Transport for the South East
Partnership Board Meeting

Agenda

29 January 2024 – 13:00-16:00
Virtual

Partnership Board Members		
Cllr Keith Glazier (Chair) Leader East Sussex County Council	Cllr Rob Humby Leader Hampshire County Council	Cllr Trevor Muten Chair, Transport & Sustainability Committee Brighton & Hove City Council
Cllr Jason Brock Leader Reading Borough Council (representing Berkshire Local Transport Body)	Cllr Phil Jordan Leader Isle of Wight Council	Cllr David Robey Deputy Cabinet Member, Highways and Transportation Kent County Council
Cllr Vince Maple Leader Medway Council	Cllr Gerald Vernon-Jackson Cabinet Member for Transportation Portsmouth City Council	Cllr Eamonn Keogh Cabinet Member for Transport and District Regeneration Southampton City Council
Cllr Matt Furniss Cabinet Member for Transport and Infrastructure Surrey County Council	Cllr Joy Dennis Cabinet Member for Highways and Transport West Sussex County Council	Geoff French CBE Chair Transport Forum
Vince Lucas Business Representative Director (KMEP) South East LEP (jointly representing LEPs)	Cllr Dr Beccy Cooper Leader Worthing Borough Council (jointly representing District and Borough Councils)	Cllr Matt Boughton Leader Tonbridge & Malling Borough Council (jointly representing District and Borough Councils)
Tim Burr Deputy Chair South Downs National Park Authority (Representative from Protected Landscapes)	Stuart Kistruck Director – Southern Region Network Rail (on behalf of Ellie Burrows)	Richard Leonard Network Planning Director National Highways
Alexander Baldwin Smith Principal City Planner Transport for London		

Apologies:
Ellie Burrows, Network Rail
Daniel Ruiz, Enterprise M3 LEP

Guests:
Nick Harris, National Highways
Steven Bishop, Steer
Edmund Cassidy, Steer

John Hix, AECOM
Paul Wilkes, AECOM
Kate Fairhall, ARUP
Max Roche, ARUP

	Item	Who
1	**Welcome and Apologies**	Cllr Keith Glazier
2	**Minutes from last meeting** *(p6-10)*	Cllr Keith Glazier
3	**Declarations of interest**	Cllr Keith Glazier
4	**Statements from the public**	Cllr Keith Glazier
5	**RIS3 Update**	Nick Harris
	For Decision	
6	**Strategic Prioritisation Tool** *(p11-16)*	Sarah Valentine / Steven Bishop, Steer
7	**Freight – Lorry Parking Study** *(p17-137)*	Kate Over / Paul Wilkes, AECOM
8	**Regional Centre of Excellence** *(p138-147)*	Emily Bailey / Kate Fairhall, ARUP & Max Roche, ARUP
9	**Audit and Governance Committee Update** *(p148-154)* - Strategic Risk Register - Draft Annual Report	Cllr Dennis
10	**Finance Update** *(p155-158)* - Spend to end Dec 2023	Sarah Valentine
11	**Responses to Consultations** *(p159-171)*	Rupert Clubb
	For Information	
12	**Lead Officer's Report** *(p172-174)*	Rupert Clubb
13	**Transport Forum Update** *(p175-176)*	Geoff French
14	**Transport Strategy Refresh** *(p177-181)*	Mark Valleley
15	**Delivery of the Strategic Investment Plan** *(p182-185)*	Sarah Valentine

16	**Technical Programme Update** ***(p186-190)*** - Regional Active Travel Strategy - Future Mobility - Decarbonisation - Freight, Logistics and Gateways Strategy - EV Charging Strategy	Mark Valleley
17	**Communications and Stakeholder engagement update** ***(p191-193)***	Duncan Barkes
18	**AOB**	All
19	**Date of Next Meeting** Monday 13 May 2024, 09:00-12:00 – Microsoft Teams	Cllr Keith Glazier

Officers in Attendance

Rupert Clubb	Transport for the South East
Mark Valleley	Transport for the South East
Sarah Valentine	Transport for the South East
Keir Wilkins	Transport for the South East
Emily Bailey	Transport for the South East
Kate Over	Transport for the South East
James Gleave	Transport for the South East
Duncan Barkes	Transport for the South East
Jessica Lelliott	Transport for the South East
Alexander Baldwin-Smith	Transport for London
Antoinette Antoine	Surrey County Council
David Stempfer	Surrey County Council
Chris Maddocks	Reading Borough Council
Pete Boustred	Southampton City Council
Felicity Tidbury	Portsmouth City Council
Frank Baxter	Hampshire County Council
Natalie Wigman	Hampshire County Council
Dominic McGrath	Hampshire County Council
Joe Ratcliffe	Kent County Council
Mark Welch	Kent County Council
Peter Duggan	DfT
Colin Rowland	Isle of Wight Council
Mark Prior	Brighton and Hove City Council
Wren Bartholomew	Tonbridge & Malling Council
Mark Breathwick	Medway Council
Martin Randall	Worthing Council
Stuart Kistruck	Network Rail
Matt Davey	West Sussex County Council
Darryl Hemmings	West Sussex County Council
Alex Pringle	SDNPA
Alice Darley	National Highways

TfSE Partnership Board
18 December – 11:00-12:00
Minutes
Virtual – Microsoft Teams

Partnership Board Members

Cllr Keith Glazier (Chair) Leader East Sussex County Council	Cllr Rob Humby Leader of the Council Hampshire County Council	Cllr Trevor Muten Chair, Transport & Sustainability Committee Brighton & Hove City Council
Cllr Paul Fishwick Executive Member for Active Travel, Transport & Highways Wokingham Borough Council *(representing Berkshire Local Transport Body and attending on behalf of Cllr Jason Brock)*	Cllr Phil Jordan Cabinet Member for Infrastructure and Transport Isle of Wight Council	Cllr David Robey Deputy Cabinet Member Highways and Transportation Kent County Council
Cllr Vince Maple Leader Medway Council	Cllr Gerald Vernon-Jackson Cabinet Member for Infrastructure and Transport Portsmouth City Council	Cllr Eamonn Keogh Cabinet Member for Transport and District Regeneration Southampton City Council
Cllr Matt Furniss Cabinet Member for Transport and Infrastructure Surrey County Council	Cllr Joy Dennis Cabinet Member for Highways and Transport West Sussex County council	Geoff French CBE Chair Transport Forum
Vince Lucas Business Representative (KMEP) South East LEP *(jointly representing LEPs)*	Cllr Vicki Wells Cabinet Member for Environment Worthing Borough Council *(jointly representing District & Borough Councils, attending on behalf of Cllr Dr Beccy Cooper)*	Cllr Matt Boughton Leader Tonbridge & Malling Borough Council *(jointly representing District & Borough Councils)*
Tim Burr Deputy Chair South Downs National Park	Stuart Kistruck Director Planning and Franchising Network Rail *(attending on behalf of Ellie Burrows)*	Heather Preen Head of Local Communities and Partnerships Transport for London
Thomas Cornwell Regional Strategy & Stakeholder Engagement Manager National Highways *(attending on behalf of Richard Leonard)*		

Apologies:

- Ellie Burrows, Network Rail
- Cllr Dr Beccy Cooper, Worthing Borough Council (D&B Rep)
- Cllr Jason Brock, Reading Borough Council (BLTB rep)
- Daniel Ruiz, Enterprise M3 LEP
- Richard Leonard, National Highways

Officers attended:

- Rupert Clubb, Transport for the South East
- Sarah Valentine, Transport for the South East
- Mark Valleley, Transport for the South East
- Jessica Lelliott, Transport for the South East
- Duncan Barkes, Transport for the South East
- Keir Wilkins, Transport for the South East

- Dan Taylor, DfT
- Peter Duggan, DfT

- Alex Pringle, SDNPA

- Alexander Baldwin-Smith, Transport for London
- Antoinette Antoine, Surrey County Council
- Wren Bartholomew, Tonbridge & Malling Borough Council
- Mark Breathwick, Medway Council
- Joe Ratcliffe, Kent County Council
- Chris Maddocks, Berkshire Local Transport Body
- Mark Prior, Brighton and Hove City Council
- Martin Randall, Adur & Worthing Council
- Matt Davey, West Sussex County Council

Item	Action
1. Welcome and Apologies	
1.1 Councillor Keith Glazier (KG) welcomed Partnership Board members to the meeting and noted apologies. 1.3 KG welcomed Keir Wilkins, new Head of Programme and Policy on secondment from the DfT to the meeting. 1.3 KG welcomed Cllr Vicki Wells attending on behalf of Cllr Dr Beccy Cooper, Stuart Kistruck attending on behalf of Ellie Burrows and Cllr Paul Fishwick attending on behalf of Cllr Jason Brock.	

2. Minutes from last meeting	
2.1 The minutes of the previous meeting were agreed.	
3. Declarations of interest	
3.1 Cllr Glazier asked Board members to declare any interests they may have in relation to the agenda. No interests were declared.	
4. Statements from the public	
4.1 Cllr Glazier confirmed that no statements from the public have been made.	
5. Business Plan	
5.1 KG reflected on the pressures authorities are facing from demand led services. Thanking the Board for all their support and local contributions. 5.2 Rupert thanked members for attending the Extraordinary Partnership Board meeting. RC provided the background to the Business Plan with the Department for Transport (DfT) producing the guidance which sets out the role for Sub-National Transport bodies to follow. 5.3 RC set out the next steps with the Business Plan to be submitted to DfT by the close of the calendar year (December) and published on our website. 5.4 RC reflected on the work undertaken by TfSE over the last year before looking ahead into our next financial year. 5.5 RC set out the funding allocation that we have profiled our Business Plan against. RC highlighted how the Business Plan sets out what more TfSE could do if more funding was available particularly with the SIP implementation. 5.6 KG sought Members' views on the draft Business Plan 5.7 Tim Burr highlighted one of the three key aims set by the DfT was for reducing environmental impact of transport. Queried why there was not more of a discussion within the plan about environmental impacts beyond decarbonisation. In response to the query RC explained that these would be picked up through the integrated sustainability appraisals undertaken and further work undertaken by delivery bodies. 5.8 Cllr David Robey raised how they expected more focus on implementation. An ask was made for further engagement with Members on the Business Plan for next year. In response to the point KG highlighted the purpose of TfSE evidence base and how we are an enabling body. RC highlighted the ask for what we could do if we secured further funding and if we did receive this, it would be put into implementation.	

5.9 RC highlighted to Members how TfSE recognise the pressure on publicly funded infrastructure and with local authorities capital budgets under pressure. TfSE are conducting some work with private sector colleagues using schemes from the SIP as case studies seeking out private funding. 5.10 Cllr Vicki Wells asked if there was any commitment to Sustainable Draining Systems (SuDS) in the workstreams. In response to this question RC explained that local authorities would be best placed to answer this question. 5.11 Geoff French supported the paper and noted that we need to keep an eye on the changing priorities of Government. 5.12 Trevor Muten raised the how COP28 will manifest legislatively and in policy terms. A concern was raised in relation to EV charging points, the speed and access and also public transport routes. In response to this RC explained we too understand it is key to see how COP28 manifests. In relation to the points on EV TfSE understand the importance of this for car and freight too. TfSE welcome the £2 bus fare cap with buses on an upward recovery following covid. 5.13 Cllr Paul Fishwick noted that he felt that TfSE's Active Travel workstream would make an outsize contribution to the DfT key aim of improving transport for the user only, instead of supporting the aim as in our Draft Business Plan. In response to this RC agrees it supports the aim however when a long distance over five miles those travel modes tend to drop off and therefore, we felt it was not applicable to all modes. However, recognise there are different views. 5.14 Cllr Vince Maple broadly support the Business Plan. Asked if under the Investing in our buses and railways section TfSE could add a balanced narrative, which highlights that some areas have not received BSIP funding. In response to this RC confirmed that the Business Plan will be tweaked to factor this in. 5.15 Cllr Gerald Vernon-Jackson highlighted an issue within Portsmouth with their utility company having turned off their parking points which have been operating for the last 3.5 years. 5.16 Vince Lucas highlighted the disparity in bus services across the region. Making sure we as TfSE have interventions in the right place when looking at disparities. 5.17 Cllr Rob Humby acknowledged the challenging timeline for the Business Plan. Discussed the pressures Local Authorities are under, agreeing that transport and infrastructure enables us to address issues however as Local Authorities we need to make sure we have capacity to de risk it. In response to this RC agreed the TfSE pipeline is fundamental with the work through the SIP implementation. We understand the impacts of inflation on schemes. Understanding that this is a national problem to de-risk investment. Dan Taylor noted the above comments.	

5.18 KG sought out Members views on whether the Active Travel workstream should be changed to “makes an outsize contribution to the aim” of improving transport for the user. The board discussed this, and it was agreed to keep Active Travel as it “as supporting the aim”. 5.19 KG asked the Board Members to agree the recommendation. The recommendation was **agreed** by the Board. ***RECOMMENDATION:*** The members of the Partnership Board are recommended to ***agree*** the Business Plan for 2024/25.	
6. AOB	
6.1 KG on behalf of the board thanked the TfSE team for their hard work over the last year. 6.2 KG thanks Members for their work over the last year and continuing to speak with one voice.	
7. Date of Next Meeting	
7.1 The date for the next Partnership Board meeting will be Monday 29 January 2024 – 13:00-16:00, held virtually.	

Agenda Item 6

Report to: **Partnership Board –Transport for the South East**

Date of meeting: **29 January 2024**

By: **Lead Officer, Transport for the South East**

Title of report: **Strategic Prioritisation**

Purpose of report: To provide an update on the development of a strategic prioritisation framework and tool that will support the delivery of the Strategic Investment Plan (SIP).

RECOMMENDATION:

The members of the Partnership Board are recommended to endorse the use of the prioritisation tool that has been developed to inform and support prioritisation decisions, and to agree to the governance process by which the prioritisation tool will be deployed.

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1. Introduction

1.1 This report provides an update on the development of a strategic prioritisation framework methodology and tool that will support the delivery of the Strategic Investment Plan (SIP).

2. Background

2.1 By virtue of their inclusion within the SIP, all the schemes have been identified as priorities for the region. However, we recognise that individual schemes will be delivered through a number of different funding streams and programmes over the long term.

2.2 One of the core functions of Sub-national Transport Bodies (STBs) is to provide advice to ministers on prioritising transport investment in their area. The most recent STB Business Planning Guidance has strengthened that and requires STBs to "develop agile prioritisation frameworks" and to "be ready to provide prioritised, evidenced advice, across all modes of transport, should investment demands change in the future". There is therefore now a specific requirement to develop a methodology which will enable Transport for the South East (TfSE) to filter the schemes within the SIP and identify priorities such as "top 10 lists" either overall or based on a range of differing factors, such as funding streams, as and when we are asked to do so.

2.3 Any prioritisation framework needs to reflect the current modally based funding landscape for bringing forward schemes and infrastructure to which, in the short term

at least, we will need to respond. However, the TfSE Transport Strategy and SIP both advocate a multi-modal approach to planning and delivering transport investment within our area, and it is important that we also develop a process for prioritising schemes within the SIP that meets that overall aspiration. It is also important to consider how TfSE would prioritise schemes if long-term funding was devolved.

2.4 At the Board meeting in October 2023, the Board endorsed a prioritisation framework and methodology to enable TfSE to carry out strategic prioritisation over the short, medium and long terms, and under differing levels of funding and devolution. The Board also agreed to the development of a tool to employ the agreed methodology and provide draft prioritised lists to inform decision making. This report summarises the approved prioritisation framework, describes how the tool has been developed and operates, and proposes a process by which the tool will be deployed.

3. Strategic Prioritisation Framework

3.1 The Strategic Prioritisation Framework ("framework") and supporting analytical tool have been developed to inform and support three types of decisions that TfSE may be required to take with respect to prioritisation:

1. Deciding what to focus revenue study money for early stage scheme development on.
2. Defining the timing and relative priority for schemes that require further development.
3. Defining the timing and relative priority to deliver interventions.

3.2 The framework development process adopted four key principles:

1. Be evidenced - The framework should make best use of available evidence that is consistent.
2. Support decisions - The framework should support decision-makers but does not make decisions.
3. Resource efficient - The framework should not reanalyse schemes in the Strategic Investment Plan but carry forward analysis.
4. Manage uncertainty - The framework should aid TfSE and partners in navigating an uncertain funding environment.

3.3 The framework can support prioritisation using a tool that can consider a number of different scored criteria or wider scenarios (e.g. funding envelopes). The framework sorts interventions into five-year windows identifying whether the intervention will be studied, developed or delivered (or a combination thereof) in each window. It can produce prioritised lists or 'action plans' that can inform decision-making and guide action from today to 2050 in five-year increments under different constraints or scenarios. There are four stages:

1. Organise - Define each intervention based on its current stream (study, develop, deliver).

2. Score - Assemble evidence and score on impacts (e.g. areas of benefit and value for money) and requirements (e.g. affordability and deliverability).
3. Evaluate - Define which interventions will be prioritised for study, development, or delivery based on their scores and the criteria constraints.
4. Finalise Action Plans - Finalise the allocation of schemes to the action plan after initial feedback.

3.4 Scenario planning has been incorporated to test how differing degrees of funding and devolution could affect the approach to prioritisation. Scenarios have been developed that reflect different external conditions that could shape the volume, type or timing of schemes that are prioritised. These consider differing levels of funding that may be available in a given year and the ability to make decisions at a regional level vs. having to make decisions based on programmed national funding.

4. Prioritisation Tool

4.1 The Strategic Prioritisation Framework is supported by a flexible spreadsheet tool. The inputs, calculations and checks within the tool are summarised below:

4.2 Inputs

1. **Delivery Action Plan:** including geography, stage of scheme development, capital cost, likely lead and supporting delivery partners (Updated annually by TfSE).
2. **Multi-criteria Assessment Framework (MCAF):** a consistent, qualitative assessment of all interventions against standard criteria aligning to the Department for Transport Early Assessment and Sifting Tool (compiled during the Area Studies and development of the SIP). This forms the core data used to inform prioritisation as well as the ability to include or weight one or many criteria grouped by:
    - Impact — Strategic Dimension
    - Expect Value for Money — Economic Dimension
    - Affordability — Financial / Commercial Dimension
    - Deliverability — Management Dimension
3. **Budget constraints:** scenarios for the level of budget available in any given five-year window from 2025 to 2050 to inform the number of interventions. 10% cost is assigned to the ‘develop’ phase and 90% to the ‘deliver’ phase
4. **Filters and weightings:** these are available in the tool to inform which schemes should be included or prioritised based on aligned elements. Filters that can be applied include:
    - Intervention Cost (e.g. less than £50m)
    - Local Authority (e.g. Kent County Council)
    - Typology (mode or type of intervention e.g. Strategic Road Network)
    - Phase complete (e.g. Outline Business Case or higher)
    - Programme (e.g. Major Road Network)

4.3 Calculations

The tool can filter in or filter out interventions and brings the various evidence bases and inputs together to sort the remaining interventions by their overall MCAF score. It then allocates each ordered intervention into five-year windows based on cumulative intervention costs and budgets for the windows.

4.4 Checks

The tool has a number of checks to review the outputs and these include:

1. Number of schemes by phase per five year window.
2. Number of schemes by LTA per five year window.
3. Number of schemes by typology per five year window.

4.5 The tool has been employed to develop a number of hypothetical, but plausible, priority lists for review. These have been reviewed by Transport Strategy Working Group and Senior Officer Group who had the opportunity to comment upon the emerging outcomes, and their feedback has been incorporated as the tool was refined.

5. Strategic Prioritisation Governance

5.1 It is important to recognise that the tool does not make decisions, that function remains with the Partnership Board.

5.2 The tool will provide an evidence based draft priority list that responds to the specific criteria for which the prioritisation is required and will support decision makers in their considerations. Any draft priority lists produced will be considered, reviewed, iterated (if appropriate) and approved through the TfSE Governance tiers prior to coming before the Board for their discussion and decision. Depending on the outcomes from the tool, there may be the need to revise the filters and weightings within the tool and iterate a draft list to better align with regional aspirations.

5.3 A flowchart showing the governance process by which the tool will be deployed has been developed to and is shown at Appendix 1.

6. Conclusions

6.1 To support one of the core functions of an STB, TfSE have developed a strategic prioritisation framework and evidence based tool. The tool together with a supporting governance process will ensure regional aspirations are reflected within any advice TfSE are required to give to the Secretary of State in relation to prioritising transport investment in relation to our area.

7. Recommendations

7.1 Board Members are recommended to note that following their endorsement of the prioritisation framework and methodology, a tool to employ the methodology has been developed.

7.2 Board members are also recommended to endorse the use of the tool to develop any draft priority lists should TfSE be required to do so.

7.3 Board members are also recommended to agree to the governance process by which the tool will be deployed.

RUPERT CLUBB

Lead Officer

Transport for the South East

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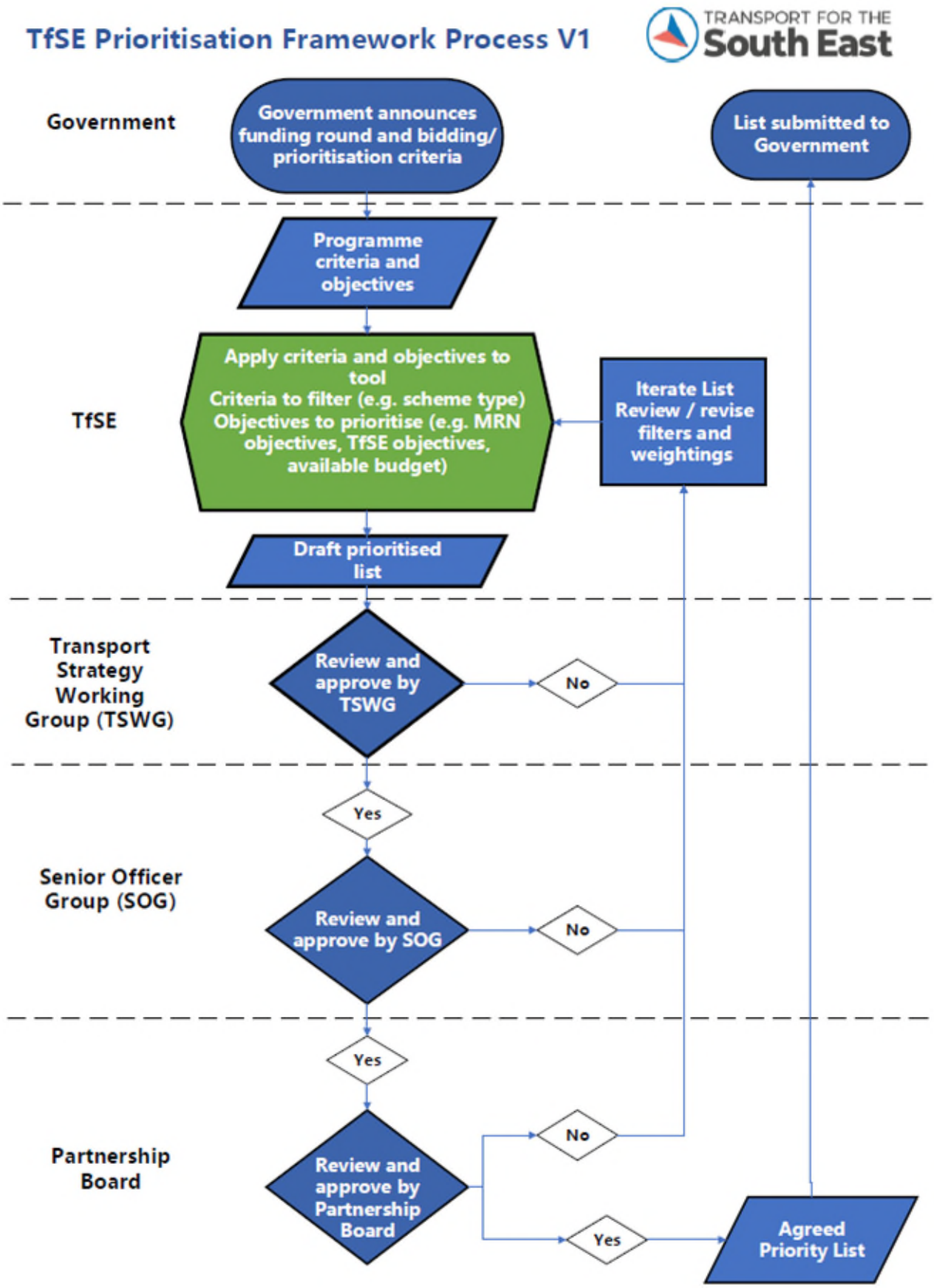
Email: sarah.valentine@transportforthesoutheast.org.uk

Appendix 1 – TfSE Governance process by which the strategic prioritisation tool will be deployed.



Agenda Item 7

Report to:	**Partnership Board – Transport for the South East**
Date of meeting:	**29 January 2024**
By:	**Lead Officer, Transport for the South East**
Title of report:	**Transport for the South East Lorry Parking Study**
Purpose of report:	**To agree the Lorry Parking Study Report**

RECOMMENDATIONS:

The members of the Partnership Board are recommended to agree the Transport for the South East Lorry Parking Study Report.

1. Introduction

1.1 The purpose of this report is to ask the members of the Partnership Board to agree the draft Transport for the South East (TfSE) Lorry Parking Study.

2. Background

2.1 The TfSE Freight, Logistics and Gateways Strategy agreed by the Board in January 2022 identifies lorry parking as a key issue in the TfSE area because:

- the impact on communities of informal overnight lorry parking, for example noise, littering, inappropriate disposal/discarding of waste, and causing laybys to be overcrowded or obstructed potentially causing road safety issues;
- the shortage of suitable lorry parking across the South East which could severely hinder the ability of the freight and logistics industry to improve its operational efficiency; and
- the lack of lorry parking and quality driver facilities contributes towards the difficulties associated with recruiting new drivers into the profession, which can have a major knock-on impact on supply chain efficiency.

2.2 Other than the research carried out to develop the TfSE Freight, Logistics and Gateways Strategy, we have not yet gathered any core evidence or data to support the implementation of the Strategy in this respect, nor to inform the how the issues identified above should be addressed.

2.3 In 2022 The Department for Transport (DfT) commissioned AECOM consultants to undertake a national audit of lorry parking on the Strategic Road Network (SRN), building on previous audits in 2010 and 2017. The purpose of the study was to help DfT, and other public bodies understand user experience to inform and provide an evidence base for policy development on HGV parking and welfare needs of drivers. As part of this work AECOM undertook a programme of night audits within five kilometres of the SRN.

3. Development of and findings from a lorry parking and driver welfare study for the TfSE area

3.1 To address the lorry parking issues identified in the Freight, Logistics and Gateways Strategy, it was decided to build on the national work undertaken by DfT to give a more complete picture of the problem in the South East in Summer 2022. A methodology was developed which mirrored the DfT approach by extending the audit carried out by the DfT to a number of non-SRN (A roads including the Major Road Network) in the TfSE area. This would provide a more complete picture of lorry parking and driver facilities in our area and provide an evidence base with which to inform any future work on this topic.

3.2 Following a competitive request for quotations undertaken in Summer 2022 in accordance with East Sussex County Council's procurement process, a contract was awarded to the consultancy AECOM to undertake this work.

3.3 The scope of the project focussed on bringing together data sources and survey work to analyse current and future demand for lorry parking in the TfSE area. The objectives of this work were as follows:

- to identify existing HGV parking locations on the SRN and non-SRN roads in the TfSE area;
- to estimate the current level and future demand for lorry parking on the SRN and non-SRN roads in the TfSE area;
- to identify potential hot spots for HGV parking;
- to ask TfSE's constituent local transport authorities to identify potential site opportunities which could help to address the shortage of HGV parking and improve facilities for drivers in their areas.

3.4 To estimate the current level and future demand for lorry parking in the TfSE area, a series of audits were carried out along the routes listed below. These were carried out at night between 8pm and 2pm at existing designated truck stops, trunk road service areas, laybys and industrial estates. They were conducted during March 2022 for the SRN routes and during February and March in 2023 for the non-SRN routes. The following routes were surveyed:

- SRN routes in the TfSE area: M4, M3, A3, M23/A23, A21, M20/A20, M2/A2, A34, A259, M27/A27 and the M25.
- A sample of 17 non-SRN routes, representing approximately 31% of the non-SRN roads including the A31 (Guildford to Winchester), A32 (Fareham to Alton), A30 (Basingstoke to Farnborough), A24 (Dorking to Horsham), A25 (Reigate to Sevenoaks), A257 (Sandwich to Canterbury), A26 (Uckfield to Lewes), and A29 (Fontwell to Clemsfold), A283 (Pullborough to Milford). A full list of the routes surveyed in included in the report and can also be found in Appendix 1.

- Industrial estate clusters including Riverside Industrial Estate in West Sussex, and Crossways Business Park, Crete Hall, Northfleet Industrial Estate, all in Kent, and Knight Road and Medway City Estate in the area of Medway Council.

3.5 The audits were supplemented by the results from driver interview surveys undertaken at the same time as the audits. These were used to ascertain whether there were any other parking issues that had not been identified as part of the 2022 and 2023 audits.

