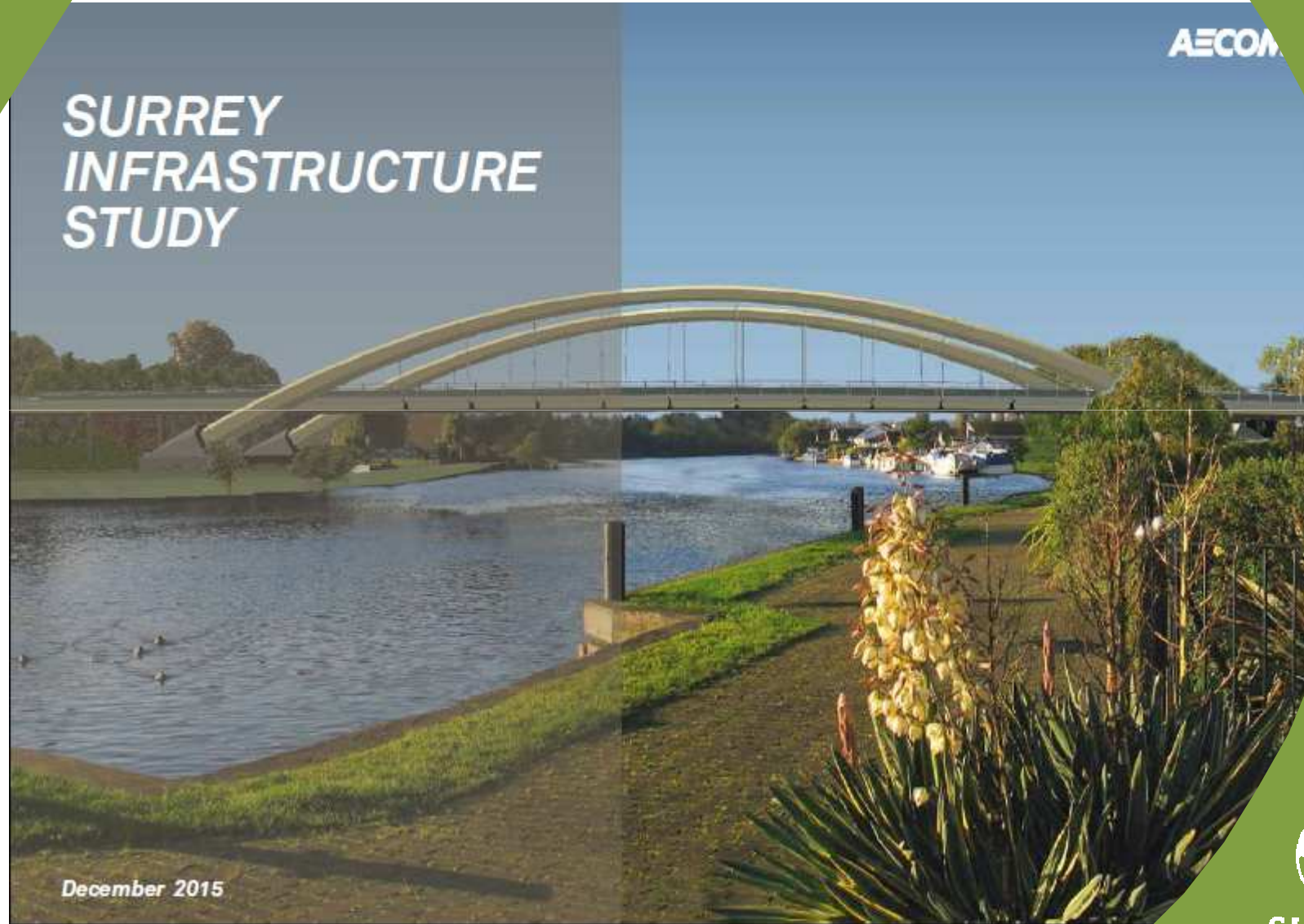


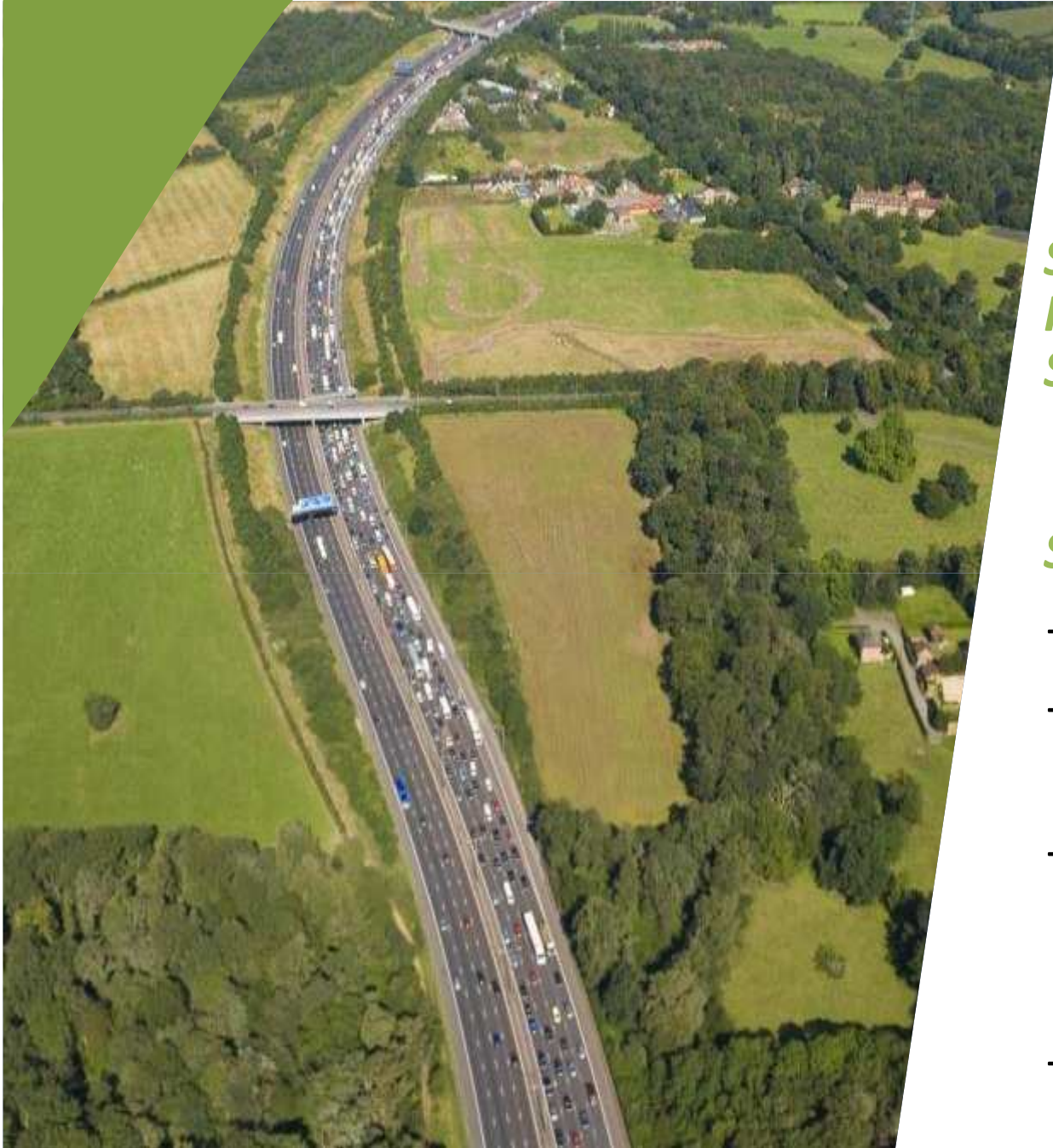
Surrey Infrastructure Study

Economic Prosperity, Environment
and Highways Board

10 March 2016

Surrey Infrastructure Study





SURREY INFRASTRUCTURE STUDY

Study Overview

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

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.



