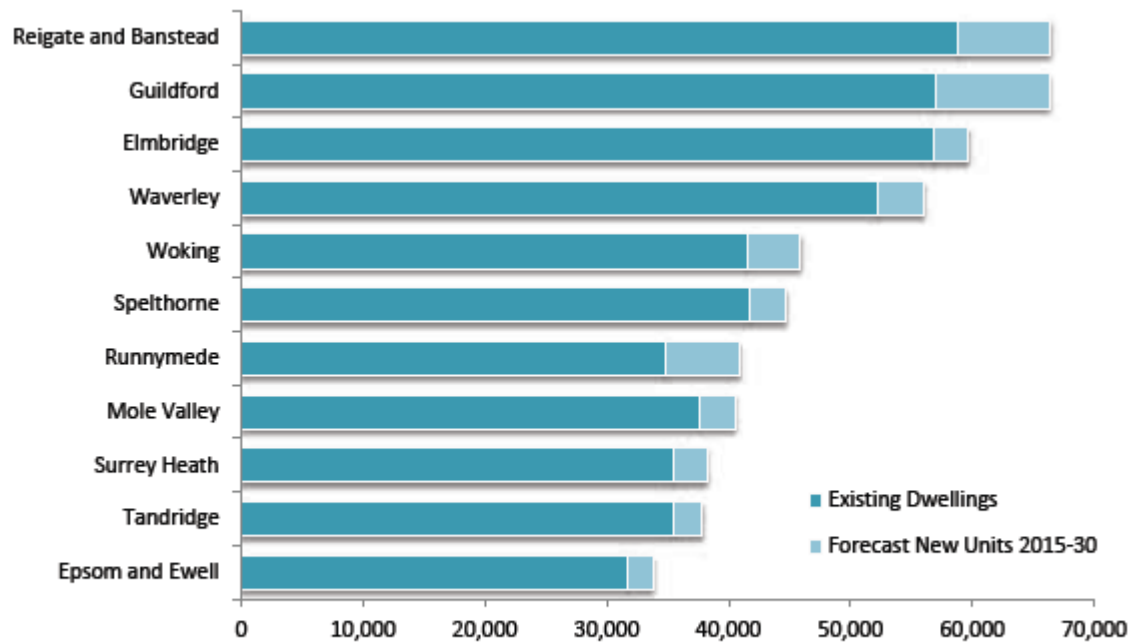


FIGURE 3.15 - EXISTING AND PROPOSED HOUSING

Source: ONS 2011, Local Authority data provided to Surrey County Council for Infrastructure Study

KEY ECONOMIC CHANGES

Job growth forecast to 2030

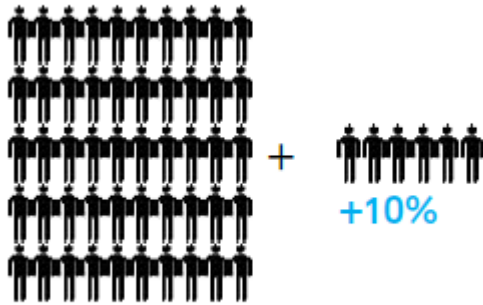
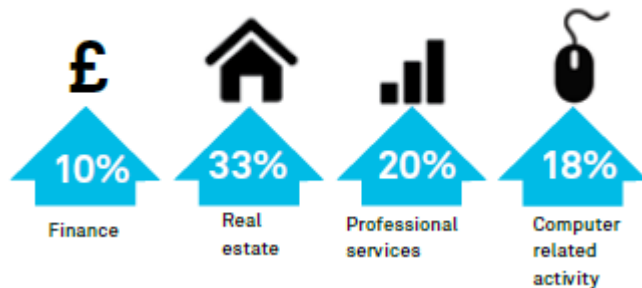


FIGURE 3.30 - JOB GROWTH FORECAST TO 2030

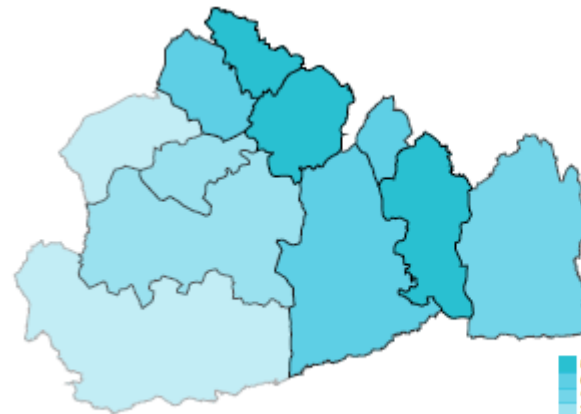
Source: Forecasts and future scenarios for the economy of Surrey: an update to the work done in 2010, 2013, SQW