3.6 Using the analysis form this data lorry parking demand profiles for 11 of the SRN and one non-SRN routes in the TfSE area were compiled.

3.7 The results of the analysis showed that approximately 77% of HGV parking at night takes place on the SRN with only 23% estimated to take place on non-SRN routes. On the SRN routes 72% of lorries were observed parking overnight in truckstops, with 19% in laybys and 9% in industrial estates. In contrast, on the non-SRN routes, it was estimated that only 36% of lorries parked in truckstops, with 34% parking in laybys and 30% in industrial estates.

3.8 From the driver surveys, it was apparent that:

- site selection was primarily driven by immediate availability and there were no distinct preferences for specific sites;
- drivers rely on their local knowledge of the area when selecting overnight parking locations; and
- proximity to the SRN the most important factor for the drivers' choice of parking location due to possible difficulties re-joining the SRN from anywhere else.

3.9 The drivers who were surveyed also identified several safety and cost issues with overnight parking locations including the lack of security measures, such as CCTV, lighting, fences and inadequate facilities such as toilets and showers. The high costs associated with parking at motorway service areas was also highlighted leading to some companies considering it more cost-effective to risk occasional fuel theft rather than paying for parking at a designated site.

3.10 Overall, in the TfSE area, 25% of truckstops and trunk road service areas where HGVs park overnight were identified as being at or near capacity across the TfSE area, although clusters exist especially around international gateways including Dover and Southampton.

3.11 The report identifies that there are currently an estimated 5,435 HGVs parking overnight in the TfSE area with an estimated shortage of 1,528 overnight HGV parking spaces on the SRN and non-SRN roads across the TfSE area. This shortage in provision is forecast to increase to 2,774 by 2040.

3.12 A copy of the report on the lorry parking study is contained in Appendix 2. A draft copy was circulated to Transport Strategy Working Group for review and comment. Comments from members of this group have been incorporated into the final draft A database of current HGV demand across the TfSE area, as at March 2023, will be made available alongside the report.

4. Recommendations from the study

4.1 The study has identified the current and future shortage of overnight parking facilities in particular areas across the TfSE area and a number of issues that drivers have identified in relation to the safety, cost and quality of driver facilities at designated truck stops. The study report includes a number of recommendations to address these issues as follows:

- The study report and the lorry parking database should be shared with local transport authorities to:
  - make them aware of the levels of usage of existing lorry parking facilities and potential future demand within their region; and
  - enable them to include the information in action plans in their local transport plans (LTPs) to address any potential LTP Guidance requirements and local transport and planning issues where applicable.
- The report should be shared with local planning authorities to provide them with information about the needs of freight and logistics operators in relation to lorry parking in the TfSE area;
- Share the report with National Highways so that they can consider including additional and expanded lorry parking sites on the SRN routes in their route strategies, where appropriate, and for information in relation to any local action plans to address lorry parking issues;
- Include the current lorry parking sites in the tool being developed by Midlands Connect STB to identify and map alternative fuel recharging and refuelling locations for HGVs.
- Share the report and its recommendations with truckstop developers and operators to inform them about the demand for parking spaces, facilities, site standards and funding opportunities.
- Disseminate the truckstop location information with HGV operators and drivers to encourage the appropriate use of lorry parking,
- Add information about the current locations and report to the Freight, Logistics and Gateways page on the TfSE website to signpost lorry parking information and details of relevant websites and apps,
- Consider running a communications campaign with HGV drivers and operators in the area and produce a truckstop guide with locations of known facilities.
- Share the report and its findings with the members of the newly established Wider South East Freight Forum to discuss potential ways of addressing the issues highlighted in the report, including further technical work.

5. Financial considerations

5.1 The total cost of the study was £49,617 which was funded from the DfT grant allocation for 2022/23 and 2023/24.

6. Conclusions and Recommendation

6.1 The TfSE lorry parking study has built upon the DfT's national lorry parking audit carried out in 2022 by carrying out our own audit on a number of non-SRN routes. It provides clear evidence about the status of lorry parking in the TfSE area both on the SRN and non-SRN road networks. It will enable TfSE to work with our constituent local authorities, private operators, National Highways and members of the Wider South East Freight Forum to resolve the issues identified in the report. Members of the Partnership Board are recommended to agree the Lorry Parking Study Report.

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Appendix 1

List of all the non-SRN roads surveyed as part of the lorry parking audit during February and March 2023.

- A31 (Guildford to Winchester)
- A272 (Winchester to Hadlow Down)
- A322 (Lightwater to Reading via Bracknell)
- A265 (Heathfield to Hurst Green)
- A229/A268/A28/A262/A274 (Hurst Green to Maidstone)
- A32 (Fareham to Alton)
- A30 (Basingstoke to Farnborough)
- A24 (Dorking to Horsham)
- A25 (Reigate to Sevenoaks)
- A257 (Sandwich to Canterbury)
- A26 (Uckfield to Lewes)
- A29 (Fontwell to Clemsfold)
- A283 (Pullborough to Milford)
- A22 (Polegate to East Grinstead)
- A264 (Royal Tunbridge Wells to Crawley)
- A339 (Alton to Basingstoke)
- A226 (Dartford to Wainscott)
- A228 (Wainscott to Grain)
- A227 (A2 to A25)

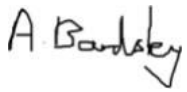
Transport for the South East (TfSE) Lorry Parking Study

Final Report

Transport for the South East

09 August 2023

Quality information

Prepared by	Verified by	Approved by
		
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Revision History

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1. Executive Summary

The provision of suitable lorry parking facilities is a vital requirement for the welfare of HGV drivers. These drivers are required to take regular breaks by law and there must therefore be enough lorry parking capacity to accommodate demand, as well as good quality provision of facilities for drivers to use whilst parked.

The TfSE Freight, Logistics and Gateways Strategy, which was published in 2022, highlighted a shortage of suitable lorry parking locations across the South East, for warehousing, storage and for driver rest facilities. Shortage of suitable facilities impacts on driver retention and recruitment including female drivers. This also impacts local communities due to the resulting proliferation of informal overnight lorry parking.

This study draws together the existing available sources of data to outline the current state of HGV parking in the region, a forecast of how this may change by 2040 and provides a number of recommendations about how the provision of additional HGV parking could be supported in the TfSE area and potential next steps which could be taken.

Overview of lorry parking in the TfSE area

In March 2022 the Department for Transport (DfT) commissioned AECOM to undertake a national overnight audit of lorry parking within five kilometres of the strategic road network (SRN) in England. In the TfSE area this national audit identified a total of 586 lorry parking locations on the SRN and a total of 4,190 vehicles were observed parked at these locations by the survey team. This was the total number of vehicles observed during the surveys. A map of these locations is shown as part of Figure 1.1.

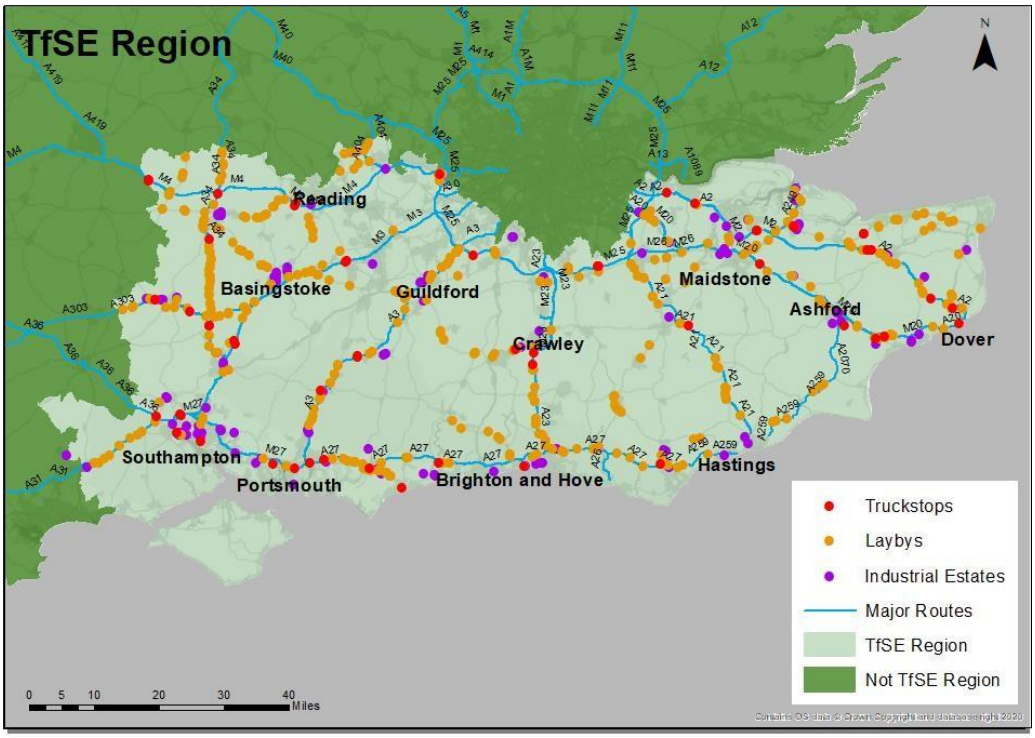


Figure 1.1 Locations of parking sites audited in the TfSE area as part of the national survey of lorry parking

Figure 1.2 shows the truckstops covered by the March 2022 National Survey of Lorry Parking which were recorded at different percentages of parking capacity being used. Sites considered to be at 'critical' utilisation level are those where HGVs are using 85% or more of the available parking capacity at the site. There are concentrations of these sites recorded as 'critical' in Kent and Southampton, and at a number of other locations across the region.

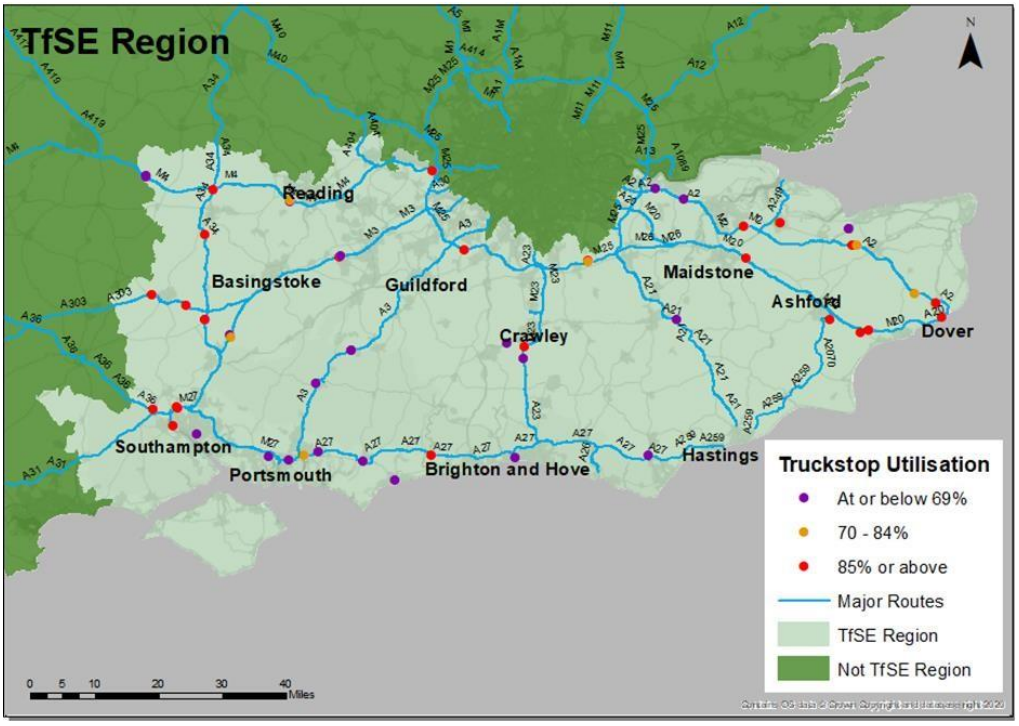


Figure 1.2 Percentage of parking capacity used by HGVs parking at sites in the TfSE area covered by the 2022 SRN national survey

The project team developed summaries for the 11 SRN routes, as well as 1 non-SRN route, within the region by pulling together key information sources to provide an overview of the number of parking spaces, additional demand and growth factors.

Table 1.1 shows the forecast additional on-site capacity required in truckstops for each route, based on low, medium, and high growth forecast cases. This shows a variation in demand across the different routes, ranging from the M4 which has a forecast additional capacity requirement of 7 spaces in the high case in 2040, to the M20/A20 which has a forecast additional capacity requirement of 432 overnight spaces in the high case in 2040. The current excess lorry parking demand shown in Table 1.1 is calculated as the difference between the 2022 truckstop capacity and the total number of HGVs observed parked. These vehicles will be spread across laybys, industrial estates and other miscellaneous locations such as side roads.

Table 1.1 Forecast additional truckstop capacity required for each SRN and non-SRN route

	M20/ A20	M3	A3/ A3(M)	M27/ A27	M2	A259/ A2070	M23/ A23	A21	M25/ A282	A34	M4[1]	A31
Current excess lorry parking demand	145	81	28	103	122	32	47	49	173	132	-58	14
2040 Forecast additional HGV spaces required (Low Case)	316	121	41	146	217	113	56	56	240	166	-19	16
2040 Forecast additional HGV spaces required (Medium Case)	374	135	46	160	249	140	59	58	262	177	-6	16
2040 Forecast additional HGV spaces required (High Case)	432	148	50	174	281	167	61	60	285	188	7	17

[1] The negative excess demand for the M4 means that unlike the other routes, the M4 has spare capacity for additional HGV parking.

The DfT study mainly focussed on the SRN and so this commission has developed a forecast for the TfSE area of lorry parking demand on the non-SRN network . This was developed using information captured during audits undertaken by the project team in February and May 2023. The audits covered approximately 31% of all non-SRN routes in the region. The data captured during the audits has allowed the project team to estimate that there is currently a requirement for an additional 674 lorry parking spaces at truckstops to accommodate the demand for HGVs parking overnight on the non-SRN.

Table 1.2 shows the forecast additional on-site capacity requirement for the SRN and non-SRN. This is based on the low, medium and high forecast cases for the non-SRN and based on the estimated on-site capacity across the TfSE area. In the high case in 2040, there is a forecast excess overnight lorry parking demand of 921 spaces.

Table 1.2 also combines the total excess demand on the non-SRN and SRN. This shows that there is currently a shortage of an estimated 1,528 overnight HGV parking spaces on the SRN and non-SRN across the TfSE region. This shortage in provision is forecast to increase to 2,774 by 2040. A number of hot spots have been identified across the region, where demand is either currently or forecast to be high and these have been highlighted within the route summaries provided within the report.

Table 1.2 Forecast additional on-site capacity required for the SRN and non-SRN

	SRN	Non-SRN	Total
Current excess lorry parking demand	868	674	1,528
2040 forecast excess lorry parking demand (low case)	1,469	822	2,275
2040 forecast excess lorry parking demand (medium case)	1,670	871	2,525
2040 forecast excess lorry parking demand (high case)	1,870	921	2,774

This report has identified some of the implications, both direct and indirect, of having a shortage of HGV parking in the TfSE area. These include road safety issues, environmental issues, increases to freight crime, impact on industry image and anti-social behaviour.

Potential lorry parking improvements

To understand what solutions might be available to create additional parking capacity within the region, engagement activity was undertaken with local authorities. They were asked to provide any information which they may have already collected to help identify existing sites that would benefit from facility and capacity improvements. TfSE and local authorities will work with private site operators to look at how we can take these proposals forward.

The study has identified a current and future excess of overnight parking demand in the region. In order to address the negative impact of inappropriate HGV parking and tackle the capacity shortfall, a number of recommendations have been identified:

1. Share the report and the lorry parking database with local authorities to make them aware of existing lorry parking facilities and potential future demand within their region. It should be shared with local planning authorities to provide them with more information about the needs of the freight and logistics operators in relation to lorry parking in their region; and with local transport authorities so that they can include the information in action plans in their local transport plans (LTPs) to address any potential LTP Guidance requirements and local transport and planning issues where applicable.

2. Share with National Highways so that they can consider including additional and expanded lorry parking sites on the SRN routes in their route strategies where appropriate and for information in relation to any local action plans to address lorry parking issues.
3. Include the current lorry parking sites in the tool being developed by Midlands Connect to identify and map alternative fuel recharging and refuelling locations for HGVs.
4. Share the report and its recommendations with truckstop developers and operators to inform them about the demand for parking spaces, facilities, site standards and funding opportunities.
5. Disseminate the truckstop location information with HGV operators and drivers to encourage the appropriate use of lorry parking, including adding the current locations and report to the Freight, Logistics and Gateways page on the TfSE website to signpost lorry parking information and details of relevant websites and apps; and run a communications campaign with HGV drivers and operators in the area and produce a truckstop guide with locations of known facilities.
6. Share with the members of the Wider South East Freight Forum to discuss potential ways of addressing the issues highlighted in the report.

2. Introduction

The provision of suitable lorry parking facilities is a vital requirement for the welfare of HGV drivers. These drivers are required to take regular breaks by law and there must therefore be enough lorry parking capacity to accommodate demand, as well as good quality provision of facilities for drivers to use whilst parked.

The TfSE Freight Logistics and Gateways Strategy, which was published in 2022, highlighted a shortage of suitable lorry parking locations across the South East, for warehousing / storage and for driver rest facilities[2]. Shortage of suitable facilities impacts on driver retention and recruitment, particularly for female drivers and presents safety issues for those carrying high value loads. A shortage of lorry parking spaces can have serious impacts on local communities due to the resulting proliferation of informal overnight lorry parking on local roads, leading to safety issues for both HGV drivers and other local road users. These issues are particularly acute within the Transport for South East (TfSE) area, due to the volume of freight traffic from the airports, ports and rail terminals servicing the links between continental Europe and the UK and the subsequent need for facilities for HGV drivers to use overnight.

2.1 Scope of the study

The scope of the project work focussed on bringing together data sources and forecasting activity to set out current and future demand, to better inform future local action planning on lorry parking. The project involved several phases and has brought together the following key data sets:

- Department for Transport (DfT) Lorry parking 2022 national survey data
- Parking demand and future forecasts for the Strategic Road Network (SRN)
- Qualitative analysis on growth factors within the region
- Non-SRN Network audits and driver surveys carried out in February and May 2023 to establish non-SRN parking demand
- Local authority feedback, including current issues, challenges and possible future sites for lorry parking

These sources of data have been combined to identify:

- HGV parking locations on the Strategic Road Network (SRN) and non-SRN in the TfSE area
- Forecasts of future demand on the SRN and non-SRN in the TfSE area
- Locations of potential hot spots for HGV parking in the region
- Potential site opportunities for consideration which could help to improve facilities in the region

2.2 Role of TfSE in lorry parking provision

TfSE is a sub-national transport body and as such cannot, at the moment, be directly responsible for funding or delivering improvements to lorry parking locations and / or facilities. However, it can highlight the need for the introduction of new sites or the expansion of existing sites, working with National Highways, the Department for Transport and local authorities to encourage the implementation of the proposed improvements and key sites that should be prioritised for funding.

This study will enable TfSE to work with its partners to understand the current position of lorry parking sites in the region, their current usage, where there are and will be hot spots and where additional demand exists. This will then allow TfSE to work with local authorities and private providers to support the continuation of existing key sites where there is pressure to change the usage of a site as well as highlighting areas where either additional sites are required, existing sites could increase capacity, and facilities could be improved. This study will enable TfSE to identify future demand for lorry parking facilities in the region, understand the impact on existing facilities and where appropriate develop additional supporting information on key hot spots to enable local authorities to understand how these can be better managed.

[2] An overview of some of the key references from the TfSE Freight, Logistics and Gateways Strategy to lorry parking are shown in Appendix F.

2.3 Study area

There are several major highway routes in the TfSE area including the M4, M3, A3, M23/A23, A21, M20/A20 and M2/A2 that service the international gateways, link these to other key urban areas such as London and the Midlands, national freight consolidation / interchange centres as well as link the key urban conurbations in the region. Other major routes including the A34, A259 and M27/A27 offer links between towns, cities, and major ports along the coast whilst the M25 forms part of the London orbital motorway.

Figure 2.1 is a map of the TfSE area showing the major highways routes providing links between the key urban areas.

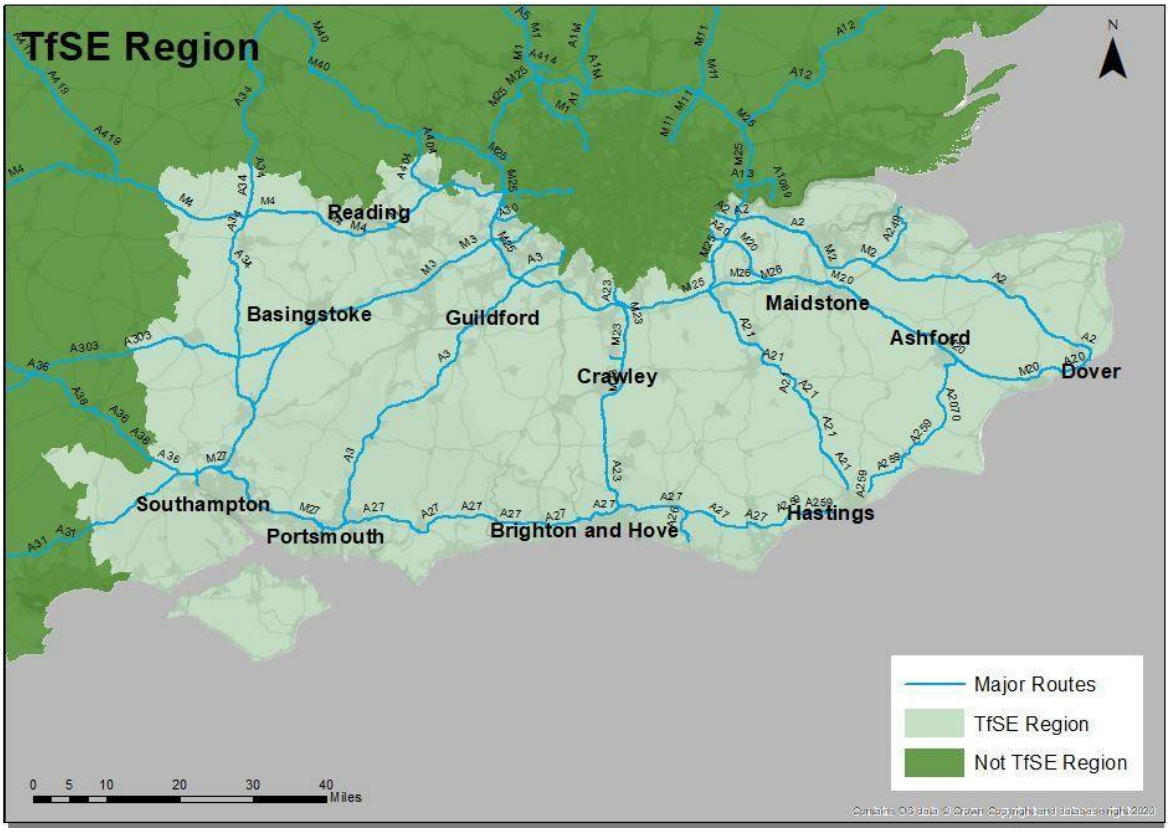


Figure 2.1 Major Road Routes in the TfSE area

3. Lorry parking in the TfSE area

3.1 Introduction

This section focuses on the characteristics of lorry parking in the TfSE area, using an analysis of the data from the 2022 National Survey of Lorry Parking, as well as supplementary data collection which has taken place as part of this TfSE Lorry Parking Study in 2023. This analysis has been used to compile lorry parking profiles for 11 SRN and one non-SRN routes in the TfSE area. For each route, the level of utilisation of each type of lorry parking site was calculated to determine where there were sites that were at a critical level. This has been supplemented by the results of a driver survey undertaken to highlight any other areas where there may be parking issues that had not been identified as part of the 2022 and 2023 audits. A further analysis was also undertaken to provide a qualitative forecast to identify the trends and changes which are likely to influence HGV parking supply in future in the TfSE area. This quantitative and qualitative analysis not only identifies where there are current and potential future lorry parking issues in the TfSE area but also considers the implications of a lack of adequate lorry parking should these issues not be addressed.

3.2 Results from the 2022 National Survey of Lorry Parking

The Department for Transport (DfT) commissioned AECOM to undertake an audit of lorry parking within five kilometres of the strategic road network (SRN) in England during March 2022. In the South East region the audit identified 586 lorry parking locations on the SRN and 4,190 vehicles were observed parked in truckstops, industrial estates or laybys. These were the total numbers observed during the survey. A map showing all locations audited as part of the national survey of lorry parking is shown in Figure 3.1.

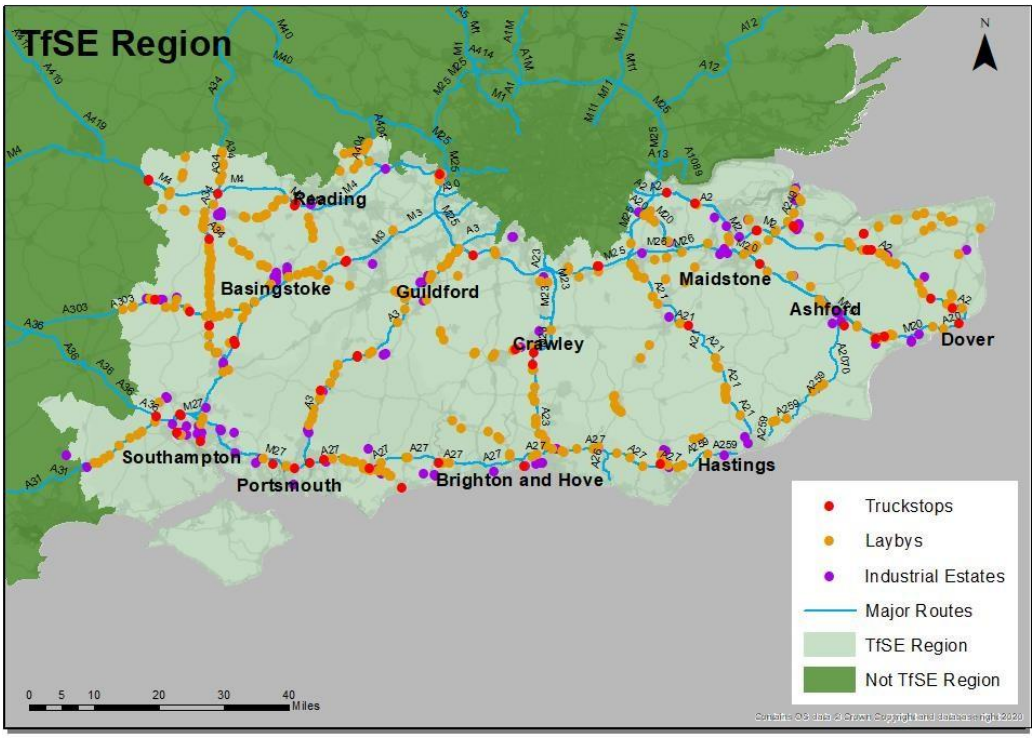


Figure 3.1 Locations of parking sites audited in the South East as part of the 2022 national survey of lorry parking

Table 3.1 shows that the majority of vehicles observed parking overnight in the region as part of the 2022 National Survey of Lorry Parking were in truckstops (72%) with 19% in laybys and 9% in industrial estates. This demonstrates the key role that large truckstops play in the provision of lorry

parking in the region. The 2022 National Survey of Lorry Parking took place during nights between 8pm-2am in March 2022.

Table 3.1 Volumes of parking locations and vehicles observed parked during the audit

Parking location type	Number	No of vehicles observed parked
Truckstops	57	3,023
Industrial estates	112	367
Laybys	417	800
Total	586	4,190

Figure 3.2 shows an overview of how busy the truckstops in the TfSE area were with HGVs parked at the time the survey took place as part of the 2022 National Survey of Lorry Parking. A critical level means that the number of HGVs observed parking is greater than or equal to 85% of the total available parking capacity for the site, with serious being between 70 and 84% full, and acceptable being less than or equal to 69% full. In the TfSE area 25 out of the 57 truckstops are at the critical level of their capacity being used. The hot spots for each of the SRN routes analysed are shown as part of the route profiles later in this section.