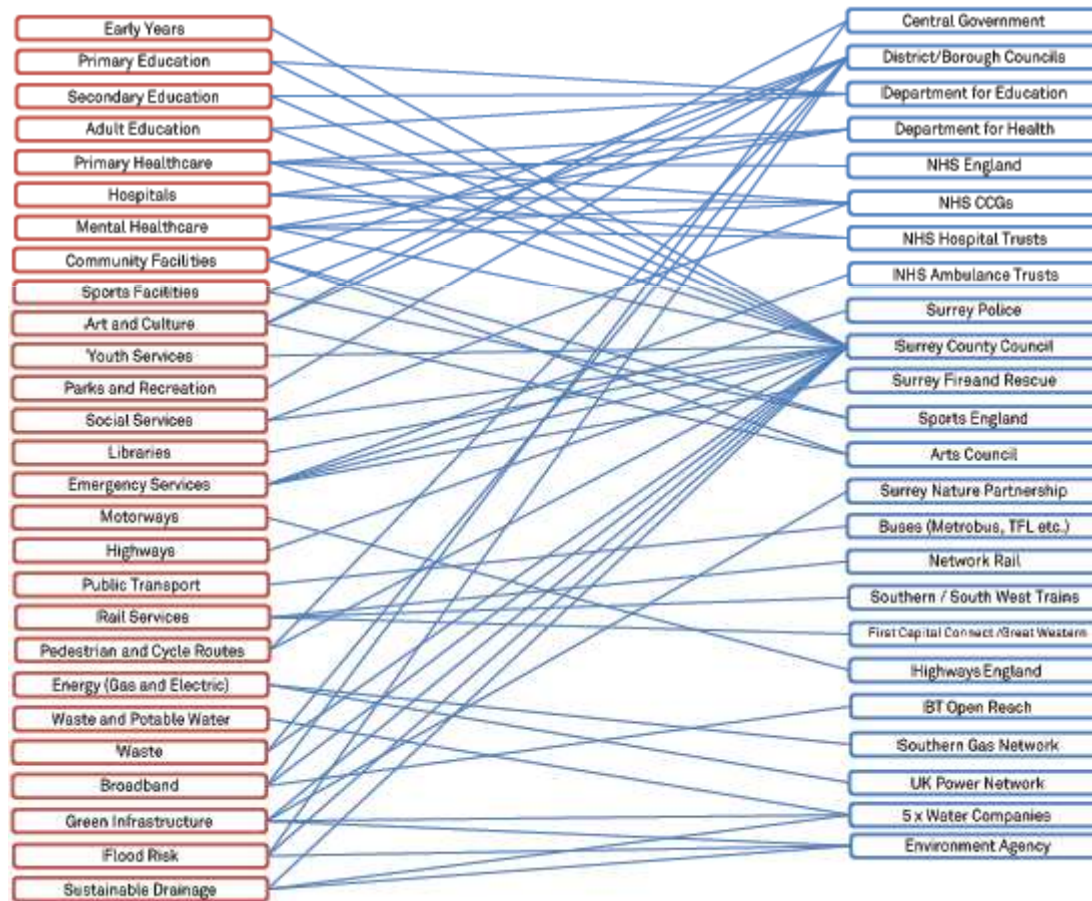
SURREY

INFRASTRUCTURE CATEGORIES



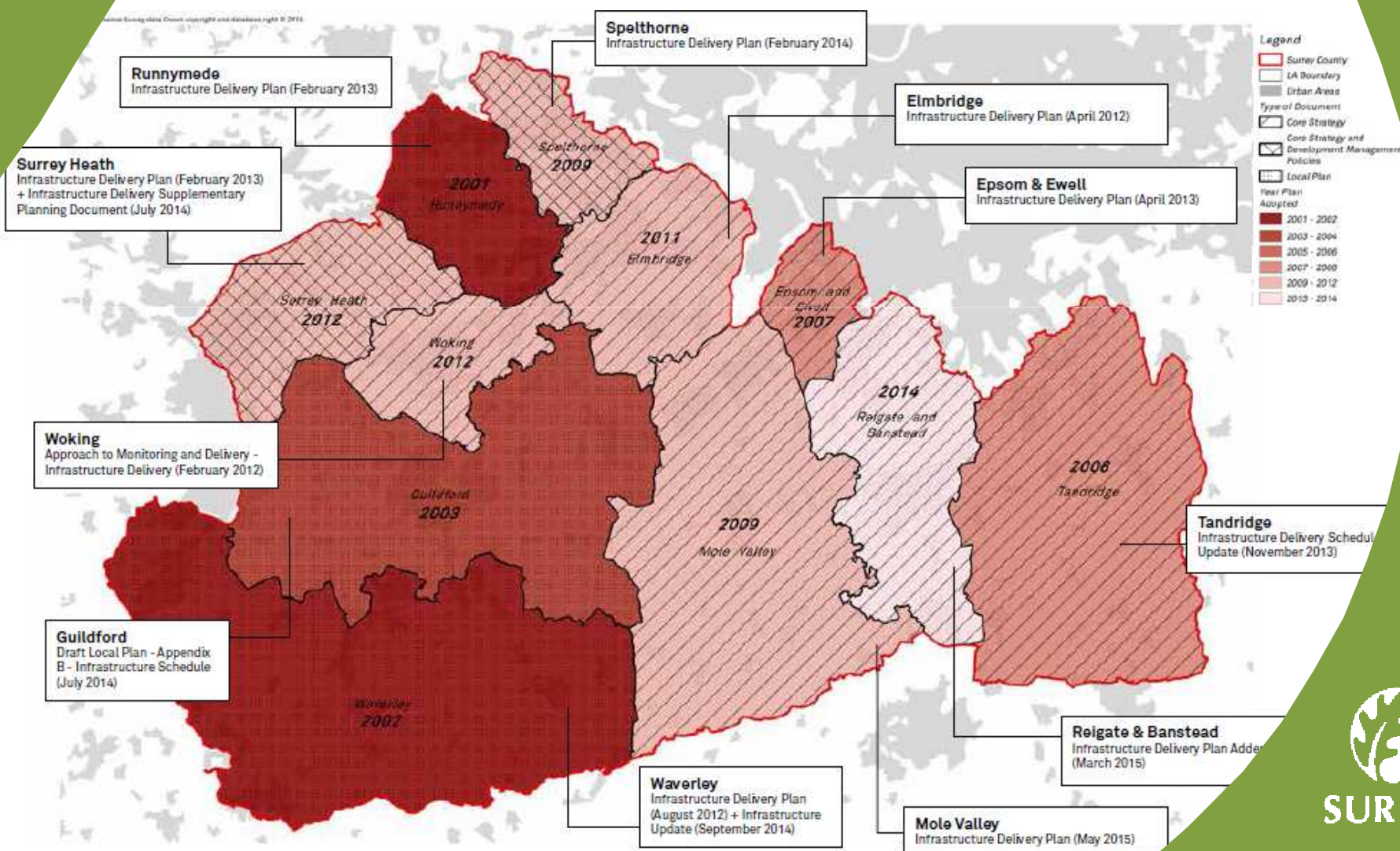
COMPLEX RELATIONSHIPS

Infrastructure requirements and providers



PLANNING CONTEXT

Local Plan and Infrastructure Delivery Plan status July 2015



SURREY

STUDY SCOPE

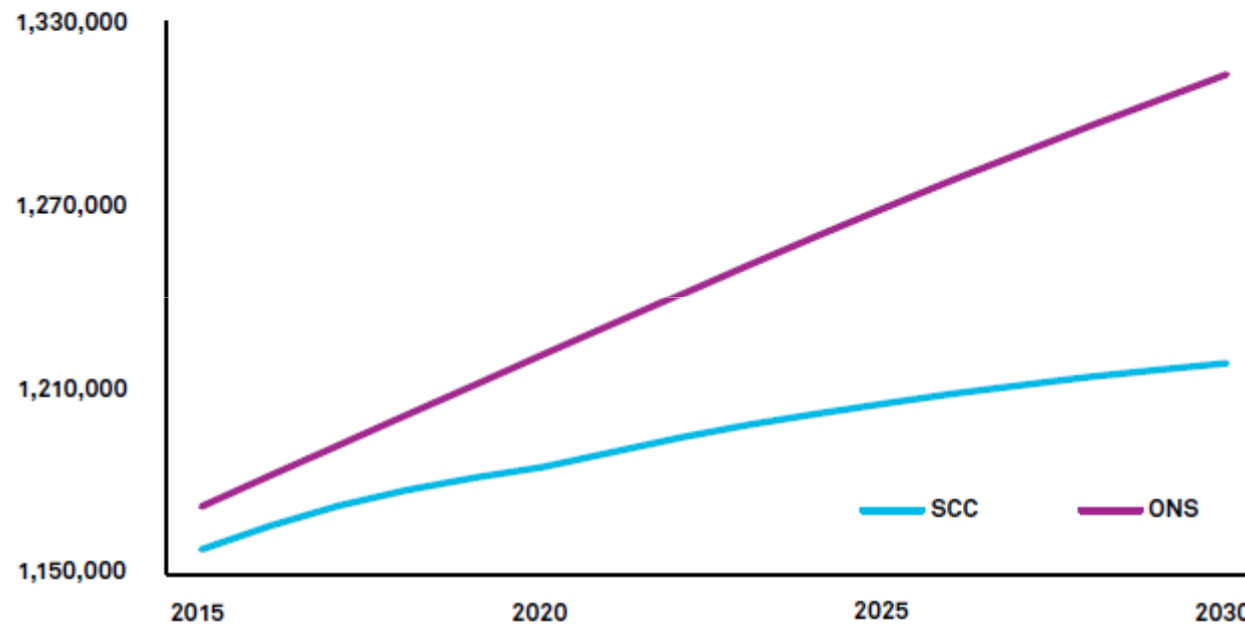
The report is a snapshot at July 2015 and presents :

