

Welsh Transport Appraisal Guidance (WelTAG)



Llywodraeth Cymru
Welsh Government

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Rydym yn croesawu gohebiaeth a galwadau ffôn yn Gymraeg /

We welcome correspondence and telephone calls in Welsh

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Figure 1: Transport targets from the Wales Transport Strategy and Net Zero Wales

Sustainable transport targets in Wales				
Transport Targets	2019 baseline	2025	2030	2040
Modal shift target (Wales Transport Strategy)	32%			45% journeys by walking, cycling or public transport
Updated modal shift targets (Net Zero Wales)	32% journeys by walking, cycling or public transport	35% of journeys by sustainable modes	39% journeys by walking, cycling or public transport	
	27% active travel and 5% public transport		33% active travel and 7% public transport ¹	35% active travel and 13% public transport
Passenger transport emissions (Net Zero Wales)	3.8 MtCO₂e	Reducing emissions from passenger transport by 22% in 2025 from 2019 levels		
Car Mileage reductions (Net Zero Wales)	10,186 Vehicle Km per person		Reduce car miles travelled per person by 10% by 2030 from 2019 levels	
Freight transport efficiency (Net Zero Wales)	2.1 MtCO₂e	Increase the efficiency of transport freight by road, rail and sea by 4% from 2019 levels		
Bus Fleet	Not Stated	TrawsCymru fleet to be zero emission by 2026	Worst 50% to Zero emission by 2028	Zero emission by 2035
Taxis and Private Hire Vehicles	Not Stated		Zero emission by 2028	

¹ As stated in Net Zero Wales with rounding to the nearest %

Introduction

This guidance is for anyone who is planning or managing a transport policy, project or programme in Wales. It will help you plan your project and show how it will deliver value for money.

You **MUST** use this WelTAG update if you want transport funding from Welsh Government for any projects, policies and programmes.

WelTAG is based on the HM Treasury Green Book that explains how to deliver value for money in all government policies, programmes and projects. WelTAG applies those principles to transport investment in Wales.

What has changed since WelTAG 2017?

The first dedicated transport appraisal guidance for Wales was published in 2008 and updated in 2017. This update to WelTAG uses the same basic approach as earlier versions but has been updated to reflect the new priorities in the Wales Transport strategy, user feedback and responses to the public consultation.

The five principal changes are:

1. Introduces different **categories of WelTAG** (lite, standard, plus), ensuring that a proportionate approach is taken in each case.
2. Introduces a **Stage 0 Case for Change** for all transport policies, programmes and projects. This should be done in-house and not by consultants and should be supported by a scoping report. This update aligns with the UK Government Department for Transport business case strategic assessment stage.
3. The economic dimension of the business case has been renamed the **well-being dimension**.
4. The Integrated Appraisal Report (IAR) is renamed the **Integrated Well-being Appraisal (IWBA)**. The revised methodology aligns it with the Wales Transport Strategy well-being ambitions and the Well-being of Future Generations (Wales) Act 2015.
5. Not all projects need benefit-cost ratios. However, all projects need an IWBA using the **Wales Transport Strategy monitoring** measures.

We have also introduced five value-for-money criteria that we will use to assess bids for transport funding. These reflect the five dimensions of a business case – strategic fit, wellbeing, affordability, delivery and manageability.

WelTAG is based on the HM Treasury Green Book that explains how to deliver value for money in all government policies and projects. WelTAG applies those principles to transport investment in Wales.

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Structure of this document

-  **Section 1** provides background on WelTAG. It explains Wales' distinctive approach to transport appraisal.
-  **Section 2** provides guidance on the five WelTAG planning stages.
-  **Section 3** provides guidance on preparing a full business case covering the five dimensions of strategic fit, well-being, affordability, deliverability and management.
-  **Section 4** provides guidance on integrated well-being appraisal.
-  **Section 5** is about engaging with people during WelTAG planning.
-  **Section 6** covers common issues that arise when working with WelTAG.
-  **Section 7** addresses WelTAG and land use planning.
-  **Section 8** covers the application of WelTAG to different transport modes.

We have published separate checklists for each part of the WelTAG process. The checklists are designed for project managers, review groups and others to review the quality of WelTAG reports.

There is a list of terms used in this guidance, a list of the most relevant legislation and guidance in Wales and further reading.

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Figure 2: WeITAG on a page

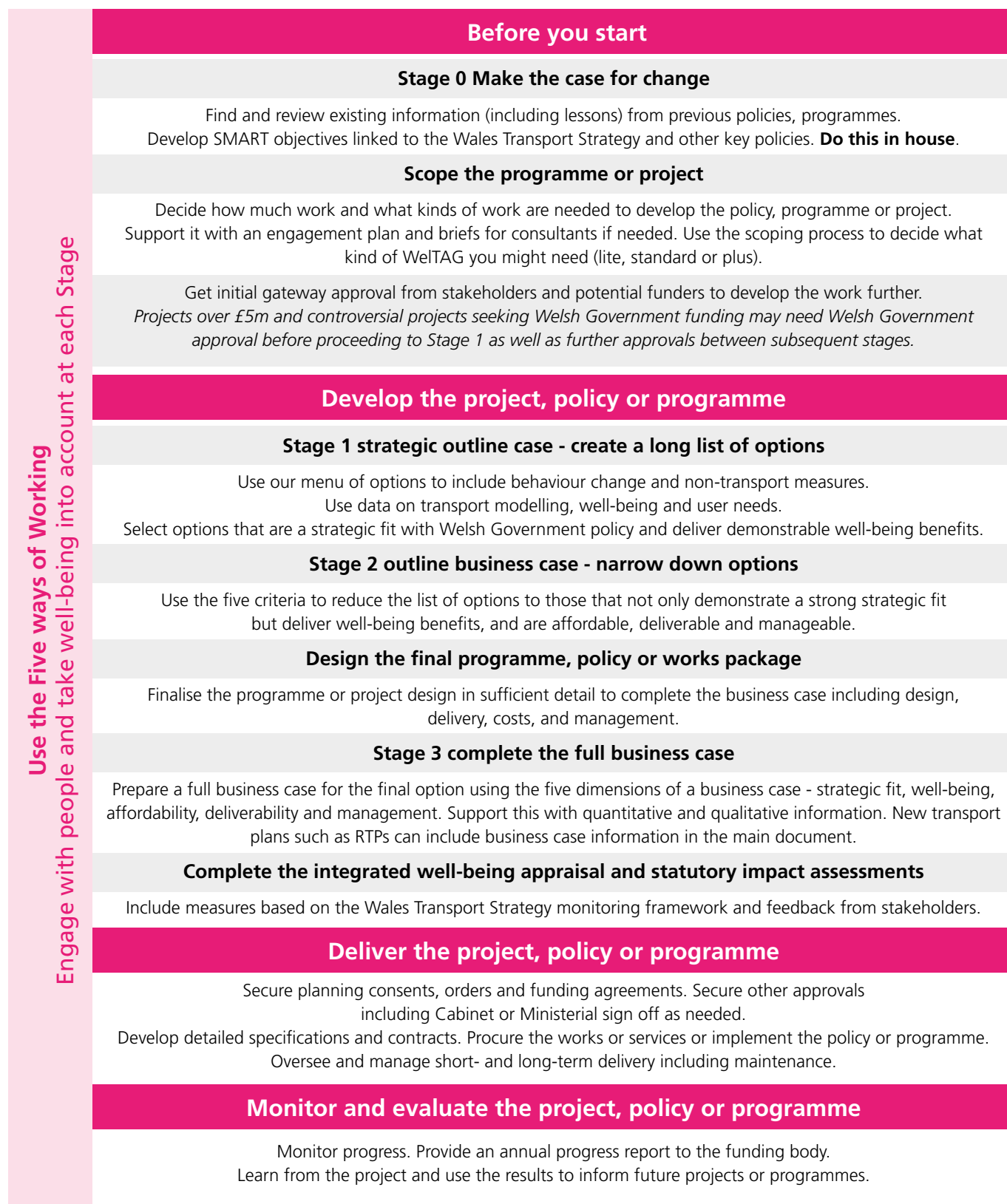
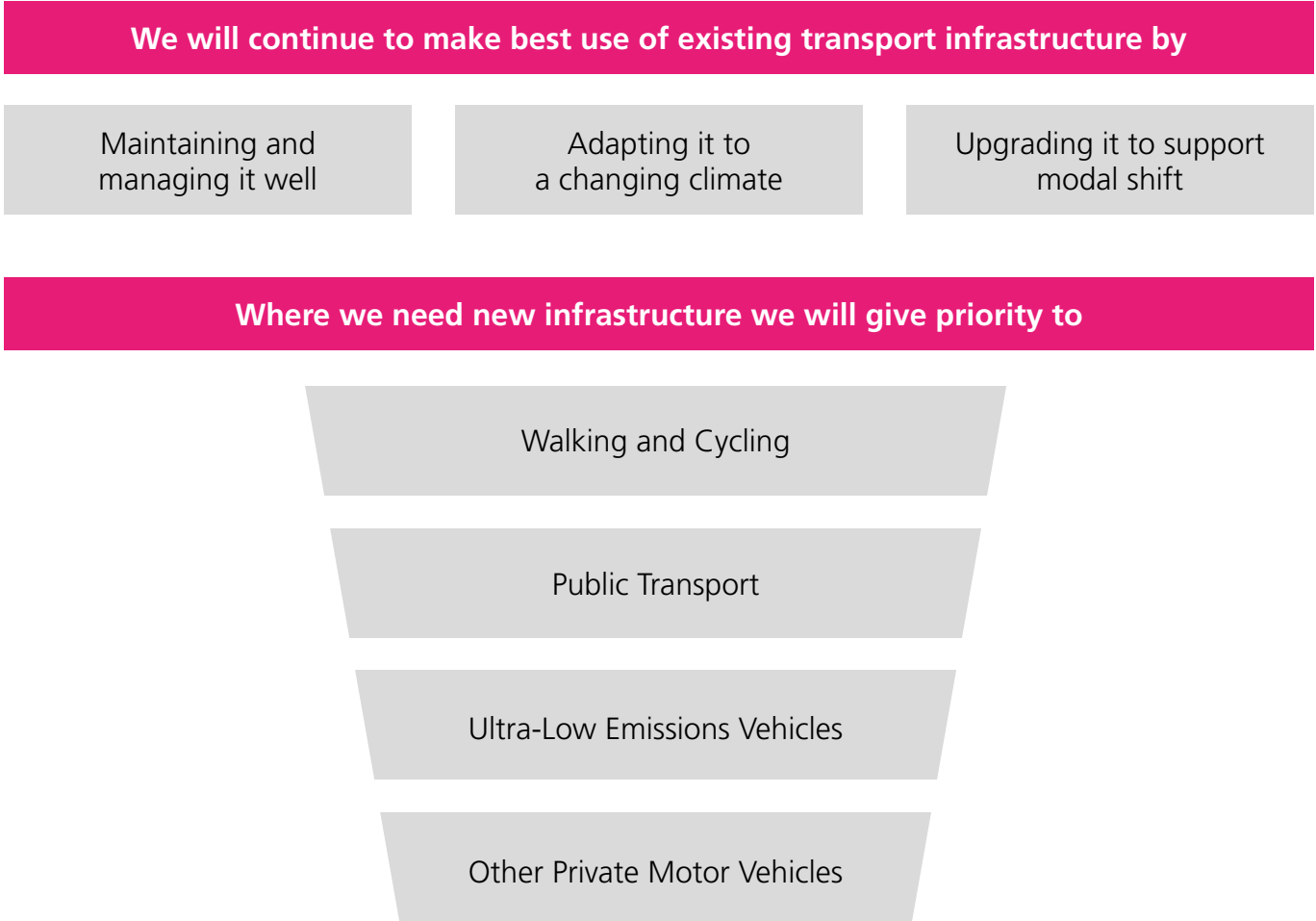


Figure 3: The Sustainable transport hierarchy



Section 1

Background and context

This section explains the background to WelTAG including the purpose of WelTAG, links to (UK) TAG and the relationship to the Wales Transport Strategy.

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Section 1: Background and context

This WelTAG guidance is primarily written for the project, programme or policy manager. They oversee the development and, eventually, delivery of the project, programme or policy.

What is WelTAG?

WelTAG is the Welsh Government guidance on planning and appraisal for transport. It must be used for any transport programme, policy or project seeking funding from Welsh Government.

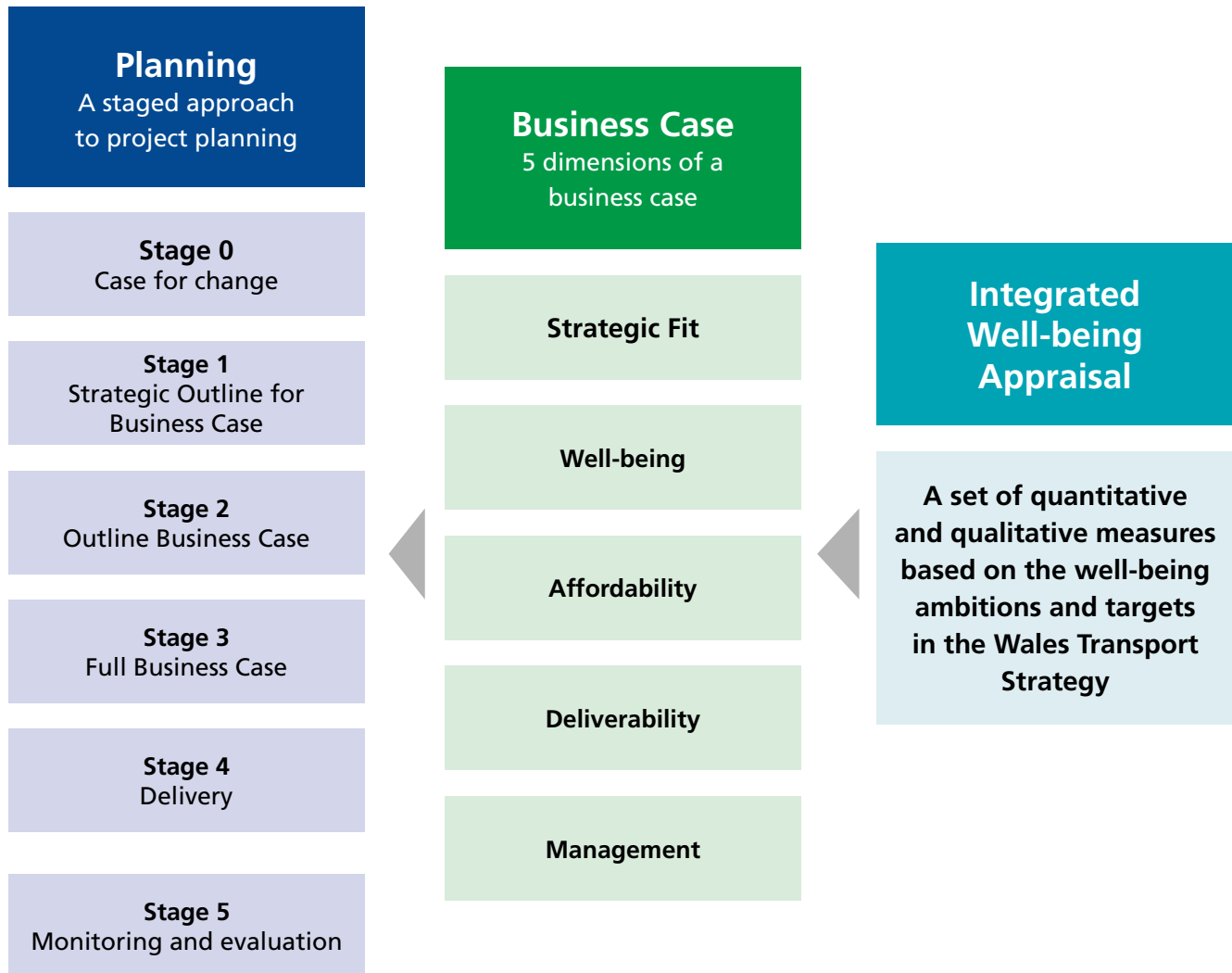
Transport planning and appraisal involves finding solutions to transport problems. Transport planning is the process of developing solutions, and transport appraisal is about ensuring that those solutions deliver value for money.