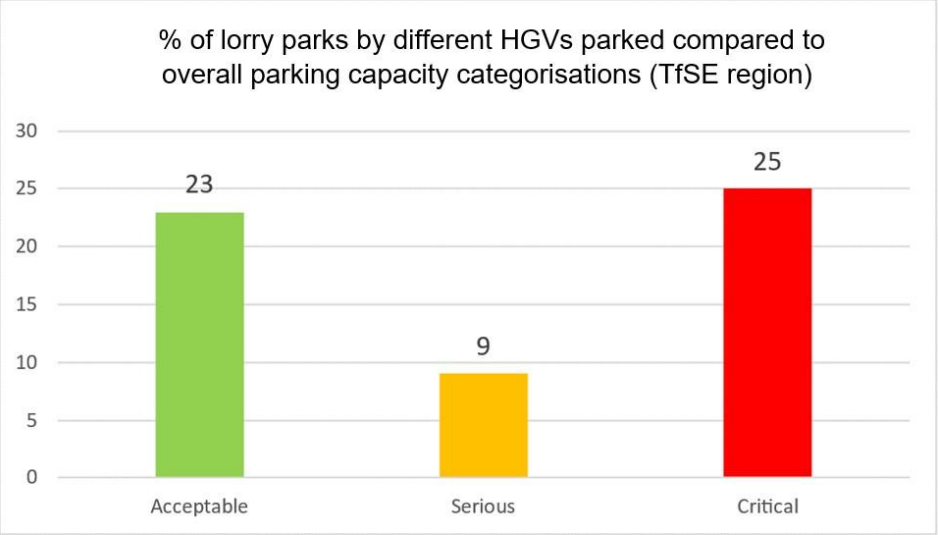


Figure 3.2 % of lorry parks by different HGVs parked compared to overall parking capacity categorisations (TfSE area)

Additionally, Figure 3.3 shows the crime hotspots along the SRN in the TfSE area as identified in the Q3 2022 National Vehicle Crime Intelligence Service (NaVCIS) freight crime intelligence report. The key hotspots in the TfSE region were reported as being Chieveley Services, Reading Services and Maidstone Services[3].

[3] Q3 2022 National Vehicle Crime Intelligence Service (NaVCIS) freight crime intelligence report.

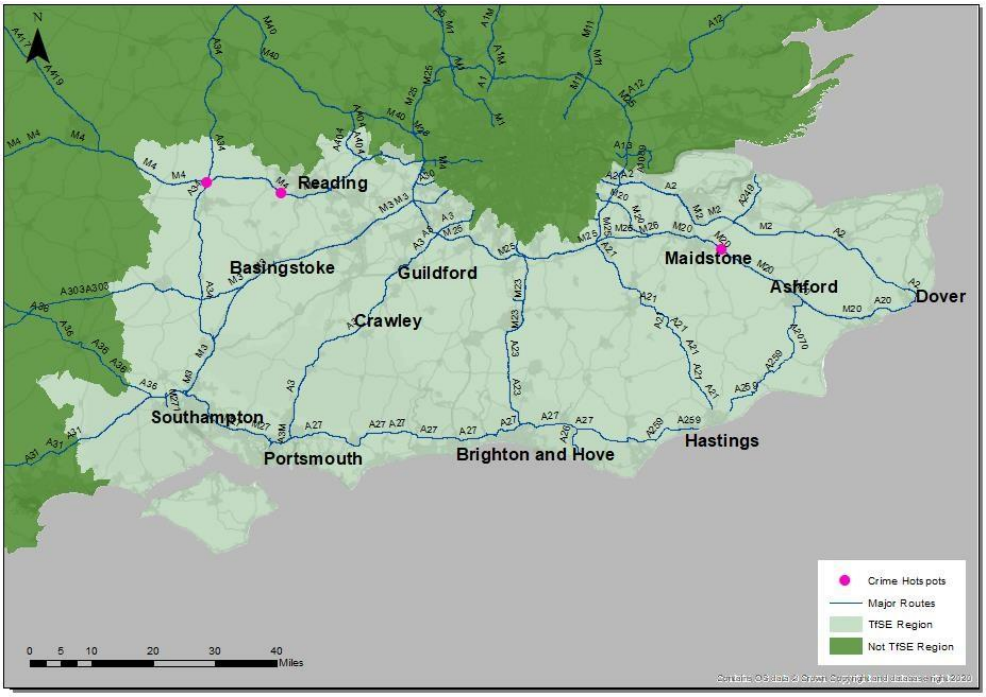


Figure 3.3 Crime Hotspots

Figure 3.4 shows the number of lorry parking locations by type covered by the 2022 National Survey in the TfSE area. Overall, 57 truckstops (10% of locations), 417 laybys (71% of locations) and 112 industrial estates (19% of locations) were identified on the routes that were surveyed. This shows that laybys make up the majority of sites within the TfSE area.

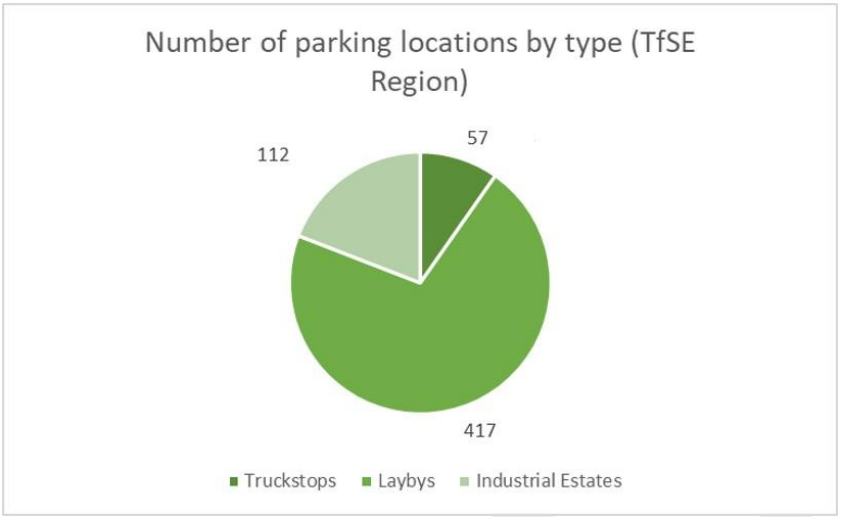


Figure 3.4 Number of lorry parking locations by type covered by the 2022 National Survey in the TfSE area

Figure 3.5 shows the on-site parking facilities by type in the TfSE area covered by the 2022 national survey. This shows that most truckstop locations are trunk road service areas (35% of locations), closely followed by Motorway Service Areas (33% of locations). Only 25% are independent truckstops and 7% are local authority truckstops.

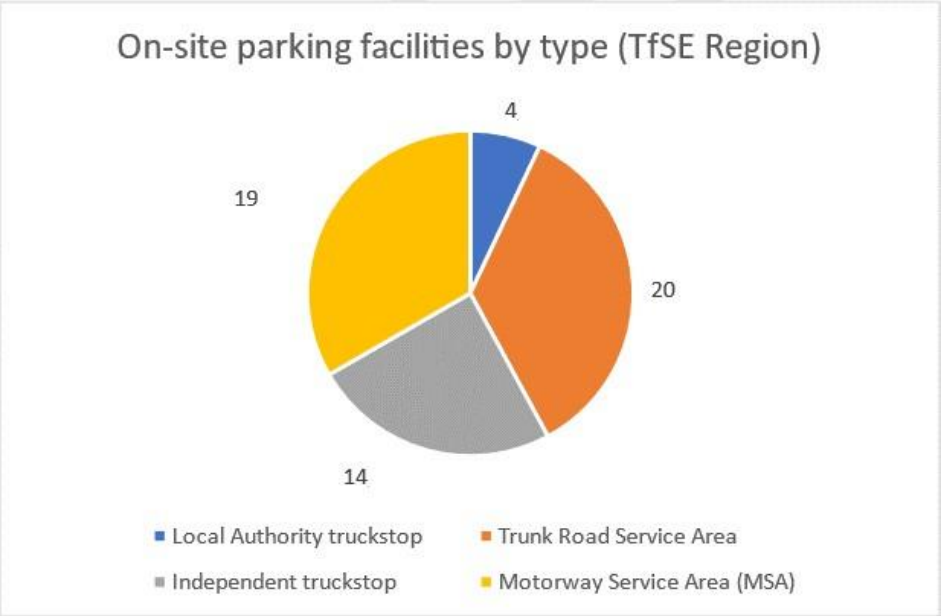


Figure 3.5 On-site parking facilities by type covered by the 2022 national survey

Figure 3.6 shows the number of vehicles observed by location type within the TFSE area covered by the 2022 national survey. This shows that the majority of vehicles observed (72%) were in truckstops, with 19% in laybys and 9% in industrial estates. This demonstrates the key role in particular that the large truckstops in the TfSE area play within the overall mix of lorry parking provision, as they only make up 10% of the lorry parking sites but provide 72% of the spaces.

Figure 3.6 Vehicles observed by parking site in the TfSE area covered by the 2022 national survey

Figure 3.7 shows a comparison of the percentage of truckstops in the TfSE area recorded as being at acceptable, serious or critical levels of utilisation against capacity compared to the national results. This shows a great deal of similarity between the profiles of the TfSE area and England as a whole, with the TfSE area having marginally fewer truckstops at acceptable level (40.35% compared to 42.33%), and slightly more at serious level (15.79% compared to 13.80%). The level of truckstops with a critical level of percentage of use vs capacity is almost identical between TfSE and England (43.86 compared to 43.87%).

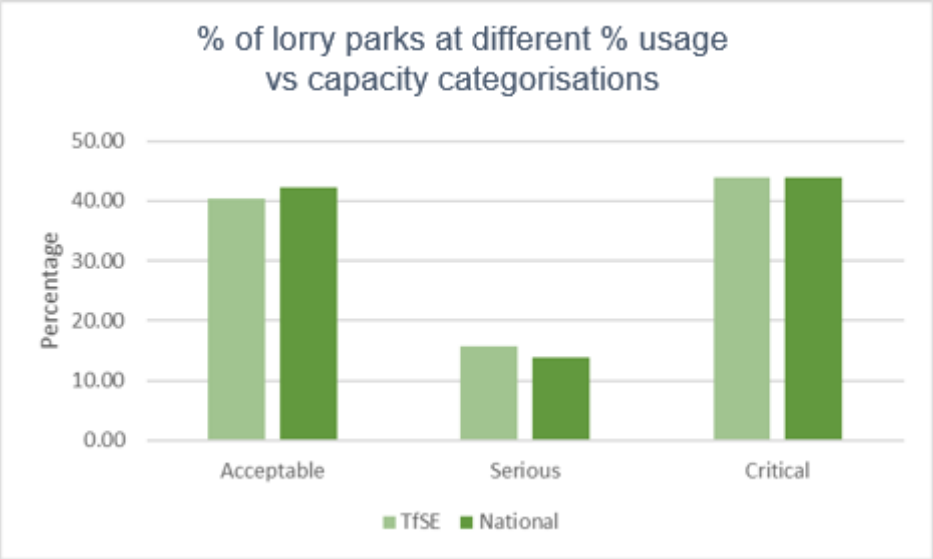


Figure 3.7 Percentage of lorry parks covered by the 2022 national survey at different % usage vs capacity categorisations

Table 3.2 shows the split of UK and non-UK registered HGVs using each parking location type in the TfSE area. This shows that a large proportion of truckstop users were non-UK vehicles (61%), particularly foreign vehicles using truckstops on the M20 and M2 corridors and close to the Port of Dover. Conversely, laybys and industrial estates were used by more UK-registered vehicles than non-UK (67% and 66% respectively). One reason for this may be that non-UK registered vehicles may book into large truckstops far in advance to ensure they get a space, whilst UK-registered vehicles may have a greater level of local knowledge and therefore a greater knowledge of good layby and industrial estate locations to use on more of an ad-hoc basis where required.

Table 3.2 UK vs non-UK registered vehicles at parking locations covered by the 2022 national survey in the TfSE area

	UK	Non-UK	All
Truckstops	1190 (39%)	1833 (61%)	3023 (100%)
Laybys	535 (67%)	265 (33%)	800 (100%)
Industrial Estates	243 (66%)	124 (34%)	367 (100%)

3.3 Supplementary data collection

In addition to the 2022 National Survey, the AECOM audit team undertook four in-depth nighttime investigations in February and May 2023 on a number of non-SRN routes to record the number of UK and foreign HGVs parked sites along this route.

Whilst the 2022 National Survey was a comprehensive study of on-site and off-site parking locations within five kilometres of the SRN, including routes in the TfSE area, there are several other important routes for freight which were not included as they were outside of the DfT study area. Therefore, as part of this TfSE lorry parking study, additional night-time audits were undertaken on non-SRN routes and areas where further investigation was needed within the TfSE area.

Audits included two types of on-site and off-site parking locations, as defined in the DfT 'National survey of lorry parking 2022 – Part one' report, including:

On-site parking facilities

- Independent truckstops

- Trunk road service areas (TRSAs)

Off-site parking locations

- Industrial estates
- Laybys

There are several aims, and benefits of additional region-specific audits being undertaken, including:

- Helping to identify any locations used for parking by HGVs away from the SRN
- Building a more comprehensive picture of lorry parking across the TfSE area, by looking to add to (and not duplicate) the data pool from the March 2022 DfT national survey
- Identifying potential 'rat-runs' and cut-through routes that HGVs are using in the TfSE area
- Looking at whether any non-SRN routes are close to or over lorry parking capacity and whether there are any key hotspots
- Understanding what lorry parking facilities are available to drivers using non-SRN routes in the TfSE area

These routes were selected to augment the SRN data to allow a better understanding of non-SRN parking levels and to build a more comprehensive picture of lorry parking across the TfSE area. The selection criteria to identify the routes to be surveyed was based on a number of inputs such as feedback from the local authorities about areas where problem parking had been mentioned (such as around Southampton and Portsmouth) or routes which desk top research had highlighted as potential alternative routes for HGVs away from the SRN and finally the A31 was also chosen to add data to the demand forecast modelling for a non-SRN route. The data outputs of these audits also provided a sample of information which could be used to provide a forecast for non-SRN lorry parking in the TfSE area.

The routes surveyed included sections of the following roads and areas:

- A31 (Guildford to Winchester)
- A272 (Winchester to Hadlow Down)
- A322 (Lightwater to Reading via Bracknell)
- A265 (Heathfield to Hurst Green)
- A229/A268/A28/A262/A274 (Hurst Green to Maidstone)
- A32 (Fareham to Alton)
- A30 (Basingstoke to Farnborough)
- A24 (Dorking to Horsham)
- A25 (Reigate to Sevenoaks)
- A257 (Sandwich to Canterbury)
- A26 (Uckfield to Lewes)
- A29 (Fontwell to Clemsfold)
- A283 (Pullborough to Milford)
- A22 (Polegate to East Grinstead)
- A264 (Royal Tunbridge Wells to Crawley)
- A339 (Alton to Basingstoke)
- A226 (Dartford to Wainscott)
- A228 (Wainscott to Grain)
- A227 (A2 to A25)
- Industrial estate clusters, for example the Riverside Industrial Estate, Crossways Business Park, Crete Hall, Northfleet Industrial Estate, Medway City Estate and Knight Road around Dartford and the Medway Towns

Figure 3.8 shows a map of the TfSE area with the lorry parking sites visited as part of these additional audits, and the routes taken.

Figure 3.8: Lorry parking sites visited, and routes taken as part of non-SRN 2023 audits

The results of these supplementary surveys were used to provide an estimate of the parking on non-SRN routes for the whole TfSE area. This captured approximately 31% of the non-SRN and was used as a factor to estimate levels of parking on the rest of the network based on what had been surveyed. Table 3.3 shows an overview of the estimate demand for truck parking in the TfSE area, with an estimated 1,245 vehicles parked on the non-SRN across the TfSE area at night.

The number of each parking location type for the non-SRN has also been estimated. Similarly, this scaled up the number of sites that were audited as part of the series of non-SRN audits and applied this as a factor to establish lorry parking for the rest of the network. It is important to note that the number of each type of parking location on the non-SRN is an estimation of the potential number of these sites and therefore data is not available for specific sites. Further information about the supplementary audits undertaken on non-SRN network can be found in Appendix D.

Table 3.3 Estimated demand for truck parking on the non-SRN network in the TfSE area

Parking location type	Estimated number of locations	Estimated number of vehicles parked
Truckstops	29	445
Industrial estates	110	419
Laybys	616	381
Total	755	1,245

An estimated total of 1,245 vehicles are estimated to park overnight on the non-SRN network compared to 4,190 observed on the SRN. It is estimated that approximately 77% of HGV parking at night takes place on the SRN with only 23% estimated to take place on the non-SRN. Additionally, there are an estimated 755 parking locations on the non-SRN network compared to 586 parking locations on the SRN. It is estimated that approximately 44% of HGV overnight parking sites are on

the SRN compared to 56% on the non-SRN. This is mainly due to there being an estimated higher number of laybys on the non-SRN in the TfSE area compared to the SRN.

3.4 HGV Parking Route profiles

HGV parking profiles have been created for 11 routes on the Strategic Road Network (SRN) in the TfSE area and for the A31 which is on the Major Road Network (non-SRN). Profiling the A31 allowed flows to be calculated for an extra non-SRN route. This provided enough information to then scale up the rest of the non-SRN in order to produce forecasts for the whole region.

To understand the current demand for overnight lorry parking along the SRN routes, data from the March 2022 DfT national survey of lorry parking was used. This provided the locations of all lorry parking sites within 2.5km of the SRN in the TfSE area split by on-site parking facilities, laybys, and industrial estates as well as the number of vehicles parked in these and the lorry parking capacity of each on-site parking facility.

Next, the lorry parking sites located within 2.5km of each of the eleven routes were identified from all lorry parking sites in the TfSE area. This established the number of vehicles parked along each route as well as current parking capacity at on-site facilities along each of these routes. These figures enabled additional calculations to be performed, including working out the 2022 on-site capacity versus the total number of HGVs parked to understand current on-site parking provision versus parking demand.

To get an average HGV flow on each SRN route, data from the National Highways WebTRIS[4] system was used. Numbers of vehicles travelling in each direction in the month of March 2022 for four count points, 24 hours Monday-Friday, on each route was downloaded. These count points were strategically chosen because they were spaced approximately equidistant along the route, however the requirement for a full month of data for March 2022 meant that some potential count points had to be discounted as they did not cover this specific time period. March 2022 was chosen as this was the month in which the DfT national survey of lorry parking was conducted, ensuring the time periods for flows and lorry parking data matched.

Then, the number of vehicles which were over 6.6m in length was split out from the overall traffic. This means that in addition to HGVs, some coaches may be included in the data, however these numbers should not materially affect the analysis. Once split out, the large vehicle flows were divided by four (as there were four count points per route) to provide an average flow for each route, then divided by 23 (as there were 23 weekdays in March 2022) to give the final figure of the average HGV flow per 24 hours per weekday in both directions in March 2022 for each route.

For the non-SRN network the process was slightly different. Survey data was used for the A31 from the further information gathering exercise conducted in February 2023. Additionally, to get the average flow on the A31, data from DfT Road Traffic Statistics was used. This is slightly different to WebTRIS data as it uses manual surveys and converts this data into Annual Average Daily Flow (AADF) which is split by vehicle type including HGVs. However, the methodology of using four count points spaced approximately equidistant along the route was the same. In addition, it is worth noting that the AADF figure used for the A31 is based on data from 2019, and whilst this does not match the audit date of March 2023, this still offers a useful comparison and enabled detailed analysis to be performed.

Finally, for all routes the following formula was used to calculate the parking demand factor. The calculation is based on the ratio of parking of overall HGV traffic within each of the routes analysed and is a measure of the proportion of overall traffic flow that chooses to park.

$$\text{Parking Demand Factor} = \frac{\text{Number of parked HGVs observed within catchment}}{\text{Total traffic volume observed within catchment}}$$

One aspect to note is that the parking demand factor is sensitive and can be skewed based on several route characteristics. One example is route length, as longer routes may lead to a greater number of HGVs parked. However, this is not expected to materially impact the analysis and results. The other key factor is the ratio between HGV flow and number of HGVs parked on the route. A higher flow with fewer HGVs parked on the route itself (for example if there are fewer large on-site

[4] https://webtris.highwaysengland.co.uk/

parking facility on the route itself) will result in a lower parking demand factor, whereas a lower flow with a higher number of HGVs parked will result in a higher factor.

For each route, a forecast has then been made both for the change in average HGV flow as well as the change in the requirement for HGV parking spaces.

The DfT National Transport Model predicts an average HGV growth of 22 per cent between the model base year of 2015 and 2040, an equivalent of 0.88 per cent per annum. The method will apply this growth-per-year factor to the TfSE area as a whole as a medium case in order to reflect national forecasts and take account of changes in the transport of goods such as construction of new roads and economic growth estimates as well as modal shift. Forecasts have been made every 6 years from 2022 up to 2040 to demonstrate the incremental changes in flows over the next 18 years. For continuity, the 2023 A31 survey counts, and the 2019 flows data have been used as the basis for the 2022 base year, whilst for the other routes the 2022 data is used as the basis for the 2022 base year.

To recognise future uncertainties and fluctuations, a low case using an increase of 0.66% per annum and high case using an increase of 1.1% per annum have been forecast in addition to the medium case. These percentages have been chosen to be 0.22% above and below the medium case to indicate how different scenarios may impact future growth in HGV flows along these routes.

Once the HGV flow forecasts have been made, these are multiplied by the parking demand factor for each route in order to calculate the forecast requirement for HGV parking spaces for each of the years and cases.

As with any forecast, it is important to note that these are indicative and subject to a variety of potential changes and fluctuations. Nevertheless, they should help to provide a useful indication of what future flows and HGV parking requirements may be going forward.

It is worth noting that for the A259/A2070, the parking demand factor of 146.0 means that nearly 1.5 times the weekday 24-hour HGV flow was observed being parked during the 2022 national survey of lorry parking. However, this is due to the Ashford International Truckstop being along the route, which primarily serves the M20/A20 route, therefore skewing the parking demand factor for the A259/A2070.

Table 3.4 is a comparison table for all routes that have been studied. This helps to illustrate the diverse nature of the routes, with interesting and significant differences in HGV flows and requirement for lorry parking between them. However, there were also similarities, especially that all but one of the routes had a lower capacity within the on-site parking facilities when compared with the number of vehicles parked on the route, showing a need for drivers to use off-site parking (laybys and industrial estates).

Table 3.4 Comparison of routes investigated

	M20/ A20	M3	A3/ A3(M)	M27/ A27	M2	A259/ A2070	M23/ A23	A21	M25/ A282	A34	M4	A31
Average HGV flow per 24 hours per weekday in both directions[5]	13,044	12,245	3,875	4,453	11,411	466	11,457	2,165	24,661	9,822	12,807	1,005
SRN/Non-SRN	SRN	SRN	SRN	SRN	SRN	SRN	SRN	SRN	SRN	SRN	SRN	Non-SRN
Total HGVs parked	1,463	339	113	360	803	682	73	57	565	284	328	14
Parked at truckstop parking locations	1,336	266	55	233	626	650	34	3	444	187	297	0
Parked in laybys	86	46	50	57	125	3	33	50	113	80	23	9
Parked in industrial estates	41	27	8	70	52	29	6	4	8	17	8	5
Recorded truckstop capacity	1,318	258	85	257	681	650	26	8	392	152	386	0
Recorded truckstop occupancy (%)	101.4	103.1	64.7	90.7	91.9	100	130.8	37.5	113.3	123	76.9	N/A
Truckstop capacity versus total HGVs parked	-145	-81	-28	-103	-122	-32	-47	-49	-173	-132	58	-14
Parking demand factor[6]	11.2	2.8	2.9	8.1	7.0	146.4	0.6	2.6	2.3	2.9	2.6	1.4
2040 Forecast HGV flows 24 hours Flows (Low Case)	14,594	13,699	4,335	4,982	12,766	521	12,818	2,422	27,590	10,988	14,328	1,124
2040 Forecast 24 Hour HGV Flows (Medium Case)	15,110	14,184	4,488	5,158	13,218	540	13,271	2,508	28,567	11,377	14,835	1,164
2040 Forecast 24 Hour HGV Flows (High Case)	15,627	14,669	4,642	5,334	13,670	558	13,725	2,594	29,544	11,766	15,343	1,204
2040 Forecast HGV spaces required (Low Case)	1,634	379	126	403	898	763	82	64	632	318	367	16
2040 Forecast HGV spaces required (Medium Case)	1,692	393	131	417	930	790	85	66	654	329	380	16
2040 Forecast HGV spaces required (High Case)	1,750	406	135	431	962	817	87	68	677	340	393	17

[5] Data from WebTRIS for SRN routes and DfT Road Traffic Statistics for non-SRN routes

[6] This is the ratio of parking of overall HGV traffic within the catchment area and is a measure of the proportion of overall traffic flow that chooses to park

The individual profiles for the SRN routes are set out below, with the A31 included within the non-SRN Overview later in this section Each profile includes a map which shows:

- The four count points used for each route to calculate the existing and forecast route flows[7]
- The truckstops/Trunk Road Service Areas (TRSAs), Laybys and Industrial Estates within 2.5km of each route[8]
- Crime hotspots for each route, were identified within the NAVCIS freight crime intelligence report[9]. Some routes do not have crime hotspots if these locations are not along these particular routes.
- Hot spots for each route, which are defined as being the truckstops/TRSAs with a 'critical' l level of their capacity being used (85% or higher). Some routes do not have hot spots because the number of trucks recorded as parking there did not meet this threshold for the parking capacity at the site.

In addition to the information on the maps, each profile shows:

- Sites where lorry parking demand is greater than the spaces available as well as the forecast data for 2040 demand. This forecast is based on the DfT National Transport Model, which predicts an average HGV growth of 22 per cent between the model base year of 2015 and 2040, an equivalent of 0.88 per cent per annum[10].
- The hot spots, as well as examples of demand factors and have been identified for each route[11].
- The names of each truckstop/trunk road service area (TRSA) along each route as well as the facilities that each contains. This breakdown of facilities comes from the 2022 National Survey of Lorry Parking[12].

[7] Full analysis and description provided in Appendix B

[8] Full analysis and description provided in Appendix B

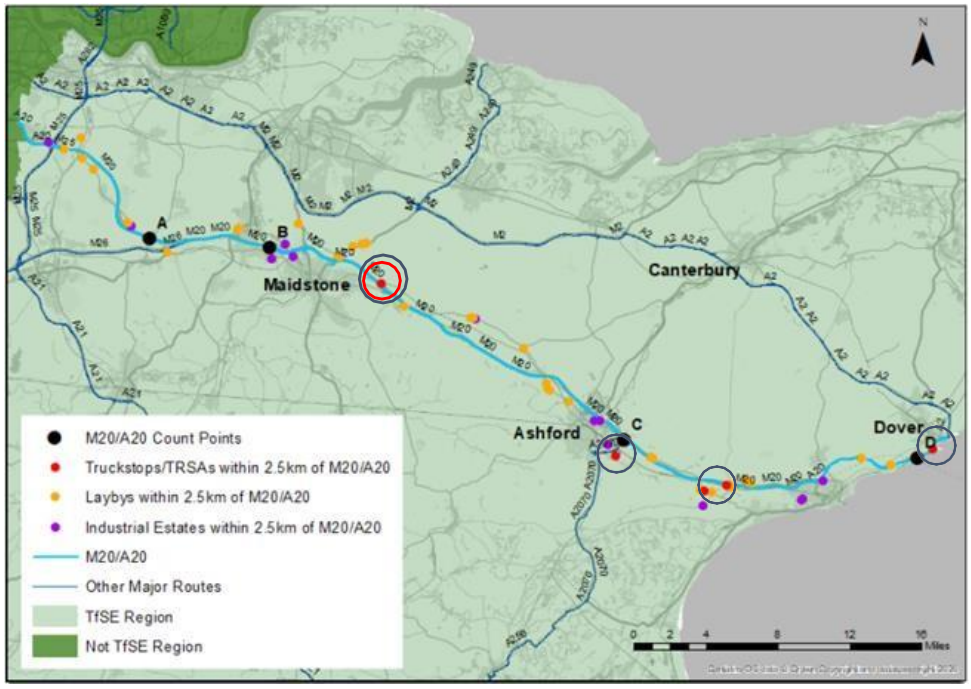
[9] Q3 2022 National Vehicle Crime Intelligence Service (NaVCIS) freight crime intelligence report.