59,000 new jobs in Surrey to 2030

Employment Growth in the following sub-sectors:



Surrey is a net exporter of labour and this is set to continue



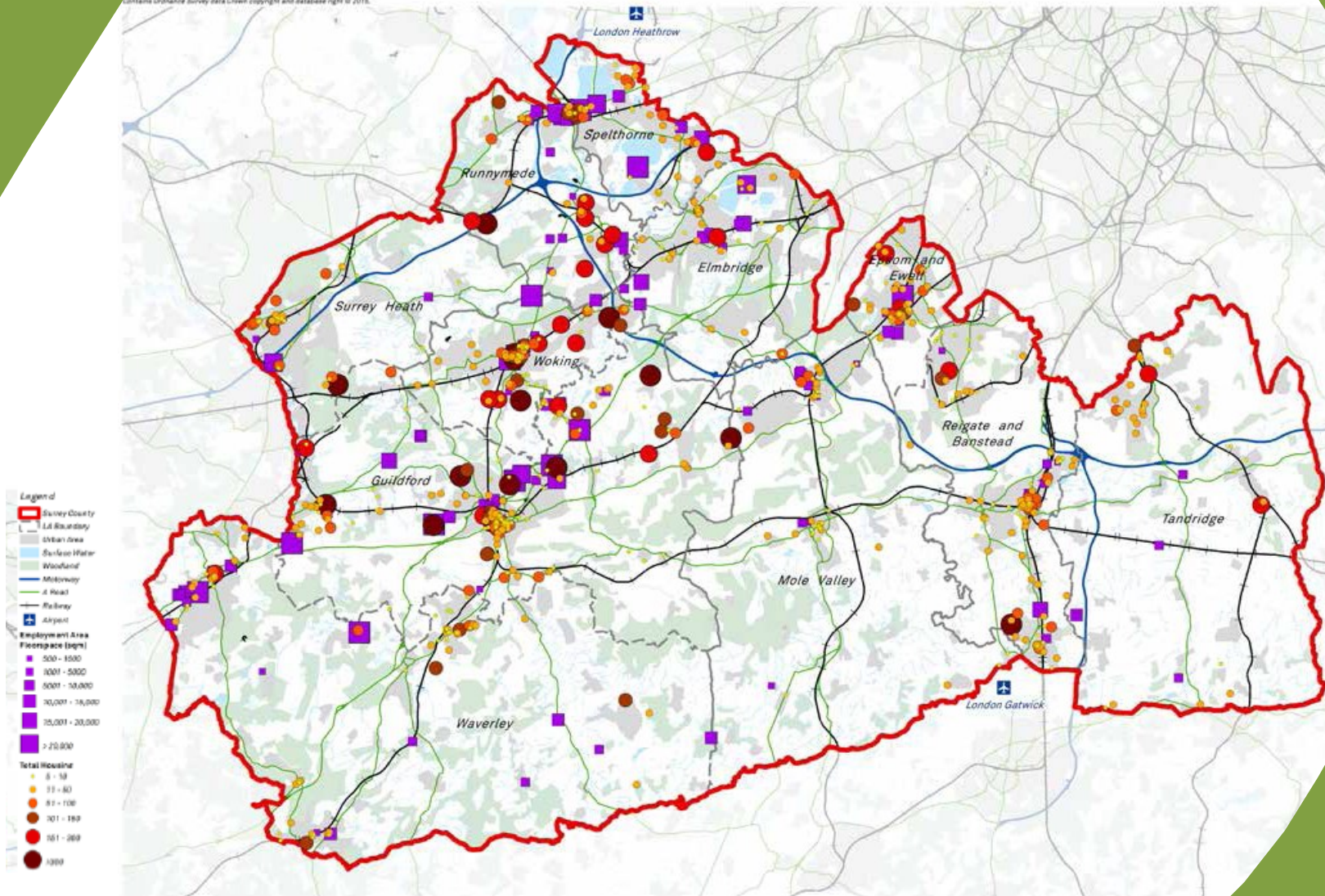
Source: ONS

Spelthorne, Reigate & Banstead, and Elmbridge had over 8,000+ net commuting to London