This WelTAG guidance is primarily written for the project, programme or policy manager. They oversee the development and, eventually, delivery of the project, programme or policy.

WelTAG sets out a structured approach to **planning** programmes and projects that starts with exploring the case for change and moves through a series of logical steps in developing a programme or project, delivering it and finally reviewing it afterwards. Those steps include identifying objectives, narrowing down options and then developing a business case for the chosen objective. It also involves monitoring and evaluating your programme or project afterwards.

WelTAG also explains how to approach **transport appraisal** in Wales through preparing a business case that explains how a programme or project will deliver value for money by addressing the dimensions of a business case – strategic fit, well-being, affordability, deliverability and management.

Figure 4: The three WeITAG elements – planning, business case & integrated well-being appraisal



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All transport programmes, policies and projects in Wales funded by Welsh Government must demonstrate their impact on well-being by providing an integrated well-being appraisal.

That business case must include information from the third key element of WelTAG - integrated well-being appraisal.

All transport programmes, policies and projects in Wales funded by Welsh Government must demonstrate their impact on well-being by providing an integrated well-being appraisal.

Integrated well-being appraisal is a structured approach that shows the impact of the programme or project on well-being using qualitative measures based on the well-being ambitions in the Wales Transport Strategy and quantitative measures drawn from the Wales Transport Strategy Monitoring Framework. It also draws on the results of statutory impact assessments, such as environmental impact assessments.

Polices, programmes and projects funded by Welsh Government must also show how they have engaged with people as part of the planning process and made use of the five ways of working set out in the Well-being of Future Generations (Wales) Act 2015.

Further guidance on the planning stages is set out in section 2. Section 3 explains the 5 dimensions of a business case, section 4 describes integrated well-being appraisal and section 5 project is about the importance of engaging with people during the process of planning and delivering a project, policy or programme.

It is important to take a proportionate approach to WelTAG tailored to the scale of the project, programme or policy so we have introduced 3 levels of WelTAG (WelTAG lite, standard and plus) set out in section 6.

There are detailed checklists for each of these.

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When should WeITAG be used?

WeITAG must be used for any transport intervention in Wales funded by Welsh Government including transport services or infrastructure. WeITAG should be used for projects, programmes and policies. This aligns with the HM Treasury Green Book which applies to projects, programmes and policies.

Transport interventions include:

- Maintaining or upgrading existing infrastructure or creating new infrastructure.
- Upgrading existing services or providing new services.
- New plans or policies such as regional transport plans or mode-specific plans (such as future planning for bus, rail or freight).

In Wales we interpret the HM Treasury Green Book to ensure that the appraisal process also reflects Welsh values.

Transport interventions must also include behaviour change measures and actions that reduce the need to travel such as those identified in the Wales Transport Strategy.

TAG and WeITAG

WeITAG is based on the UK Government Transport Analysis Guidance (TAG) which in turn is based on the HM Treasury Green Book that guides decisions on spending public money. Scotland also publishes Scottish Transport Analysis Guidance (Scot-TAG).

In Wales, we interpret the HM Treasury Green Book to ensure that the appraisal process reflects Welsh values. As a result, there are some differences in how appraisal is done in Wales. WeITAG reflects the relevant legislation in Wales, including the Well-being of Future Generations (Wales) Act 2015, the Active Travel (Wales) Act 2013, Llwybr Newydd the Wales Transport Strategy 2021, Net Zero Wales and devolved transport responsibilities (see the annex for the most relevant policies and legislation).

Projects that seek funding from the UK Government must meet UK Government requirements set out in TAG. Projects that seek funding from Welsh Government must demonstrate strategic fit with transport priorities in Wales and address well-being using WeITAG.

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Figure 5: Comparison between the full business case in TAG and WeITAG

TAG business case	WeITAG business case	Requirements in Wales
Strategic dimension	Strategic fit	Must show how your programme or project fits with Welsh Government priorities for transport set out in the Wales Transport Strategy, Net Zero Wales and other policy documents
Economic dimension	Well-being	Must show how the programme or project contributes to social, environmental, economic and cultural well-being in Wales using integrated well-being appraisal
Financial dimension	Affordability	No major differences
Commercial dimension	Deliverability	No major differences
Management dimension	Management	No major differences
	Five ways of working	Must demonstrate the five ways of working in Wales in accordance with the Well-being of Future Generations (Wales) Act 2015

A proportionate approach

To help project managers take a proportionate approach and avoid unnecessary information, this update to WelTAG introduces three levels tailored to the size, scope and complexity of the project. These are:

- **WelTAG lite** – a single business case that combines Stages 1-3 into one report.
- **WelTAG standard** – separate reports at Stage 1 (long list of options, stage 2 (short list of options and justification for final option) and Stage 3 (full business case).
- **WelTAG plus** – more complex programmes and projects may need to supplement the integrated well-being appraisal with additional transport modelling and benefit-cost ratios.

There is further information about how to choose the best approach in section 6.

The use of benefit-cost ratios in Wales

Benefit-cost ratios are a quantitative tool for comparing different transport options. They are a core element of the TAG process. In Wales there are many more smaller transport projects, where benefit-cost ratios may not be helpful. Many transport programmes or policies in Wales do not require benefit-cost ratio calculations. Nevertheless, all transport projects, programmes and policies must still demonstrate how they deliver value for money through a business case (section 3) supported by an integrated well-being appraisal using the Wales Transport Strategy monitoring measures and Wales Transport Strategy ambitions (see section 4).

A small number of high-risk projects with a long payback period or projects that also require funding from the UK Government may also support their business case with benefit-cost ratios (BCRs). For these, benefit-cost calculations will only be applied to options that already meet the priorities and ambitions in the Wales Transport Strategy. Where projects do provide BCRs they must provide one that includes travel-time savings as a benefit and one that excludes the benefits of travel-time savings.

All transport programmes **MUST** demonstrate value for money through a business case (section 3) supported by an integrated well-being appraisal that uses quantitative and qualitative measures. Larger, more complex projects may also require benefit-cost ratio calculations (BCRs).

Net Zero Wales sets out an explicit target to reduce the number of car miles travelled per person by 10% by 2030.

WelTAG and the Wales Transport Strategy

Llwybr Newydd – the Wales Transport Strategy (WTS) was published in 2021.

It describes a future where the need to travel is reduced as services are increasingly digital and are closer to people, where people increasingly move by walking, cycling, bus and rail, and goods are transported in a more sustainable way. Net Zero Wales sets out an explicit target to reduce the number of car miles travelled per person by 10% by 2030.

Welsh Government can only fund transport interventions that meet the Wales Transport Strategy (WTS) targets, priorities and ambitions. The four long-term ambitions are a transport system that is good for people and communities, good for the environment, good for the economy and places and good for culture and the Welsh language. Those four ambitions are based on the well-being goals set out in the Well-being of Future Generations (Wales) Act 2015. Each ambition contains more specific goals.

Three 5-year priorities help address the long-term ambitions:

1. Bring services to people to reduce the need to travel,
2. enable people and goods to move easily from door to door using sustainable transport services and infrastructure, and
3. encourage people to make the change to more sustainable transport (behaviour change measures).

There are also targets for transport in Wales including a target for 45% of journeys to be made using sustainable transport by 2040.

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Figure 6: Vision, priorities and ambitions in the Wales Transport Strategy



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Welsh Government has identified five value-for-money criteria for transport funding in Wales. These align with the five dimensions of a good business case set out in UK TAG and with the Welsh Government policy principles.

How Welsh Government uses WeITAG to assess value-for-money

This section sets out our 5 criteria for assessing value for money in Wales.

The Welsh Ministers ultimately make decisions about funding for transport projects in Wales in accordance with wider priorities. The HM Treasury Green Book and the Welsh Government's Chief Economist have made clear that something cannot be considered value for money if it runs counter to government policy aims. Therefore, a programme, policy or project cannot be said to deliver value for money in Wales unless it meets our priorities for transport set out in the Wales Transport Strategy and Net Zero Wales.

Welsh Government has identified five value-for-money criteria for transport funding in Wales. These align with the five dimensions of a good business case set out in UK TAG and with the Welsh Government policy principles.

They are:

- 1. Strategic fit** – how the programme or project meets Government priorities for transport set out in Llwybr Newydd and other government policies.
- 2. Well-being** – how the programme or project delivers wider local or national well-being benefits for people in Wales including helping to meet our targets on decarbonisation.
- 3. Affordability** – whether the short- and long-term costs of the programme or project are affordable.
- 4. Deliverability** – whether there is the capacity, capability and skills to deliver the programme or project effectively and efficiently.
- 5. Management** – whether the programme or project and any risks will be effectively managed.

Criteria 1 and 2 must be met before considering criteria 3, 4 and 5.

A programme, policy or project cannot be said to deliver value for money in Wales unless it contributes to our priorities for transport set out in the Wales Transport Strategy and Net Zero Wales.

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WelTAG and the five ways of working

All programmes and projects must explain how the five ways of working have been used and how they have shaped the programme or project.

While the explanation need not be lengthy, programmes or projects that do not do this in a meaningful way will not be funded by Welsh Government. It is not acceptable simply to provide a check list.

The five ways of working set out in the Well-being of Future Generations (Wales) Act 2015 are long term, integration, involvement, collaboration and prevention.

The engagement plan should explain how the five ways of working will be used and who is responsible for leading on them (see section 5).

The final business case should explain how the five ways of working were used to develop the project policy or programme.

The Wales Transport Strategy explains how to use the five ways of working in transport programmes and projects, whilst the mini-plans explain how they apply to each mode and sector in Wales.

WelTAG and decarbonisation

Every transport programme and project in Wales funded by Welsh Government must help reduce carbon emissions from transport, whether that is through improving existing infrastructure or services, behaviour change or reducing the need to travel or through providing new services and infrastructure.

One of the biggest challenges for transport policy in Wales is how to reduce carbon emissions from transport. In 2019 transport was responsible for 17% of carbon emissions in Wales according to Net Zero Wales Carbon Budget 2 (2021-25).

The Wales Transport Strategy commits to a modal shift target designed to help deliver a significant reduction in carbon emissions from transport. It also commits to a range of other actions to achieve that including reducing the need to travel, adopting the sustainable transport hierarchy for new transport infrastructure and making better use of existing infrastructure, if necessary, future proofing it.

It is important to account fully for the additional carbon produced by new transport schemes or groups of schemes.

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Thinking about modal shift and decarbonisation must be built into the WeITAG process from the outset, through identifying options and by showing how your final project will reduce carbon emissions.

When we review programmes and projects for funding, we will be looking at the cumulative impact of projects on decarbonisation as well as the impact of individual projects.

Behaviour change

All projects funded by Welsh Government should include actions that encourage more people or organisations to make the change to more sustainable transport.

There is no point in investing in sustainable transport services and infrastructure unless people use them, which is why encouraging people to make the change to more sustainable transport is the third priority in the Wales Transport Strategy.

This involves innovative ways of making sustainable transport options more attractive, easier to use and more affordable.

Using a conceptual framework for behaviour change may be helpful. For example, the COM-B model of behaviour change posits that to do a behaviour, an individual must have the capability to do it, the motivation to do it and external factors must provide them with the opportunity to do it.

Transport project and programmes can do this by:

- Overcoming the barriers that prevent people from using sustainable transport (capability),
- delivering opportunities (investing in services or infrastructure) and
- activities or campaigns that help motivate people to make the change.

Section 2

the WelTAG planning stages

This section is an overview of the WelTAG planning stages from making the initial case for change through options appraisal, the business case, delivery and evaluation.

Section 2: The WelTAG planning stages

WelTAG involves a series of project planning stages that follow the life of a project, programme or policy from early ideas to after it is completed.

The standard WelTAG planning stages are:



Stage 0 case for change – What are the strategic priorities for transport in Wales and in your area and what can you do to address them? Does not include options.



Stage 1 strategic outline case – which options do we have to meet those objectives? Which of those are the best?



Stage 2 outline business case – narrowing down your options to the point where you have an outline business case.



Stage 3 full business case – developing the programme or project proposal to the point where it is good to go, including a detailed business case.



Stage 4 delivery – if the programme or project is funded, WelTAG will help think about how to manage and monitor your project, working with partners.



Stage 5 monitoring and evaluation – all Welsh Government funded projects should provide annual progress reports in addition to regular monitoring. Larger projects may also require a formal evaluation to answer questions such as did it work as intended? Did we do the right thing and how did we contribute to meeting transport targets in Wales?

Many projects in Wales may combine stages 1-3 into a single WelTAG lite business case (see section 6). However, even if your project is using WelTAG lite it is still useful to understand each of the stages.

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Stage 0 case for change (strategic assessment)

Welsh Government will not support programmes or projects that do not have a clear case for change at the outset.

The first stage in the WeITAG planning process is the stage 0 case for change. This sets out transport objectives and what you want to achieve. The case for change is the foundation of the WeITAG process.

It is tempting to jump straight into planning a specific transport option such as a park and ride, cycle route or junction upgrade. This can waste time and money because the project or package of works does not meet Wales's strategic priorities for transport or the needs of users.

The case for change explains why you need to do anything at all and ensures that all projects are based on a clear rationale, well before people have begun to think about specific transport option. It addresses a problem or opportunity rather than putting forward a particular transport solution.

The case for change should set out the objectives to be addressed. These must be based on our national and regional priorities for transport in the Wales Transport Strategy, the National Transport Delivery Plan (NTDP), your local or regional transport plan or existing approved plans such as active travel network maps (ATNM). Local well-being plans may also be helpful. Those objectives need to take a long-term view of the issues. The objectives should be SMART – specific to the problem or opportunity, measurable, achievable, realistic and timebound. Those objectives should consider the impact of doing nothing or doing the absolute minimum on our priorities and ambitions for transport in Wales.

Those objectives also need to be specific enough about what needs to be changed, to make it possible in the future to differentiate between different options.

For example, 'contribute to modal shift by constructing new active travel route identified on ATNM' does not necessarily help differentiate between different options. It is important to know about the specific problem that needs to be solved, what the current barriers are for people using active travel, why this route has been prioritised, what stakeholder feedback there might have already been during the ATNM consultation and what design challenges there might be (see section 8). Similar questions will arise for any transport intervention.

So the key issue is to identify the problem and why anything needs to be done, and then draft an objective around addressing that problem.