[10] Full analysis and description provided in Appendix B

[11] The qualitative analysis of demand factors for lorry parking for the TfSE region can be found in Appendix C

[12] A full analysis of data from the March 2022 National Survey of Lorry Parking for the TfSE region is shown in Appendix A and a full methodology and route analysis for the chosen SRN routes is found in Appendix B. A qualitative analysis can also be found as part of Appendix C

HGV Parking Overview – M20/A20



Crime Hotspots ◯ Parking Hotspots ◯

	M20/A20
Current excess lorry parking demand	145
2040 forecast excess lorry parking demand (low case)	316
2040 forecast excess lorry parking demand (medium case)	374
2040 forecast excess lorry parking demand (high case)	432

Current state	M20/A20
MSAs / truck stops	5

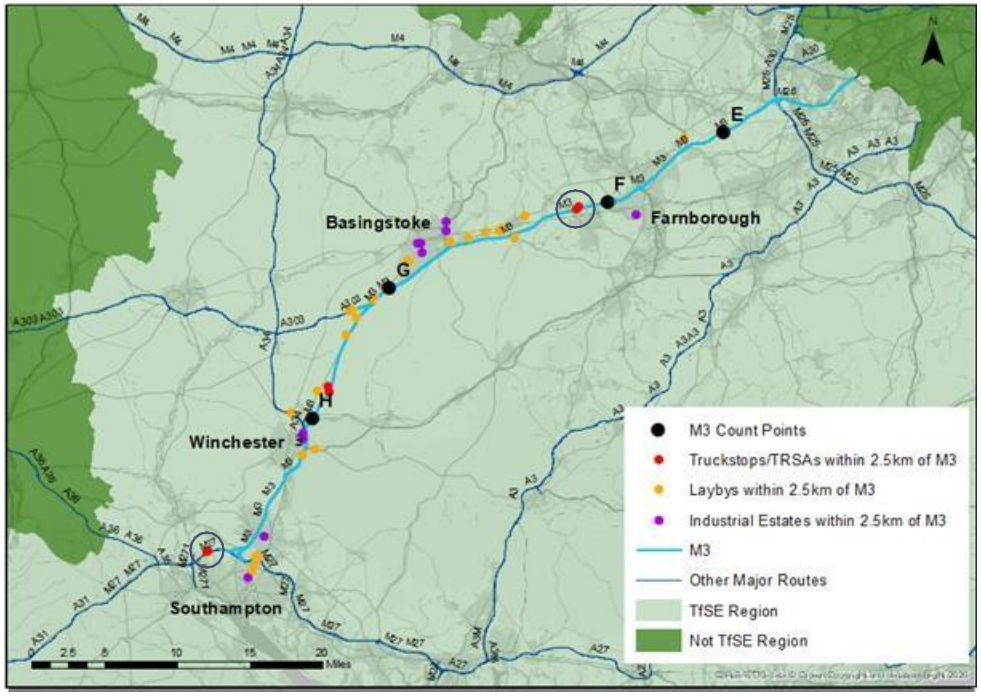
Demand factors

- Dover port masterplan 2045
- Growth in Channel Tunnel Intermodal Freight

MSA / Truck stops	Toilets	Showers	Café / restaurant	CCTV	Lighting	Security fence	Accommodation	Charge points	Filling station	WiFi	Shop	Bar	Gym	Laundry	Driver lounge	Truck wash
Roadchef Maidstone Services	✓	✓	✓	✗	✓	✗	✗	✗	✓	✓	✓	✗	✗	✗	✗	✗
Ashford International*	✓	✓	✓	✓	✓	✓	✗	✓	✗	✓	✓	✓	✓	✓	✓	✗
Airport Cafe	✓	✓	✓	✓	✗	✗	✗	✗	✗	✓	✗	✗	✗	✗	✗	✗
Stop24 Services - Folkestone	✓	✓	✓	✓	✓	✓	✗	✗	✓	✓	✓	✗	✗	✗	✗	✗
Motis Truckstop	✓	✓	✓	✓	✓	✓	✗	✗	✗	✓	✓	✓	✗	✓	✓	✗

*On A259/A2070 but close to M20/A20

HGV Parking Overview – M3



Crime Hotspots ◯ Parking Hotspots ◯

	M3
Current excess lorry parking demand	81
2040 forecast excess lorry parking demand (low case)	121
2040 forecast excess lorry parking demand (medium case)	135
2040 forecast excess lorry parking demand (high case)	148

Current facilities	M3
MSAs / truck stops	6

Demand factors

- Southampton port expansion
- Solent freeport

MSA / Truck stops	Toilets	Showers	Café / restaurant	CCTV	Lighting	Security fence	Accommodation	Charge points	Filling station	WiFi	Shop	Bar	Gym	Laundry	Driver lounge	Truck wash
Moto Winchester (North)	✓	✗	✓	✓	✓	✗	✗	✗	✓	✗	✓	✗	✗	✗	✗	✗
Moto Winchester (South)	✓	✓	✓	✓	✓	✗	✓	✓	✓	✓	✓	✗	✗	✗	✗	✗
Welcome Break Fleet Services Northbound	✓	✓	✓	✓	✓	✗	✗	✓	✓	✓	✓	✗	✗	✗	✗	✗
Welcome Break Fleet Services Southbound	✓	✓	✓	✓	✓	✗	✓	✓	✓	✓	✓	✗	✗	✗	✗	✗
Roadchef Rownhams Services Eastbound*	✓	✗	✓	✓	✓	✗	✗	✗	✓	✗	✓	✗	✗	✗	✗	✗
Roadchef Rownhams Services Westbound*	✓	✗	✓	✓	✗	✗	✓	✗	✓	✗	✓	✗	✗	✗	✗	✗

*On M27 but close to M3

HGV Parking Overview – A3/A3(M)

	A3/A3(M)
Current excess lorry parking demand	28
2040 forecast excess lorry parking demand (low case)	41
2040 forecast excess lorry parking demand (medium case)	46
2040 forecast excess lorry parking demand (high case)	50

Current state	A3/A3(M)
MSAs / truck stops	5

Demand factors

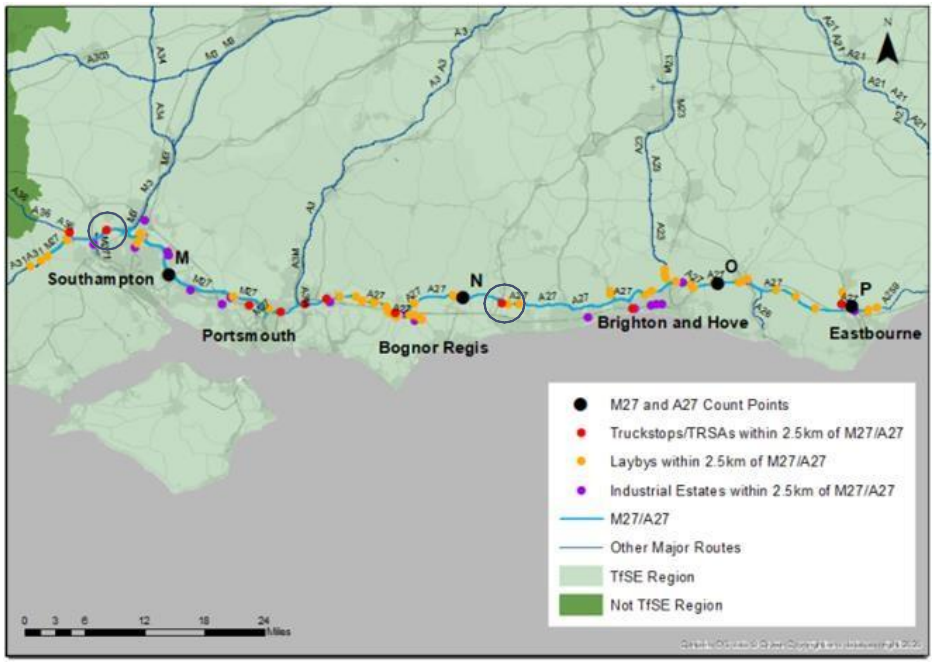
- Portsmouth Port Expansion

MSA / Truck stops	Toilets	Showers	Café / restaurant	CCTV	Lighting	Security fence	Accommodation	Charge points	Filling station	WiFi	Shop	Bar	Gym	Laundry	Driver lounge	Truck wash
South Downs National Park BP	✓	✕	✕	✓	✓	✕	✕	✕	✓	✕	✓	✕	✕	✕	✕	✕
Liphook Services Southbound (Shell)	✓	✕	✕	✕	✓	✕	✕	✓	✓	✕	✓	✕	✕	✕	✕	✕
Liphook Services Northbound (Shell)	✓	✕	✕	✕	✓	✕	✕	✓	✓	✕	✓	✕	✕	✕	✕	✕
Portsmouth - Farlington Truckstop*	✓	✓	✓	✓	✕	✓	✕	✕	✓	✕	✕	✓	✕	✕	✓	✕
Havant Lorry Park*	✓	✓	✓	✓	✓	✓	✕	✕	✕	✕	✕	✕	✕	✕	✕	✕

*On M27/A27 but close to A3/A3(M)

*Havant Lorry Park was open during when the National Survey of Lorry Parking was conducted in March 2022 but has since closed. It is included for completeness.

HGV Parking Overview – M27/A27



Crime Hotspots ○ Parking Hotspots ○

	M27/A27
Current excess lorry parking demand	103
2040 forecast excess lorry parking demand (low case)	146
2040 forecast excess lorry parking demand (medium case)	160
2040 forecast excess lorry parking demand (high case)	174

Current state	M27/A27
MSAs / truck stops	11

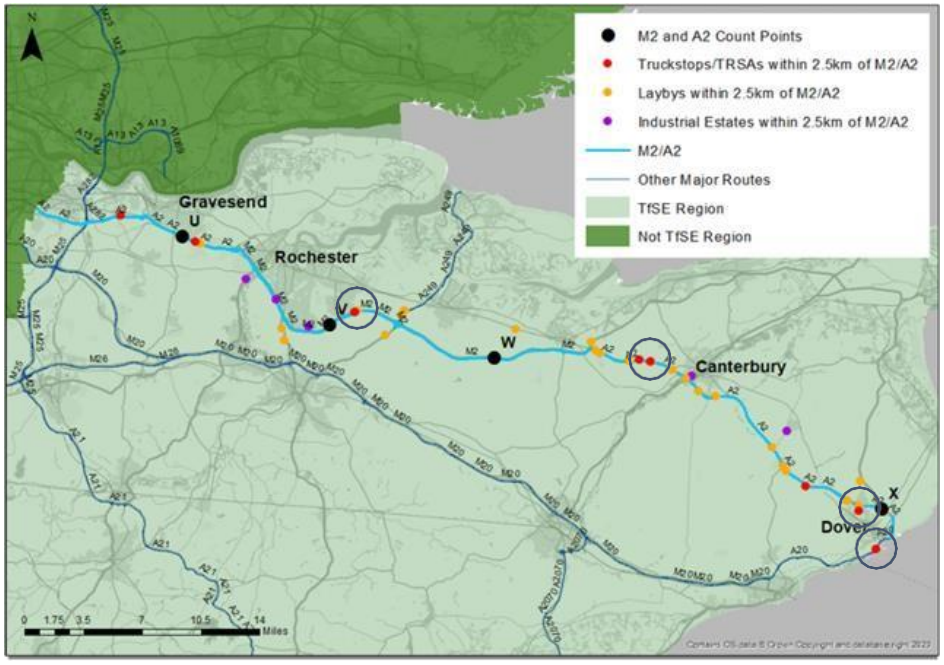
Demand factors

- Solent freeport
- Southampton port growth

MSA / Truck stops	Toilets	Showers	Café / restaurant	CCTV	Lighting	Security fence	Accommodation	Charge points	Filling station	WiFi	Shop	Bar	Gym	Laundry	Driver lounge	Truck wash
Texaco Ower Roundabout services	✓	✗	✗	✓	✓	✗	✗	✗	✓	✗	✓	✗	✗	✗	✗	✗
Roadchef Rownhams Services Eastbound	✓	✗	✓	✓	✓	✗	✗	✗	✓	✗	✓	✗	✗	✗	✗	✗
Roadchef Rownhams Services Westbound	✓	✗	✓	✓	✗	✗	✓	✗	✓	✗	✓	✗	✗	✗	✗	✗
Portchester Lorry Park	✗	✗	✗	✗	✓	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗
Portsmouth - Farlington Truckstop	✓	✓	✓	✓	✗	✓	✗	✗	✓	✗	✗	✓	✗	✗	✓	✗
Havant Lorry Park	✓	✓	✓	✓	✓	✓	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗
Emsworth Services	✓	✗	✗	✓	✓	✗	✗	✗	✓	✗	✓	✗	✗	✗	✗	✗
Via Ravenna Lorry and Coach Park	✗	✗	✓	✗	✓	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗
Crossbush Services	✓	✗	✓	✓	✗	✗	✓	✗	✓	✗	✓	✗	✗	✗	✗	✗
Albion St, Shoreham	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗
Polegate Services	✓	✗	✗	✓	✓	✗	✗	✗	✓	✗	✓	✗	✗	✗	✗	✗

*Havant Lorry Park was open during when the National Survey of Lorry Parking was conducted in March 2022 but has since closed. It is included for completeness.

HGV Parking Overview – M2/A2



Crime Hotspots ○ Parking Hotspots ○

	M2/A2
Current excess lorry parking demand	122
2040 forecast excess lorry parking demand (low case)	217
2040 forecast excess lorry parking demand (medium case)	249
2040 forecast excess lorry parking demand (high case)	281

Current state	M2/A2
MSAs / truck stops	9

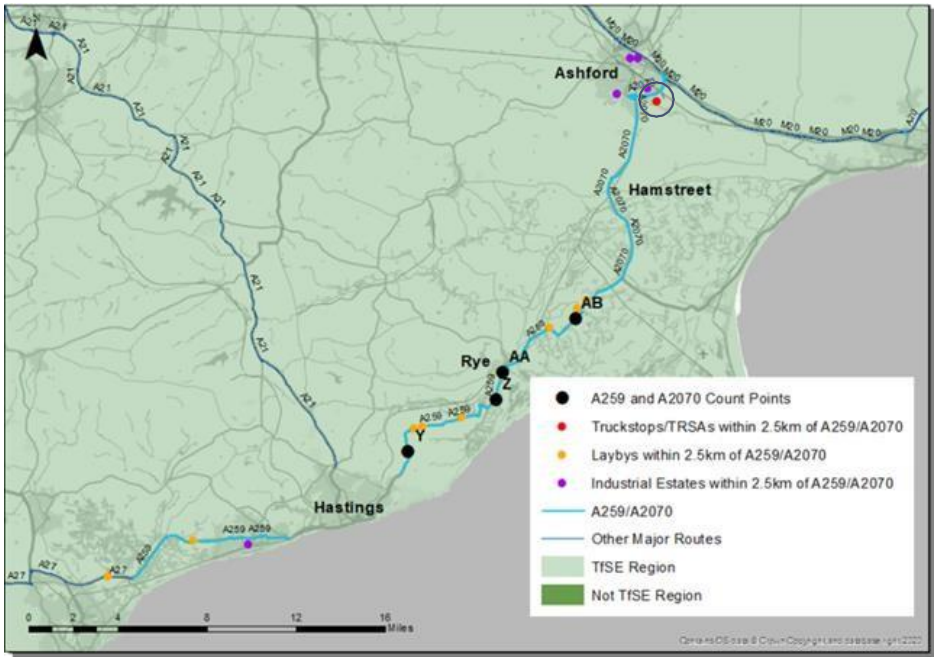
Demand factors

- Dover port masterplan 2045
- Growth in Channel Tunnel Intermodal Freight
- Road upgrade schemes, such as M2 Junction 5

MSA / Truck stops	Toilets	Showers	Café / restaurant	CCTV	Lighting	Security fence	Accommodation	Charge points	Filling station	WiFi	Shop	Bar	Gym	Laundry	Driver lounge	Truck wash
Merrychest Cafe	✓	✗	✓	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗
Esso Cobham	✓	✗	✓	✗	✓	✗	✗	✗	✓	✗	✓	✗	✗	✗	✗	✗
Moto Medway Eastbound	✓	✓	✓	✓	✓	✗	✗	✓	✓	✗	✓	✗	✗	✗	✓	✗
Moto Medway Westbound	✓	✓	✓	✓	✓	✗	✗	✓	✓	✗	✓	✗	✗	✗	✓	✗
Gate Services (Esso)	✓	✗	✓	✗	✗	✗	✓	✗	✓	✗	✓	✗	✗	✗	✗	✗
Dover Truckstop	✓	✓	✓	✓	✓	✓	✗	✗	✗	✓	✗	✗	✗	✓	✓	✗
Motis Truckstop*	✓	✓	✓	✓	✓	✓	✗	✗	✗	✓	✓	✓	✗	✓	✓	✗
Husk UK	✓	✓	✗	✓	✓	✓	✗	✗	✗	✗	✗	✗	✗	✗	✗	✓
BP, Dover Road	✓	✗	✓	✗	✓	✗	✓	✓	✓	✗	✓	✗	✗	✗	✗	✗

*On M20/A20 but close to M2/A2

HGV Parking Overview – A259/A2070



Crime Hotspots

Parking Hotspots

	A259/A2070
Current excess lorry parking demand	32
2040 forecast excess lorry parking demand (low case)	113
2040 forecast excess lorry parking demand (medium case)	140
2040 forecast excess lorry parking demand (high case)	167

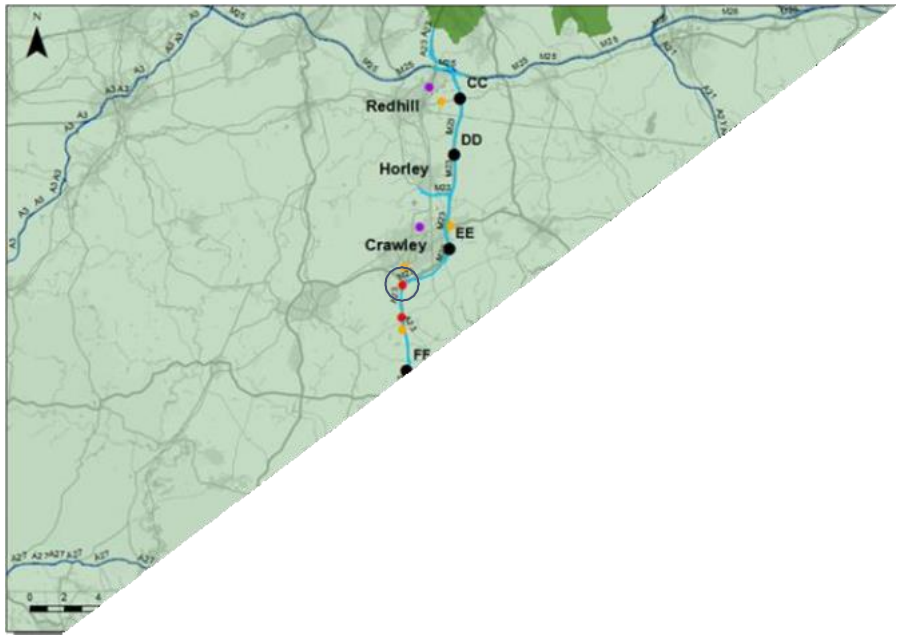
Current state	A259/A2070
MSAs / truck stops	1

Demand factors

- None currently

MSA / Truck stops	Toilets	Showers	Café / restaurant	CCTV	Lighting	Security fence	Accommodation	Charge points	Filling station	WiFi	Shop	Bar	Gym	Laundry	Driver lounge	Truck wash
Ashford International	✓	✓	✓	✓	✓	✓	✗	✓	✗	✓	✓	✓	✓	✓	✓	✗

HGV Parking Overview – M23/A23



Crime Hotspots ◯ Parking Hotspots ◯

	M23/A23
Current excess lorry parking demand	47
2040 forecast excess lorry parking demand (low case)	56
2040 forecast excess lorry parking demand (medium case)	59
2040 forecast excess lorry parking demand (high case)	61

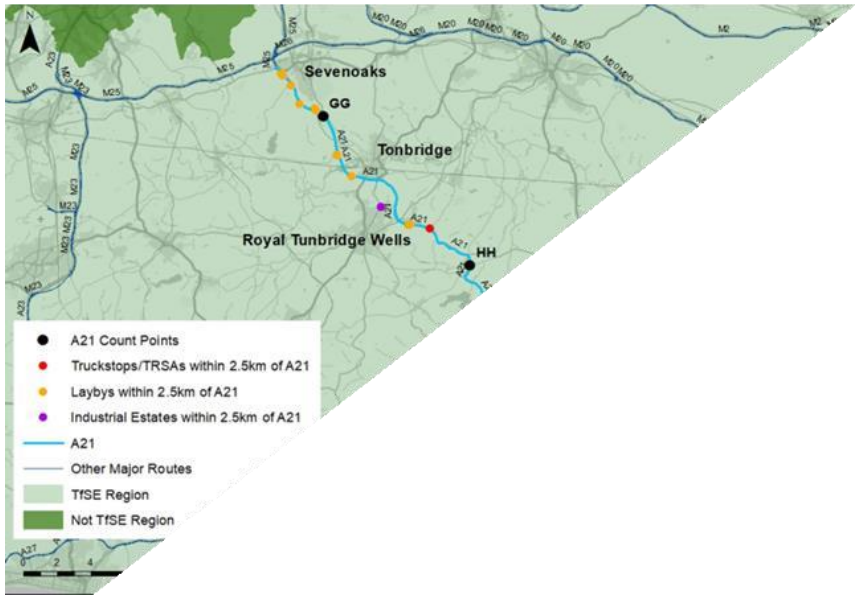
Current state	M23/A23
MSAs / truck stops	2

Demand factors

- Newhaven port masterplan may require more HGV parking on routes near the port

MSA / Truck stops	Toilets	Showers	Café / restaurant	CCTV	Lighting	Security fence	Accommodation	Charge points	Filling station	WiFi	Shop	Bar	Gym	Laundry	Driver lounge	Truck wash
BP Handcross Filling Station	✓	×	✓	×	×	×	×	✓	✓	×	✓	×	×	×	×	×
Moto Pease Pottage	✓	✓	✓	✓	✓	×	×	✓	✓	✓	✓	×	×	×	×	×

HGV Parking Overview – A21



Crime Hotspots

Parking Hotspots

	A21
Current excess lorry parking demand	49
2040 forecast excess lorry parking demand (low case)	56
2040 forecast excess lorry parking demand (medium case)	58
2040 forecast excess lorry parking demand (high case)	60

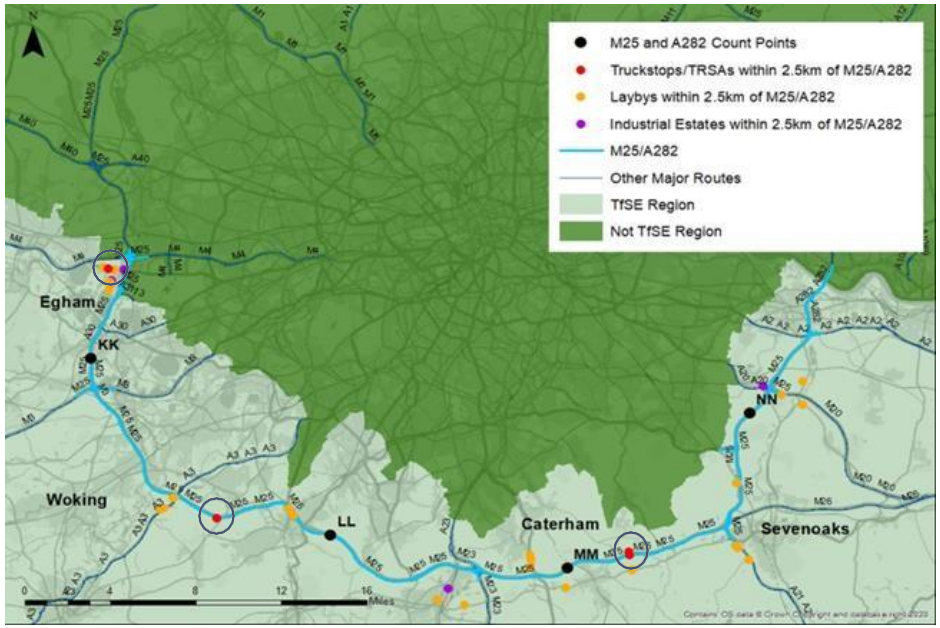
Current state	A21
MSAs / truck stops	1

Demand factors

- None currently

MSA / Truck stops	Toilets	Showers	Café / restaurant	CCTV	Lighting	Security fence	Accommodation	Charge points	Filling station	WiFi	Shop	Bar	Gym	Laundry	Driver lounge	Truck wash
BP Tunbridge Wells Services	✓	✗	✓	✗	✗	✗	✗	✗	✓	✗	✓	✗	✗	✗	✗	✗

HGV Parking Overview – M25/A282



Crime Hotspots ○ Parking Hotspots ○

	M25/A282
Current excess lorry parking demand	173
2040 forecast excess lorry parking demand (low case)	240
2040 forecast excess lorry parking demand (medium case)	262
2040 forecast excess lorry parking demand (high case)	285

Current state	M25/A282
MSAs / truck stops	4

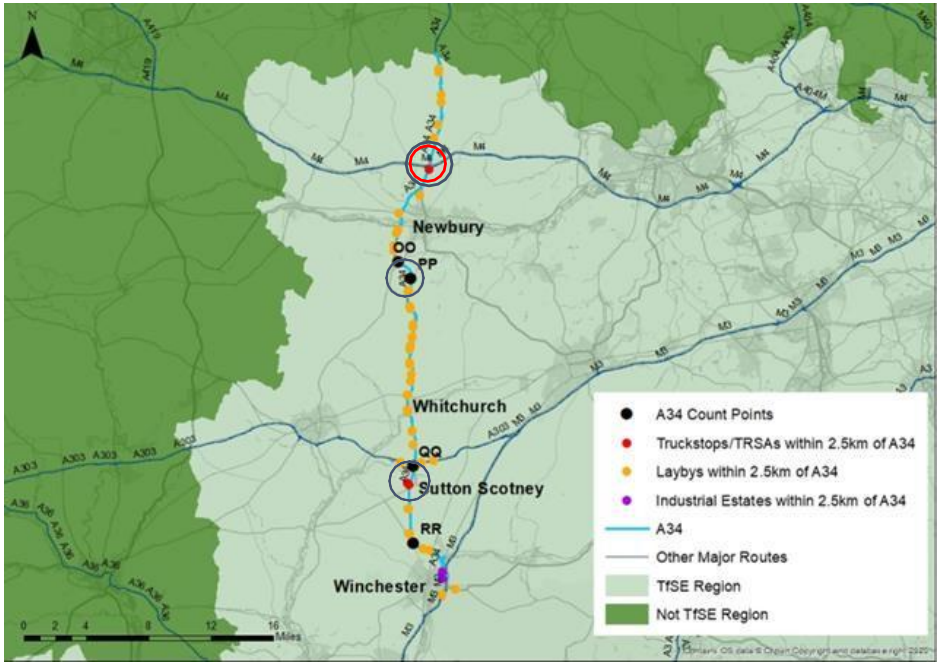
Demand factors

- Increase in freight vehicles using M25 en route to international gateways

MSA / Truck stops	Toilets	Showers	Café / restaurant	CCTV	Lighting	Security fence	Accommodation	Charge points	Filling station	WiFi	Shop	Bar	Gym	Laundry	Driver lounge	Truck wash
Extra Cobham Services	✓	✓	✓	✓	✓	✕	✓	✓	✓	✓	✓	✓	✕	✕	✓	✕
Roadchef Clacket Lane Services Eastbound	✓	✓	✓	✓	✓	✕	✓	✓	✓	✓	✓	✕	✕	✕	✕	✕
Roadchef Clacket Lane Services Westbound	✓	✓	✓	✓	✓	✕	✕	✓	✓	✓	✓	✕	✕	✕	✕	✕
Riverside Transport Cafe*	✓	✓	✓	✓	✕	✕	✕	✕	✕	✕	✕	✕	✕	✕	✕	✕

*On M4 but close to M25/A282

HGV Parking Overview – A34



Crime Hotspots ○ Parking Hotspots ○

	A34
Current excess lorry parking demand	132
2040 forecast excess lorry parking demand (low case)	166
2040 forecast excess lorry parking demand (medium case)	177
2040 forecast excess lorry parking demand (high case)	188

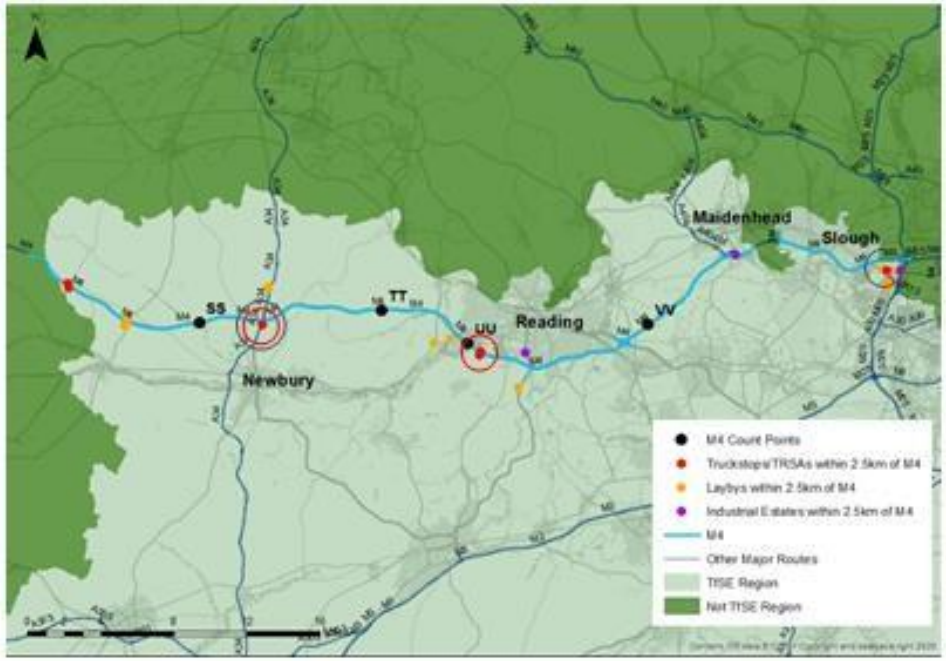
Current state	A34
MSAs / truck stops	4

Demand factors

- Solent freeport
- Southampton port growth

MSA / Truck stops	Toilets	Showers	Café / restaurant	CCTV	Lighting	Security fence	Accommodation	Charge points	Filling station	WiFi	Shop	Bar	Gym	Laundry	Driver lounge	Truck wash
Sutton Scotney Northbound (Roadchef)	✓	×	✓	✓	✓	×	✓	×	✓	×	✓	×	×	×	×	×
Sutton Scotney Southbound (Roadchef)	✓	×	✓	✓	✓	×	✓	✓	✓	×	✓	×	×	×	×	×
Shell Tot Hills Service Area	✓	×	✓	✓	×	×	✓	✓	✓	×	✓	×	×	×	×	×
Moto Chieveley	✓	✓	✓	✓	✓	×	✓	✓	✓	✓	✓	×	×	×	×	×

HGV Parking Overview – M4



Crime Hotspots ○ Parking Hotspots ○

	M4
Current excess lorry parking demand	-58
2040 forecast excess lorry parking demand (low case)	-19
2040 forecast excess lorry parking demand (medium case)	-6
2040 forecast excess lorry parking demand (high case)	7

Current state	M4
MSAs / truck stops	6

Demand factors

- None currently

MSA / Truck stops	Toilets	Showers	Café / restaurant	CCTV	Lighting	Security fence	Accommodation	Charge points	Filling station	WiFi	Shop	Bar	Gym	Laundry	Driver lounge	Truck wash
Welcome Break Membury Services Eastbound	✓	✓	✓	✓	✓	×	✓	✓	✓	✓	✓	×	×	×	×	×
Welcome Break Membury Services Westbound	✓	✓	✓	✓	✓	×	✓	✓	✓	✓	✓	×	×	×	×	×
Moto Chieveley*	✓	✓	✓	✓	✓	×	✓	✓	✓	✓	✓	×	×	×	×	×
Moto Reading Westbound	✓	✓	✓	✓	✓	×	✓	✓	✓	✓	✓	×	×	×	×	×
Moto Reading Eastbound	✓	✓	✓	✓	✓	×	✓	✓	✓	✓	✓	×	×	×	×	×
Riverside Transport Cafe	✓	✓	✓	✓	×	×	×	×	×	×	×	×	×	×	×	×

*On A34 but close to M4

3.5 Truckstop/TRSA utilisation

Figure 3.9 shows the truckstops and TRSAs covered by the March 2022 National Survey of Lorry Parking which were recorded as having a critical level of their capacity being used. This means that HGVs are using 85% or more of the available parking capacity at the site. This shows truckstops with a critical level their parking capacity being used are spread all over the TfSE area, but clusters exist especially around international gateways. As shown in Figure 3.8 sites with a critical level of capacity are concentrated in Kent, especially around Dover, as well as around Southampton.