All Local Authorities see an outflow of commuters to London

MAPPING GROWTH

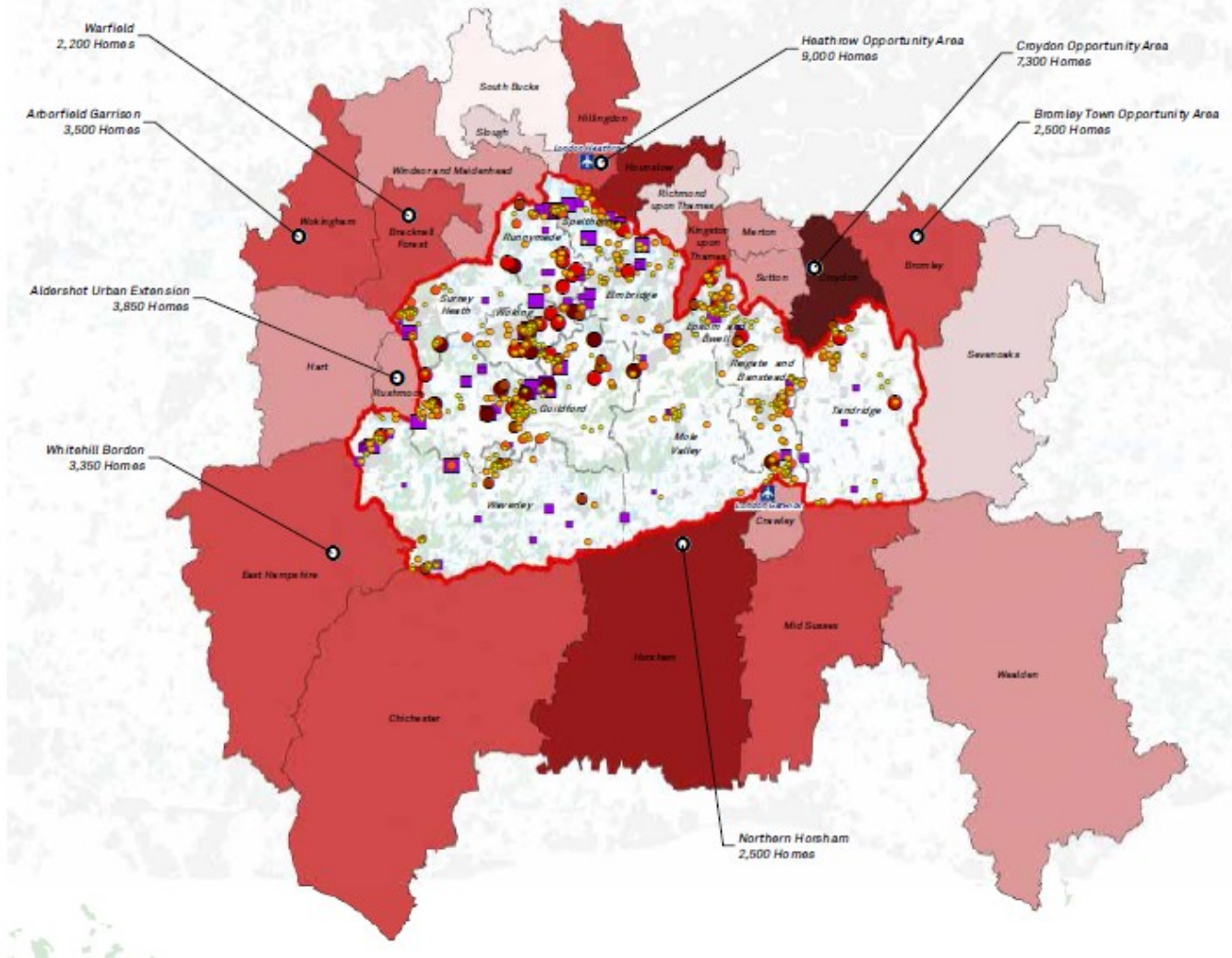
Contains Ordnance Survey data Crown copyright and database right © 2015.