The case for change simply explains why something needs to be done and what it should achieve. It should not propose a particular option or transport mode unless it follows a previous review that has already explored options.

The case for change should be informed by stakeholder views but it may not be necessary to undertake a full consultation. Instead, draw on feedback from previous consultations, for example as part of developing a regional transport plan or strategic programme such as an Active Travel Network Map.

The case for change should be agreed with key partners before progressing further. If there are likely to be areas of disagreement or contention, these should be noted.

The case for change should be developed by the internal team leading the programme or project. They are best placed to make the strategic case for intervention in the context of local and national priorities. External consultants can, if appropriate, assist later with developing options. Transport for Wales Tfw regional staff can provide advice.

The case for change should go through the relevant gateway approval process or check-in before progressing further. For example, Tfw has specific 'check-in' points for active travel projects or large rail projects.

If you have set up a review group at this stage (see section 5), they should also review the case for change (although only the funding body can approve it).

It is often useful to return to this rationale during the work to ensure that the proposals are still justified and worth doing.

Further details of the contents of the case for change is in the separate WelTAG checklists.

Remember the case for change is simply a rationale for intervention and should not propose a particular option or transport mode. The exception to this rule is if the project follows on from a more strategic review that has already explored options.

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Scoping establishes what kind of work and how much work is needed to develop a project, programme or policy to address the case or change. Use it to help decide whether to use WelTAG lite, WelTAG or WelTAG plus

Scoping

Once the case for change has been developed, the programme or project manager must undertake a scoping exercise.

Scoping establishes what kind of work and how much work is needed to develop a project, programme or policy to address the case or change. It will include deciding whether to use WelTAG lite, WelTAG or WelTAG plus (see section 6).

Scoping also considers how that work might be delivered (eg by consultants or in house). Scoping involves both understanding the potential benefits of the project (set out in the case for change) and the potential risks.

You must scope the project before commissioning (if needed) external consultants. Projects can be big or small, high risk or low risk; scoping makes sure any commissioned work is tailored to the needs of the project, policy or programme.

Scoping information can be set out in a scoping report. For active travel and major rail projects, the scoping report is known as a project execution plan or project implementation plan (PIP).

The scoping checklist lists things to consider and includes a potential contents list for a scoping report.

The scoping report should include an engagement plan (see chapter 4) and briefs or specifications for any consultants such as engineers, designers or transport planners.

Do not proceed with the work until the case for change and the scoping report have been agreed with relevant stakeholders including the potential funding body.

Use the scoping exercise to decide whether to use a single stage WelTAG (WelTAG lite) or a more detailed WelTAG standard or WelTAG plus (see section 6).

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Stage 1 strategic outline case

The next step is to explore a longlist of options or ideas that might help achieve the objectives, and then to narrow that longlist down to a shortlist.

Note that if you are using WeITAG lite you should combine stage 1-3 into a brief explanation of how and why you have chosen your final option, using the same broad approach as set out here.

To help develop the strategic outline case, we have created a menu of options that align with the Wales Transport Strategy priorities. For example:

- **Do nothing or do minimum** – you must explore and if necessary, dismiss this option before going further. How will doing nothing, impact on the targets for modal shift and other ambitions and priorities in the Wales Transport Strategy?
- **Land-use planning options** – transport solutions do not always solve transport problems. Priority one of the Wales Transport Strategy is to bring services to people to reduce the need to travel on a daily basis. Are there planning options such as locating new services close to where people live, setting aside land for multi-modal hubs to transfer goods for last mile deliveries and remote working hubs to reduce commuting distances?
- **Behaviour change options** – priority three of the Wales Transport Strategy is around behaviour change – finding ways to enable more people to use sustainable transport services. All programmes or projects should address capabilities, motivation and opportunities. These might include better information, faster and more reliable services, better connectivity between services or innovations that encourage people to switch to more sustainable transport modes.
- **Options for more sustainable services** – priority two of the Wales Transport Strategy is to allow people and goods to move easily from door to door by sustainable transport services. Are there options to invest in public transport services? These can include options for improving the reliability, safety and frequency of services or extending their geographical reach. Or options to make it easier to switch between different types of transport? Can you make services more accessible?

- **Options to make better use of existing infrastructure** – the Sustainable Transport Hierarchy sets out that we will make better use of existing infrastructure before investing in new infrastructure. Are there options to upgrade or make better use of existing infrastructure – for example to adapt to climate change or meet our accessibility obligations? Are there options for adapting infrastructure to support modal shift?
- **Options for new infrastructure using the Sustainable Transport Hierarchy** – where we need new infrastructure, the Sustainable Transport Hierarchy gives priority to investing in infrastructure for walking, cycling, public transport and ultra-low emissions vehicles over other private car use. Have you considered these options?

There are also ideas for options in the nine mini-plans in the Wales Transport Strategy covering active travel, bus, rail, roads streets and parking, third sector, freight and logistics, maritime and aviation.

Be creative about options. Is there new technology that could address the problem? Are there digital solutions?

Some projects may combine options into packages rather than single discrete options. Alternatively, options may be combined later, perhaps by mixing transport and non-transport interventions or complementing behaviour change measures with new services.

Note that the duties created by the Active Travel (Wales) Act 2013 in Wales mean that all local authority programmes or projects should include active travel options.

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Refining options

Use the five dimensions of a business case to refine that long list of options. Test the options against whether they are a strategic fit, address well-being, affordable, deliverable or manageable.

At Stage 1 give more emphasis to assessing options against the strategic fit and well-being dimensions of a business case.

At this early stage, give more priority to assessing options against strategic fit and well-being. Issues such as delivery and how the project will be managed are more important at later stages.

Take on board the views of partners and stakeholders.

Use the five ways of working to take a long-term view, involve the right people, seek ways to integrate different priorities, prevent future problems and collaborate with partners.

There may be no need to consider routes as options where a route has already been identified in a local plan or on an active travel network map (ATNM) and has already been through a process of systematic appraisal. However, WelTAG can still be used to establish the most appropriate infrastructure options for a particular route that deliver the greatest benefits.

WelTAG for predetermined options

WelTAG can still be used to develop and test an option that has already been given priority because it delivers against wider policy objectives – such as a manifesto commitment.

If a project already has indicative support, it is still important to set out a robust case for change, consider a range of options for delivering that commitment and provide a business case showing how it will deliver value for money. Working through the WelTAG processes may also result in the choice of a better option or design refinements. As ever the 'do nothing' or 'do minimum' option should be included in any business case for comparison.

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Stage 2 outline business case

The next step is to narrow down the long list of options to a shortlist, set out in an outline business case (if you are using WelTAG lite or developing a policy or programme, you may not need a stage 2 report).

At stage 2 use the five dimensions of a good business case again to narrow down the long list of options to a short list:

Use the Wales Transport Strategy monitoring measures to show how options might contribute to well-being and achieving transport targets and priorities.

- **Strategic fit:** which options fit best with your objectives (and thus the priorities in the Wales Transport Strategy and local or regional transport priorities)? Why are some a better fit than others?
- **Well-being:** which options will have the most beneficial impact on the social, environmental, economic and cultural well-being of people in Wales (use the well-being appraisal framework to do this)? At this stage you are simply anticipating likely impacts, based on existing data and information.

At stage 2 think in more detail about whether the options meet the next three criteria:

- **Affordability:** what are the estimated costs of each option and which are realistically affordable or at least represent value for money? You may want to consult with Welsh Government on potential levels of funding available
- **Deliverability:** what are the delivery challenges around each option? Who would you have to collaborate with to deliver the option? What would they be worried about?
- **Management:** what are the risks and oversight challenges around each option? Which options would be the easiest or most realistic to manage? What are the main risks and how will you manage them?

Think creatively. Can options be combined or phased?

Begin to develop your integrated well-being appraisal. Use the Wales Transport Strategy monitoring measures to show how options might contribute to well-being and achieving transport targets and priorities. Support your arguments with data. This could be quantitative data, for example about traffic movement or costs or demand, or more qualitative information about, for example the impact on biodiversity.

At the end of stage 2 ask the review group to agree on the final option or package of works. This should be submitted to the funding body for approval. There is a more detailed checklist for the outline business case.

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Stage 3 business case

Stage 3 WelTAG involves developing a full business case.

The full business case justifies the chosen option or approach. It reassures partners and the potential funding body that your scheme is a good fit with strategic objectives, that it will have a beneficial impact on well-being, that the costs are robust, that it can be delivered and any risks can be managed.

There are five dimensions to a good business case:

- The **strategic fit** dimension explains how your project policy or programme fits with wider Welsh Government, regional and local priorities.
- The **well-being** dimension explains how well-being has been considered in the choice of options and design of the final project policy or programme. It should be a summary of the more detailed integrated well-being appraisal (see Section 4).
- The **affordability** dimension provides more precise costs for your programme or project including short- and long-term capital and revenue costs.
- The **delivery** dimension explains how your programme or project will be delivered and how the tendering or procurement process can be used to secure the delivery of some of the wider well-being benefits of the programme or project – such as skills, the protection of biodiversity or community benefits.
- The **manageability** dimension explains how the project, programme or policy will be managed in order to reach milestones, address risks and deal with unforeseen issues.

The business case should also explain how the programme policy or project will be evaluated and how you will measure success.

It should be supported by a more detailed integrated well-being appraisal and other relevant documents such as design documents and costings.

At the end of this stage, you should have enough information to make an application to a funding body such as Welsh Government. You should be able to provide enough information to make an informed decision.

Section 3 provides further details of the five dimensions of a business case and section 4 provides further guidance on integrated well-being appraisal.

We have published a separate business case checklist.

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The various guidance notes on individual transport modes including roads, rail and active travel include more detailed information on project delivery (see also Section 8).

Stage 4 delivery

If you are successful in obtaining funding, the next stage is to deliver the project, policy or programme. The full business case should already explain how the project will be delivered and managed.

There may still be further design work to do, especially for larger projects such as road and rail programmes or projects, or major upgrades to infrastructure or new infrastructure.

This stage may also involve obtaining statutory consents or regulatory approvals, and any public inquiries.

It will involve project procurement, including detailed specifications and contracting arrangements.

Finally, this stage involves delivering the project or programme itself. This will involve not just work on the ground but ensuring that it is properly managed through implementing the governance process to monitor progress, meet milestones, monitor costs and compliance and deal with any project variations.

See the checklist for programme or project delivery.

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Stage 5 Monitoring and evaluation

If the project is funded by Welsh Government, we will ask for annual progress reports. You may also need to provide regular delivery updates to your internal sponsor or senior team.

An **annual progress report** includes information about what the programme or project has achieved. An annual progress report is a less detailed version of a full evaluation report. It provides details about the project, any changes and how the engagement plan has been implemented. It explains what difference the project made to people, what worked well, what did not and the lessons learned.

Like other funders, we recognise that things can change during the delivery of a programme or project including unforeseen risks. Identify any issues as early as possible. Regular updates to us, as well as annual progress reports can help identify issues early.

For larger and more complex projects the final stage is to evaluate and review the project after it has been delivered.

Monitoring involves collecting data to assess whether the programme or project has delivered as intended. **Evaluation** is the more systematic assessment of the design, implementation and outcomes of an intervention, to understand its effects and what can be improved. Information from evaluation reports also help us to refine our grants processes for the future.

Not every transport project needs a full evaluation. Projects using WelTAG lite should simply submit an annual progress report (see above). Programmes or policies using WelTAG standard may need a full evaluation as will larger more complex projects.

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Going back a stage

Transport projects, policies and programmes can be big, complex and take time. Often circumstances change during the planning. Sometimes you can accommodate those changes by simply tweaking the project.

Where the change in circumstances presents a significant risk to the success of the project, it may be necessary to rethink the programme or project. In this case, do not be afraid to go back a step. This might involve simply revisiting some earlier assumptions, rethinking some options or even revisiting the case for change. Hopefully much of the earlier work will still be relevant.

Having a clear sense of whether the reasons why you need to take action are the same or have changed, and whether your objectives are still the right ones or no longer valid, can help you reassess your options and your final scheme.

You may also need to go back a stage if planning work is more than five years old or there have been significant events or policy changes.

Section 3

The five dimensions of the WelTAG business case

This section explains the five dimensions of a WelTAG business case.

Section 3: The five dimensions of the WelTAG business case

These are based on the common principles for a good business case set out in the HM Treasury Green Book, the HM Treasury business case guidance for projects, and the HM Treasury business case guidance for programmes.

There is also guidance in the UK Government Department for Transport guidance on full business cases (see further reading below). HM Treasury provide training and accreditation in the Better Business Case methodology. Wales does not publish its own separate guidance on business cases.

WelTAG broadly follows the UK Department for Transport full business case guidance with some key differences, noted in the introduction.

Do not wait until after the project is designed to develop the business case. Use the five dimensions of a business case as criteria in the options appraisal process. This includes the stage 1 strategic outline case and the stage 2 outline business case.

Project description

The quality and robustness of the final business case depends on having a sufficiently detailed description of the project, programme or policy.

Before you complete the stage 3 business case, you must have the following information in place (as a minimum):

- The case for change,
- the earlier work on options appraisal, including the stage 1 strategic outline case and stage 2 outline business case,
- a detailed description of the project, programme or policy and how it will be delivered,
- an integrated well-being appraisal report supported by any statutory or regulatory impact assessments,
- feedback from your engagement and involvement activities, and
- thoughts about how you will evaluate or monitor the scheme.

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The detailed scheme description or project design is essential. For a new transport service, specify the outcomes and outputs – what services will be delivered by whom, and to what standards? For a capital project a project specification setting out the design, location and route of any new or improved infrastructure is needed. This must take the results of stakeholder engagement, well-being appraisal and statutory impact assessments into account. Where the project, policy or programmes involves other options such as behaviour change programmes, provide details of the outcomes – what the programme will deliver and how it will be delivered. It may include a specification for the delivery of campaigns, public engagement or information around transport interventions. For IT solutions, set out the project outcomes and outputs.

Strategic fit

This part of the business case explains how the proposals fit with wider strategic priorities in Wales including but not limited to transport priorities.

It is based on the underlying stage 0 case for change and grounded in the strategic context including:

- The strategic context for transport for both Wales and the UK
- the regional transport plan, strategic development plan and any local transport priorities,
- current priorities for expenditure set out in the National Transport Delivery Plan and the Wales Infrastructure Investment Strategy,
- local and regional strategic priorities set out in local plans,
- relevant legislation and duties including the Active Travel (Wales) Act 2013,
- existing agreed priorities set out in active travel network maps (ATNM), and
- the specific criteria for any grant schemes you may be applying for.

It is important not to see transport in isolation – it needs to be linked with place making and people.

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The four long term wellbeing ambitions in the Wales Transport Strategy are a transport system that is good for people and communities, good for the environment, good for places and the economy and good for culture and the Welsh language.

For **transport**, the strategic context is set out in the Wales Transport Strategy, Net Zero Wales, the National Transport Delivery Plan and regional transport plans.

It is also important to understand the UK wide strategic context if you are dealing with transport modes such as rail, maritime transport, or aviation that are not devolved to Wales. You may also need to understand current transport data and patterns.

The land-use planning context is also important. Placemaking is about understanding the national, regional or local places that will potentially benefit from your transport intervention. The local development plan or Future Wales will help provide the wider land-use planning, and place- based context for transport.