Figure 3.9 also shows the truckstops and TRSAs covered by the March 2022 National Survey of Lorry Parking which were recorded as having acceptable or serious levels of HGVs parked compared to the available parking capacity at the site. 'Acceptable' is a truckstop or TRSA with HGVs using at or below 69% of the available parking capacity at the site, whilst 'Serious' is a truckstop or TRSA with HGVs using 70 to 85% of the available parking capacity at the site. This means that for all sites shown, the amount of HGVs parking was less than 85% of the available parking capacity at the site, indicating there is potentially space available for trucks to use within these sites. Clusters of sites with a low number of HGVs parked compared to the available parking capacity at the site are observed around the port of Portsmouth as well as in north Kent, especially along the M2 and A2.

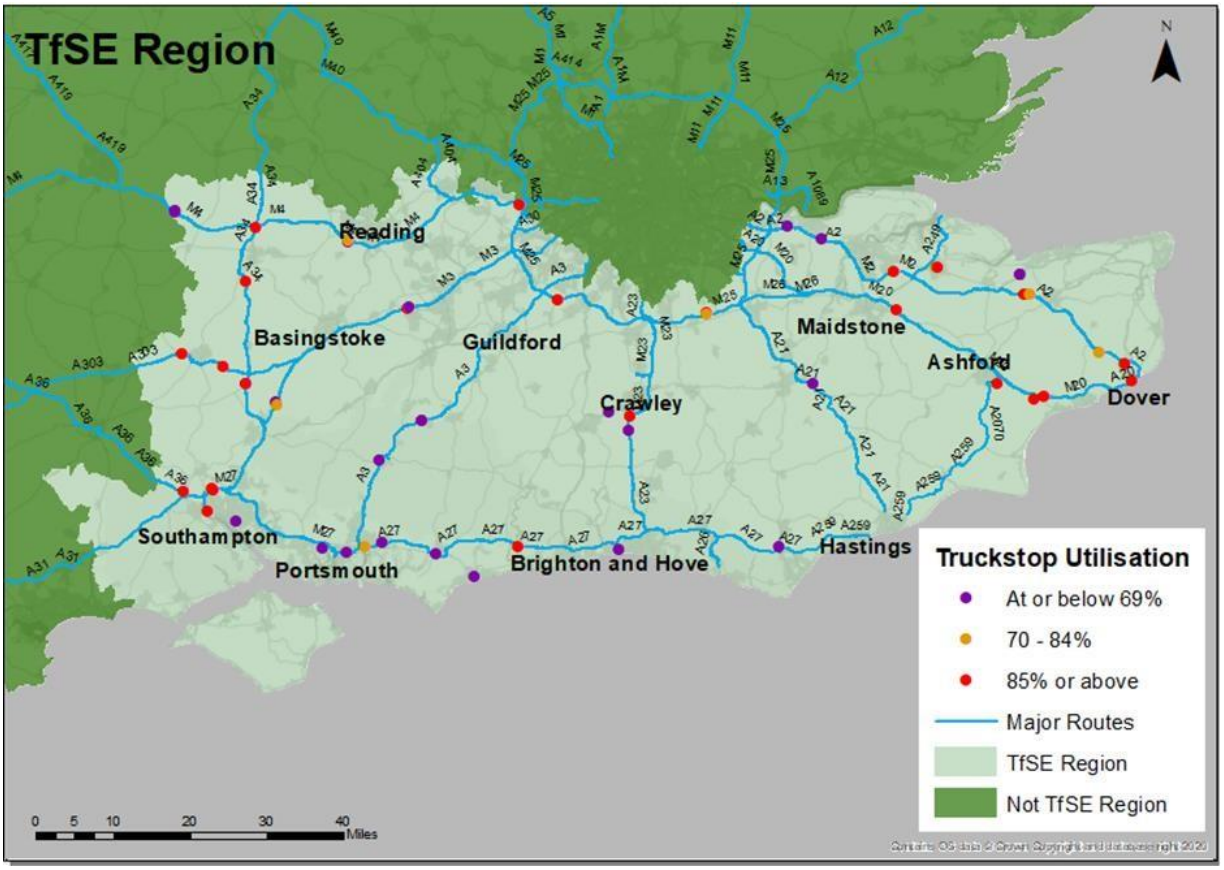
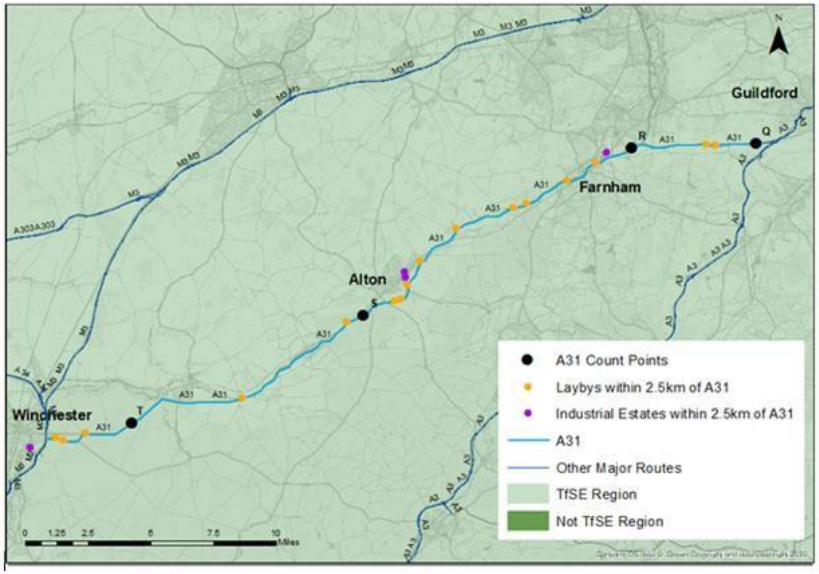


Figure 3.9 Truckstops and TRSAs in the TfSE area identified as having different levels of utilisation during March 2022 audits

3.6 Non-SRN Overview

Following on from the route profiles created for the SRN, a route profile that has been created for the A31 is shown below.

HGV Parking Overview – A31



Crime Hotspots ◯ Parking Hotspots ◯

	A31
Current excess lorry parking demand	14
2040 forecast excess lorry parking demand (low case)	16
2040 forecast excess lorry parking demand (medium case)	16
2040 forecast excess lorry parking demand (high case)	17

Current state	A31
MSAs / truck stops	-

Demand factors

- None currently

(No MSAs/TRSAs on A31)

An estimation of current demand and future forecast for the level of lorry parking demand on the non-SRN network within the TfSE area has been produced. Two sources of information were used for this which were the results of the audit on the A31[13] and the results of the additional surveys undertaken on the non-SRN network as part of this study. Approximately 31% of the non-SRN was covered during the non-SRN audits which were conducted as part of this study.[14] The outputs from these two sources of information have been scaled up to estimate the parking requirement for the whole non-SRN within the TfSE area and to produce a forecast of future HGV parking demand. The flows are based on DfT road traffic statistics data from 2019 whilst the HGV parking figures are based on 2023 audits of the non-SRN.

3.7 Results of driver surveys

Prior to the non-SRN audits taking place, a series of driver surveys were undertaken. These were intended to enable a better understanding of the overnight parking preferences of drivers. The results of these surveys indicated that some drivers would rather double park or not find a suitable lorry parking location if that meant going over their hours.

Some of the other key findings from the driver surveys included the following: :

- Site selection was primarily driven by immediate availability, as there were no distinct preferences among drivers regarding specific Motorway Service Area sites. One driver mentioned that, given sufficient time, they would continue driving until they found a suitable location that accepted Snap. Snap is a payment system and national parking account for drivers and fleet operators.
- Drivers relied heavily on their local knowledge of the area when planning and selecting overnight parking locations, indicating the significance of their familiarity with their surroundings in making informed decisions.
- Proximity to the strategic road network (SRN) was a crucial factor for drivers when selecting locations for overnight parking as there could be difficulties re-joining the SRN.
- The respondents also identified several common issues with overnight parking locations, of particular concern were the lack of security measures, such as the absence of CCTV, lighting, and fences at a number of locations, and inadequate facilities such as toilets and showers.
- The high costs associated with parking at MSAs led some companies to consider it more cost-effective to risk occasional fuel theft rather than paying for parking; one company determined that it was cheaper to have fuel stolen from an HGV once a month than pay for on-site overnight parking for their drivers.

These driver surveys helped AECOM identify where parking locations were, and where potential parking could be located on the non-SRN. These included particular industrial estates, as well as other miscellaneous parking locations such as behind pubs and restaurants as well as along particular stretches of road.

Figure 3.10 shows the routes that were covered as part of the non-SRN audits and the HGV parking sites that were visited.

[13] Explained further as part of Appendix B

[14] A more detailed description of the NON-SRN audits can be found in Appendix D

Figure 3.10 Routes covered and sites audited as part of the non-SRN audits

Figure 3.11 shows the truckstops/TRSAs visited as part of the non-SRN audits that had a critical level of HGV parking compared to the available parking capacity at the site (over 85%). This shows that these locations were spread across Kent and East Sussex.

Figure 3.11 Truckstops/TRSAs that were identified as having a critical level of HGV parking as part of the non-SRN audits

Table 3.5 shows the forecast additional on-site capacity requirement for the non-SRN. This is based on the forecast demand cases for the non-SRN and is based on the estimated on-site capacity across the TfSE area which is currently estimated as 571 spaces. In the high case in 2040, there is a forecast excess lorry parking demand of 921 spaces[15].

Table 3.5 Forecast additional on-site capacity requirement for the non-SRN

	Non-SRN
Current excess lorry parking demand	674
2040 forecast excess lorry parking demand (low case)	822
2040 forecast excess lorry parking demand (medium case)	871
2040 forecast excess lorry parking demand (high case)	921

Figure 3.12 shows an overview of the spare parking capacity observed across all of the on-site parking facilities audited as part of the supplementary surveys. Of the nine on-site parking locations audited, around 44.5% (4 sites) were found to have an acceptable level of HGVs parking there compared to available capacity, 11% (1 site) was found to have a serious level of HGVs parking there compared to available capacity, and around 44.5% of them (4 sites) were found to have a critical level of HGVs parking there compared to the available capacity.

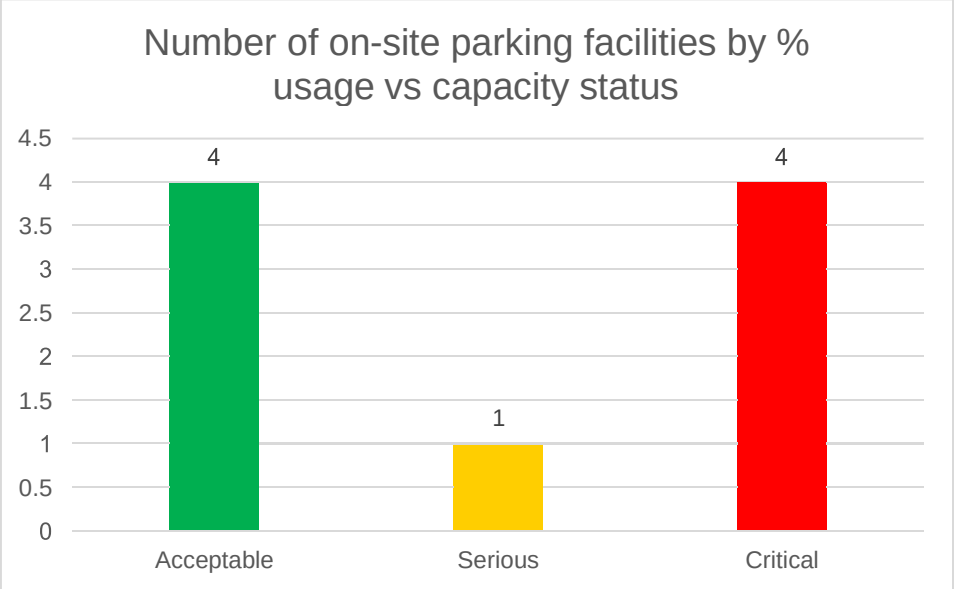


Figure 3.12 Truckstops visited as part of audits by the level of usage compared to available parking capacity

Figure 3.13 shows the number of vehicles observed by parking site type. 118 vehicles in total (around 29% of all vehicles observed) were parked at the 191 laybys audited, 138 at the nine on-site parking facilities audited (around 34%), and 130 (around 32%) at the 34 industrial estates audited. The on-site facility figure includes two independent truckstop (Embassy and United Truckstops) which accounted for 101 of the 138 vehicles (73%) observed at on-site parking facilities.

[15] A full set of outputs from the forecast is provided as part of Appendix B

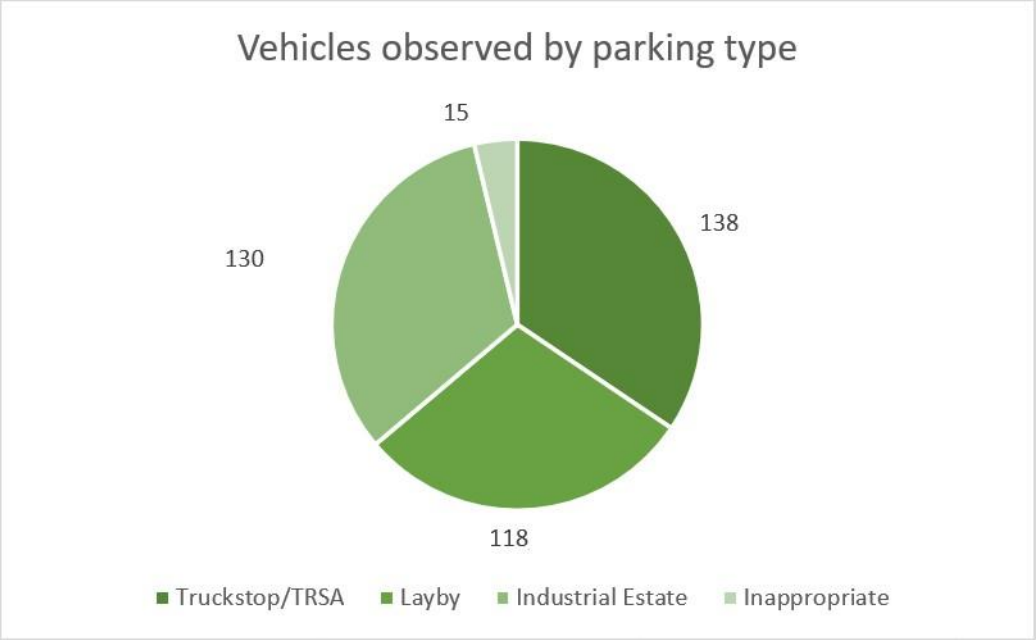


Figure 3.13 Number of vehicles observed by parking site type at each location visited as part of audits

3.8 Trends and changes analysis

In addition to the quantitative forecast, a qualitative narrative has also been developed regarding trends and changes likely to influence future HGV parking supply[16]. There are several factors and influences that will be explored as part of this qualitative analysis. These are:

- Port growth
- Road upgrades
- Change in freight originators and attractors
- Growth in Channel Tunnel intermodal freight

National Infrastructure Planning, managed by the Planning Inspectorate, provides information on proposed Nationally Significant Infrastructure Projects (NSIPs) within England and Wales[17]. This includes projects within the TfSE area. Information on specific dates of opening/operation are not given because of the early stage of these projects. At time of writing, there are several developments that are listed as being at the decided or pre-application stage which may become key freight originators and attractors during the construction phase, the operational phase, or both.

The following projects are marked as 'decided', meaning that a decision has been made by the relevant body or individual, such as the Secretary of State, on whether development consent is accepted or refused. The following projects include those for which development consent was granted:

- Manston Airport (RiverOak Strategic Partners Ltd)
- Thurrock Flexible Generation Plant (Thurrock Power Ltd)
- Southampton to London Pipeline Project (Esso Petroleum Company, Ltd)
- Cleve Hill Solar Park (Cleve Hill Solar Parl Ltd)
- Tilbury2 (Port of Tilbury London Ltd)
- Richborough Connection Project (National Grid)

[16] Full quantitative analysis is provided as part of Appendix C

[17] https://infrastructure.planninginspectorate.gov.uk/projects/south-east/

Projects marked as ‘pre-application’ include:

- Gatwick Airport Northern Runway (Gatwick Airport Limited)
- Stonestreet Green Solar (EPL 001 Limited)
- Rampion 2 Offshore Wind Farm (Rampion Extension Development Limited)
- Hampshire Water Transfer and Water Recycling Project (Southern Water Services Limited)
- Sea Link (National Grid Electricity Transmission)
- Perrys Farm Hazardous Waste Management Facility (Peel Environmental)
- Junction 11 M27, Electric@11, existing car charging site with potential for additional HGV charging and parking allocation

It will be important that suitable provision of lorry parking is provided during the construction and operational phases of these projects to ensure adequate provision and facilities are available for lorry drivers.

3.9 Implications of a lack of HGV parking

There are several direct and indirect implications if a shortage of HGV parking in the TfSE area is not addressed. Examples of these include:

- **Road safety issues –** For example inappropriately parked trucks causing an obstruction or overcrowding of laybys. There are also safety issues with trucks parking at the side of the road where other vehicles have to go around trucks with an obstructed sightline.
- **Environmental issues –** For example littering, and inappropriate disposal/discarding of (human) waste. The National Highways reporting system has multiple reports of litter on grass verges across the UK, including in the south east such as along the M20[18].
- **Increased freight crime –** Insecure lorry parking, such as in laybys and industrial estates, encourages freight crime. This can lead to additional crime hotspots developing. NavCIS recorded 16 freight crime hotspots across the UK, of which 3 were in the south east[19] (Chieveley Services, Reading Services and Maidstone Services).
- **Industry Image –** A shortage of lorry parking can act as a deterrent for potential HGV drivers entering the industry, including those underrepresented such as female drivers. It is also a reason for existing drivers leaving the industry. In March 2023, it was estimated there is a UK-wide shortage of 60,000 HGV drivers[20].
- **Antisocial behaviour –** Such as issues caused by the absence of toilets and other facilities. In the past in Kent, for example, human waste has been found in laybys[21] which is unpleasant and can present an environmental hazard.

As part of this study the project team consulted with the local authorities within the area to identify improvement opportunities.

[18] https://report.nationalhighways.co.uk/around?lat=51.08993&lon=1.13166&js=1&zoom=0

[19] Q3 2022 National Vehicle Crime Intelligence Service (NaVCIS) freight crime intelligence report.

[20] https://fleetpoint.org/fleet-management-2/driver-shortage/where-are-we-now-with-the-hgv-driver-shortage/

[21] https://www.kentonline.co.uk/canterbury/news/stop-lorry-drivers-dumping-trash-in-pot-holed-verges-190148/

4. Potential improvements to truckstop provision

This section provides a summary of the engagement that has taken place with local authorities regarding improvements to sites in the TfSE area, as well as the outputs from this engagement.

4.1 Funding to improve site facilities

Government funding has been made available nationally to improve lorry parking facilities from two main sources. The National Highways designated funds (£20 million) and DfT funding (£32.5 million) have been made available to improve driver welfare and security.

It is understood that seven truckstops on the SRN in South East have applied for funding to date, including one site where the study team visited and discussed funding opportunities with the site manager. Although the study team have been made aware of the applicants who include a number of MSA operators and one independent truckstop operator, due to the confidentiality of the process the names and locations of these sites have not been included in the report.

Where an email address was available, an email was sent on behalf of TfSE to the sites that haven't applied for funding (12 out of 50) to make them aware of the availability and process for applying for the existing National Highways funding for 2023, again due to the confidentiality of the process the names and locations of these sites have not been included in this report. It is recommended that all sites are made aware if further DfT funding is made available in 2024.

The NH and DfT funding streams were established specifically to improve the standard of facilities at truckstops. Although this will not increase capacity at the sites it will improve the standard of the facilities provided which will help to encourage more drivers to utilise on-site parking.

The local authority feedback included recommendations on a number of sites within the region that they believe would benefit from funding to improve the facilities.

Tasked with maintaining all non-trunked roads, laybys and public car parks in their respective areas, local transport authorities have a vested interest in keeping their roads moving and their communities safe from dangerous and illegal HGV parking. An important component of the study was to capture any insights or feedback from local authorities across the South East area on current lorry parking provision, the demand for parking and driver facilities, related issues, and any potential hotspots for consideration.

The key stakeholders contacted during the project are listed below:

- Southampton City Council
- Portsmouth City Council
- Kent County Council
- Reading Council
- Slough Borough Council
- Medway Council
- Isle of Wight Council
- Brighton and Hove City Council
- West Berkshire Council
- Royal Borough of Windsor and Maidenhead
- Wokingham Borough Council
- Hampshire County Council
- West Sussex County Council
- Bracknell Forest Council

They were asked to provide any information which they may have already collected to help identify existing sites that would benefit from facility and capacity improvements. TfSE and local authorities will work with private site operators to look at how we can take these proposals forward.

4.2 Database of HGV parking demand

A database has also been created which aims to give local authorities and TfSE a way to input and display any existing and future sites for lorry parking locations when these become known. Table 4.1 shows a snapshot of the front page of this database, which gives a snapshot overview of current demand. When all routes that were analysed are combined, there is a current excess HGV parking requirement of 1,528 spaces, which is forecast to increase to 4,019 spaces by 2040 in the high case. It is worth noting that some sites are within 2.5km of multiple corridors. The spreadsheet will be made available to TfSE for them to disseminate to the local transport authorities in their area.

Table 4.1 Snapshot of the database giving an overview of the current HGV parking demand

Corridor	2022 SRN/non-SRN HGV parking sites within 2.5km of corridor	2022 SRN/non-SRN HGV parking spaces within 2.5km of corridor	2022 excess HGV parking	2040 high case forecast excess HGV parking demand
M20/A20	5	1,318	145	+432
M3	6	258	81	+148
A3/A3(M)	5	85	28	+50
M27/A27	11	257	103	+174
M2/A2	9	681	122	+281
A259/A2070	1	650	32	+167
M23/A23	2	26	47	+61
A21	1	8	49	+60
M25/A282	4	392	173	+285
A34	4	152	132	+188
M4	6	386	-58	+07
Non-SRN	29	571	674	+2,166
Totals	**83**	**4,784**	**1,528**	**4,019**

5. Next steps

The study has identified a current and future excess of overnight parking demand in the region. In order to address the negative impact of inappropriate HGV parking and tackle the capacity shortfall, a number of recommendations have been developed.

These recommendations are:

1. Share the report and the lorry parking database with local authorities to make them aware of existing lorry parking facilities and potential future demand within their region. It should be shared with local planning authorities to provide them with more information about the needs of the freight and logistics operators in relation to lorry parking in their region; and with local transport authorities so that they can include the information in action plans in their local transport plans (LTPs) to address any potential LTP Guidance requirements and local transport and planning issues where applicable.

2. Share with National Highways so that they can consider including additional and expanded lorry parking sites on the SRN routes in their route strategies where appropriate and for information in relation to any local action plans to address lorry parking issues.

3. Include the current lorry parking sites in the tool being developed by Midlands Connect to identify and map alternative fuel recharging and refuelling locations for HGVs.

4. Share the report and its recommendations with truckstop developers and operators to inform them about the demand for parking spaces, facilities, site standards and funding opportunities.

5. Disseminate the truckstop location information with HGV operators and drivers to encourage the appropriate use of lorry parking, including adding the current locations and report to the Freight, Logistics and Gateways page on the TfSE website to signpost lorry parking information and details of relevant websites and apps; and run a communications campaign with HGV drivers and operators in the area and produce a truckstop guide with locations of known facilities.

6. Share with the members of the Wider South East Freight Forum to discuss potential ways of addressing the issues highlighted in the report.

6. Conclusions

The provision of suitable lorry parking facilities is a vital requirement for the welfare of HGV drivers in the TfSE area. A shortage of suitable facilities has serious impacts on local communities due to the resulting proliferation of informal overnight lorry parking on local roads, resulting in safety issues for both HGV drivers and other local road users.

As shown in this study there is currently a shortage of an estimated 1,528 HGV parking spaces on the SRN and non-SRN across the TfSE area. This shortage in provision is forecast to increase to 4,019 HGV parking spaces by 2040. A number of hot spots have been identified across the region, where demand is either currently or forecast to be high.

This report has identified some of the implications, both direct and indirect, of having a shortage of HGV parking in the TfSE area. These include road safety issues, environmental issues, increases to freight crime, impact on industry image and anti-social behaviour.

The study has identified a current and future excess of overnight parking demand in the region. In order to address the negative impact of inappropriate HGV parking and tackle the capacity shortfall, a number of recommendations have been identified. These recommendations identify a number of actions that need to be undertaken to address the current and future HGV overnight parking requirements in the region.

Appendix A Lorry parking 2022 national survey data

In 2022, the DfT commissioned AECOM to undertake an audit of lorry parking within five kilometres of the SRN in England.

As part of this national survey, data was collected that allowed AECOM to undertake detailed analysis relating to the current picture of lorry parking. This included analysis regarding:

- The locations of all on-site and off-site parking facilities
- The number of parking facilities by type
- The capacity and the number of HGVs observed parking compared to the available parking capacity at the truckstops
- The number of vehicles observed across all on-site and off-site locations audited, split by parking site type
- The number of UK versus non-UK registered vehicles observed across all parking sites audited.

By geolocating all audited sites, the sites audited within the TfSE area have been identified to allow a region-specific analysis. This included analysis relating to all truckstops, laybys and industrial estates within the TfSE area and enable AECOM to create maps and graphs.

In addition, for the purposes of this study, the following categories to show truckstop usage vs capacity have been used:

Table A.1 Categorisations for the level of HGVs parking compared to available parking capacity at the site

Description	Percentage of HGVs parking compared to available parking at the truckstop capacity versus observed
Critical	Greater than or equal to 85%
Serious	70% to 84% full
Acceptable	Less than or equal to 69% full

Figure A.1 shows the number of lorry parking locations by type covered by the 2022 National Survey in the TfSE area. Overall, there are 57 truckstops (10% of locations), 417 laybys (71% of locations) and 112 industrial estates (19% of locations). This shows that laybys make up the majority of sites within the TfSE area.