- 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



SURREY

POPULATION PROJECTIONS

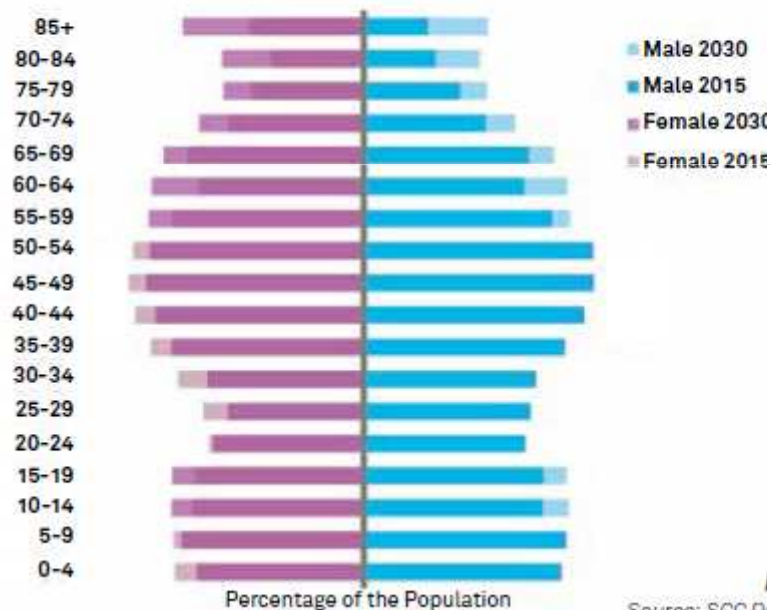


Source: SCC PopGroup Model Forecasts, ONS 2012 based Sub National Population Projections

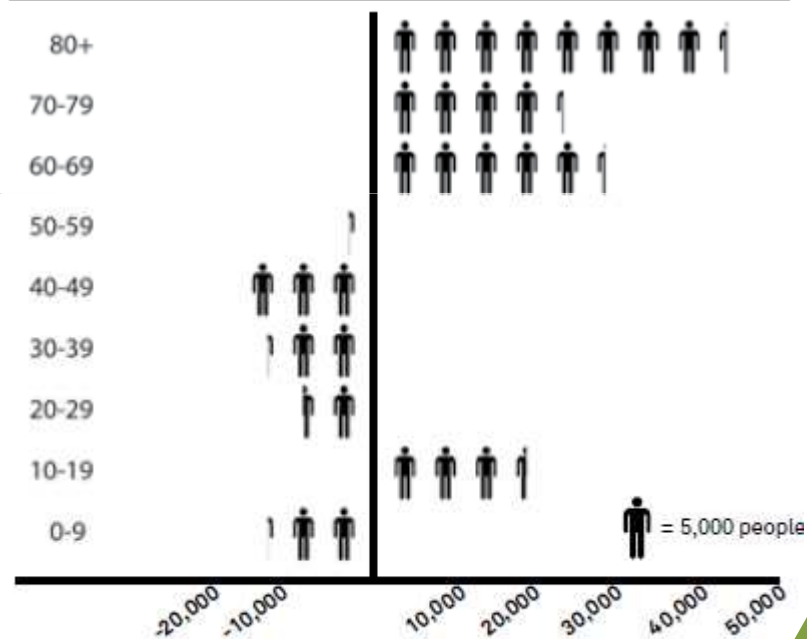
**Surrey will grow by at least 61,000 people
(5% increase) by 2030**