Finally, **people** is about understanding the strategic context for people and communities who might be impacted by, or benefit from, your potential programme or project. This includes understanding the wider social, economic, environmental and cultural context such as socio-economic deprivation or health issues that shape people's lives in your area.

Timing

Consider strategic fit as part of the stage 0 case for change and during the stage 1 and 2 process of identifying options as well as in the business case.

Well-being

This section of the business case identifies the wider impact of your programme or project on well-being. It is the equivalent of the economic case in TAG. The Well-being of Future Generations Act (Wales) 2015 provides a framework for thinking about well-being and the Wales Transport Strategy shows how transport can contribute to the well-being goals through four long term well-being ambitions – good for people and communities, good for the environment, good for places and the economy and good for culture and the Welsh language.

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The full business case should explain how your programme or project will contribute to well-being. It should summarise the more detailed integrated well-being appraisal.

Integrated well-being appraisal uses quantitative and qualitative measures to assess well-being impacts in a structured way, based on the four ambitions in the Wales Transport Strategy. The quantitative measures are set out in the Wales Transport Strategy monitoring framework. An IWBA may need to be supported by the relevant statutory and regulatory impact assessments. Further guidance on integrated well-being appraisal is set out in section 4 below.

It is particularly important to use good data, especially if you are not providing additional benefit-cost modelling. The Wales Transport Strategy monitoring framework provides both quantitative and qualitative measures. Those measures include the targets for transport in Net Zero Wales. You must show how your programme or project will contribute to these.

It is particularly important to use good data, especially if you are not providing additional benefit-cost modelling. The Wales Transport Strategy monitoring framework provides both quantitative and qualitative measures. Those measures include the targets for transport in Net Zero Wales.

Timing

Do not wait to think about well-being until after you have designed your programme or project. During options appraisal, filter out options that do not contribute to well-being. Complete more detailed statutory impact assessments before you prepare the final business case. This will ensure you can show how you have taken well-being into account in designing your project.

Further information about integrated well-being appraisal is set out in section 4 below. We have published more detailed checklists for integrated wellbeing appraisals.

Affordability

This section of the business case concentrates on the affordability of the scheme including short and long-term costs, funding arrangements and technical accounting issues. In TAG it is called the financial case.

It covers both capital and revenue requirements over the lifetime of the programme or project and the implications of these for the balance sheet, income and expenditure accounts for public sector organisations.

As noted, there must be a detailed scheme description or project design in place before the affordability section of the business case can be finalised. This should specify the required outputs in enough detail to be able to make robust assessments of the likely short and long-term costs of the scheme.

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Identify both the initial capital costs of the programme or project and the longer term revenue costs including the costs of maintaining and managing infrastructure and the ongoing costs of providing a service. Those costs should include administration, resource and capital costs over the whole life of the programme or project.

Identify both the potential source of any capital costs, and who will be responsible for long term revenue funding, including maintenance and repair of any infrastructure.

You must engage with those who will be responsible for delivering any project or services (including the local authority) and develop a good understanding of both short- and long-term delivery costs and responsibilities. This should have been considered as part of the engagement plan.

Explain when the lifetime costs of the programme or project will occur. Set out the price at the time they will occur including allowances for inflation and who will pay what costs and when, including maintenance liabilities. The costings must identify the sums allowed for contingencies and risks. If possible, a whole-life costing approach should be taken including the costs for re-use or disposal at the end of life. The costs associated with securing and delivering well-being benefits must also be identified, including environmental, social and cultural impacts.

The source of funding should be set out. You must identify where the money will come from at the different project stages, including capital and revenue sources, as well as any likely requirements from the funding body.

If funding involves borrowing, explain how robust the arrangement is and any risks associated with servicing the repayment and interest. Identify any accounting implications.

Any funding gap must be made clear. Potential sources of external funding the meet capital and revenue shortfalls should be identified, and the requirements and criteria of those funding bodies stated. Risks affecting the level and timing of income from third parties, such as fares income from users, should be identified. Where these revenue streams come from the private sector, there should be links to the deliverability case (below).

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Timing

Although most of the detailed work on costings can only be done late in the planning process, affordability must be considered at the outset.

The stage 0 case for change must consider potential sources of funding and the likely affordability. As the programme or project progresses through the stage 1 and 2 options appraisal process, use affordability to narrow down options.

The stage 3 final business case must include more detailed and more robust costs for the programme or project. During the delivery of the project (stage 4) you must manage costs including dealing with any contingencies, risks or unforeseen processes. At stage 5 cost changes should be included in the annual progress reports.

Deliverability

This section of the business case explains how the programme or project will be delivered and by whom. In TAG it is called the commercial case. It sets out the viability of the project and the procurement strategy that will be used to engage the market.

It explains whether a scheme will be viable, for example whether it is going to be possible to procure the scheme and whether its future benefits will be realised. It considers how the private sector might be involved in each option. If the private sector is involved, it also looks at issues such as contractual and staffing arrangements, and the commitment to Fair Work.

If the scheme also requires planning consent or other statutory permissions, it should explain how these will be addressed and how any potential changes to the project or programme will be considered (see section 6).

As noted above it can only be completed after you have a reasonably detailed scheme (or policy, or programme description or project design in place).

For projects or packages of work, it is important to set out the procurement strategy. This explains the project will be sourced and paid for, and details of the contractual issues including the length of the contract and how it will be managed, and how you will secure the wider impacts and benefits. It also sets out issues around risk including who will take on risks around demand, planning consent, or revenue availability. It also identifies mechanisms to incentivise performance, efficiency and innovation. For policies and programmes you must also explain how they will be delivered.

For projects or packages of work, it is important to set out the procurement strategy. This explains the project will be sourced and paid for, and details of the contractual issues including the length of the contract and how it will be managed, and how you will secure the wider impacts and benefits.

The deliverability section of the business case must cover:

- Any requirements for planning consent or other permissions and agreements,
- procurement strategy including your sourcing options,
- payment mechanisms and pricing framework,
- risk allocation and transfer, and
- contract length and management and key clauses.

Explain how the well-being benefits will be secured. For example, if you will expect the organisation who delivers your project to include an element of community benefit such as new apprenticeships, or training and skills how they be secured? What contracting arrangements will be put in place to secure community, environmental, design or other benefits and how will those benefits be delivered?

This section should also explain the long-term delivery and operational aspects of the project, programme or package of works. Who will be responsible for delivering any new services? How will any new infrastructure be maintained and operated and by whom? How will the behaviour change measures be implemented and by whom?

If the project, policy or programme might have an impact on biodiversity or ecosystem resilience, for example, how will you ensure that the successful contractors or partners deliver those benefits to a proper standard? Who will monitor and oversee it?

Further details can be found in the stage 3 business case checklists.

Timing

Most of the work on deliverability can only be completed following an initial review of options. For complex infrastructure projects there may need to be feasibility reviews of different options and additional work relating to planning consent. More detailed work on deliverability should proceed together with work on costings as they will be closely related. This is particularly important for understanding the long-term revenue implications of any new services, facilities or infrastructure.

Management

This part of the business case is about how the programme or project will be overseen, managed and delivered. It reassures us that your programme or project is achievable and that you and the delivery partners have the capacity to deliver it. It shows us that you have addressed key risks.

Again, this section of the business case cannot be completed unless there is a detailed scheme description or project design in place and the other sections of the business case including the sections on affordability and delivery are also in place.

It must set out:

- The programme or project and what will be delivered including work packages and timings,
- what arrangements you have made for a review group and who will be on it,
- milestones and decision points,
- how stakeholder engagement will be managed during delivery,
- a risk management strategy – identifying key risks (including their likelihood and impact) and who will be responsible for addressing them,
- project or programme governance arrangements,
- arrangements for monitoring and evaluating the project or programme,
- how future operations and maintenance requirements will be governed, and
- any data and information security issues related to the project or programme and how they will be managed including compliance.

Note that this should cover both the governance of any immediate works or services, as well as the governance of ongoing delivery.

This section must also set out arrangements for decision points and gateway reviews. For example, if the scale of the projects or the costs change, who will make decisions?

Explain how the project, policy or programme will be monitored or evaluated. For smaller, lower risk projects using WeITAG lite, provide annual progress reports. For larger, higher risks projects using WeITAG standard and plus, provide a full evaluation plan.

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Set out a risk management process that explains how risks will be identified and dealt with, and what contingency arrangements are in place to deal with changing circumstances.

See also the business case checklist for the project manager.

Timing

Whilst it is important to think about how the project or programme will be managed at earlier stages, the bulk of this section of the business case cannot be completed unless the scheme is well developed, with appraisals in place, delivery issues considered and costs finalised.

Section 4

Integrated well-being appraisal

This section introduces integrated well-being appraisal for transport programmes, policies and projects in Wales.

Section 4: Integrated well-being appraisal

Integrated well-being appraisal applies to each stage of WelTAG. The appraisal should become more detailed as the project progresses.

All transport initiatives funded by Welsh Government in whole or in part must deliver well-being benefits for people in Wales in accordance with the Well-being of Future Generations Act (Wales) 2015. The key tools for doing this are the integrated well-being appraisal and the Wales Transport Strategy monitoring measures.

Integrated well-being appraisal is a rigorous, structured approach to understanding the impact of a programme or project on well-being, using quantitative and qualitative information.

Every transport programme, policy or project funded by Welsh Government must include an integrated well-being appraisal that shows how it will contribute to well-being in Wales including our four well-being ambitions and our specific targets for transport.

The IWBA should be tailored to the needs of the project, programme or policy. It is not just a 'tick box' reporting exercise. The information in the IWBA must be used to design in benefits and design out any potentially harmful impacts at each stage of the WelTAG process.

This is not a new requirement. Previous WelTAG guidance included an integrated assessment report (IAR). This update to WelTAG simply renames the IAR as an integrated well-being appraisal (IWBA) and updates the guidance to align with the Wales Transport Strategy.

The requirement for IWBA does not replace the need for statutory impact assessments (see section 7) but it does replace the need for integrated sustainability appraisals (ISAs) for transport projects.

Integrated well-being appraisal applies to each stage of WelTAG. The appraisal should become more detailed as the project progresses.

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Contents of an integrated well-being appraisal

An integrated well-being appraisal must show how well-being has been addressed within the policy, programme or project. It should identify both positive and negative impacts and show how any negative impacts have been avoided or mitigated.

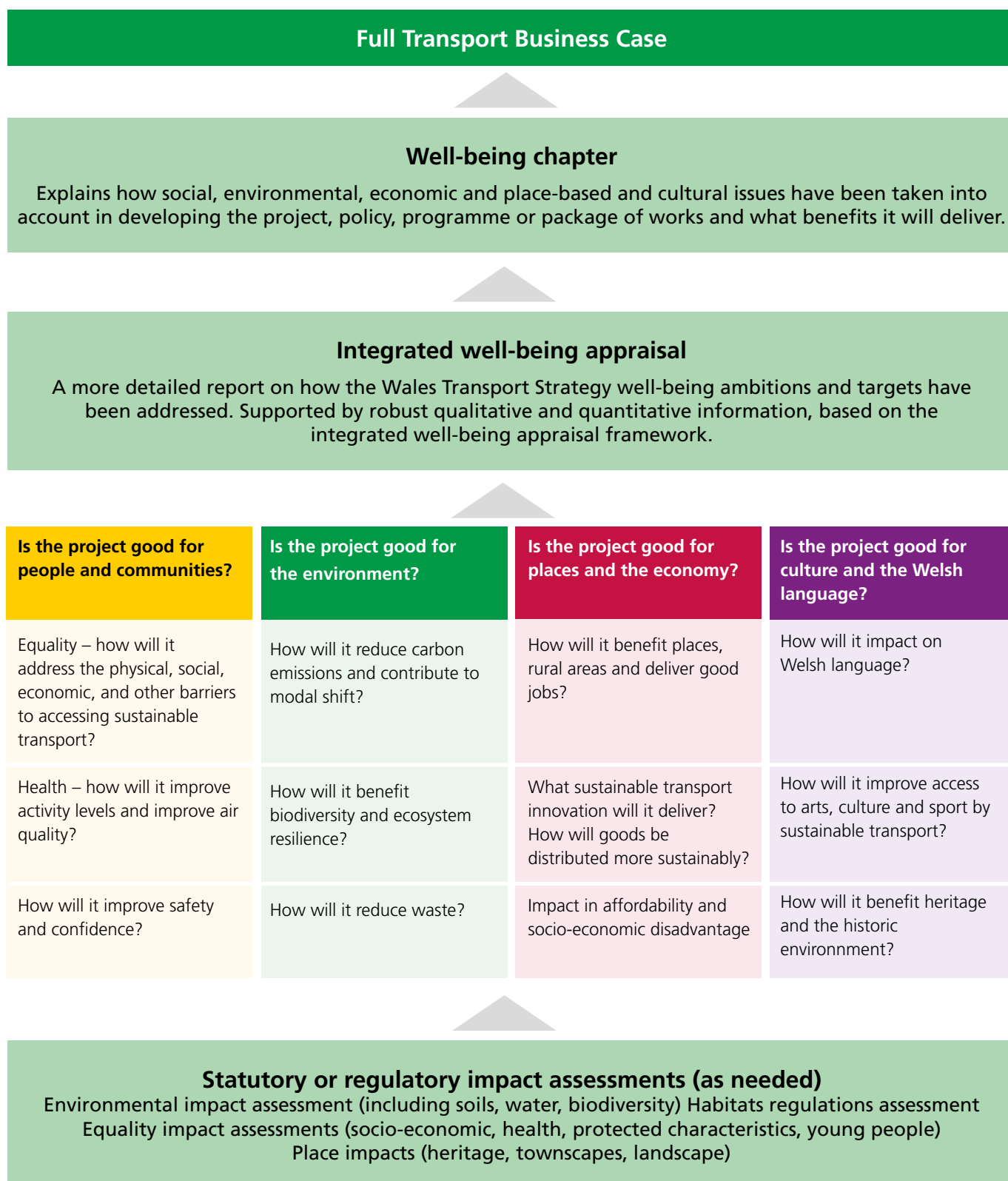
For transport interventions, the integrated well-being appraisal should address four key questions based on the four ambitions in the Wales Transport Strategy:

- How will the programme or project benefit people and communities?
- How will it benefit the environment?
- How will it benefit places and the economy?
- How will it benefit culture and the Welsh language?

These questions should be addressed qualitatively by considering the more detailed goals under each ambition in the Wales Transport strategy. For people and communities, the goals are about equality, health and safety and confidence. For the environment these are about reducing carbon emissions, benefiting biodiversity and ecosystems resilience and reducing waste. For places and the economy there are goals around place-making, innovation, freight, and for culture and the Welsh language, arts and sport and the historic environment.

The questions should also be addressed quantitatively using the Wales Transport Strategy monitoring framework. Those measures incorporate the quantitative targets on modal shift and carbon emissions in the Wales Transport Strategy.

Figure 7: Well-being appraisal in WelTAG



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The IWBA must also identify any potentially negative impacts and how those will be addressed. For each question the report should explain how:

- Well-being has been integrated into the design of the programme or project from the earliest stages,
- the project, policy or programme will deliver well-being benefits,
- any potentially negative impacts have been avoided or reduced,
- well-being benefits will be secured during delivery and monitored or evaluated afterwards, and
- how people have been involved in the process and how feedback has been taken on board.