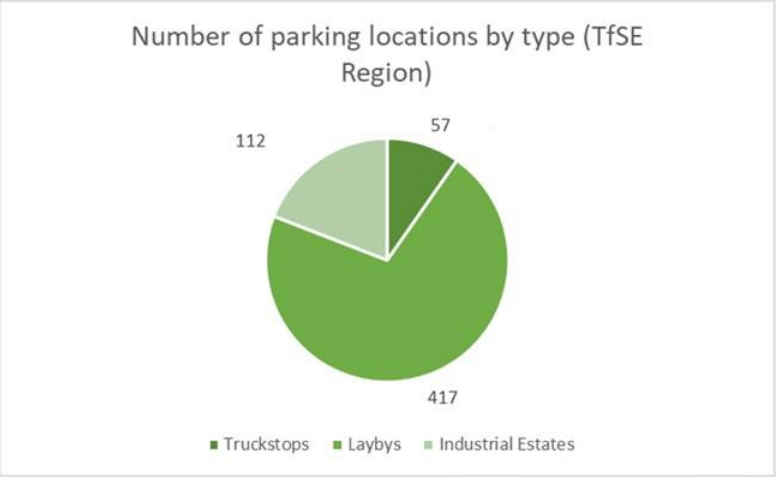


Figure A.1 Number of parking locations by type in the TfSE area covered by the 2022 national survey

Figure A.2 shows a map of lorry parking locations in the TfSE area covered by the 2022 national survey. This shows clusters of truckstops around key locations such as Dover, Southampton and Portsmouth. Industrial estates are mainly located around key urban clusters including Maidstone, Ashford and Basingstoke. Meanwhile, laybys are spread along the major routes with a particularly high concentration along the A34 and A3.

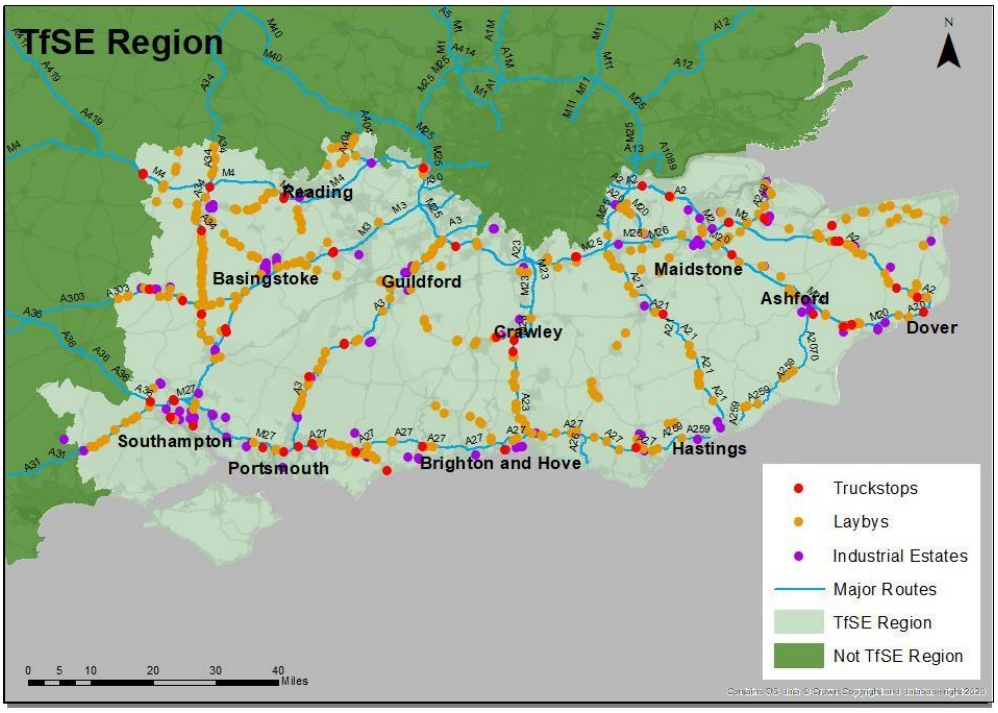


Figure A.2 Lorry parking locations covered by the 2022 National Survey in the TfSE area

Figure A.3 shows the HGV parking locations in Hampshire covered by the 2022 national survey, one county within the TfSE area. This county is spotlighted due to the important ports of Southampton and Portsmouth being included within it. This reinforces the cluster of sites around Southampton, as well as additional clusters of industrial estates around locations such as Andover and Basingstoke. There are also several laybys including along the A34, A3 and M27 west of Southampton.

The truckstops have also been labelled to correspond with those labels in Table A.2 for Hampshire. Table A.2 also shows the capacity and the percentage of HGVs observed parking compared to the available parking capacity at the truckstops in Hampshire.

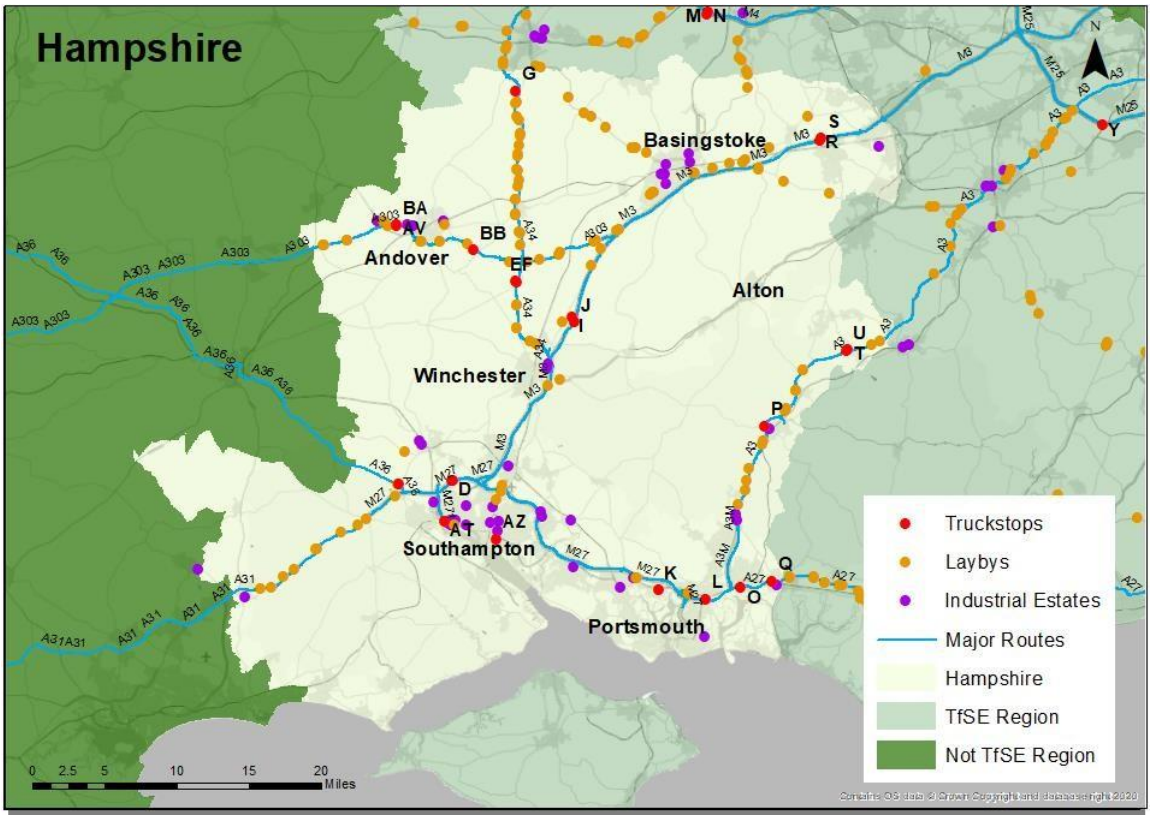


Figure A.3 Lorry parking locations in Hampshire covered by the 2022 national survey

Table A.2 Details for lorry parking locations in Hampshire covered by the 2022 national survey

Truckstop name	Capacity	% of use vs capacity	Under or over 100% of total capacity	Letter Code
Roadchef Rownhams Services Westbound	70	116 %	+16	D
Sutton Scotney Northbound	28	57%	-43	E
Sutton Scotney Southbound	27	133%	+33	F
Shell Tot Hills Service Area	12	275%	+175	G
Moto Winchester {North}	28	36%	-64	I
Moto Winchester {South}	28	75%	-25	J
Portchester Lorry Park	11	36%	-64	K
Portsmouth - Farlington Truckstop	30	60%	-40	L
Havant Lorry Park*	40	73%	-27	O
South Downs National Park BP	6	0%	-100	P
Emsworth Services	10	60%	-40	Q
Welcome Break Fleet Services Southbound	45	116%	+16	R
Welcome Break Fleet Services Northbound	45	69%	-31	S
Liphook Services Southbound	4	200%	+200	T
Liphook Services Northbound	5	0%	-100	U
Cartland Truck Stop	35	140%	+40	AT
Weyhill Services	10	70%	-30	AV
Woolston and District Lorry Park (Oakbank Lorry Park)	10	40%	-60	AZ
BP Weyhill Service Area East	6	100%	0	BA
BP Weyhill Service Area West	6	183%	+83	BB

*Havant Lorry Park was open during when the National Survey of Lorry Parking was conducted in March 2022 but has since closed. It is included for completeness.

Figure A.4 shows Truckstop Capacity for truckstops in the TfSE area covered by the 2022 national survey. This shows a cluster of large lorry parks (51+ vehicles) around Ashford and Dover as well as locations on the M25 and M4. There are several medium sized locations along the M27 and A27 as well as on the A23 around Crawley. For the smaller truckstops, there are several of these along the A3, A303 and A2 with a particular cluster west of Canterbury.

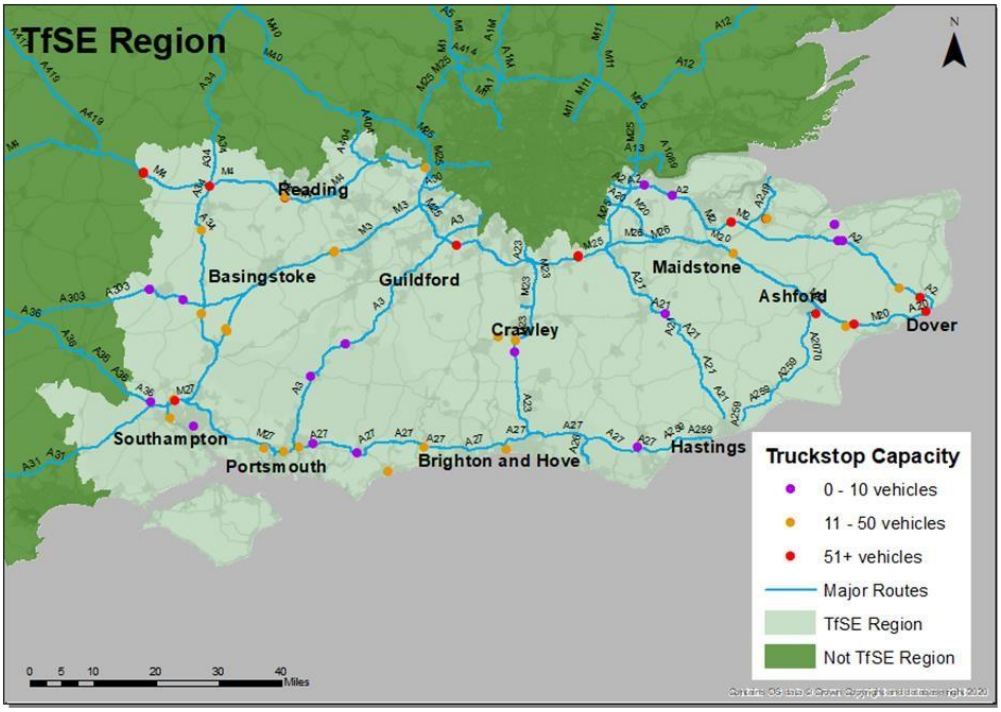


Figure A.4 Truckstop capacity in the TfSE area covered by the 2022 national survey

Figure A.5 shows the percentage of HGVs observed parking compared to the available parking capacity at the site for each truckstop in the TfSE area covered by the 2022 national survey. This shows that there are key clusters of truckstops with a critical level of HGVs parking compared to the available parking capacity at the site along the M20 and M2 corridors, and especially around Dover and Southampton. Meanwhile, most truckstops along the A27, including around Portsmouth, are showing as having a low % of use vs capacity level as well as those on the A3 and the A2 close to the junction with the M25.

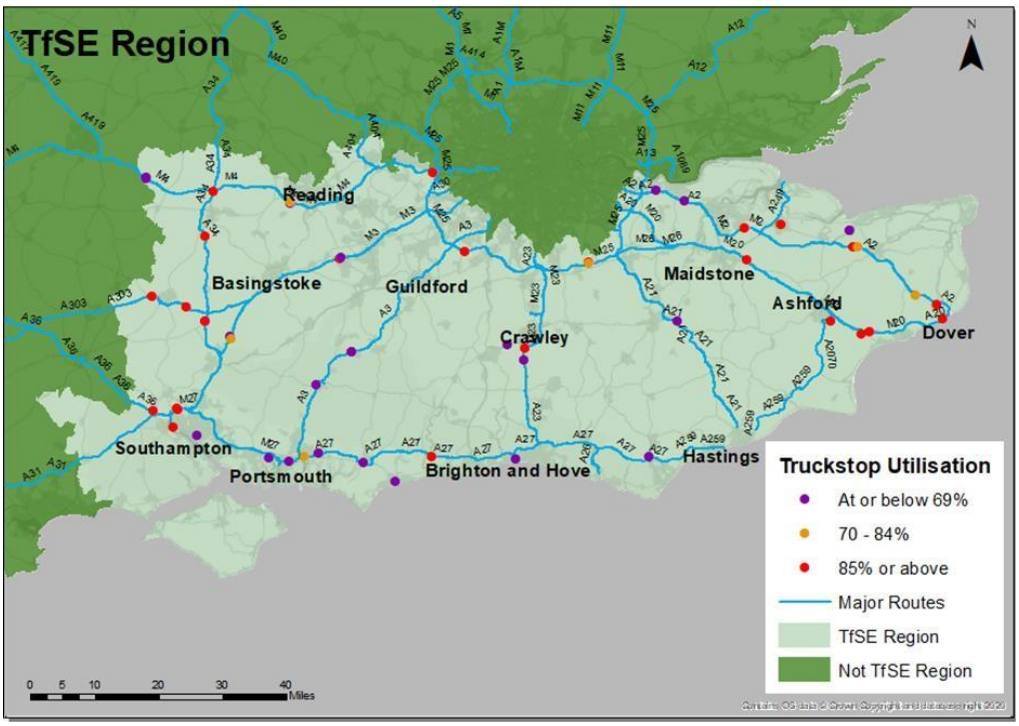


Figure A.5 Percentage of HGVs observed parking compared to the available parking capacity at the site for each truckstop in the TfSE area covered by the 2022 national survey

Figure A.6 shows the total vehicles observed for all types of lorry parking within the TfSE area covered by the 2022 national survey. This shows that most sites have had 0-2 vehicles, which reflects the high percentage of laybys within the TfSE area, many of which would only be able to accommodate a small number of vehicles. Areas where there are sites with a large number of vehicles include around Dover, Ashford and Southampton which correlates with these being the locations of some of the larger truckstops.

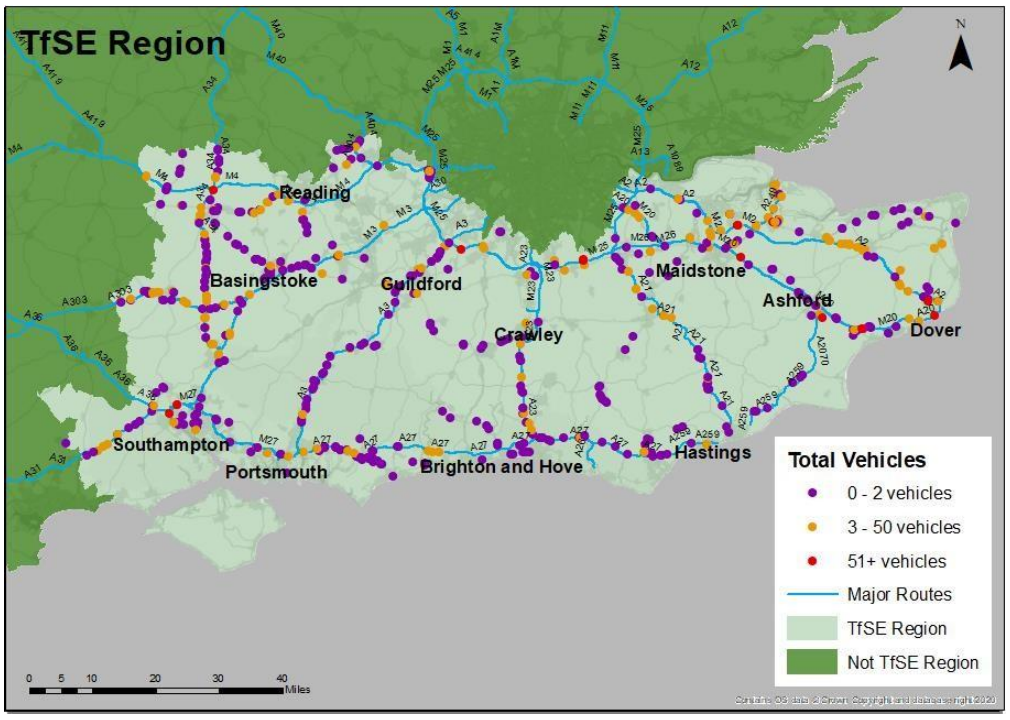


Figure A.6 Total vehicles at HGV parking sites in the TfSE area covered by the 2022 national survey

Figure A.7 shows the on-site parking facilities by type in the TfSE area covered by the 2022 national survey. This shows that most Truckstop locations are trunk road service areas (35% of locations),

closely followed by Motorway Service Areas (33% of locations). Only 25% are independent truckstops and 7% are local authority truckstops.

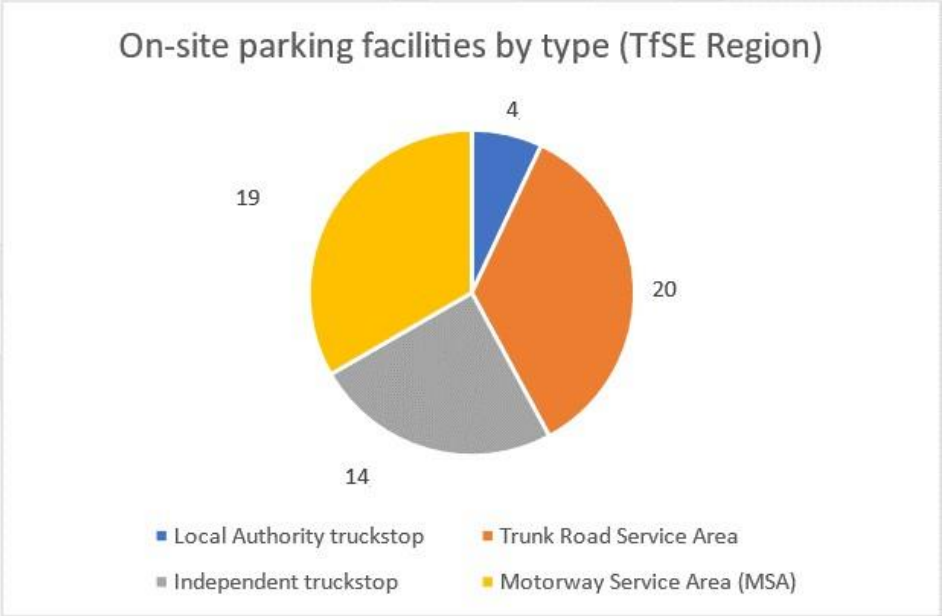


Figure A.7 On-site parking facilities by type covered by the 2022 national survey

Figure A.8 shows the number of vehicles observed by parking site within the TFSE area covered by the 2022 national survey. This shows that the majority of vehicles observed (72%) were in truckstops, with 19% in laybys and 9% in industrial estates. This demonstrates the key role in particular that the large truckstops in the TfSE area play within the overall mix of lorry parking provision, as they only make up 10% of the lorry parking sites but provide 72% of the spaces.

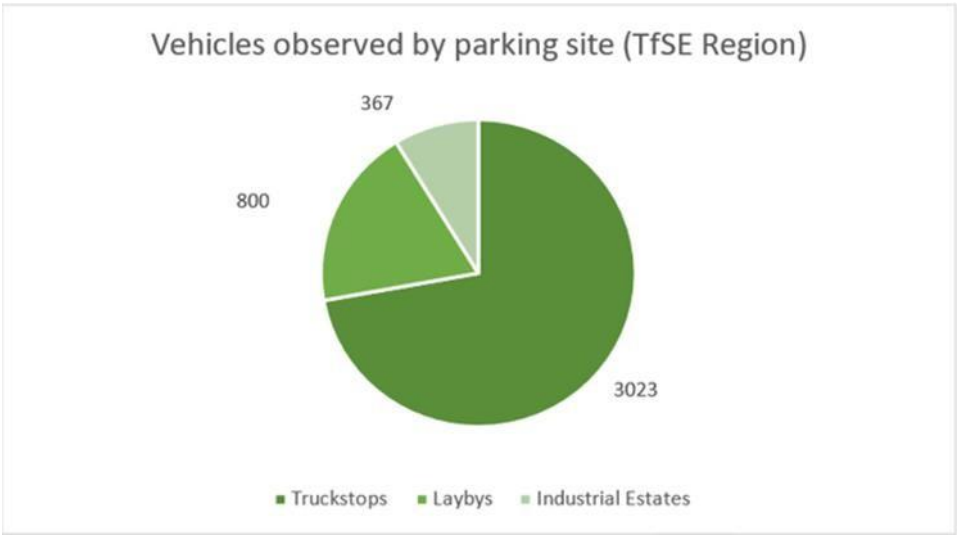


Figure A.8 Vehicles observed by parking site in the TfSE area covered by the 2022 national survey

Figure A.9 shows an overview of truckstops in the TfSE area covered by the 2022 national survey and the percentage of vehicles observed parking compared to the available parking capacity at the site. This shows that 25 out of 57 truckstops (43.86%) are at the critical level (85% or more of the available parking capacity was being used).

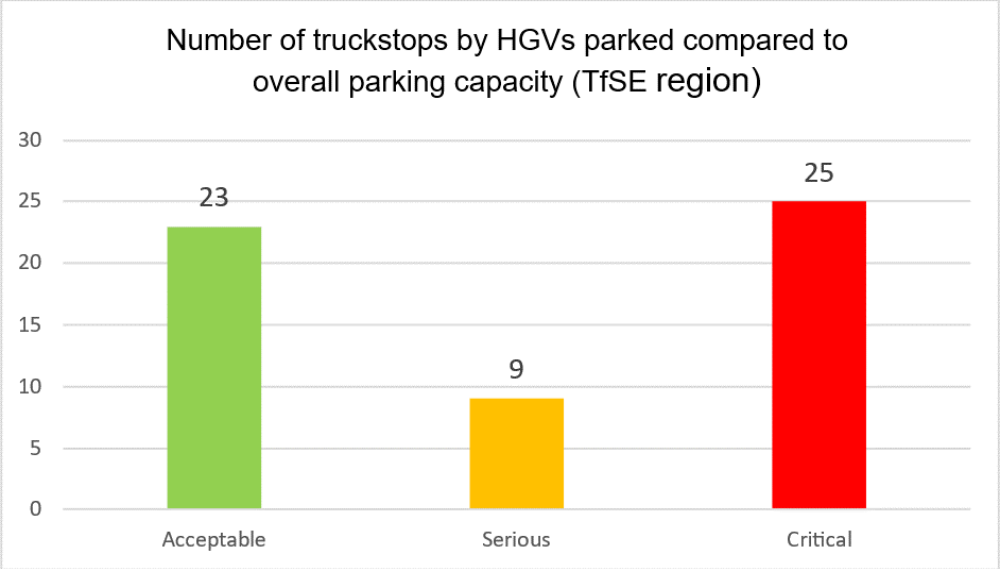


Figure A.9 Number of truckstops by status category for the percentage of HGVs parked compared to the available parking capacity for the site in the TfSE area covered by the 2022 national survey

Figure A.10 shows a comparison of the number of truckstops for each category showing level of usage for the sites covered by the national survey of lorry parking for the TfSE area. This shows a great deal of similarity between the profiles of the TfSE area and England as a whole, with the TfSE area having marginally fewer truckstops at acceptable level (40.35% compared to 42.33%), and slightly more at serious level (15.79% compared to 13.80%). The level of truckstops with a critical level of HGVs parked compared to the available parking capacity is almost identical between TfSE and all of the HGV parking sites in England (43.86 compared to 43.87%).

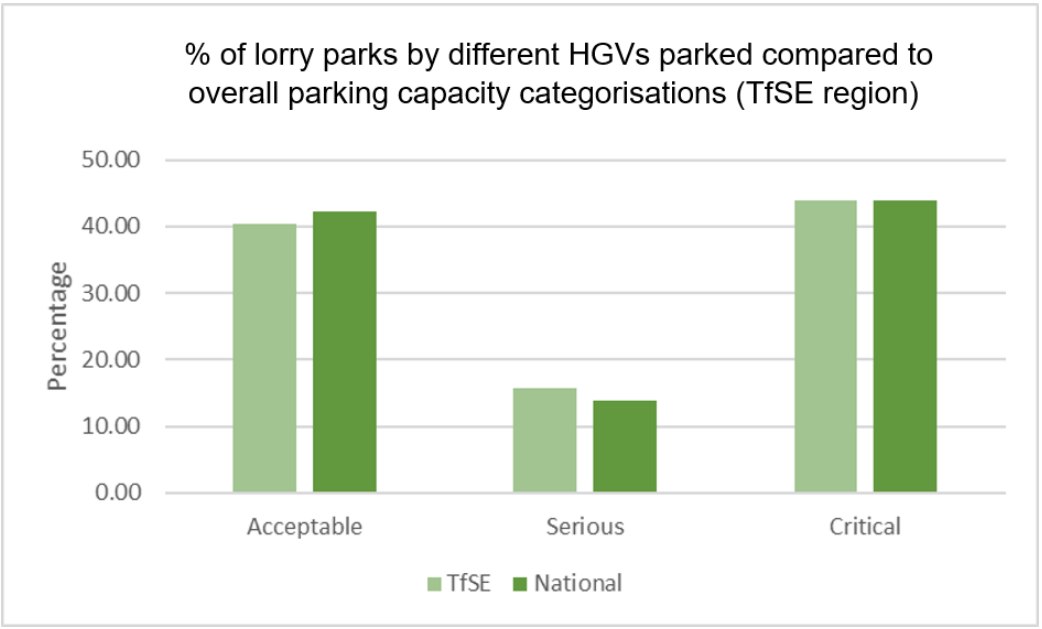


Figure A.10 Percentage of lorry parks covered by the 2022 national survey at different usage categorisations

Table A.3 shows the split of UK and non-UK registered HGVs using each parking location type in the TfSE area. This shows that a large proportion of Truckstop users were non-UK vehicles (61%), particularly foreign vehicles using truckstops on the M20 and M2 corridors and close to the Port of Dover. Conversely, laybys and industrial estates were used by more UK-registered vehicles than non-UK (67% and 66% respectively). One reason for this may be that non-UK registered vehicles may book into large truckstops far in advance to ensure they get a space, whilst UK-registered vehicles

may have a greater level of local knowledge and therefore a greater knowledge of good layby and industrial estate locations to use on more of an ad-hoc basis where required.

Table A.3 UK vs non-UK registered vehicles at parking locations covered by the 2022 national survey in the TfSE area

	UK	Non-UK	All
Truckstops	1,190 (39%)	1,833 (61%)	3,023 (100%)
Laybys	535 (67%)	265 (33%)	800 (100%)
Industrial Estates	243 (66%)	124 (34%)	367 (100%)

Appendix B Full Parking Demand and Future Forecasts

Methodology for calculating parking demand

Eleven routes that form part of the SRN and one route from the major road network (non-SRN) in the TFSE region have been chosen as the key routes to be used for developing the demand forecast. These are:

- M20/A20 (linking London to the Port of Dover)
- M3 (linking London to the Port of Southampton)
- A3/A3(M) (linking London to the Port of Portsmouth)
- M27/A27 (linking key ports and other towns and cities along the south coast)
- M2/A2 (linking London to the Port of Dover)
- A259/A2070 (linking Pevensey to Ashford)
- M23/A23 (linking London to Brighton and Hove)
- A21 (linking London to Hastings)
- M25/A282 (London orbital, analysis conducted only for the part of the route in the TfSE area)
- A34 (Linking Winchester to Newbury and the Midlands, analysis conducted only for the part of the route in the TfSE area)
- M4 (linking London to Reading and beyond to South Wales, analysis conducted only for the part of the route in the TfSE area)
- A31 (linking Winchester and Guildford) - non-SRN

Figure B.1 shows these routes within the wider TfSE area.