* This is based on the most up to date information at the time of publication and could be subject to change, subject to review of planning policy documents
Source: Local Authority data

WIDER GROWTH

Ordnance Survey, Esri, DeLorme, Garmin, copyright contributors, Esri © 2018



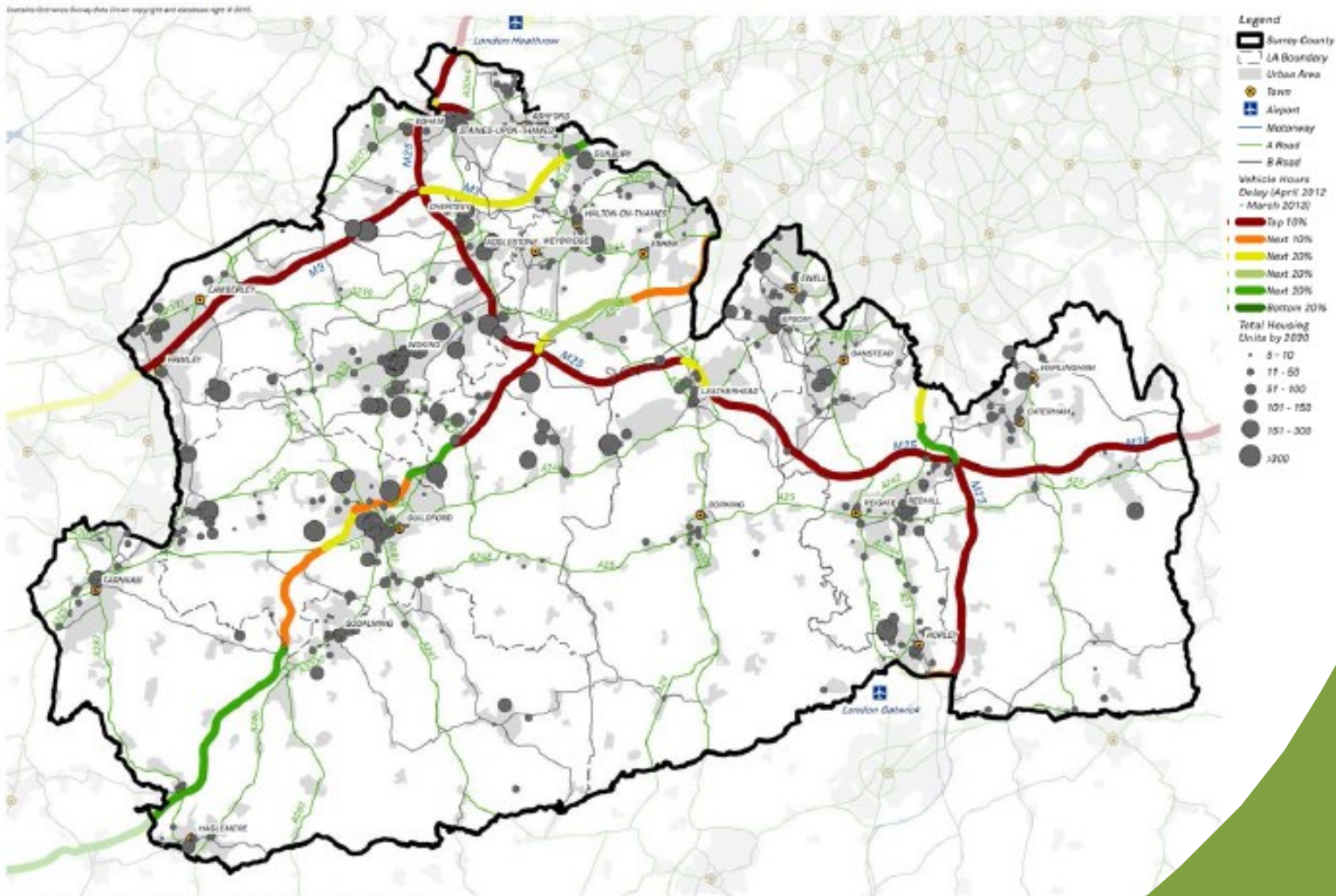
Estimated housing forecasts and key sites in neighbouring areas

APPROACH TO ASSESSING INFRASTRUCTURE REQUIREMENTS

- Assessment of existing provision and capacity
- Mapping growth against existing capacity for each type of infrastructure
- Service provider and borough and district workshops
- Identification of projects to support growth
- Costing of projects (and benchmark standards to fill gaps)
- Review with service providers and boroughs and districts
- Assessment of potential funding sources

MAPPING GROWTH AGAINST EXISTING CAPACITY

Motorway and trunk road - Vehicle Hours Delay



FUNDING – ASSUMPTIONS

- Funding classified into two categories:
 - Secured
 - Expected
- Secured funding - that identified in source documents and discussions with infrastructure providers
- Expected funding – from Government, LEPs, utility companies, other private sector operators, developer contributions (S106 and CIL)
- Funding totals primarily based on sum of projects in database where secured or expected funding from one or more sources has been identified.