KEY DEMOGRAPHIC CHANGES

Forecast Change in Age Profile 2011 - 2030



NEW PERSON BY AGE BRACKET



SURREY

EXISTING AND PLANNED HOUSING

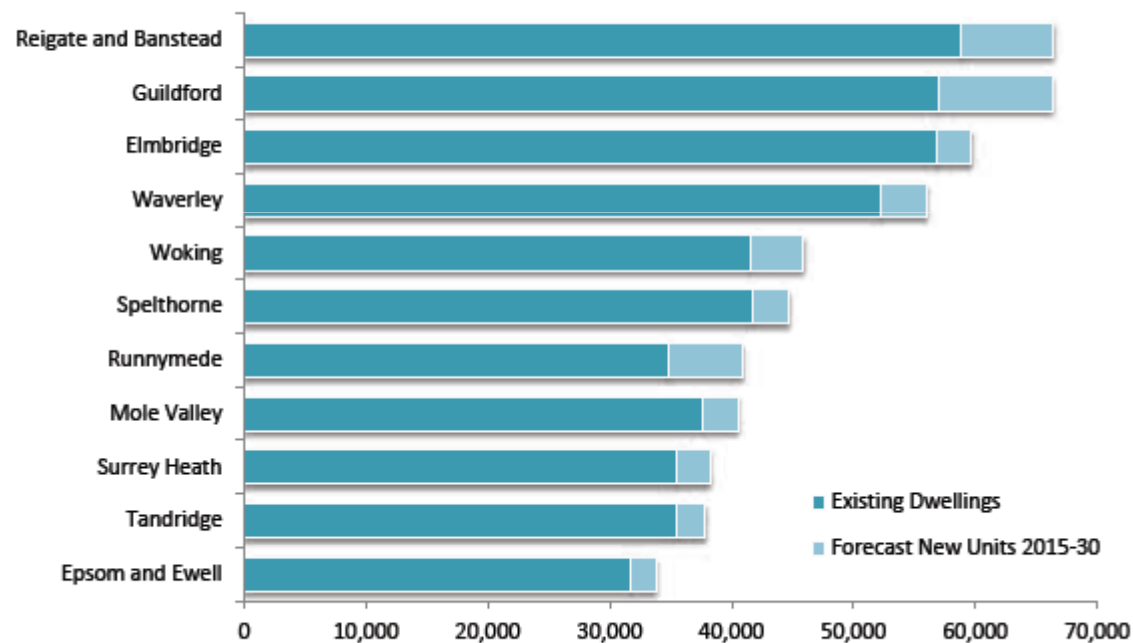


FIGURE 3.15 - EXISTING AND PROPOSED HOUSING

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



SURREY

KEY ECONOMIC CHANGES

Job growth forecast to 2030

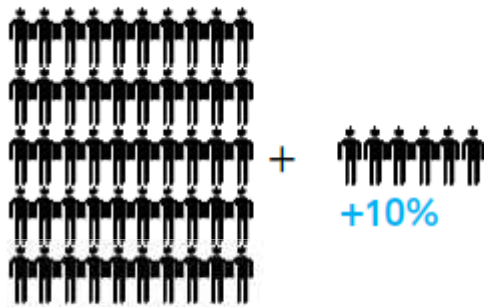
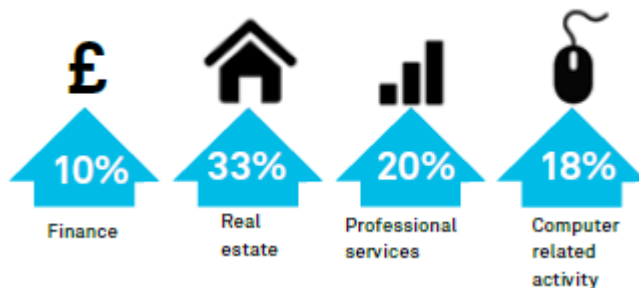


FIGURE 3.30 - JOB GROWTH FORECAST TO 2030

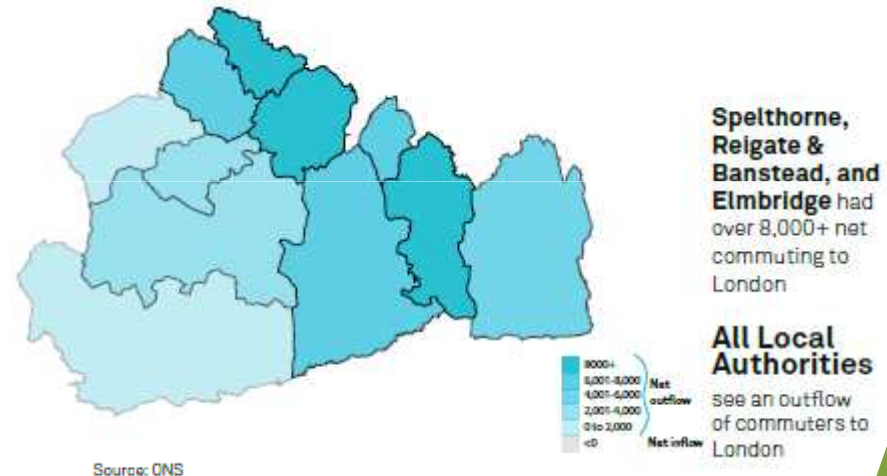
Source: Forecasts and future scenarios for the economy of Surrey: an update to the work done in 2010, 2013, SQW

59,000 new jobs in Surrey to 2030

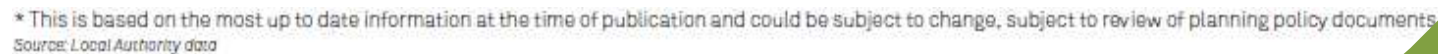
Employment Growth in the following sub-sectors:



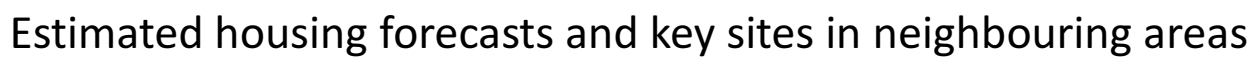
Surrey is a net exporter of labour and this is set to continue