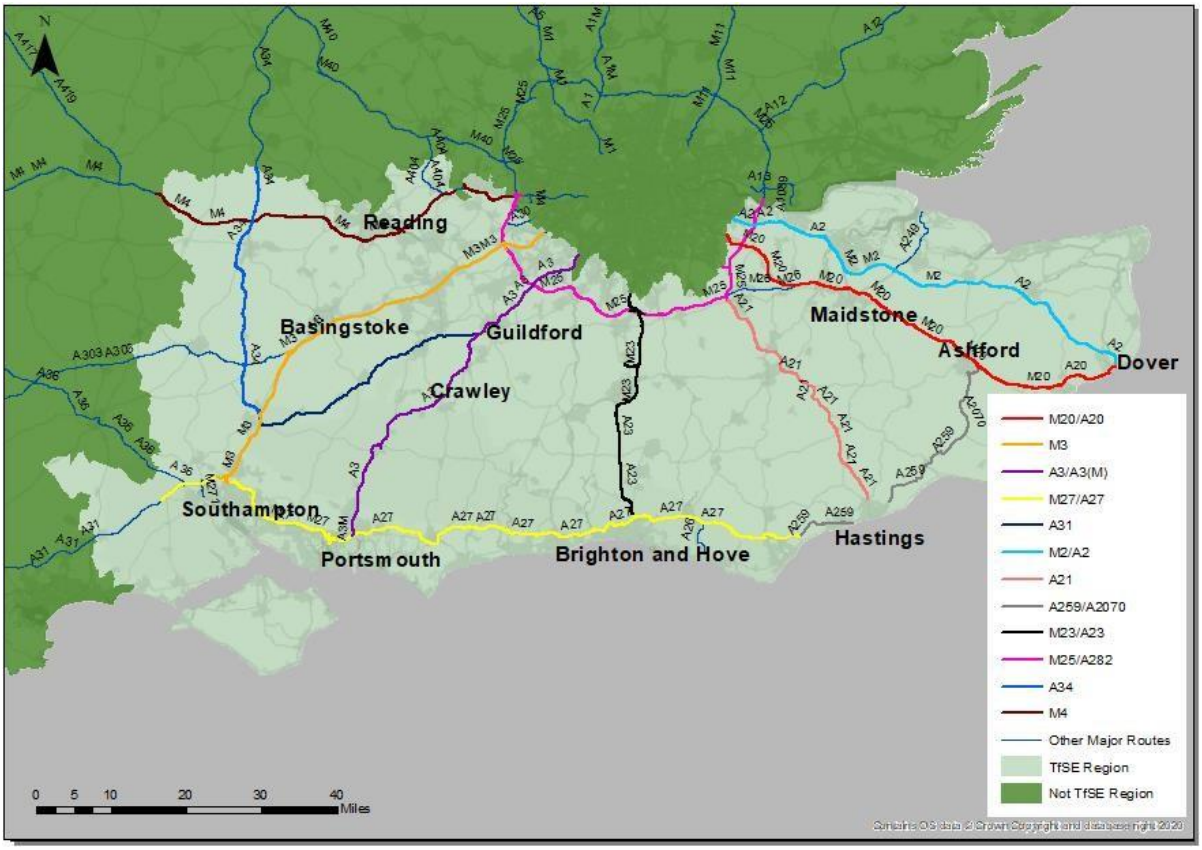


Figure B.1 Routes chosen to help aid understanding of lorry parking demand within the TfSE area

To understand current demand for lorry parking along the SRN routes, data from the March 2022 DfT national survey of lorry parking was used. This provided the locations of all lorry parking sites within 2.5km of the SRN in the TfSE area split by on-site parking facilities, laybys, and industrial estates as well as the number of vehicles parked in these and the lorry parking capacity of each on-site parking facility.

Next, the lorry parking sites located within 2.5km of each of the four routes were identified from all lorry parking sites in the TfSE area. This enabled knowledge of the number of vehicles parked along each route as well as current parking capacity at on-site facilities along each of these routes. These figures enabled additional calculations to be performed, including working out the 2022 on-site capacity versus the total number of HGVs parked to understand current on-site parking provision versus parking demand.

To get an average flow on each SRN route, data from the National Highways WebTRIS[22] system was used. Numbers of vehicles travelling in each direction in the month of March 2022 for four count points, 24 hours Monday-Friday, on each route was downloaded. These count points were strategically chosen so they were spaced approximately equidistant along the route, however the requirement for a full month of data for March 2022 meant that some potential count points had to be discounted as they did not cover this specific time period. March 2022 was chosen as this was the month in which the DfT national survey of lorry parking was conducted, ensuring the time periods for flows and lorry parking data matched.

Then, the number of vehicles which were over 6.6m in length was split out from the overall traffic. This means that in addition to HGVs, some coaches may be included in the data, however these numbers should not materially affect the analysis. Once split out, the large vehicle flows were divided by four to provide an average flow for each route, then divided by 23 (as there were 23 weekdays in March 2022) to give the final figure of the average HGV flow per 24 hours per weekday in both directions in March 2022 for each route.

[22] https://webtris.highwaysengland.co.uk/

For non-SRN routes (the A31 for this study) the process was slightly different. As the A31 was one of the routes covered as part of the audits for the further information gathering exercise conducted in February 2023, data from this survey was used. Additionally, to get the average flow on the A31, data from DfT Road Traffic Statistics was used. This is slightly different to WebTRIS data as it uses manual surveys and converts this data into Annual Average Daily Flow (AADF) which is split by vehicle type including HGVs. However, the methodology of using four count points spaced approximately equidistant along the route was the same. In addition, it is worth noting that the AADF figure used for the A31 is based on 2019, and whilst this does not match with the audit date of March 2023, this can still offer a useful comparison and enable detailed analysis to be performed.

Finally, for all routes the following formula is used to calculate the parking demand factor. This is the ratio of parking of overall HGV traffic within the catchment area and is a measure of the proportion of overall traffic flow that chooses to park.

$$\text{Parking Demand Factor} = \frac{\text{Number of parked HGVs observed within catchment}}{\text{Total traffic volume observed within catchment}}$$

One aspect to note is that the parking demand factor is sensitive and can be skewed based on several route characteristics. One example is route length, as where routes are longer this may lead to a greater number of HGVs parked along these longer routes. However, this is not expected to materially impact the analysis and results. The other key factor is the ratio between HGV flow and number of HGVs parked on the route. A higher flow with fewer HGVs parked on the route itself (for example if there are fewer large on-site parking facility on the route itself) will result in a lower parking demand factor, whereas a lower flow with a higher number of HGVs parked will result in a higher factor.

Methodology for calculating future demand forecasts

For each route, a forecast has been made both for the change in average HGV flow as well as the change in the requirement for HGV parking spaces.

The DfT National Transport Model predicts an average HGV growth of 22 per cent between the model base year of 2015 and 2040, an equivalent of 0.88 per cent per annum. The method will apply this growth-per-year factor to TfSE as a whole as a medium case in order to reflect national forecasts and take account of changes in the transport of goods such as construction of new roads and economic growth estimates as well as modal shift. Forecasts have been made every 6 years from 2022 up to 2040 to demonstrate the incremental changes in flows over the next 18 years. For continuity, the 2023 A31 survey counts and the 2019 flows data have been used as the basis for the 2022 base year, whilst for the other routes the 2022 data is used as the basis for the 2022 base year.

To recognise future uncertainties and fluctuations, a low case using an increase of 0.66% per annum and high case using an increase of 1.1% per annum have been forecast in addition to the medium case. These percentages have been chosen to be 0.22% above and below the medium case to indicate how different scenarios may impact future growth in HGV flows along these routes.

Once the HGV flow forecasts have been made, these are multiplied by the parking demand factor for each route in order to calculate the forecast requirement for HGV parking spaces for each of the years and cases.

As with any forecast, it is important to note that these are indicative and subject to a variety of potential changes and fluctuations. Nevertheless, they should help to provide a useful indication of what future flows and HGV parking requirements may be going forward.

Route-specific analysis

M20/A20

The M20 and A20 form a key route between London and Southampton, routing via Maidstone and Ashford.

Figure B.2 shows the routing of the M20 and A20, as well as the on-site parking facilities, laybys and industrial estates within 2.5km. This shows key clusters of on-site parking facilities between Ashford and Dover, as well as clusters of industrial estates in Maidstone and Ashford.

As outlined in the methodology, the four count points used were at the following locations:

- Adjacent to the village of Wrotham (marked A on Figure B.2)
- Adjacent to the village of Aylesford (marked B on Figure B.2)
- South East of Ashford (marked C on Figure B.2)
- West of Dover (Marked D on Figure B.2)

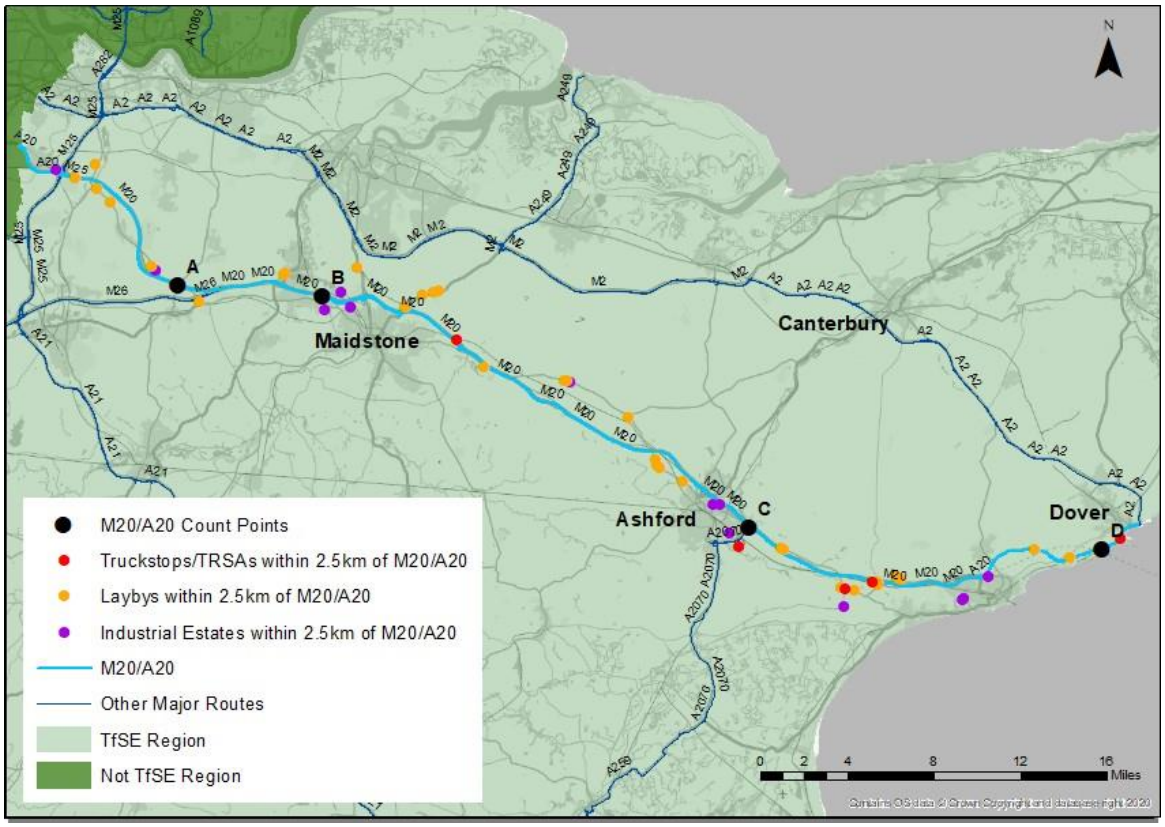


Figure B.2 Routing of the M20/A20 and lorry parking sites along the route

Figure B.3 shows the westbound and eastbound HGV flow at each of the count points. This shows a daily average weekday flow in March 2022 of 6,366 HGVs westbound and 6,678 HGVs eastbound. The average for Count Point B is significantly higher than the other count points, at 12,887 HGVs westbound and 13,919 HGVs eastbound, however this can be explained by the fact that this location is the only count point between the Eurotunnel terminal and Junction 3 (turnoff for the M26, leading to the anticlockwise M25).

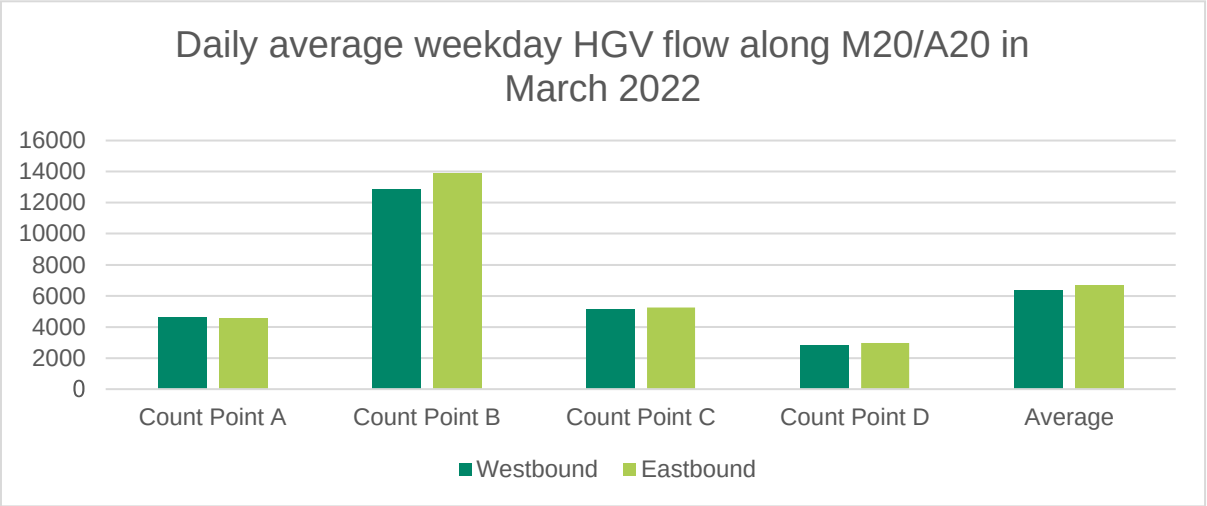


Figure B.3 Daily average weekday HGV flow along M20/A20 in March 2022

Table B.1 shows an overview of key lorry parking statistics for the M20/A20. This shows that there was a 145-space deficit in the total on-site parking capacity versus the number of HGVs recorded as being parked along the corridor. The parking demand factor of 11.2 means that approximately 11.2% of the weekday 24-hour HGV flow was observed being parked during the 2022 national survey of lorry parking.

Table B.1 Overview of key lorry parking statistics for the M20/A20

	M20/A20
Average HGV flow per 24 hours per weekday in both directions in March 2022	13,044
Total HGVs parked	1,463
Parked at on-site parking facilities	1,336
Parked in laybys	86
Parked in industrial estates	41
2022 on-site capacity on route	1,318
2022 on-site % of use vs capacity on route	101.4
2022 on-site capacity versus total HGVs parked	-145
Parking demand factor	**11.2**

Figure B.4 shows the forecast daily average weekday flow along the M20/A20. This shows that in the low case daily weekday flows are forecast to increase by around 1,550 vehicles by 2040 to a total of 14,594. In the medium case, daily weekday flows are forecast to increase by around 2,066 vehicles by 2040 to a total of 15,627 and in the high case daily weekday flows are forecast to increase by around 2,583 vehicles by 2040 to a total of 15,627.

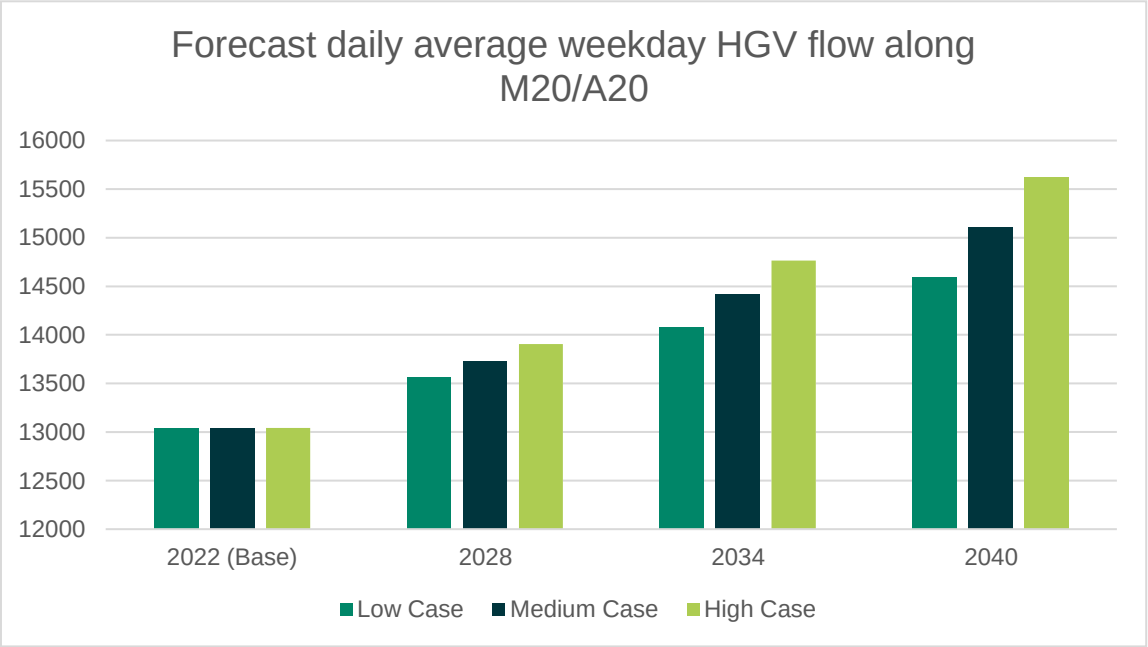


Figure B.4 Forecast daily average weekday HGV flow along M20/A20

Figure B.5 shows the forecast requirement for HGV parking spaces along the M20/A20. This shows that in the low case the required number of HGV parking spaces is forecast to increase by 171 to 1,634 by 2040. In the medium case, the required number of HGV parking spaces is forecast to increase by 229 to 1,692 by 2040. And in the high case the required number of HGV parking spaces is forecast to increase by 287 to 1,750 by 2040.

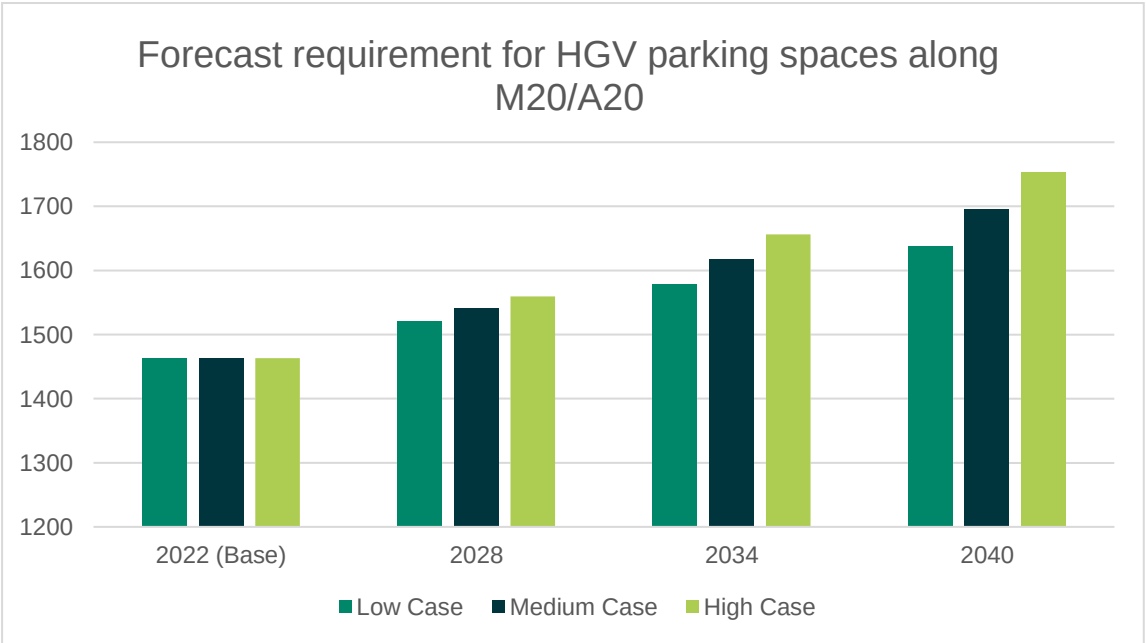


Figure B.5 Forecast requirement for HGV parking spaces along M20/A20

M3

The M3 forms a key route between London and Southampton, routing via Basingstoke and Winchester.

Figure B.6 shows the routing of the M3, as well as the on-site parking facilities, laybys and industrial estates within 2.5km. This shows key clusters of on-site parking facilities west of Farnborough and north of Winchester and a cluster of industrial estates in Basingstoke.

As outlined in the methodology, the four count points used were at the following locations:

- North of the village of Chobham (marked E on Figure B.6)
- West of Farnborough (marked F on Figure B.6)
- West of Basingstoke (marked G on Figure B.6)
- North of Winchester (Marked H on Figure B.6)

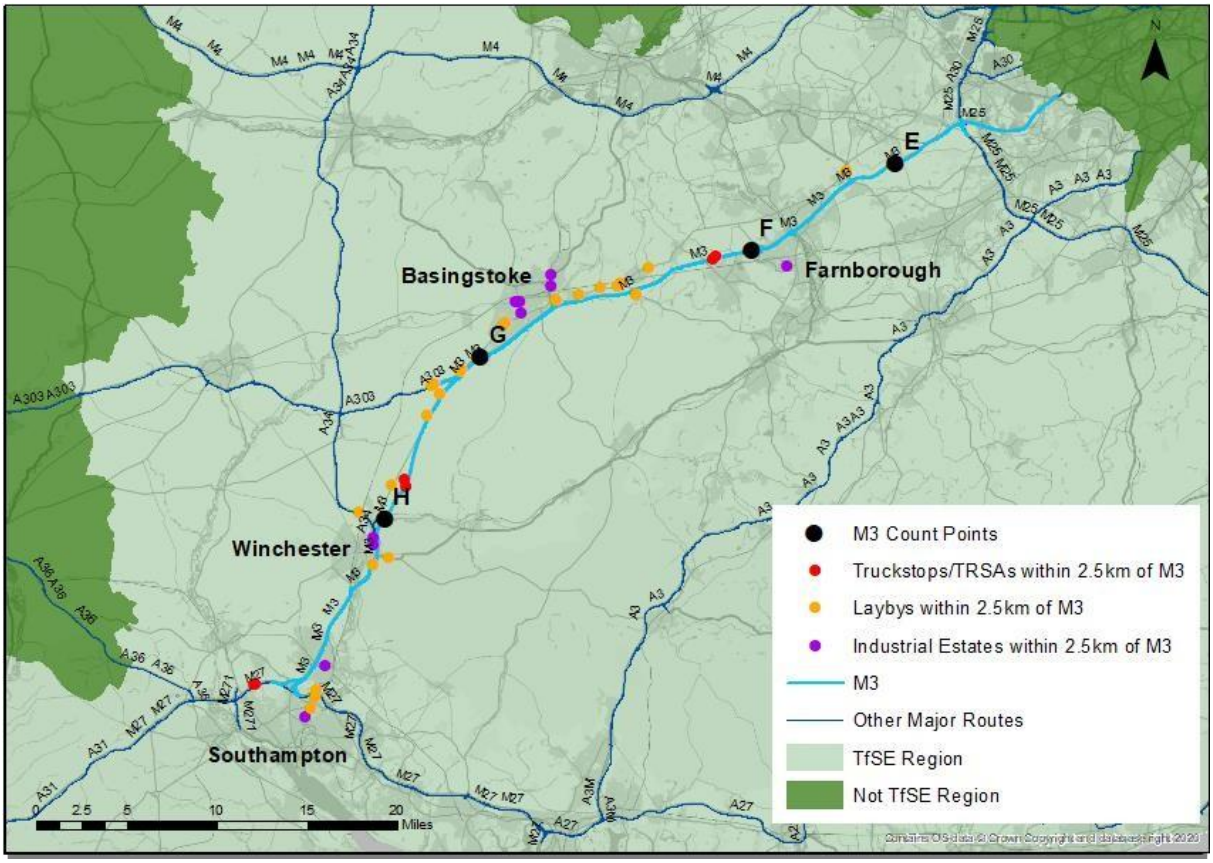


Figure B.6 Routing of the M3 and lorry parking sites along the route

Figure B.7 shows the northbound and southbound HGV flow at each of the count points. This shows a daily average weekday flow in March 2022 of 5,919 HGVs northbound and 6,325 HGVs southbound. The average for Count Point E is slightly higher than the other count points, at 9,653 HGVs northbound and 11,477 HGVs southbound, however this can be explained by the fact that this location is the only count point between junctions for key industrial sites such as Bracknell and Farnborough and the M25.

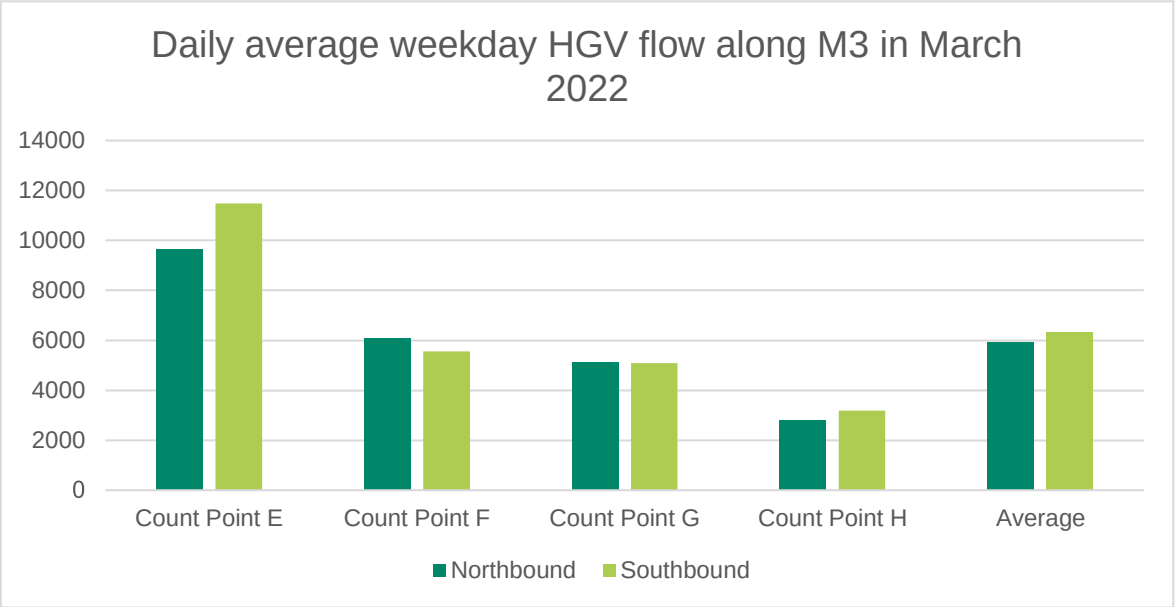


Figure B.7 Daily average weekday HGV flow along M3 in March 2022

Table B.2 shows an overview of key truck parking statistics for the M3. This shows that there was an 81-space deficit in the total on-site capacity versus the number of HGVs recorded as being parked along the corridor. The parking demand factor of 2.8 means that approximately 2.8% of the weekday 24-hour HGV flow was observed being parked during the 2022 DfT national survey of lorry parking.

Table B.2 Overview of key lorry parking statistics for the M3

	M3
Average HGV flow per 24 hours per weekday in both directions in March 2022	12,245
Total HGVs parked	339
Parked at on-site parking facilities	266
Parked in laybys	46
Parked in industrial estates	27
2022 on-site capacity on route	258
2022 on-site % of use vs capacity on route	103.1
2022 on-site capacity versus total HGVs parked	-81
Parking demand factor	**2.8**

Figure B.8 shows the forecast daily average weekday flow along the M3. This shows that in the low case daily weekday flows are forecast to increase by around 1,455 vehicles by 2040 to a total of 13,699. In the medium case, daily weekday flows are forecast to increase by around 1,940 vehicles by 2040 to a total of 14,184 and in the high case daily weekday flows are forecast to increase by around 2,424 vehicles by 2040 to a total of 14,669.