SURREY – HEADLINES

SURREY

THE INFRASTRUCTURE STUDY IDENTIFIES THE FOLLOWING HEADLINES FROM 2015 TO 2030:

47,053
new homes

60,991
new people

59,000
new jobs

Total Infrastructure Costs: **£5,717,020,000**

Total Secured Funding: **£933,760,000**

Total Expected Funding: **£1,580,420,000**

Total Funding Gap: **£3,202,830,000***

% of Infrastructure Funded: **44%**

* (considering both secured and expected funding)

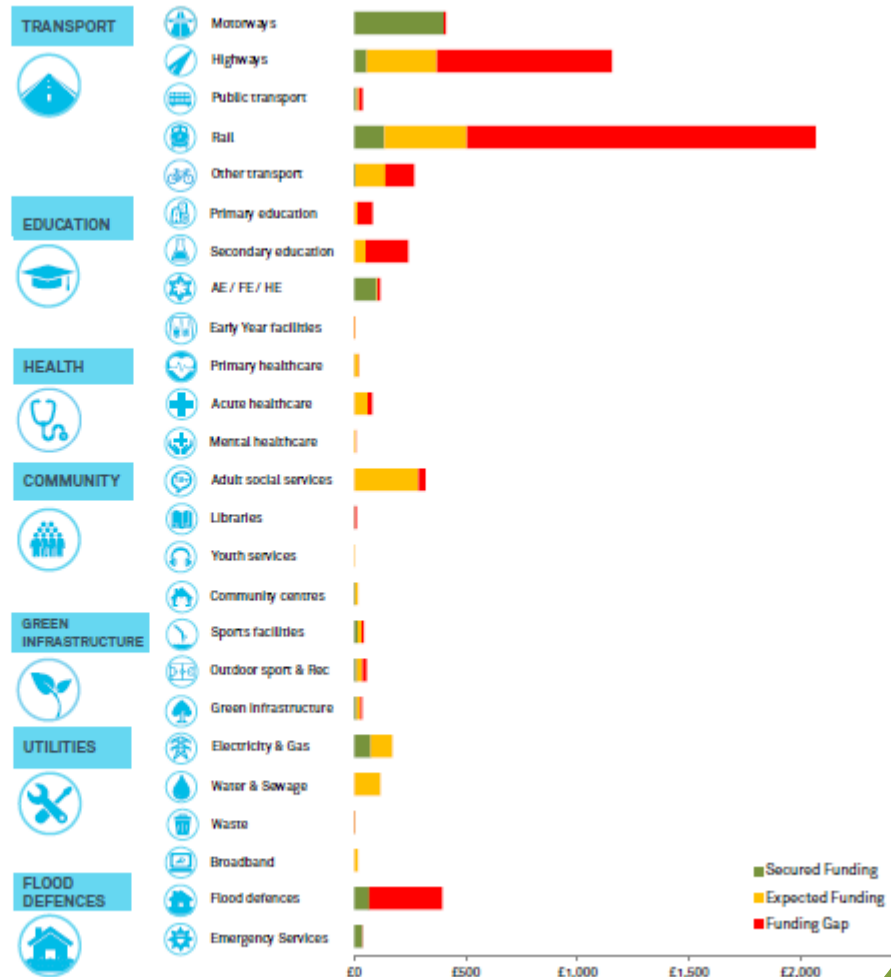


FIGURE B - SUMMARY OF INFRASTRUCTURE PROJECT COSTS AND FUNDING GAPS (2015-2030)

GUILDFORD HEADLINES

5.3 GUILDFORD

9,300
new homes
(+16%)

20,301
new people
(+14%)

to 2030

INFRASTRUCTURE HIGHLIGHTS

- A3 road deficient in quality and capacity.
- Guildford town centre gyratory
- Vehicular demand on Local Road network approaches or exceeds capacity of some links and junctions.
- Traffic congestion affects bus route efficiency which is also limited in village areas.
- Scope to improve pedestrian & cyclist provision.
- Capacity issues on current rail infrastructure.
- Strategic Flood Risk Assessment identifies increased long term flood risk to some areas of Guildford Town.
- Shortage of primary school places (currently being addressed) and surplus provision of secondary places
- Authority wide library provision insufficient for population.