Llwybr Newydd Wales Transport Strategy monitoring framework

Integrated well-being appraisals must use the Wales Transport Strategy monitoring framework.

This is a set of measures developed to assess progress against the Wales Transport Strategy. The framework has six key measures and 27 subsidiary measures. The key measures are those considered most important in supporting Welsh Government's overarching aims of mode shift and carbon reduction. Transport for Wales has provided baseline information against each measure, which will be updated annually from 2023.

The measures have been chosen to demonstrate progress against the four ambitions in the Wales Transport Strategy, which in turn link to the well-being goals in the Well-being of Future Generations Act 2015. They also incorporate the targets in the Wales Transport Strategy and Net Zero Wales.

The Wales Transport Strategy Monitoring Framework measures

The below data provides a current picture for each of the key and subsidiary measures in the Monitoring framework.

This data will be updated on an annual basis from 2023. The Wales Transport Strategy Monitoring Framework measures can be used as part of the IWBA process. Not all measures are relevant to all projects, policies and programmes.

Figure 8: Summary of the integrated well-being appraisal framework

Priorities		Ambitions	
1	Bring services to people in order to reduce the need to travel	1	Good for people and communities;
2	Allow people and goods to move easily from door to door by accessible, sustainable and efficient transport services and infrastructure	2	Good for the environment
3	Encourage people to make the change to more sustainable transport	3	Good for the economy and places in Wales
		4	Good for culture and the Welsh language

Key measures	Priorities	Ambitions
M1 Percentage of journeys by walking, cycling and public transport	1 2 3	1 2 3 4
M2 Percentage of vehicles that are ultra-low or zero emission	2 3	1 2 3
M3 Total vehicle kilometres travelled	1 2 3	1 2
M4 Average distance travelled per person	1 3	2
M5 Percentage of the workforce working remotely on a regular basis	1 3	2
M6 Greenhouse gas emissions from the transport sector	1 2 3	2

Subsidiary measures		Priorities			Ambitions			
S1	Average travel time to education, health and leisure services	1	2	3	1	2	3	4
S2	Percentage of people satisfied with their ability to access services in their local area	1	2	3	1	2	3	4
S3	Percentage of people within walking distance of sustainable modes of transport	1	2	3	1	2	3	
S4	Percentage of people who walk or cycle at least once a week as a means of transport		2	3	1	2	3	
S5	Percentage of journeys to a rail station by walking, cycling or bus		2	3	1	2	3	
S6	Percentage of trips to visitor attractions by sustainable modes of transport		2	3	1	2	3	4
S7	Percentage of rail network that is electrified		2	3		2	3	
S8	Percentage of land-based freight moved by rail		2			2	3	
S9	Percentage of bus and rail services on time		2	3	1		3	
S10	Number of publicly available electric vehicle charging points		2	3		2		
S11	Percentage of people satisfied with their journey		2	3	1			
S12	Percentage of people satisfied with their ability to access public transport independently		2	3	1			
S13	Percentage of railway stations that are step-free		2	3	1			
S14	Percentage of buses and trains with audio-visual information		2	3	1			
S15	Percentage of Welsh speakers using Welsh language services in the transport sector		2	3	1			4

Subsidiary measures		Priorities		Ambitions	
S16	Average travel time to education, health and leisure services	2	3		3
S17	Average cost per kilometre travelled by public transport	2	3	1	3
S18	Percentage of people who feel they can't afford to travel by public transport	2	3	1	3
S19	Number of people killed or injured on the transport network	2	3	1	
S20	Percentage of people who feel safe and welcome when travelling	2	3	1	
S21	Percentage of transport infrastructure in good condition	2	3	1	3
S22	Percentage of transport infrastructure at risk of flooding	2	3	1	3
S23	Level of air pollutants from the transport sector			1	
S24	Percentage of people regularly bothered by noise from outside the home caused by transport			1	
S25	Hectares of habitat on the transport estate maintained or improved for biodiversity benefit				2
S26	Percentage of waste produced by the transport sector that is reused or recycled				2
S27	Percentage of designated historical assets on the transport estate that are in a stable or improving condition				4

Not all measures will be relevant to every project or programme. Select those measures that are most relevant to your project, programme or policy. If you choose not to use particular measures, the reason for not using those measures should be set out in the IWBA.

A full description of the calculation method used for each of the key and subsidiary measures including their technical definition and information about their data sources and frequency can be found in the Wales Transport Strategy Monitoring Framework technical report 2022).

Not all measures will be relevant to every project or programme. Select those measures that are most relevant to your project, programme or policy. If you choose not to use particular measures, the reason for not using those measures should be set out in the IWBA.

The integrated well-being appraisal should also draw on other data sources data such as the Future Trends report published by the Future Generations Commissioner.

The use of benefit-cost ratios in Wales

A benefit-cost ratio (BCR) expresses impacts and benefits in monetary terms. It is a calculation that sets the costs of a scheme against monetized benefits. As noted above, most individual projects in Wales will not require benefit-cost calculations.

Instead, a robust, rigorous evidence-based integrated well-being appraisal, using the WTS monitoring measures and drawing on evidence from statutory impact assessments, will suffice. This should be supported by details of current and future costs of the programme or project set out in the affordability section of the business case.

A small number of large, complex projects that involve significant amounts of public money may supplement the IWBA with more detailed benefit-cost calculations. Many of these projects are likely to require funding from both Welsh Government and the UK Government. They will therefore need to comply with the requirements of UK TAG as well as WeITAG.

Where those projects require funding from Welsh Government, two sets of benefit-cost ratios will be needed – one that includes travel time savings as a benefit, and a second set that exclude the benefits delivered by travel time savings. In addition, monetised time savings should be separated out to show the distribution of time savings (for example 0-2 minutes, 2-5 minutes and 5 minutes plus). This will enable decision makers to see the impacts and the distribution of the benefits separately and aid them in making judgements on the impact of the time savings in achieving Welsh Government policy objectives.

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Future forecasting

Future forecasting involves predicting likely future trends in transport and travel, based on expected changes in incomes, prices, demographic structures, employment, leisure, and other factors, using these forecasts to assess future transport needs and the value for money of different ways of meeting them.

Projects using WelTAG plus may supplement the integrated well-being appraisal with additional models and calculation that reflect Wales Transport Strategy priorities and wellbeing ambitions, including equality (including health) and decarbonisation.

While this need not be explicitly modelled, all schemes should consider the likely future of the Welsh Transport system in developing objectives and appraising options. This future should be grounded in the Wales Transport Strategy which sets out a future where the need to travel is reduced as services are increasingly digital and are closer to people, where people increasingly move by walking, cycling, bus and rail, and goods are transported in a more sustainable way. Net Zero Wales sets out an explicit future where the number of car miles travelled per person reduces by 10% by 2030, in line with this, the baseline for the future should assume that road usage is reduced in line with this target.

Projects using WelTAG plus may supplement the integrated well-being appraisal with additional models and calculations that reflect Wales Transport Strategy priorities and wellbeing ambitions, including equality, including health and decarbonisation.

Timing

Do not leave it to the final stages of the business case before considering well-being as part of the project, policy or programme. Consider well-being impacts and benefits from the very earliest stages of the project and use well-being considerations to select options, to design the scheme and consider costs.

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Figure 9: How well-being should be assessed at each stage of WeITAG

WeITAG stages	WeITAG standard or plus	WeITAG lite
Stage 0 case for change	Include well-being outcomes in the case for change.	Include well-being outcomes in the case for change
Programme or project scoping	Identify what additional statutory or regulatory impact assessments may be needed as part of the scoping or screening. Develop a brief for the IWBA	Develop a brief for the IWBA
Stage 1 strategic outline business case	Use the IWBA to anticipate potential impacts of each option	Use the IWBAF to show how well-being has influenced the choice and design of the final option
Stage 2 outline business case	Use the IWBA to narrow down the short list of options	
Stage 3 full business case	Use the IWBAF to design the final option Provide an integrated well-being appraisal Provide statutory impact assessments	Provide an integrated well-being appraisal
Stage 4 delivery	Secure well-being benefits in contract documentation Ensure well-being benefits are delivered	Ensure well-being benefits are delivered
Stage 5 monitoring and evaluation	Include well-being measures in the annual performance report Evaluate well-being outcomes	Include well-being measures in the annual performance report

Section 5

Engaging with people

This section sets out why and how you must engage with people as part of WelTAG and how to develop a plan to do that.

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Section 5: Engaging with people

You must engage with stakeholders as part of the WeITAG process.

Engagement is not just consulting people on whether they agree with a particular proposal – it also means involving people. Some people or groups may need to be directly involved in (or participate in) developing and delivering your programme or project; some you may need to engage with to understand their perspective whilst some may be people that you need to consult with before you can finalise your project.

Engagement also helps deliver against the five ways of working set out in the Well-being of Future Generations (Wales) Act 2015; involvement and collaboration are two of the five ways of working that public bodies in Wales need to adopt. There is information about transport and the five ways of working in the WTS and the Future Generations Commissioner also provides guidance (see further reading).

Engaging with people has many benefits. It can help you improve the quality of your programme or project and avoid any unintended harmful consequences. It can help the team to design services or infrastructure that will meet people's needs. Engagement can help you develop a programme or project that can be delivered, and it can also ensure that you bring key influencers with you.

One of the biggest benefits of engaging with people is to help inspire behaviour change. There is no point in investing in sustainable transport services or infrastructure unless people use them. Behaviour change is one of the three priorities in the Wales Transport strategy and all projects funded by Welsh Government should include elements of behaviour change.

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The Engagement Plan

When you approach us for funding, we will expect you to tell us how you have engaged with people as part of your project, programme or policy. This is why your project will need an engagement plan.

You will need to prepare an engagement plan as part of the scoping exercise for your project. Your engagement plan should address five key topics:

Draft the plan at an early stage as part of the scoping stage and include the engagement plan with your scoping report. You may need to update your engagement plan as the programme or project develops.

- Who you want to engage with,
- why you want to engage with them,
- how you will engage with them,
- when you will engage, and
- what you will do with the feedback they provide.

The last is the most important as there is no point in engaging with people unless you are prepared to respond to feedback and inform the design of your programme or project.

For a simple project an engagement plan might be two sides of paper – for a programme or complex project it could be longer.

Draft the plan at an early stage as part of the scoping stage and include the engagement plan with your scoping report. You may need to update your engagement plan as the programme or project develops.

You will also need to report on the results of your engagement as part of the business case for your project, including whether your project is acceptable to different groups, and how you have taken their views into account in designing the project.

For further details, see the engagement plan checklist.

Review group

The engagement plan should include arrangements for a project, programme or policy review group.

If you do not propose to set up a review group, the engagement plan should explain the rationale for not doing so and how the views of stakeholders will be incorporated.

This is the group of key stakeholders who need to review elements of your project. The purpose of a review group is to provide feedback and constructive challenge to the project manager and programme team.

Note that the review group does not make the final decision on whether a project, programme or policy will be funded. That decision rests with Welsh Ministers or their delegated authorities.

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Note that the review group does not make the final decision on whether a project, programme or policy will be funded. That decision rests with Welsh Ministers or their delegated authorities.

The group should include representatives of major partner organisations or stakeholders, as well as representatives of people likely to be most affected by the potential work. It should include people with expertise in aspects of well-being appraisal, including social, economic, environmental, place-based and cultural impacts. There should be somebody with expertise in active travel, for example from one of the many organisations representing transport users, cyclists or pedestrians. It is also useful to have people with lived experience of transport challenges, such people who share protected characteristics.

Depending on the scope, there should also be an independent member with knowledge of the issues who is not part of the team who can provide an impartial review of the evidence and the case.

Rather than having lots of different groups you may find it useful to have one review group that looks at different transport projects or programs, and so builds up expertise over time.

You will need to engage early, and often, with the review group. The review group can use the checklists at the end of this guidance to help assess any reports and the progress of projects.

Note that a review group is only one element of the engagement process. You will also need to engage with others, for example on technical aspects of the project or in ensuring that there is a good understanding of the short- and long-term costs of the project and how it will be managed.

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WelTAG roles and responsibilities

The governance of the WelTAG process is just as important as the content of reports.

People involved in the WelTAG process must understand their roles and responsibilities. These include:

Review group member

As noted above, most projects or programmes will need a review group. Review group members support the project manager by identifying key issues and risks and helping find solutions. They do not make the final decision on funding a project – that is the role of Welsh Ministers. Instead they review the quality of evidence and submissions and help the project team to develop the best possible business case. The checklists help do this.

Members who represent a particular group may also have wider responsibility for representing the views of that group on the review panel. The review group is only one element of the wider engagement process.

Ministers and officials

Ultimately decisions about funding for transport in Wales are made by Welsh Government Ministers against their national priorities, but individual decisions may be delegated to officials in Welsh Government, Transport for Wales or local authorities, as part of programmes such as grant schemes which have been signed off by Ministers. Officers or other decision-makers will need sufficient information about projects to make an informed decision, or recommendation to Ministers, using the five criteria.

Corporate Joint Committees

These bring together multiple local authorities to oversee regional transport planning as well as other functions. Corporate Joint Committees will set the regional transport priorities on which regional and local WelTAG programmes and projects will be based. They have a vital role in aligning transport and development priorities – particularly the need to bring services closer to people to reduce the use of cars on a daily basis.

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Whilst the consultant may have expertise in modelling or appraisal, it is equally important that they understand the wider role of transport as an enabler and can support the project manager in designing a project that delivers well-being. Their reports must be brief, easy to read and accessible.

Project sponsor (SRO)

This person is responsible for the strategic oversight of the programme or project. They make the wider connection between the project and other policy areas – such as planning or health. They must provide regular updates to directors, Ministers and/or elected Members on the progress of the project, alerting them to any emerging risks. They will also need to support the team developing the project, helping to collaborate with others.

Project, programme or policy manager

This WelTAG guidance is primarily written for the project, programme or policy manager. They oversee the development and, eventually, delivery of the project, programme or policy. During the WelTAG process they ensure that the work is proportionate and tailored to the needs of the project, programme or policy; lead any stakeholder engagement events; and oversee the review group meetings. They should be responsible for drafting the initial case for change, and also preparing the implementation (or execution plan). During the delivery stage (stage 4) they oversee project delivery and are responsible for monitoring and evaluation at stage 5 including submitting annual progress reports.

Consultant/transport planner or appraiser

The project manager may need to commission an external organisation to develop the detailed programme or project design and the business case. As well as providing expertise in transport projects and appraisal, an external consultant should ensure that any WelTAG reports they produce are tailored to the needs of the project team. The project manager may ask the consultant to lead on some elements of stakeholder engagement such as convening the review group.

Whilst the consultant may have expertise in modelling or appraisal, it is equally important that they understand the wider role of transport as an enabler and can support the project manager in designing a project that delivers well-being. Their reports must be brief, easy to read and accessible.

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The five ways of working

Each of the different people involved in WeITAG can play an important role in ensuring that the five ways of working in the Well-being of Future Generations (Wales) Act 2015 are embedded throughout the WeITAG process.