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APPROACH TO ASSESSING INFRASTRUCTURE REQUIREMENTS

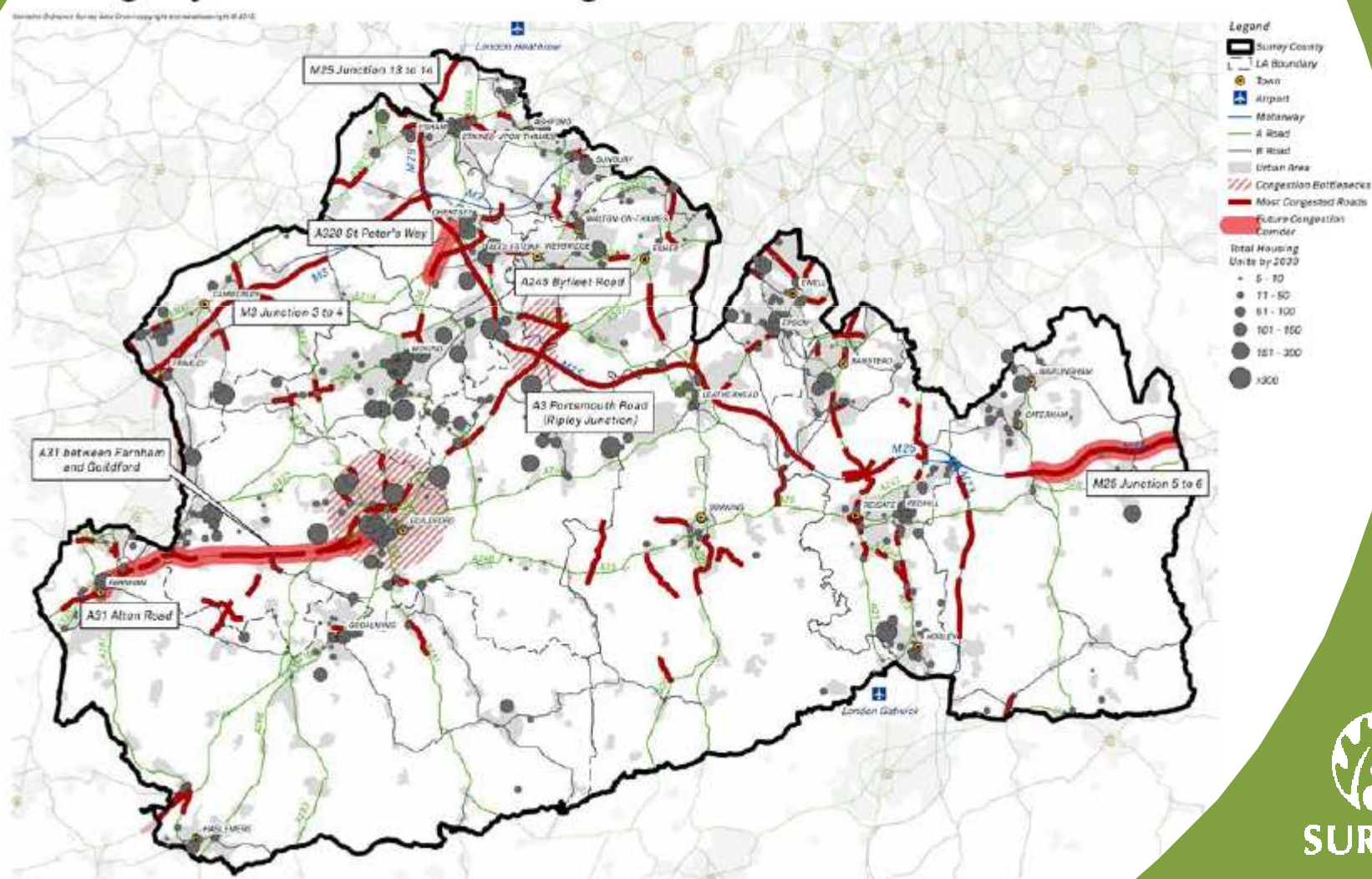
Stage 1

- Assessment of existing provision and capacity
- Mapping growth against existing capacity for each type of infrastructure



MAPPING GROWTH AGAINST EXISTING CAPACITY

Existing major road network and congestion



Source: Surrey Future Congestion Programme



SURREY

APPROACH TO ASSESSING INFRASTRUCTURE REQUIREMENTS

Stage 2

- 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



SURREY

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

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: **£5,368,480,000**

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

Total Expected Funding: **£1,231,890,000**

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

% of Infrastructure Funded: **40%**

* (considering both secured and expected funding)