Total Infrastructure Costs: **£1,162,040,000**

Total Secured Funding: **£75,800,000**

Total Expected Funding: **£568,220,000**

Total Funding Gap: **£518,020,000**

Funding as % of Costs: **55%**

TRANSPORT



EDUCATION



HEALTH



COMMUNITY



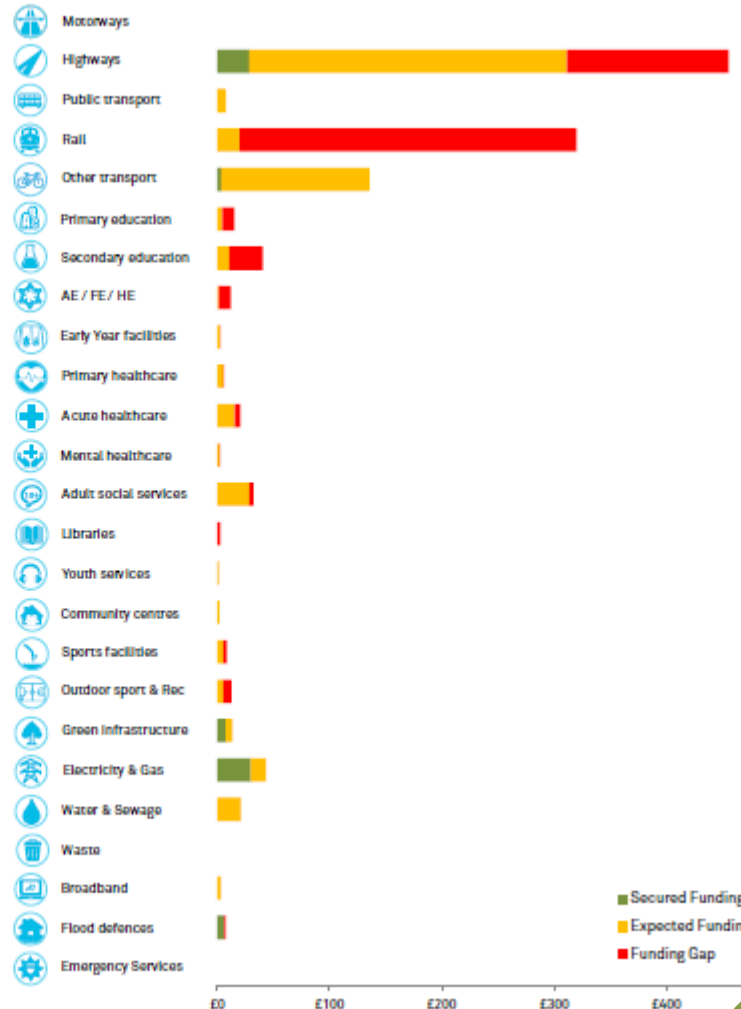
GREEN INFRASTRUCTURE



UTILITIES

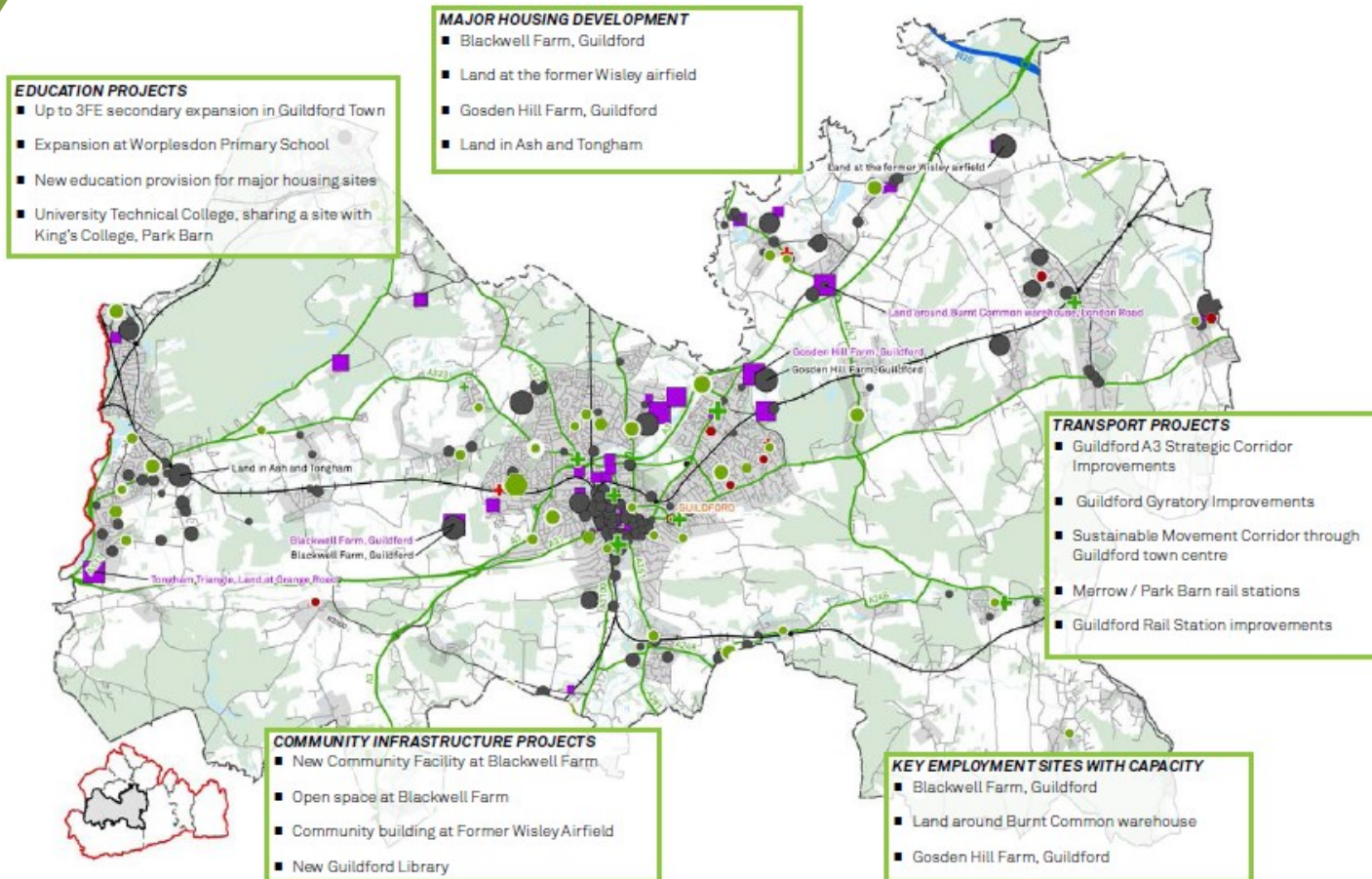


FLOOD DEFENCES



SUMMARY OF INFRASTRUCTURE PROJECT COSTS AND FUNDING GAPS (2015-2030)

ANALYSIS BY DISTRICT



SUMMARY OF GROWTH + INFRASTRUCTURE ISSUES IN GUILDFORD

Refer to Universal Legend at start of Chapter 5 to interpret Map icons

Projects Note - Any Strategic Projects Listed in Table 5.3 and affecting this local authority are not included in local costs and funding on facing page.

NEXT STEPS

Next steps include:

- Working with infrastructure providers to improve forward planning by relevant services and organisations, including new service delivery models and how to best utilise publicly owned assets
- Engaging with Government and national agencies to explore delivery and funding issues and to shape their investment plans
- Working with the districts and boroughs on bids for funding through the LEPs for shorter term infrastructure investment to address identified shortfalls
- Engaging with authorities across the South East and the GLA on growth issues and the opportunities of investing in strategic infrastructure priorities that benefit the wider area

NEXT STEPS (continued)

- Developing an investment framework and strategy for infrastructure delivery in Surrey and to support planned growth
- Developing an infrastructure strategy for 3SC devolution proposals for the Surrey, West Sussex and East Sussex area
- Engaging with the private sector in reviewing potential funding sources
- Working with partners to maintain an up-to-date understanding of growth distribution and supporting infrastructure reflecting the ongoing development of Local Plans, refinement of projects and funding assumptions including developer contributions