For example the project sponsor plays a key role in **integration** – taking a strategic overview of the project to understand how it contributes to wider agendas, such as decarbonisation, equality, health or the economy. They should reach out to other policy areas in local or national government to ensure that the programme or project is aligned with other goals. The project manager ensures that the project addresses each of the five ways of working and a particular role in **collaboration** through how the project is delivered. The engagement plan will show how people have been **involved** in the development of the project.

The consultant/expert transport appraiser ensures that the WeITAG process is taking a **long-term** view by providing the data and analysis to understand the longer-term impacts of the programme or project. They have a vital role in **involvement** through coordinating consultation and engagement strategies. The integrated well-being appraisal will contribute directly to **prevention** by showing how the proposed policy programme or project will prevent problems from getting worse – such as inequality in transport or higher carbon emissions. Review group members help the project manager to ensure that the right people are **involved** in the development of the project.

Section 6

WelTAG in practice

This section addresses key issues around WelTAG in practice, including some commonly asked questions raised by WelTAG users.

Section 6: WelTAG in practice

Length of reports

WelTAG reports should be concise and to the point. The reader should be able to easily understand what you are proposing and why you are proposing it. There should be a clear link to Welsh Government policies, and you should show how you have addressed any potential risks.

Length:

- The case for change must be no more than 6 pages of text (3000 words).
- A full business case must be no more than 20 pages of text (10000 words).
- An integrated wellbeing appraisal must be no more than 25 pages of text (12000 words).

This word limit does not include supporting information which should be put in annexes. This includes design documents, financial information and risk management as well as more detailed appraisal information. The annexes could also include a summary of your background research, modelling information or more details on how you have selected particular options. Again, keep the annexes as short as possible.

Illustrations are welcome and are not included in the page limit.

WelTAG lite, standard and plus

As noted in section 1, to help project managers take a proportionate approach and avoid unnecessary information, this update to WelTAG introduces three levels tailored to the size, scope and complexity of the project. These are:

- **WelTAG lite** – a single business case that combines Stages 1-3 into one report.
- **WelTAG standard** – separate reports at Stage 1 (long list of options, stage 2 (short list of options and justification for final option) and Stage 3 (full business case).
- **WelTAG plus** – more complex programmes and projects may need to supplement the integrated well-being appraisal with additional transport modelling and benefit-cost ratios.

All projects must be supported by a proportionate integrated well-being appraisal that includes quantitative and qualitative data showing how the project will contribute to well-being ambitions and targets. They should also provide detailed financial information on the short and long term costs of the project.

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Figure 10: WelTAG lite, standard WelTAG and WelTAG plus

WelTAG Stages	WelTAG lite	WelTAG standard	WelTAG plus
Stage 0 case for change	Case for change	Case for change	Case for change
(scoping)	Scoping report identifies which type of WelTAG is appropriate		
Stage 1 strategic outline case	Business case + Integrated well-being appraisal	Strategic outline case	Strategic outline case
Stage 2 outline business case		Outline business case	Outline business case
Stage 3 business case + Integrated well-being appraisal		Full business case + Integrated well-being appraisal + Statutory impact assessments	Full business case + Integrated well-being appraisal + Evaluation plan + Statutory impact assessments + Modelling & benefit-cost ratios
Stage 4 delivery	Project or programme management	Statutory consents Additional design Procurement Project or programme management	Statutory consents Additional design Procurement Project or programme management
Stage 5 monitoring and evaluation	Annual performance reports	Annual performance reports	Annual performance reports + Evaluation

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Projects that involve designing new infrastructure or services may need to go through several steps in refining design options.

Choosing which type of WelTAG to use

The project team should decide which type of WelTAG to use as part of the scoping process. They should take advice from the project sponsor or other approval process.

There are no hard and fast rules about what kind of WelTAG to use because every transport intervention is different. Some small active travel projects can be high risk and some larger maintenance projects can potentially be quite straightforward.

Strategic transport policies, programmes and plans – such as regional transport plans – should use WelTAG lite. This is because they do not need to go through a series of separate options appraisal steps. This can be done in one step.

Projects that involve designing new infrastructure or services may need to go through several steps in refining design options. In this case the standard three-step WelTAG options appraisal may be more useful.

Projects that are large or high risk should use WelTAG plus. Projects that require funding from UK Government, should use TAG. However, if the project also requires funding from Welsh Government, there should be a brief statement on how the project will address strategic priorities in Wales and how it will contribute to well-being in Wales.

The likely cost of the project is only one factor in deciding what level of WelTAG to use and this should not be considered in isolation. Less expensive projects (under £1m for example) can present significant risks, whilst some more expensive projects can potentially be straightforward (especially if there is already a lot of previous work in place). For example, an active travel project that does not meet active travel standards may be higher risk than one that does, regardless of cost.

There is an additional guidance to help decide what level of WelTAG to use.

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The do-nothing (or do-minimum) option

In making the case for change and exploring options, it is always important to explore the do-nothing, and the do-minimum options. The do-nothing option means just that, and the do-minimum option simply means continuing to maintain existing infrastructure. For each of these options it is important to model the impact of taking no action on the targets in the Wales Transport Strategy, including the impact on modal shift targets and on Net Zero ambitions, as well as the wider impacts on well-being.

WeITAG for programmes and policies

The WeITAG process can be used for policies and programmes as well as for individual projects. The five planning stages are useful in developing a policy or programme while the appraisal process can help refine a policy or programme.

The main difference is that programmes or policies may not always need a separate business case. Instead, the five dimensions of a good business case can be embedded in the policy or programme. The reader should be able to see how the policy or programme will deliver value for money by:

- Aligning with wider national and regional strategies,
- delivering well-being in Wales,
- being affordable in the short and long-term,
- being deliverable, and
- putting in place arrangements for management and review.

Programmes and policies will still need to be supported by a separate integrated well-being appraisal and any statutory impact assessments. This shows how well-being has been considered in selecting options and the final proposals.

The supporting documents can also summarise the background research and other information that has been used to develop the main policy or programme.

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Design and appraisal

Design work (including the choice and refining of options) and appraisal should proceed in parallel. Do not wait until after a scheme has been designed to do the appraisal.

A description of the scheme, project, programme or policy must be in place before the business case can be finalised. This is because it is difficult to assess costs, risk factors or well-being impacts, or complete the business case unless there is a comprehensive scheme description or project design in place.

Early thinking about design is never wasted as it helps with understanding risk and ensures that only feasible options are taken forward, noting design costs at each stage. If design issues are not considered early enough, there is a risk of taking forward options that may considerably exceed the available budget.

Like appraisal, design and technical feasibility involves stages that move from initial concepts through outline design to detailed design to project delivery. The Royal Institute of British Architects (RIBA) plan of work sets out design stages for the construction industry. There are also design stages for different types of transport projects including the Transport for Wales plan of work, which is in turn based on rail industry standards and the Design Manual for Roads and Bridges (DMRB).

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Figure 11: WelTAG and other plans of work

Appraisal		Design	
WelTAG stages	Transport for Wales plan of work - Rail		Royal Institute of British Architects (RIBA) plan of work
Stage 0: case for change	Stage A: develop output requirements & options		Stage 0: strategic definition
(Scoping)			Stage 1: preparation and briefing
Stage 1: strategic outline case			Stage 2: concept design
Stage 2: outline business case	Stage B: options development & selection		Stage 3: spatial coordination
Stage 3: full business case	Stage C: outline or preliminary design	Stage D: statutory processes	
Stage 4: delivery statutory processes	Stage E: detailed design		
	Stage F: construct, commission handover		Stage 4: technical design
			Stage 5: manufacturing and construction
			Stage 6: handover
Stage 5: monitoring and evaluation	Stage G: close out		Stage 7: use

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Design and technical feasibility must be considered at each WeITAG stage. For example:

- **Stage 1: strategic outline case** – ensure shortlisted options are technically feasible. For larger projects this may involve a technical feasibility report which must be proportionate but could include 2D spatial plans based on OS mapping with an initial technical review of the issues and risks, as well as any operational analysis.
- **Stage 2: outline business case** – the design work should include a more in-depth technical look at each option, including environmental and geotechnical considerations. The outline business case report should include more detailed design information setting out the spatial requirements of the programme or project, as well as key design components, land, and statutory requirements.
- **Stage 3: full business case** – this should be accompanied by a preliminary design that identifies all key design aspects of the project, including choice of materials. Although some details may still need to be finalised, the design should be presented on the basis of full topographic survey and mapping with sufficient detail to become the basis of a detailed application for planning consent or powers. Where projects will involve the compulsory purchase of land it is vital that the outline design and the full business case have been developed in detail.

There are also design standards that transport projects need to comply with, including the standards set out in the Design Manual for Roads and Bridges and the Active Travel Guidance for Wales. Local design standards for planning purposes may also be relevant to the design or upgrading of transport infrastructure.

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Gateway reviews and check ins

Many transport projects, including road, rail and active travel projects will need to comply with mode-specific gateway review points, broadly aligned with the Office of Government Commerce (OGC) gateway process.

Many transport projects, including road, rail and active travel projects will need to comply with mode-specific gateway review points, broadly aligned with the Office of Government Commerce (OGC) gateway process. For example, Welsh Government gateway review processes for projects on the Trunk Road Forward Programme have seven key stage approval processes and three major gateway reviews. For active travel, Transport for Wales defines key check-in points.

At each gateway review stage or check-in, the approval team must read and approve the relevant WelTAG documents before moving to the next stage. Check-ins or gateways reviews should use the quality checklists to ensure that the project complies with the WelTAG guidance, that the necessary work has been done, and the work meets the value-for-money criteria.

Projects, policies or programmes that do not meet the value-for-money criteria or comply with the quality check lists or contribute to meeting modal shift targets, must not be approved.

Check-ins may align with the WelTAG stages, but projects using a single stage WelTAG lite might need interim check-ins before submitting the final business case.

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Data available from Transport for Wales

The Geospatial and Strategic Transport Analysis Unit (G-STAT) at Transport for Wales can provide scheme promoters and authorities in charge of transport programmes, policies and projects with data and analysis for strategic transport planning. They can be contacted at gstat@tfw.wales

Where they are in place, Regional Transport Plans should already have set the context for regional transport planning, making use of the strategic data from TfW. However specific projects, programmes or policies may need further data.

Where they are in place, Regional Transport Plans should already have set the context for regional transport planning, making use of the strategic data from TfW. However specific projects, programmes or policies may need further data. There are three regional transport models – South East Wales, South West & Mid Wales and North Wales that provide base-year travel demand matrices by time period, mode (car, public transport) and journey purpose (commute, business, other).

Transport for Wales may also have scenario modelling or forecasts available from these models. Further information on the Wales Regional Transport Models is available at: [Wales Regional Transport Models | TfW](#)

TfW may be able to provide access to the following types of data (subject to agreement or licensing requirements):

- Bus route coverage / bus stop mapping.
- Summary annual rail demand for specific stations or specific rail corridors based on ticket sales data.
- Origin-destination mobile network data summary mapping at the MSOA census level.

Transport for Wales may also be able to provide data analytics such as:

- Journey time accessibility isochrone mapping for public transport, walk, cycle access to specific destinations, by time of day. Similarly, journey time accessibility mapping for walk or cycle access to the public transport network.
- Catchment analyses, for populations within certain distances / times of bus stops and/or rail stations.
- Trip numbers and mode share estimates.

Section 7

WelTAG and land-use planning

This section contains guidance on ensuring that there is a strong link between transport planning and land-use planning.

Section 7: WelTAG and land-use planning

Transport planning and land-use planning are closely related. Decisions about where we build new development impact on transport, and transport availability can impact on new development and transport investment often influences subsequent development.

Priority one of the Wales Transport Strategy is to reduce the need to travel by bringing services closer to people. Land-use planning plays a vital role in delivering this priority. This can mean locating new health, education and other services close to where people live, rather than building new access roads. It can also mean setting aside land for sustainable transport infrastructure. It can also mean accepting a degree of congestion if there are alternative opportunities for more people to use sustainable transport modes. The WelTAG options appraisal process should also consider planning options that help achieve transport outcomes.

Transport in Planning Policy Wales

Planning Policy Wales is the national planning policy for Wales. It addresses transport issues as part of planning. It recognises the importance of well-designed, people-oriented streets and the need to increase opportunities for active travel, while reducing the reliance on cars. New development should improve the quality of place and create safe, social attractive streets where people want to walk, cycle and enjoy. It includes the Sustainable Transport Hierarchy for new development. This is supported by detailed planning guidance in TAN 18 - Transport.

Planning Policy Wales has a firm focus on placemaking – an approach to development which ensures communities have all the services they need within easy reach and development is of high quality. The delivery of this is supported through the Placemaking Charter – a series of principles for placemaking that include the importance of thinking about transport.

Transport programmes and projects can have a major impact on placemaking by either improving the quality of places or having an adverse effect on them. It is important to including thinking about placemaking in scheme objectives.

Planning Policy Wales notes that development plans should identify and include policies and proposals relating to the development of transport infrastructure and related services and when assessing transport projects, planning authorities should have regard to WeITAG noting that,

“is especially important in the planning of strategic transport infrastructure projects and transport associated with major developments, as it helps to ensure account is taken of the full range of impacts of transport options. This helps identify solutions which maximise contributions to well-being goals and allows solutions and mitigation measures to be identified and developed before decisions to proceed with schemes are made. The WeITAG process also acts as a safeguard to ensure that solutions are appropriate for tackling the transport problems identified and to avoid the selection of modal options being pre-determined without supporting evidence.”

Future Wales – the National Plan 2040 sets out priorities for land-use. This places a strong focus on creating places that reduce the need to travel, make efficient use of land and which ensure that land-use choices are guided by a clear understanding of their environmental, social, cultural and economic impacts.

Future Wales – the National Plan 2040 sets out priorities for land-use. This places a strong focus on creating places that reduce the need to travel, make efficient use of land and which ensure that land-use choices are guided by a clear understanding of their environmental, social, cultural and economic impacts. This is aligned with the Wales Transport Strategy, and they will work together to deliver these outcomes.

The potential for land to be used for future public transport or rail freight improvements should be a consideration in new developments.

Planning Policy Wales has fully embraced active travel and emphasises its importance as a consideration in new development. Planning authorities must ensure development proposals, through their design and supporting infrastructure, prioritise provision for access and movement by walking and cycling. The design of development proposals should, in accordance with the sustainable transport hierarchy, start with identifying the shortest, most attractive walking and cycling connections and then addressing the other transport needs.

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WelTAG projects that need planning consent

Transport projects that involve upgraded or new infrastructure may need planning approval in addition to any approval for funding from Welsh or UK sources.

Ideally planning consent should be in place before the final application for funding is made, but in practice this may not always be possible. For larger projects planning consents are usually obtained after the completion of the Stage 3 business case. If the project will need consent but does not already have it, the deliverability section of the business case should also set out any requirements for planning consent and highlight any risks of not obtaining consent or of potential delays in the process.

The land-use planning process follows a broadly similar trajectory to the WelTAG transport planning process from outline consent, through to more detailed consent supported by the necessary impact assessments. There may also be monitoring requirements.

Some transport projects may fall within the scope of permitted development. However these will still need to follow WelTAG guidance and be supported by a integrated well-being appraisal.