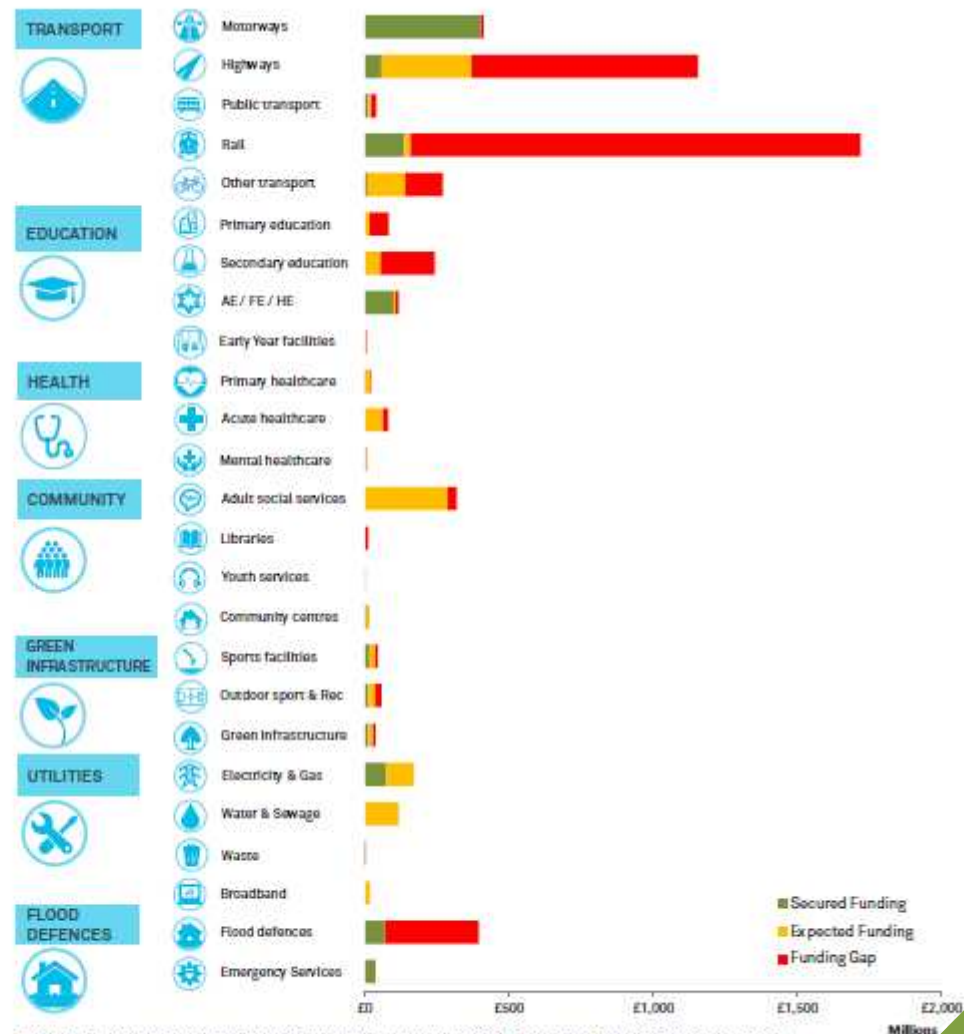


FIGURE B - SUMMARY OF INFRASTRUCTURE PROJECT COSTS AND FUNDING GAPS (2015-2030)



SURREY

ANALYSIS BY DISTRICT

5.1 ELMBRIDGE

2,861
new homes
(+5%)
to 2030

1,018
new people
(+1%)

INFRASTRUCTURE HIGHLIGHTS

- M25, junctions 1A to 16, and the A3 between Esher and Bordon traffic congestion
- Current trends indicate that the A3 from Ditton Hill to Guildford is likely to be more highly congested.
- South West Mainline capacity increases planned for peak AM times requires station platform lengthening.
- Need for Secondary school places.
- Brooklands College Weybridge Campus in need of refurbishment / replacement.
- Weylands Treatment Works in Hersham allocated as potential site for expansion of waste processing.
- Development site mitigation expected to be sufficient to limit changes to flood risk

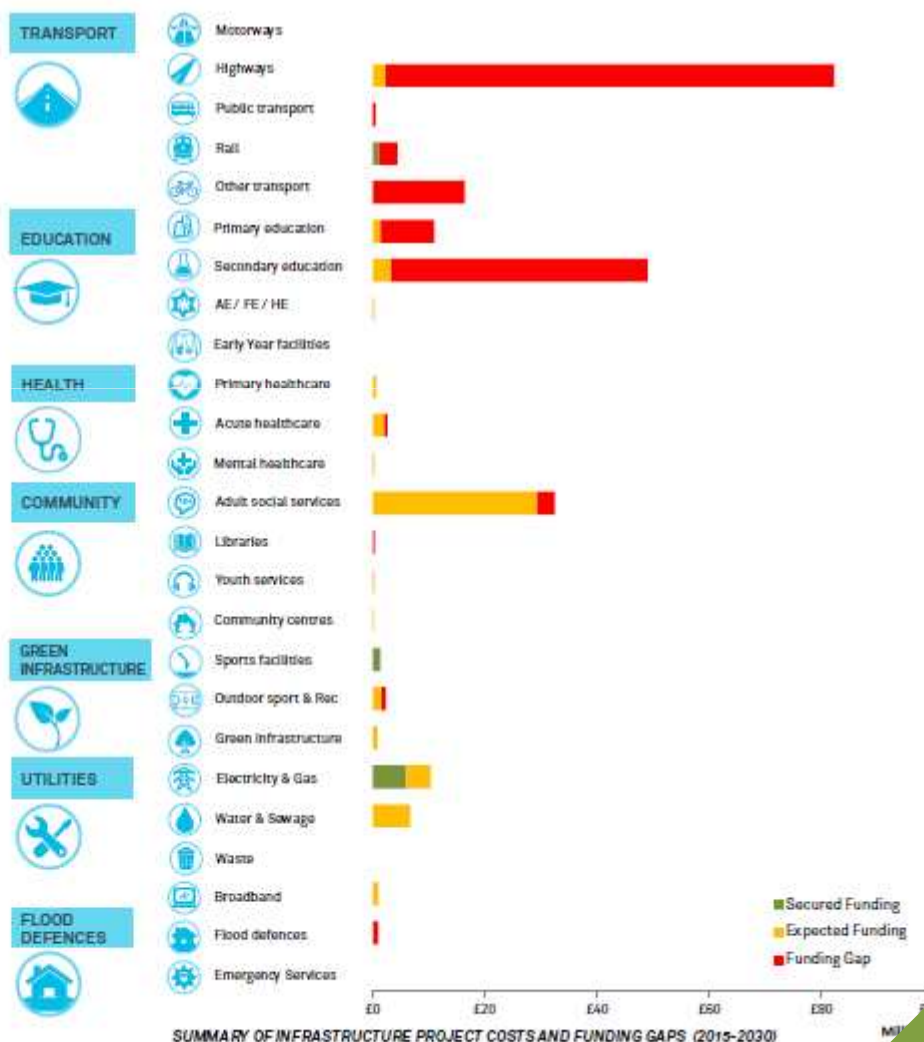
Total Infrastructure Costs: £224,240,000