WelTAG and statutory impact assessments

Both land use planning and transport planning require impact assessments to show how environmental and well-being issues have been considered. The need for statutory or regulatory impact assessments arises from the statutory duties of local authorities or other public bodies under various pieces of legislation including:

- [Wales Act 2017](#);
- [Conservation of Habitats and Species Regulations 2017 \(Habitats Regulations\)](#);
- [Environment \(Wales\) Act 2016](#);
- Air Quality (Wales) Regulations (2000), as amended by the Air Quality (Wales)(Amendment) Regulations 2002) and Air Quality (Wales) Regulations (2010).
- [Well-being of Future Generations \(Wales\) Act 2015](#);
- [Active Travel \(Wales\) Act 2013](#);
- [Welsh Language \(Wales\) Measure 2011](#) and [Welsh Language Standards](#);
- Equality Act 2010;
- The Transport (Wales) Act 2006; and
- [Environmental Assessment of Plans and Programmes \(Wales\) Regulations 2004 \(SEA Regulations\)](#)

There should be no need to duplicate information for transport and land-use

planning requirements. Much of the information will serve both purposes. As noted in section 4, the integrated well-being appraisal does not replace the need for other statutory or regulatory impact assessments but should summarise the results of those.

The project manager should consider both transport planning and land-use planning requirements at the scoping stage.

If a strategic project might also require planning permission, the local authority should be consulted on the brief for the integrated well-being appraisal to ensure that any issues relating to Strategic Environmental Assessment (SEA) have been included in the work. Criteria for SEA are set out in the relevant regulations, including the likely significant effects on the environment, including short, medium and long-term effects, permanent and temporary effects, positive and negative effects and secondary, cumulative and synergistic effects on issues including biodiversity, population, human health, fauna, flora, soil, water, air, climatic factors, material assets, cultural heritage, landscape, and the inter-relationship between these issues.

Providing the information required for a SEA is included in the well-being appraisal there should be no need for a separate SEA or integrated sustainability appraisal (ISA).

Transport implementation strategies

Where developers need to consider transport interventions as part of new development, the core principles of the WelTAG process may be helpful in shaping those proposals.

Transport implementation strategies are provided by developers in support of applications for planning consent. This is usually where developers have been asked to provide additional transport infrastructure as part of a development project.

Transport is often vital to new developments – particularly public sector and commercial developments that need to be accessible to as many people as possible. Development applications will often need to consider existing transport options, and the impact of new development on those options. Technical advisory note 18 (TAN 18) asks that developers provide transport implementation strategies. TAN 18 does not specifically mention WelTAG as it was written before the first WelTAG guidance.

Where developers need to consider transport interventions as part of new development, the core principles of the WelTAG process may be helpful in shaping those proposals.

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Land-use planning issues in WelTAG studies

Land-use planning issues must be considered at each stage of WelTAG.

For example:

Transport programmes and projects can have a major impact on placemaking by either improving the quality of places or having an adverse effect on them. It is important to integrate thinking about placemaking into transport interventions.

- **Stage 0 case for change** – should consider not only the Wales Transport Strategy, but also priorities in Future Wales and the local development plan, local transport plan or regional transport plan or active travel network map (ATNM).
- **WelTAG standard or WelTAG lite** – where a project is already identified in a local development plan, local transport plan or regional transport plan, on an active travel network map (ATNM) that has been approved by Ministers and subject to consultation or in the National Transport Delivery Plan, there may be no need for a complex options appraisal process. Simply use the WelTAG lite process explain how your final option was chosen and refer to previous development work or to the appropriate reference document. You should also show how you have taken stakeholder views into account.
- **Business case** – the strategic fit section of the business case should explain how the programme or project will address local, regional and national land-use planning priorities. If the project needs planning consent (see below) any statutory or other regulatory impact assessments should be put in place before completing the business case.
- **Planning conditions** – well-being benefits can be secured through planning conditions and also potentially through contract conditions (e.g. training and skills or community events). The deliverability section of the business case should explain how well-being benefits will be secured by which ever route, and the management section should explain how that will be monitored or enforced.

Note that an Active Travel Network map may not provide sufficient detail to inform the choice, design and delivery of a particular active travel solution. If a full options appraisal has not been undertaken, then justification for the choice and design of the final option should be set out in the WelTAG lite business case or should be part of the Active Travel grant application. These should explain who authorised the choice and the criteria behind it (see section 8).

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In Wales Corporate Joint Committees have a responsibility to prepare regional transport plans whilst local authorities have a duty to deliver the policies in the plan.

Regional Transport Plans

Regional Transport Plans play a central role in helping to align land use and transport planning.

In Wales Corporate Joint Committees (CJCs) have a responsibility to prepare regional transport plans whilst local authorities have a duty to deliver the policies in the plan. Those plans should promote and encourage safe, integrated, efficient and economic transport to, from and within the area covered by the CJC and include policies for the implementation of the Wales Transport Strategy.

They must also have regard to the transport needs of disabled persons (within the meaning of the Equality Act 2010) and people who have mobility problems. In the plan, local authorities must also comply with their statutory duties. The principles of WeITAG should be used to inform the regional transport planning process. These include a structured approach to developing the plan and the five elements of a business case.

There is no need to provide a separate business case for a regional transport plan – instead the WeITAG approach can be incorporated into the content, for example by showing how the plan will fit with strategic priorities, and will be delivered and managed.

However regional transport plans must be supported by an integrated well-being appraisal that includes information about the impact of the plan on the environment.

Individual projects that have been put forward under a regional transport plan may also require the relevant statutory impact assessments, such as environmental, habitats regulations, noise, air quality or other impact assessments as part of the detailed design process.

Section 8

WelTAG for specific transport modes

This section explains how WelTAG relates to specific planning guidance on active travel, bus, roads and rail, and maintenance.

Section 8: WelTAG and land-use planning

WelTAG sets out planning and appraisal principles that can be used for any kind of transport policy, programme or project. In practice, most transport projects, programmes or policies in Wales will be multi-modal or involve integration between different transport modes.

However it is also important to be aware of mode-specific requirements. These might include project planning requirements, design standards or regulatory requirements.

WelTAG has been designed to be broadly compatible with these. The same staged approach is relevant, as is the need to provide a robust business case and the need to undertake the relevant impact assessments.

WelTAG and active travel

Active travel needs to be considered in all new transport provision.

The Active Travel (Wales) Act 2013 places duties on Welsh ministers and local authorities in relation to active travel in Wales. Welsh Government has published comprehensive Active Travel Guidance covering the duties, principles and providing detailed guidance on design and planning of schemes. This includes active travel as part of road and rail schemes.

Active travel network maps (ATNM) are a core element of active travel in Wales. The Act requires local authorities to map, plan for and review Active Travel Network Maps (ATNM) for walkers and cyclists.

Welsh Government also provides guidance for local authorities applying for funding from the active travel fund. This is closely aligned with WelTAG.

Specific issues to consider in planning active travel projects using WelTAG include:

- **Active travel network maps** – where a project is focussed on delivering a dedicated active travel scheme that is already identified and agreed in an approved ATNM there will still need to be a case for change and a WelTAG process to inform the detailed design of the route,
- **WelTAG lite** – most dedicated active travel projects should only require a WelTAG lite business case supported by an integrated well-being appraisal and any statutory impact assessments, and
- **an integrated approach** – for multi-modal transport projects including road or rail, active travel options should be integrated into project planning from the outset rather than simply added on at the end.

Therefore, whether or not a route has been set out on an ATNM, all projects involving active travel should begin with a stage 0 case for change. This should include:

- Identifying the particular problem that the scheme is looking to address (such as enhancing access to a community facility, school or transport interchange).
- The specific objective of the scheme (it is not enough to just improve active travel use).
- An explanation of why this route has been given priority compared to others on the ATNM.
- A brief summary of stakeholder engagement including any feedback on the route from the ATNM process.

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As with all transport interventions the case for change should be followed by a scoping exercise. This should include a stakeholder engagement plan. It should identify any particular technical design challenges that may arise and how they will be addressed, and agree any check in requirements with, for example, Transport for Wales.

The integrated well-being appraisal will need to address any conflicts between well-being objectives – for example, improving cycle routes could make it harder for people with impaired mobility to access public transport. This in turn creates a design challenge.

As part of the scoping exercise, you should agree whether the project will need a single stage business case (WelTAG lite) or may need more work to refine options.

As part of the scoping exercise, you should agree whether the project will need a single stage business case (WelTAG lite) or may need more work to refine options. The single stage WelTAG lite was specifically intended for active travel projects. However, designing active travel provision can often be a complex process with competing priorities from different road users to equality, environmental and safety issues. In many cases, the Active Travel Network Map simply provides indicative routes and does not provide a sufficiently detailed basis for developing a specific active travel solution. Whilst a single stage business case can be useful, it may be necessary to explore different options for active travel projects and explain why one option has been chosen as part of the business case.

Very straight forward active travel projects may not need a business case but can simply apply for funding through the application process. However that process asks very similar questions to those used in WelTAG so it is still important to think about strategic fit, wellbeing, deliverability, affordability and management.

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WelTAG for bus programmes and projects in Wales

WelTAG can be used to help plan investment in bus in Wales, including network planning and infrastructure planning. The key WelTAG principles of a staged approach to planning plus the use of a business case is as relevant to bus as to any other form of transport. This is especially important as bus is often integrated into other transport planning projects such as the creation of transport interchanges or integrated ticketing.

Bus projects, such as the new Cardiff bus station, also bring together a range of partners including the private sector, local authorities, developers and investors as well as Welsh Government. Effective programme and project planning, good communication and project governance, integration with planning and a strong business case are all vital to such projects.

Specific issues to consider in planning bus programmes and projects using WelTAG include:

- **Engaging with operators** – as well as engaging more widely, the engagement plan for any programme or project that includes bus services and infrastructure should include plans to engage with operators as services are delivered in partnership with operators and it is vital to understand their needs and perspectives. Developers and any other delivery partners also need to be engaged with as part of the process.
- **Integrating service planning with infrastructure development** – increasingly transport projects combine service planning with infrastructure. Indeed, there may be little point in upgrading services if the required infrastructure is not in place.
- **Planning for decarbonisation** – the Wales Transport Strategy mini plan sets ambitions for decarbonising bus so future network and infrastructure planning must anticipate that from the outset.

WelTAG for rail programmes and projects in Wales

Appraisal of rail projects funded by Welsh Government should comply with WelTAG, the Well-being of Future Generations (Wales) Act 2015 and the Wales Transport Strategy as well as the design and engineering deliverables associated with the Transport for Wales plan of works stages or Network Rail's PACE (Project in acceleration in a controlled environment). PACE has recently replaced GRIP (Governance for railway investment projects). The alignment with WelTAG stages is set out below.

Due to the cost and complexity associated with rail programmes and projects, there must be greater surety of the option feasibility at an early stage of the project to support better definition of project costs and risks.

Key engineering inputs into the appraisal at each stage include:

- A feasibility design report to support the short list of options at the end of WelTAG Stage 1, strategic outline business case,
- an option selection report to support the selection of a preferred option as part of WelTAG stage 2, outline business case, and
- single option development/preliminary design to support WelTAG stage 3, full business case.

Figure 12: Alignment between WelTAG and Transport for Wales plan of work, PACE and GRIP

WelTAG stage	Stage 1 strategic outline case		Stage 2 outline business case	Stage 3 full business case	Stage 4 delivery		Stage 5 monitoring and evaluation	
TfW plan of work stages	Stage A: develop output requirements & options		Stage B: options development & selection	Stage C preliminary design	Stage E: detailed design	Stage F: construct, commission handover	Stage G: close out	
				Stage D* statutory processes				
Network Rail PACE	Strategic programme definition		Development & option selection	Project development & design		Project delivery	Project close	
Network Rail GRIP	1. output definition	2. project feasibility	3. option selection	4. single option development	5. detailed design	6. construct, test, commission	7. scheme hand back	8. close out

*The WelTAG stage 3 full business case and stage C preliminary design is usually an input into stage D.

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WelTAG and roads programmes and projects

Roads provide infrastructure for public transport, walking, wheeling, cycling, cars and freight. The Welsh Government recognises that investment in roads can help achieve an accessible, sustainable and efficient transport system.

Investment in new roads or alterations that increase road capacity

Programs and projects that include roads investment should use WelTAG and the IWBA proportionately to show how they align with the WTS ambitions and priorities.

Investment in new roads, or alterations to existing roads that significantly increase private car capacity will be considered if it meets at least one of the following purposes:

- 1. Support modal shift and reduce carbon emissions.** Road investment should not solely increase the demand for private car travel but should contribute meaningfully to modal shift and result in reduced carbon emissions. This requires different approaches in different parts of Wales. OR
- 2. Improve safety through proportionate changes.** Investments for safety should focus on the specific safety issues to be addressed. Speed limit changes should be considered as a tool for improving safety. OR
- 3. Adapt existing infrastructure to the impacts of climate change to ensure roads can continue to function.** Climate change is already having an impact on our road network and is likely to become an increasing issue in future decades. OR
- 4. Provide access and connectivity to jobs and centres of economic activity in a way which supports modal shift.** This includes new and existing access roads needed to connect new developments, including Freeports, to the existing network. Growth should be shaped around sustainable forms of transport and places that make us and the environment healthier. The location of nationally significant new developments needs to be consistent with Future Wales and Planning Policy Wales, which includes maximising the opportunity of access by sustainable means. They should be designed to prevent 'rat-running'.

The full IWBA should show how these purposes have informed the development of the scheme and how the investment will deliver other well-being ambitions including (but not limited to) how it will:

- minimise carbon emissions including embedded and operational carbon,
- increase capacity where it can be justified by using one of the four purposes and showing there is no better alternative. This should also consider how a scheme might affect demand on other roads in the area (for example if new capacity on one road might allow increased walking, wheeling and cycling or public transport on an alternative route),
- avoid adverse impacts on biodiversity and ecosystem resilience, soils, water, heritage, landscape and townscape, noise and air quality, and
- consider the wider impact on placemaking and the environment including the scale, location, design, materials and massing of infrastructure, and the impact on communities including severance.

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Local authority projects and programmes, and projects funded by Welsh Government, must take reasonable steps to enhance the provision for walking, wheeling and cycling and public transport. This includes projects to improve or maintain the highway, or the provision of new infrastructure. Further guidance is set out in the Active Travel (Wales) Act 2013 and the Active Travel Act Guidance.

Considering the road purposes at each stage of WelTAG

The roads purposes should inform every stage of the development and design of schemes that may involve new roads or increase capacity, as part of the IWBA. Do provide an evidence-based rationale, do not rely on assertion or tick-box tables in isolation and provide a clear rationale for the inclusion/exclusion of options.

- **Stage 0 case for change** – identify the transport problem and set objectives to solve the problem e.g. don't just cite congestion as the problem to be solved but consider where people are travelling to and the reasons for the congestion, such as lack of public transport or active travel provision. Do not assume a particular solution.
- **Stage 1 strategic outline case** – the long list of options should consider all modes of transport to meet the objectives. The Stage 1 well-being case should consider the fit with the four purposes through the emerging IWBA, including how each option will minimise emissions and maximise modal shift (e.g. considering lower speed limits, giving buses priority and reducing emissions from construction). Rule out options where there are alternatives which better align with the road purposes and the WTS.
- **Stage 2 outline case** – If the preferred option at Stage 2 is a package of measures that includes a new road or will increase road capacity, the WelTAG business case should demonstrate
 - i) that all other options have been considered, and
 - ii) that the inclusion of a road scheme in the package of measures is the only way to deliver the objectives; and
 - iii) that the measures will maximise modal shift and minimise carbon emissions while also avoiding wider detrimental impacts, perhaps by also including public transport and active travel measures.
- **Stage 3 full business case** – the IWBA for the full business case should also show how the roads purposes have been addressed, including an estimate of the change in carbon emissions and mode share that will result from the package of works.

WelTAG for maintenance programmes

WelTAG is not generally designed for projects that primarily maintain and repair existing infrastructure. However, WelTAG could be used to inform major maintenance programmes and policies for existing infrastructure, such as programmes or policies to help optimise the well-being benefits from maintenance regimes, or planning future repair works in a way that improves benefits for active travel.

All projects that involve upgrading existing infrastructure or providing new infrastructure must address the long-term maintenance and management costs of that infrastructure as part of the business case. Options for the maintenance, management or upgrading of existing infrastructure must be considered as part of the options appraisal process for programmes or projects involving new infrastructure.

Useful terms and abbreviations

Accessible – transport services and infrastructure that meet the relevant policy and regulatory standards on equality access, human rights and the Welsh language, recognising the social model of disability.

Active travel network map (ATNM) – to meet their duties under the Active Travel (Wales) Act 2013 local authorities must produce maps of existing active travel routes and related facilities in their area, and of the future and improved active travel routes and facilities needed to create integrated networks for active travel. These maps must be submitted to Welsh Ministers and there are duties to create year on year improvements. If a route is already identified in an ATNM there may be no need for extensive options appraisal.

Appraisal – this is the process of assessing the costs, benefits and risks of alternative ways to meet government objectives. It helps decision makers to understand the potential effects, trade off and overall impact of options by providing an objective evidence base for decision making.

Behaviour change – priority three of the Wales Transport Strategy involves encouraging people to make the change to more sustainable transport modes. Addressing behaviour change involves understanding why people behave the way they do, determining barriers and motivators to change and identifying solutions or interventions to drive change.

Benefit-cost ratio (BCR) – this is the process of assessing the present value capital and operating costs against the present value monetised economic, social and environmental benefits of a programme or project. Some impacts are adequately covered by benefit-cost analysis but others are not. It is important that the values in benefit-cost ratios align with our values in Wales so where projects are required to provide BCRs they must provide two BCRs – one that includes travel-time savings as a benefit, and one that excludes the benefits of travel time savings.

Decarbonisation – actions needed to cut greenhouse gas emissions and move towards a low carbon economy. Welsh Government is committed to net zero carbon emissions by 2050.

Design manual for roads and bridges (DMRB) – contains information about current standards relating to the design, assessment and operation of motorway and all-purpose trunk roads in the United Kingdom. When implementing DMRB standards in Wales, it is important to also reflect Welsh policy priorities.

Demand modelling – transport modelling used to forecast travel patterns and demand.

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Environmental impact assessment (EIA) – the process of assessing the impact of a project on the environment and finding ways to maximise benefits and avoid or mitigate any harmful impacts.

Equality impact assessment (Eqia) – the process of assessing the impact of a programme or project on groups who share protected characteristics and finding ways to maximise benefits and avoid or mitigate any potential harm.

Evaluation – the systematic assessment of the design, implementation and outcomes of an intervention, to understand its effects and what can be improved. It is an opportunity to look back at what difference the programme or project made, and what lessons might be learned for the future and hopefully to provide peer-to-peer advice to others. Information from evaluation reports also help us to refine our grants processes for the future.

Five ways of working – the Well-being of Future Generations (Wales) Act 2015 sets out five ways of working that public bodies need to think about and show how they have applied the sustainable development principle. The five ways of working are long-term, prevention, integration, collaboration and involvement.

Green Book – HM Treasury guidance on how to appraise legislation, regulation, policies, programmes and projects. It provides tools to help in decision-making and providing assurance to the Accounting Officer that public money has been used wisely.

GRIP (Governance for railway investment projects) – Network Rail developed the GRIP to manage and control investment projects that enhance or renew the national rail network (as opposed to those involved with routine maintenance of the railway). It was developed to minimise and mitigate the risks associated with delivering such projects. GRIP divides a project into eight distinct stages. The overall approach is product, rather than process, driven and, within each stage, an agreed set of products is delivered. It has now been updated by PACE (see below)

Heritage impact assessment (HIA) – the process of assessing the impact of a programme or project on historic environment assets and finding ways to maximise benefits and avoid or mitigate any harm.

Infrastructure – transport infrastructure includes all the things that enable transport services and activities to operate including streets and roads, railway lines and active travel networks such as cycle-paths and footpaths. It also includes associated structures such as stations, bridges, embankments, car parks, signage, signalling, bus stops and transport interchanges as well as the soft estate – land and greenspace associated with transport. Ports and harbours, airports, and freight and logistics facilities are also important.

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Integrated well-being appraisal – the process of assessing the impact of new proposals on well-being including society, the economy, the environment and culture. It involves understanding both benefits and risks and looking at whether it is possible to take action to avoid or mitigate any potential harm. The impact assessment can help inform the appraisal process.

Integrated well-being appraisal framework (IWBAF) – a set of qualitative and quantitative measures for assessing the impact of a programme or project on well-being in Wales. The measures are based on the well-being ambitions and targets in the Wales Transport Strategy and Net Zero Wales, as well as measures from statutory impact assessments.

Llwybr Newydd – means new path in Welsh. This is the title of the Wales Transport Strategy 2021. It should inform all aspect of WeITAG from the case for change through options appraisal, the business case, programme or project delivery and any final monitoring or evaluation.

Monitoring – the process of collecting data to assess whether the programme or project is delivering what was intended. It is different to evaluation which looks at what difference the programme or project has made.

National transport delivery plan (NTDP) – sets out Welsh Government investment priorities based on the Wales Transport Strategy.

National well-being goals – the seven national well-being goals are set out in the Well-being of Future Generations (Wales) Act 2015. They are: a prosperous Wales, a resilient Wales, a healthier Wales, a more equal Wales, a Wales of cohesive communities, a Wales of vibrant culture and thriving Welsh Language, and a globally responsible Wales. These are reflected in the four well-being ambitions in the Wales Transport Strategy.

National well-being indicators – the 46 indicators that demonstrate progress against the seven national well-being goals. Welsh Government reports on these annually.

Net zero Wales – the second emissions reduction plan for Carbon Budget 2 (2021-2025) setting the foundation to make Wales net zero by 2050 (see Annex).

Objective – a short high-level, measurable statement that explains what difference a programme or project will make.

Options appraisal – the process of identifying a long list of options to deliver particular objectives, then using an appraisal process to narrow that list down to a short list and finally a preferred option. The process can include combining options.

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Outcomes and outputs – a transport outcome is a result or an effect of doing something, such as more people walking and cycling. A transport output something that a programme or project delivers such as an upgraded cycle path.

PACE (Project acceleration in a controlled environment) – describes how Network Rail manages and controls investment projects on the rail network, developed to minimise and mitigate the risks associated with project development and delivery.

Planning – transport planning covers all the activities needed to develop a transport programme or project including transport plans and the work needed to plan specific projects. Land-use planning refers to the activities needed to plan for the way land is used, through the planning and development control process. This includes local plans and statutory consent. Transport planning and land-use planning need to work together.

Project – in this document the term ‘project’ refers to projects, packages of work, programmes and policies. The WeITAG business case, project planning stages and integrated well-being assessment are relevant to policies and programmes as well as individual projects.

Project manager – WeITAG 2022 is primarily designed to guide anyone taking a lead role in developing a transport programme or project, package of works, policy or programme and making the case for it to a funding organisation.

Regional Transport Plans – set the policies for the delivery of the Wales Transport Strategy by local authorities in Wales.

Statutory (or regulatory) impact assessment – there are also legislative requirements for impact assessments, including environmental impact assessments (EIA), heritage impact assessments (HIA), habitats regulations assessments (HRA), Welsh language impact assessments and equality impact assessments (EqIA). Whether these are needed will depend on the specific nature of the programme or project.

Sustainable development principle – under the Well-being of Future Generations (Wales) Act 2015 public bodies must act in a manner which ensures that the needs of the present are met without compromising the ability of future generations to meet their own needs.

Sustainable transport modes – types of transport that contribute to decarbonisation including walking and cycling, public transport and low - or zero-emissions vehicles.

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Sustainable transport hierarchy – guides decisions about transport investment. It gives priority to maintaining, managing and future proofing existing infrastructure. Where new infrastructure is needed, it gives priority to walking and cycling and public transport followed by ultra-low emissions vehicles and finally private vehicles. It is set out in Planning Policy Wales (PPW) (see annex one).

Scottish transport analysis guide (Scot-TAG) – guidance for transport practitioners working on transport projects in Scotland. Includes guidance on transport appraisal.

Transport Analysis guidance (TAG) – guidance for transport practitioners provided by the UK Government on transport projects which includes guidance on transport appraisal.

Transport appraisal – the process of options appraisal for transport programmes or projects. It covers each of the stages in the process from making the case for change through developing options, delivery, and monitoring and evaluation. It is sometimes called transport analysis.

Theory of change – a description of how and why a particular change is expected to happen. In transport appraisal you can use it as part of the initial case for change.

Transport – refers here to all the different transport modes, including walking and cycling, bus, rail, roads, taxis and public service vehicles, freight and logistics, maritime and aviation.

Transport programmes or projects – these include new interventions designed to address transport problems and to help deliver the Wales Transport Strategy. They include individual projects or packages of works, as well as more strategic programmes and policies. They can involve any transport mode, and include planning issues, services, infrastructure, behaviour change measures, or other non-transport measures designed to address transport issues.

Value-for-money criteria – value-for-money involves an assessment of the extent to which a project – including its wider public benefits and impacts – represents a good return on public investment. In Wales value-for-money is demonstrated through meeting the five value-for-money criteria for transport projects – strategic fit, well-being affordability, deliverability and management.

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Well-being of Future Generations (Wales) Act 2015 – legislation that aims to improve the social, economic, environmental and cultural well-being of Wales. It sets out a common national vision for well-being that requires public bodies listed in the Act to carry out sustainable development aimed at achieving well-being goals.

Welsh transport appraisal guidance (WelTAG) – a framework for assessing the impact and benefits of proposed transport interventions funded by Welsh Government. It is aligned with Welsh legislation policy and priorities.

Wales Transport Strategy well-being ambitions – the four long-term well-being ambitions in the Wales Transport Strategy are good for people and places, good for the environment, good for places and the economy, and good for culture and the Welsh Language. They mirror the national well-being goals. There are more detailed well-being objectives under each ambition.

Wales transport strategy monitoring framework – this is a framework of 6 key measures and 27 subsidiary measures that are considered most important in delivering the Wales Transport Strategy and achieving modal shift and carbon reduction. It is published by Transport for Wales and updated annually.

Wales transport strategy priorities – the four well-being ambitions in the Wales Transport Strategy are supported by three five-year priorities. They are to bring services closer to people to reduce the need to travel, to allow people and goods to move easily from door to door by accessible, sustainable and efficient transport services and infrastructure and thirdly, encouraging people to make the change to more sustainable transport.

Relevant legislation and policy in Wales

The following documents are particularly relevant to transport planning and policy in Wales.

Well-being of Future Generations (Wales) Act 2015 – WelTAG incorporates the sustainable development principle through the seven well-being goals and five ways of working set out in the Well-being of Future Generations (Wales) Act 2015. This act requires public bodies to take the goals and ways of working into account. The WelTAG guidance shows you how to do this for transport. The five ways of working need to be taken into account at each stage in the process. The ‘Well-being’ element of the full business case must understand the potential social, environmental, economic and cultural impacts of a scheme and show how those issues have been addressed in the design of the scheme.

Llwybr Newydd: the Wales Transport Strategy 2021 – this sets the national ambitions and priorities for transport in Wales. It is underpinned by nine mini-plans for each mode or sector. Llwybr Newydd is closely aligned to the Well-being of Future Generations (Wales) Act of 2015. Individual transport interventions need to align with the national ambitions and priorities, and this WelTAG guidance helps you to do this.

Net Zero Wales – Welsh Government has declared a climate emergency and committed to zero carbon by 2050. Transport is a significant source of greenhouse gases in Wales. Net Zero Wales is the Welsh Government strategy for achieving this. The transport chapter sets out a target to reduce car driver mileage per capita by 10% by 2030. It reflects the other commitments in the Wales Transport Strategy 2021 including a significant reduction in greenhouse gas emissions from transport and a more specific target on modal shift to help achieve that. It identifies the transport hierarchy that prioritises investment in active travel, public transport and zero emission vehicles over private cars.

Active Travel (Wales) Act 2013 – this legislation imposes a duty on local authorities to provide for active travel in their areas. It also sets out duties on highways authorities to “take reasonable steps to enhance the provision made for walkers and cyclists... in the exercise of their functions: (...) creation, maintenance and improvement of highways, interference with highways and acquisition etc of land (section 9 (1).” In practice this means that active travel should be considered in the context of all transport interventions, not just when planning dedicated active travel schemes.

Active Travel Guidance – Welsh Government guidance on active travel that sets out the duties on local authorities and Ministers, the policy and legislative requirements and network principles. It includes detailed guidance on the development of Active Travel Network Maps (ATNM) and on user needs, as well as on routes and links.

Planning Policy Wales (PPW) – PPW sets out national planning policy in Wales. It underpins planning decisions and plan-making at all levels. It sets out the national policy for the creation of active and social places, taking a placemaking approach to development, including the provision of infrastructure and sets out the sustainable transport hierarchy (also reflected in Llwybr Newydd). This guides Strategic and Local Development Plans. PPW11 is the most recent version of Planning Policy Wales, and this is supported by Technical Advice Note (TAN) 18 – Transport, which provides detailed planning guidance.

Future Wales: the National Plan 2040 – published in 2020 this national scale development plan sets priorities for land-use planning in Wales – in other words where development should be located. Transport planning and land-use planning are closely linked. Llwybr Newydd is already aligned with Future Wales at a national level. Future Wales also notes that, significant new developments should be located within towns and city centres ...with good access by public transport to or from the whole town or city (71) and that new development should be built in sustainable locations and supported by active travel and public transport infrastructure. (80)

Strategic and Local Development Plans – these are regional and local tier development plans. Local Development Plans set out the Local Planning Authority's proposals and policies for future development and use of land in its areas. Strategic Development Plans are regional scale development plans which have been introduced to deal more effectively with cross boundary issues and achieve better planning outcomes.

Regional Transport Plans – Regional Transport plans link regional development priorities with regional planning priorities. Regional Transport Plans will set the framework for individual transport schemes, taking into account Llwybr Newydd and Future Wales 2040.

The National Transport Delivery Plan (NTDP) – sets out specific plans for how Welsh Government expenditure will deliver against the priorities and ambitions in Llwybr Newydd.

Programme for Government – each incoming government in Wales sets a new programme for government. The 2021 Programme for Government sets whole of government priorities.

More recent transport policies

From time to time we will deliver more specific plans for individual transport modes or topics in Wales such as our Electric Vehicle Charging Strategy and work on bus reform.

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