Total Secured Funding: £8,620,000

Total Expected Funding: £54,610,000

Total Funding Gap: £161,020,000

Funding as % of Costs: 28%

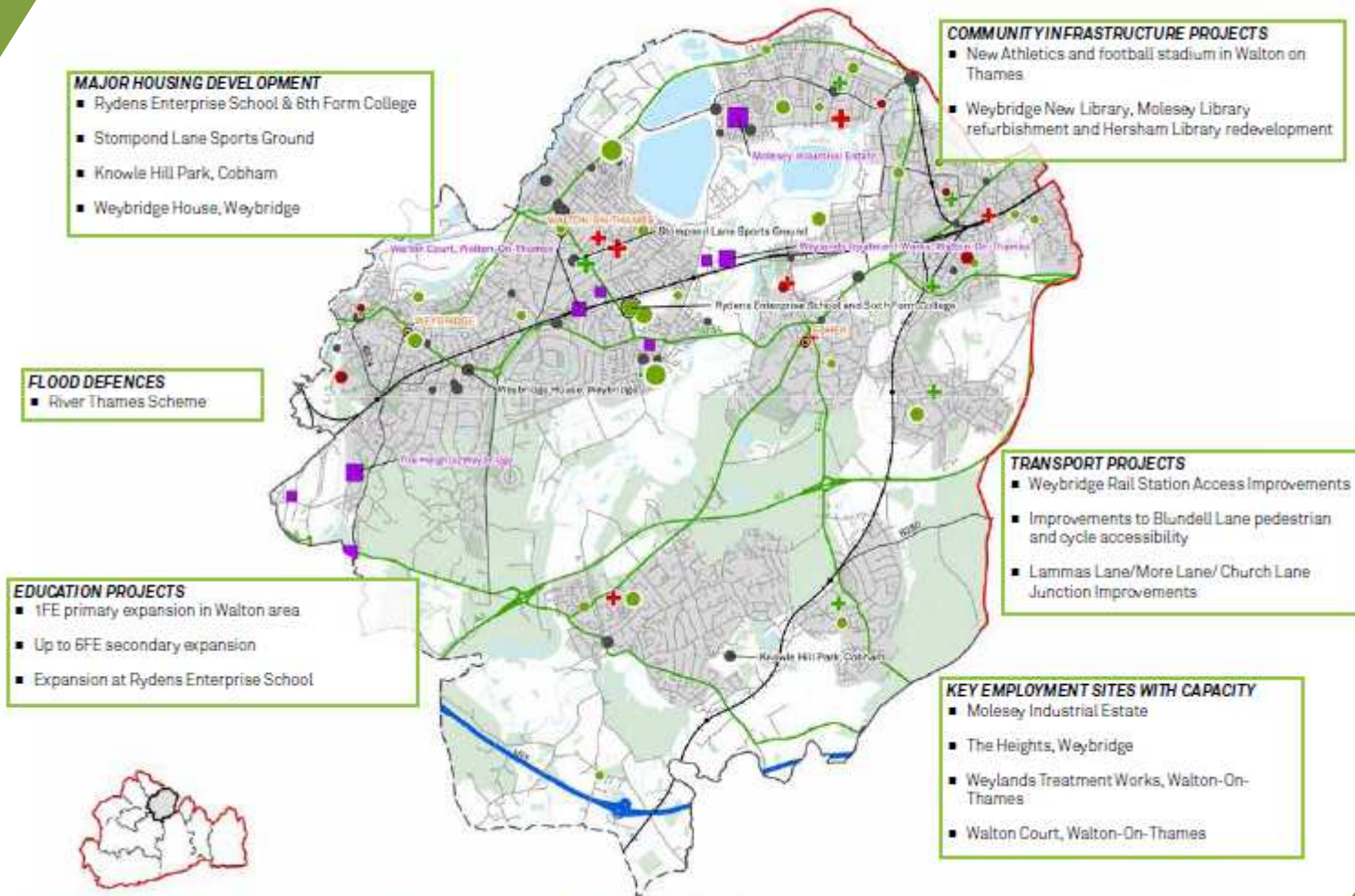


SUMMARY OF INFRASTRUCTURE PROJECT COSTS AND FUNDING GAPS (2015-2030)



SURREY

ANALYSIS BY DISTRICT



SUMMARY OF GROWTH + INFRASTRUCTURE ISSUES IN ELMBRIDGE

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

Projects Note - Any Strategic Projects Listed in Table 6.3 and affecting this local authority are not included in local costs and funding on facing page.

Surrey Infrastructure Study



SURREY

NEXT STEPS

The Study will be used to demonstrate the challenges faced in accommodating and supporting growth and in particular to:

- Improve forward planning by relevant services and organisations
- Provide the basis for an understanding across Surrey of the distribution of growth and associated infrastructure
- Support bids for funding
- Contribute to analysis of wider strategic developments in London and the South East
- In the context of devolution, support the development of a 3SC Infrastructure Strategy



SURREY