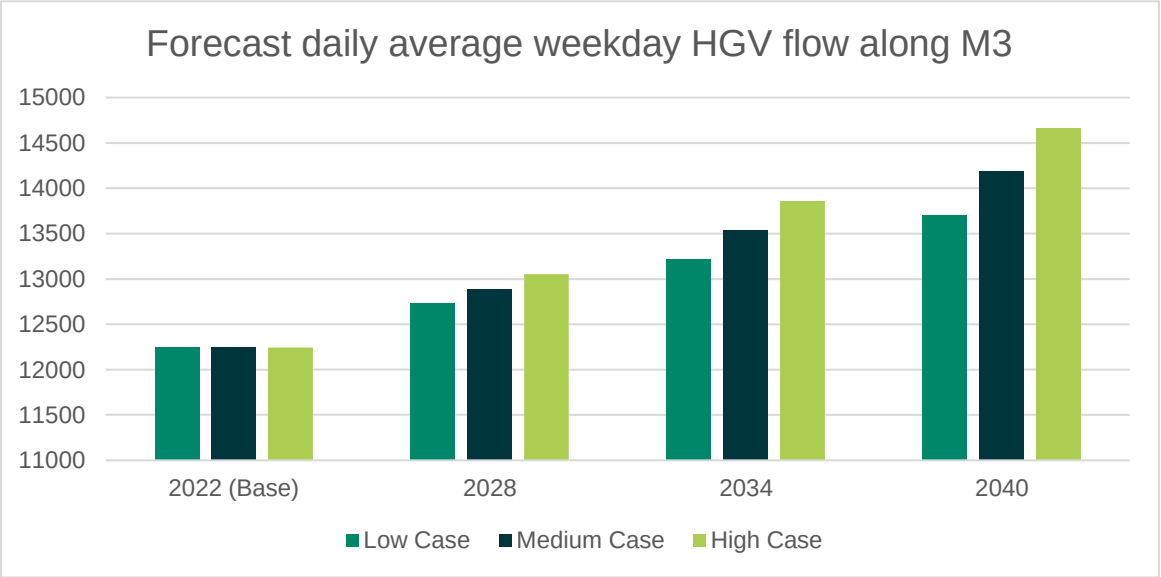


Figure B.8 Forecast daily average weekday HGV flow along M3

Figure B.9 shows the forecast requirement for HGV parking spaces along the M3. This shows that in the low case the required number of HGV parking spaces is forecast to increase by 40 to 379 by 2040. In the medium case, the required number of HGV parking spaces is forecast to increase by 54 to 393 by 2040. And in the high case the required number of HGV parking spaces is forecast to increase by 67 to 406 by 2040.

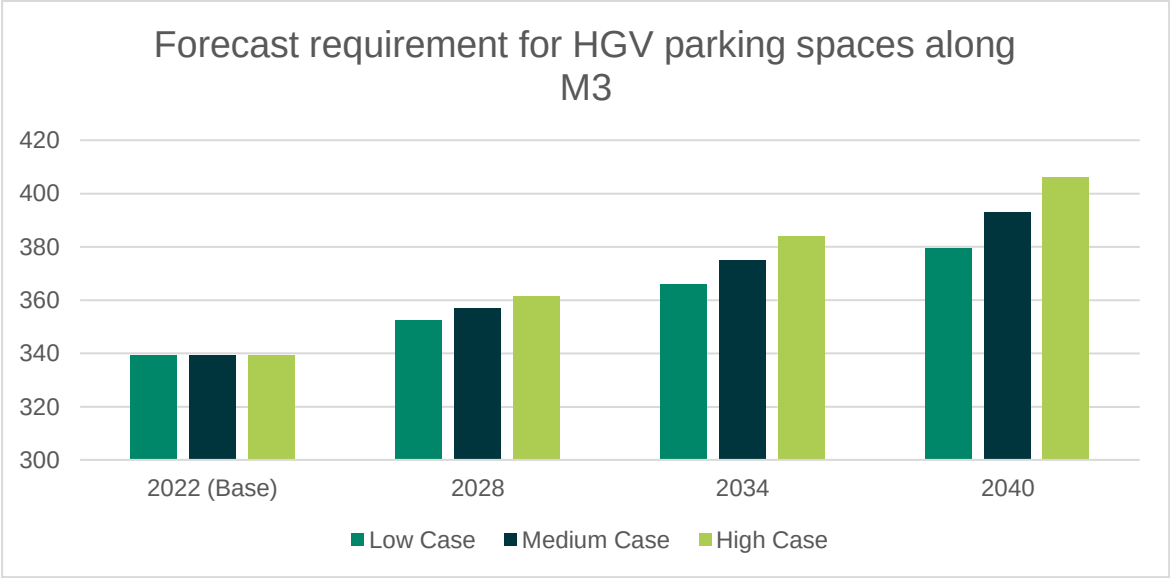


Figure B.9 Forecast requirement for HGV parking spaces along M3

A3/A3(M)

The A3 and A3(M) forms a key route between London and Portsmouth, routing via Guildford and Petersfield.

Figure B.10 shows the routing of the A3, as well as the on-site parking facilities, laybys and industrial estates within 2.5km. This shows key clusters of on-site parking facilities around Portsmouth as well as a cluster of industrial estates around Guildford.

As outlined in the methodology, the four count points used were at the following locations:

- West of Cobham (marked I on Figure B.10)
- West of Godalming (marked J on Figure B.10)
- North of Petersfield (marked K on Figure B.10)

- North of Portsmouth (Marked L on Figure 4.10)

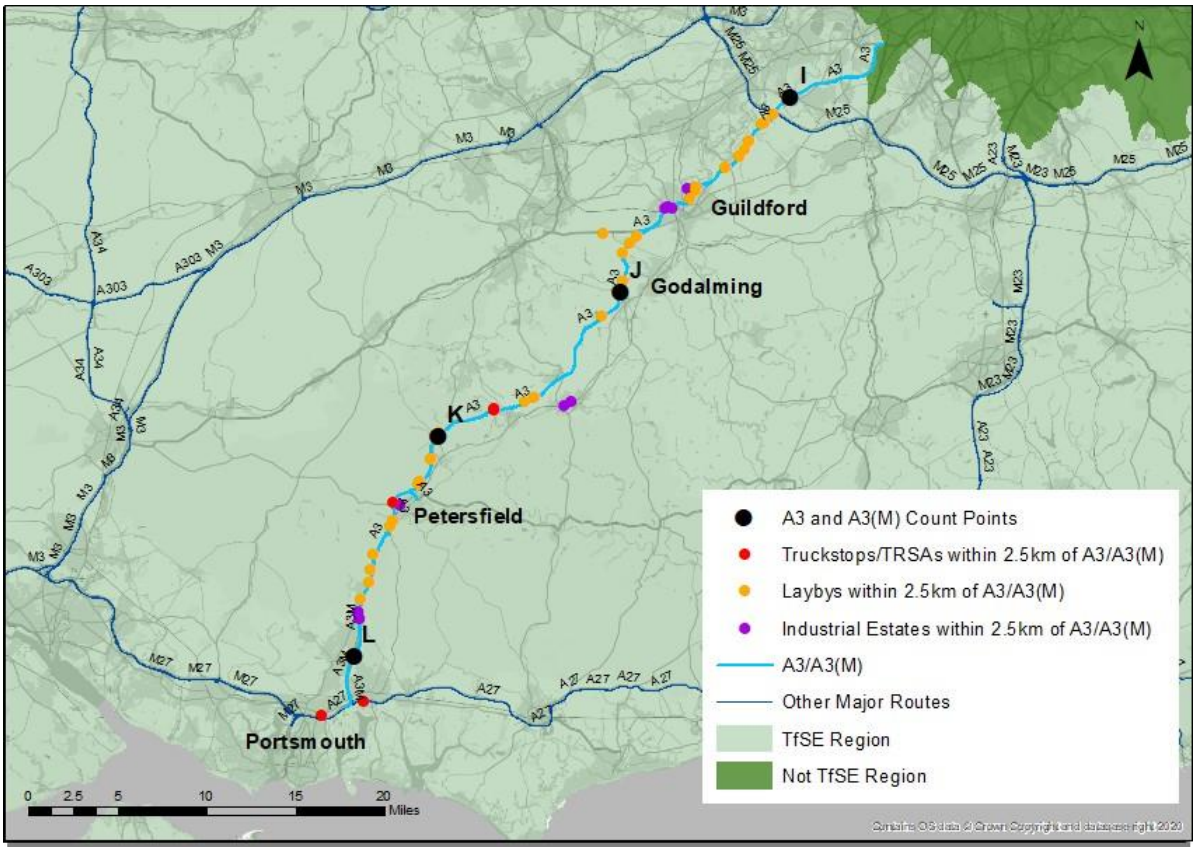


Figure B.10 Routing of the A3/A3(M) and lorry parking sites along the route

Figure B.11 shows the northbound and southbound HGV flow at each of the count points. This shows a daily average weekday flow in March 2022 of 1,961 HGVs northbound and 1,914 HGVs southbound. The average for Count Point L is slightly higher than the other count points, at 2,497 HGVs northbound and 2,363 HGVs southbound, however this can be explained by traffic passing this count point that is turning to or from the A272 north of Petersfield to serve destinations in West Sussex and beyond.

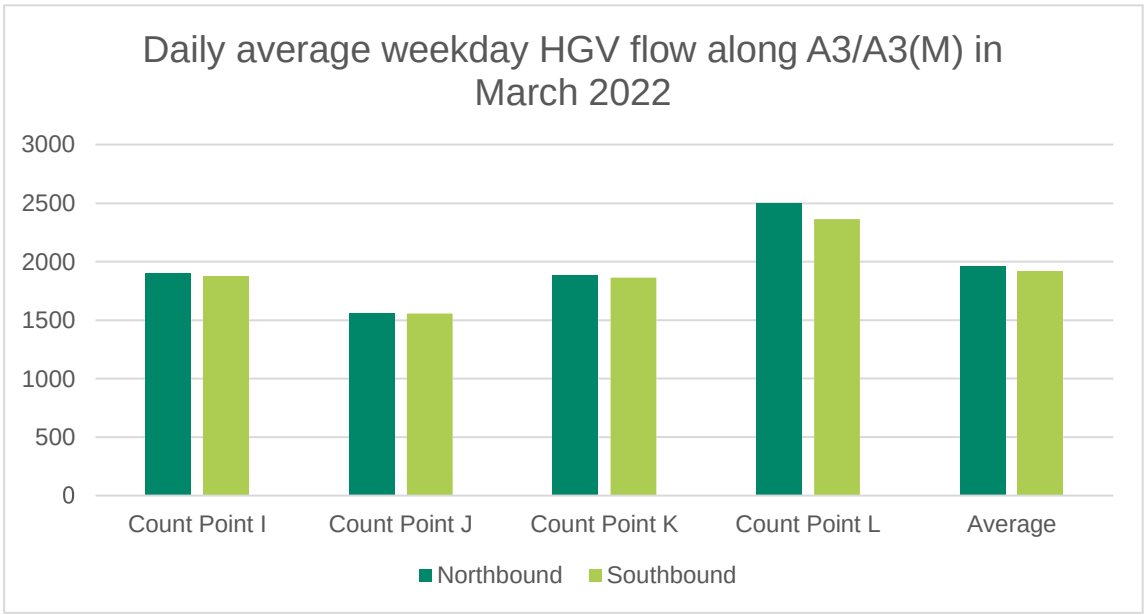


Figure B.11 Daily average weekday HGV flow along A3/A3(M) in March 2022

Table B.3 shows an overview of key truck parking statistics for the A3/A3(M). This shows that there was an 85-space deficit in the total Truckstop capacity vs the number of HGVs recorded as being parked along the corridor. The parking demand factor of 2.9 means that approximately 2.9% of the weekday 24-hour HGV flow was observed being parked during the 2022 national survey of lorry parking.

Table B.3 Overview of key lorry parking statistics for the A3/A3(M)

	A3/A3(M)
Average HGV flow per 24 hours per weekday in both directions in March 2022	3,875
Total HGVs parked	113
Parked at on-site parking facilities	55
Parked in laybys	50
Parked in industrial estates	8
2022 on-site capacity on route	85
2022 on-site capacity versus total HGVs parked on route	64.7
2022 on-site capacity versus total HGVs parked	-28
Parking demand factor	**2.9**

Figure B.12 shows the forecast daily average weekday flow along the A3/A3(M). This shows that in the low case daily weekday flows are forecast to increase by around 460 vehicles by 2040 to a total of 4,335. In the medium case, daily weekday flows are forecast to increase by around 614 vehicles by 2040 to a total of 4,488 and in the high case daily weekday flows are forecast to increase by around 767 vehicles by 2040 to a total of 4,642.

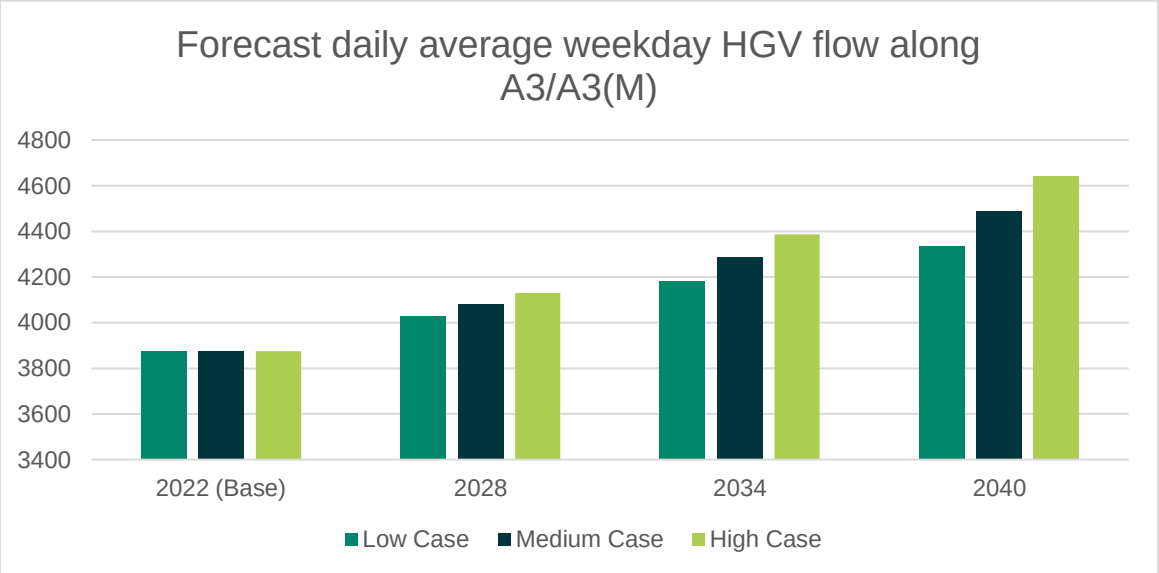


Figure B.12 Forecast daily average weekday HGV flow along A3/A3(M)

Figure B.13 shows the forecast requirement for HGV parking spaces along the A3/A3(M). This shows that in the low case the required number of HGV parking spaces is forecast to increase by 13 to 126 by 2040. In the medium case, the required number of HGV parking spaces is forecast to increase by

18 to 31 by 2040. And in the high case the required number of HGV parking spaces is forecast to increase by 22 to 135 by 2040.

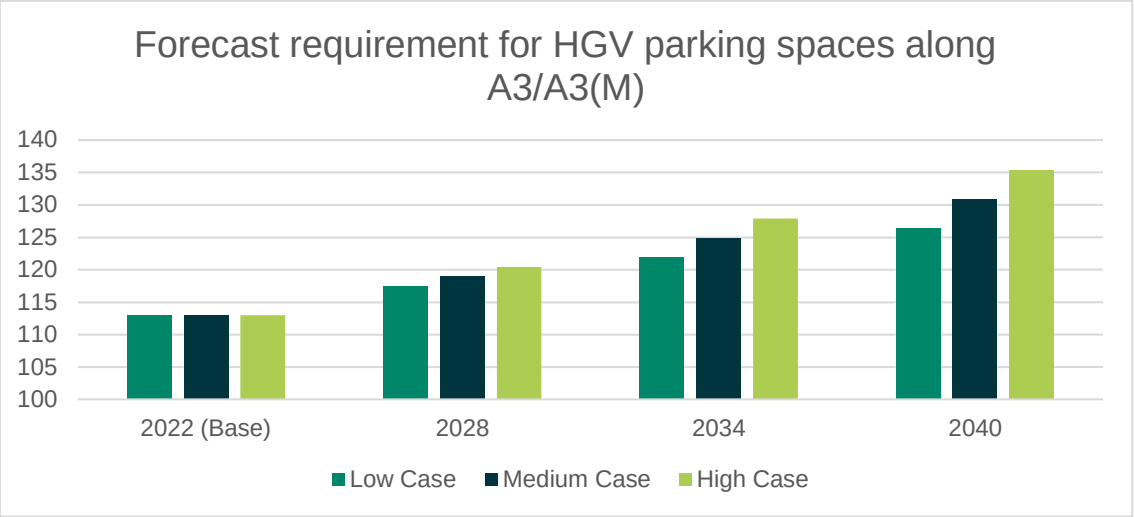


Figure B.13 Forecast requirement for HGV parking spaces along A3/A3(M)

M27/A27

The M27 and A27 forms a key route between Southampton and Pevensey, routing via Guildford and Petersfield.

Figure B.14 shows the routing of the M27/A27, as well as the on-site parking facilities, laybys and industrial estates within 2.5km. This shows key clusters of on-site parking facilities around Southampton and Portsmouth and a cluster of industrial estates in Brighton and Hove.

As outlined in the methodology, the four count points used were at the following locations:

- East of Swanwick (marked M on Figure B.14)
- East of Chichester (marked N on Figure B.14)
- East of Brighton and Hove (marked O on Figure B.14)
- West of Pevensey (Marked P on Figure B.14)

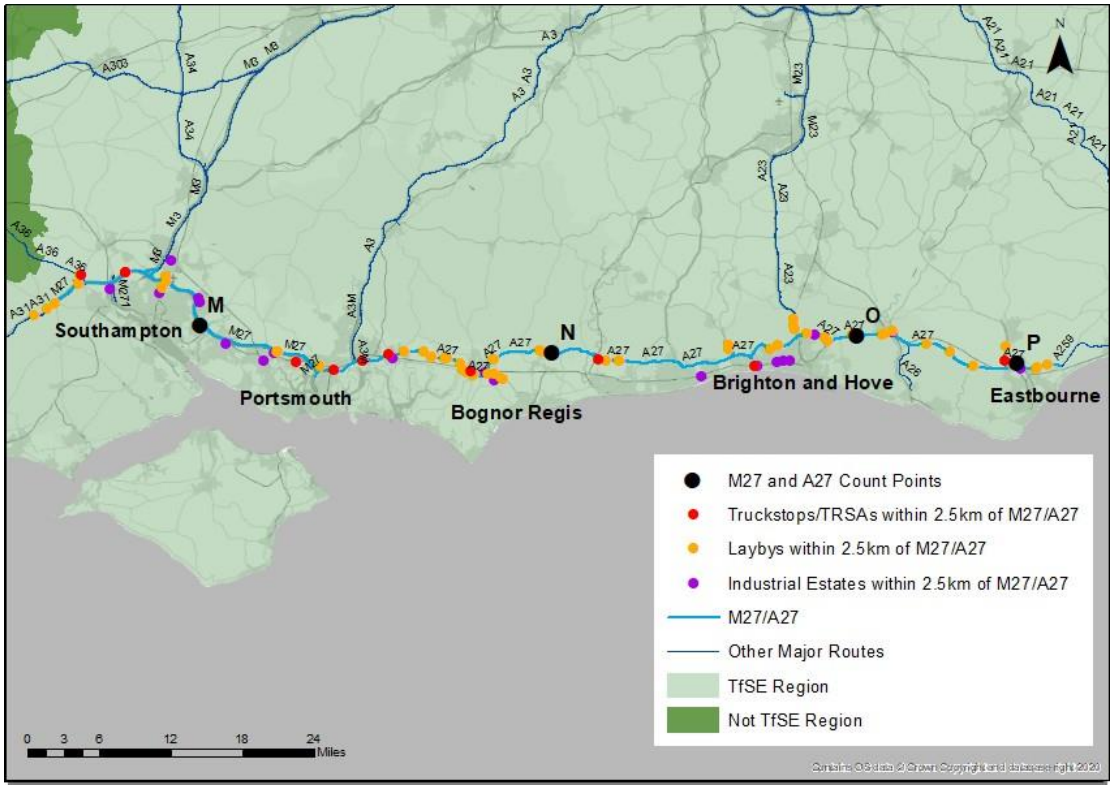


Figure B.14 Routing of the M27/A27 and lorry parking sites along the route

Figure B.15 shows westbound and eastbound HGV flow at each of the count points. This shows a daily average weekday flow in March 2022 of 2,173 HGVs westbound and 2,279 HGVs eastbound. The average for Count Point M is slightly higher than the other count points, at 4,047 HGVs westbound and 4,430 HGVs eastbound, however this can be explained by traffic passing this count point that is only running between the key port cities and urban conurbations of Southampton and Portsmouth.

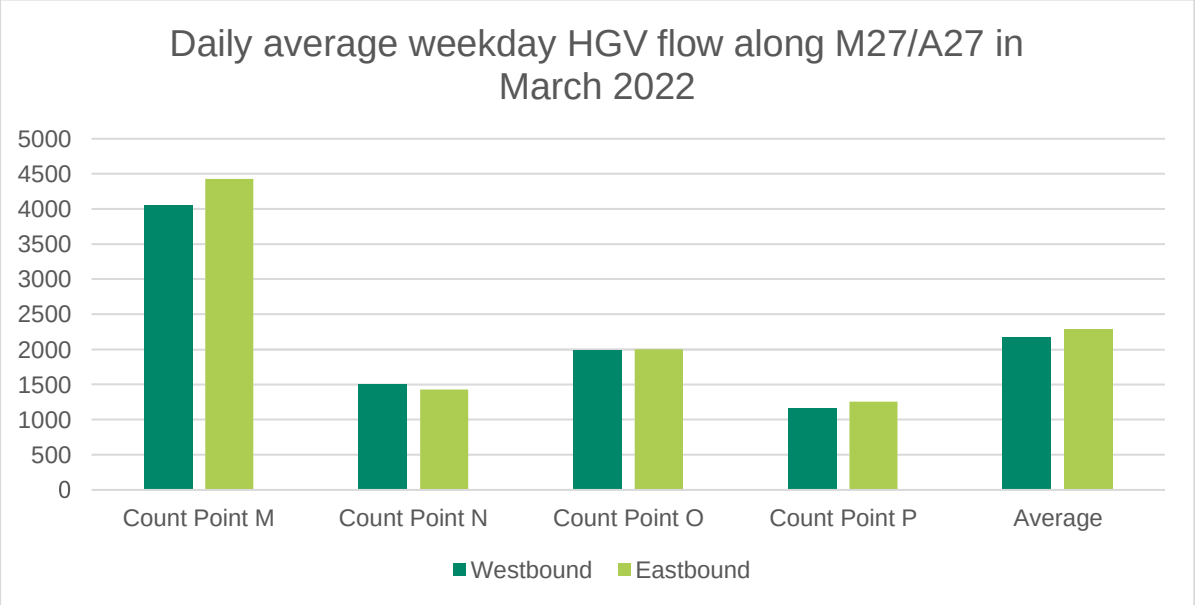


Figure B.15 Daily average weekday HGV flow along M27/A27 in March 2022

Table B.4 shows an overview of key truck parking statistics for the M27/A27. This shows that there was a 103-space deficit in the total Truckstop capacity vs the number of HGVs recorded as being parked along the corridor. The parking demand factor of 8.1 means that approximately 8.1% of the weekday 24-hour HGV flow was observed being parked during the 2022 national survey of lorry parking.

Table B.4 Overview of key lorry parking statistics for the M27/A27

	M27/A27
Average HGV flow per 24 hours per weekday in both directions in March 2022	4,453
Total HGVs parked	360
Parked at on-site parking facilities	233
Parked in laybys	57
Parked in industrial estates	70
2022 on-site capacity	257
2022 on-site capacity versus total HGVs parked on route	90.7
2022 on-site capacity versus total HGVs parked	-103
Parking demand factor	**8.1**

Figure B.16 shows the forecast daily average weekday flow along the M27/A27. This shows that in the low case daily weekday flows are forecast to increase by around 529 vehicles by 2040 to a total of 4,982. In the medium case, daily weekday flows are forecast to increase by around 705 vehicles by 2040 to a total of 5158 and in the high case daily weekday flows are forecast to increase by around 882 vehicles by 2040 to a total of 5,334.

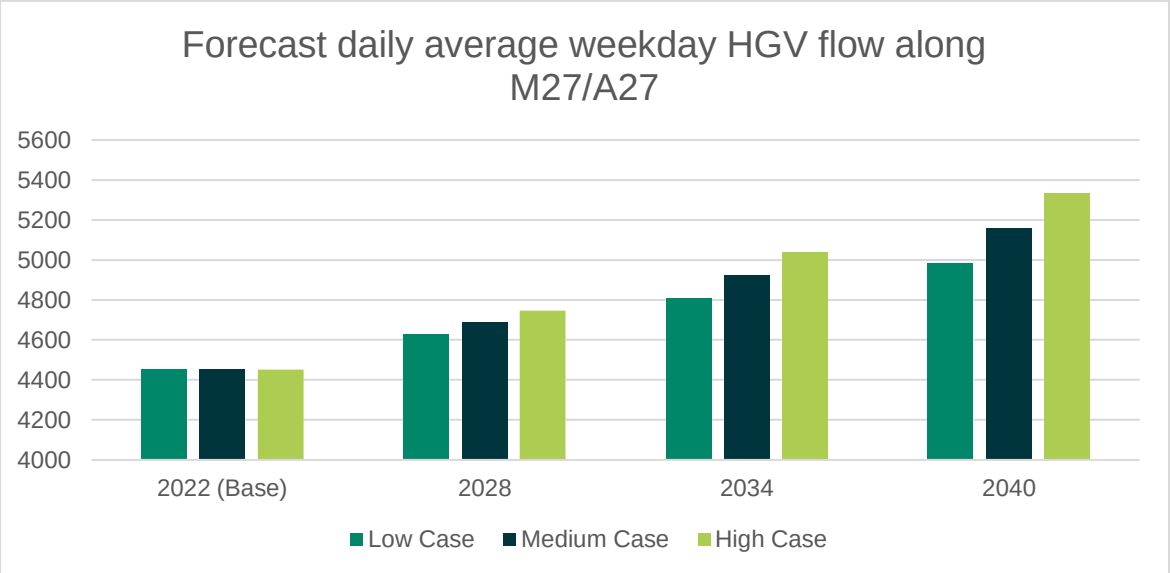


Figure B.16 Forecast daily average weekday HGV flow along M27/A27

Figure B.17 shows the forecast requirement for HGV parking spaces along the M27/A27. This shows that in the low case the required number of HGV parking spaces is forecast to increase by 43 to 403 by 2040. In the medium case, the required number of HGV parking spaces is forecast to increase by 57 to 417 by 2040. And in the high case the required number of HGV parking spaces is forecast to increase by 71 to 431 by 2040.

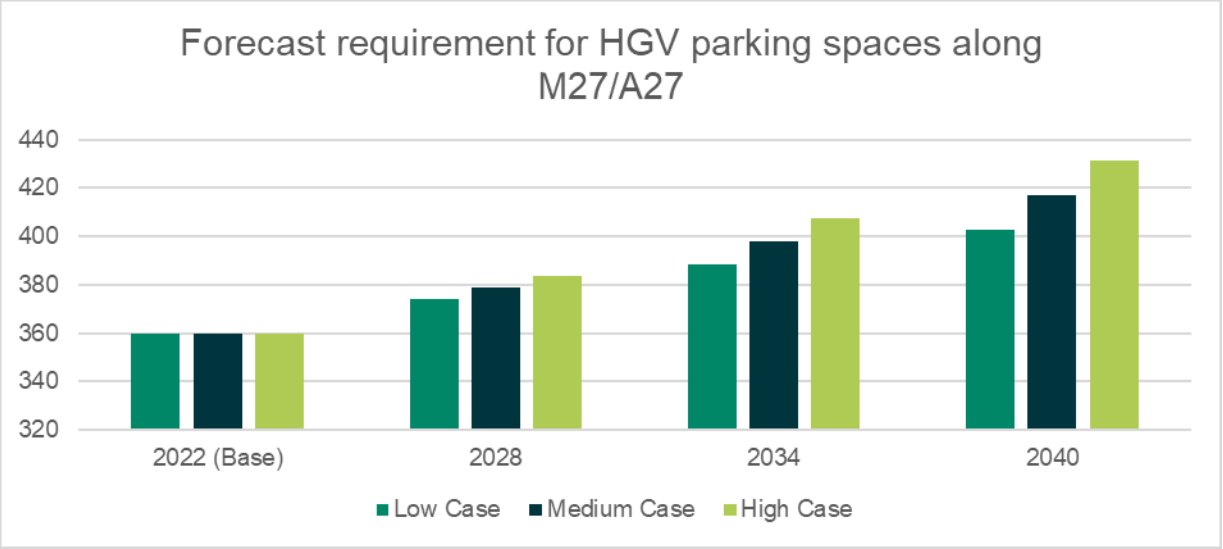


Figure B.17 Forecast requirement for HGV parking spaces along M27/A27

M2/A2

The M2 and A2 form a key route between London and Dover, routing via Rochester and Canterbury.

Figure B.18 shows the routing of the M2 and A2, as well as the on-site parking facilities, laybys and industrial estates within 2.5km. This shows key clusters of on-site parking facilities west of Canterbury and near Dover, as well as a cluster of industrial estates in Rochester.

As outlined in the methodology, the four count points used were at the following locations:

- South of Gravesend (marked U on Figure B.18)
- Adjacent to the village of Bredhurst (marked V on Figure B.18)
- Adjacent to the village of Doddington (marked W on Figure B.18)
- North of Dover (marked X on Figure B.18)

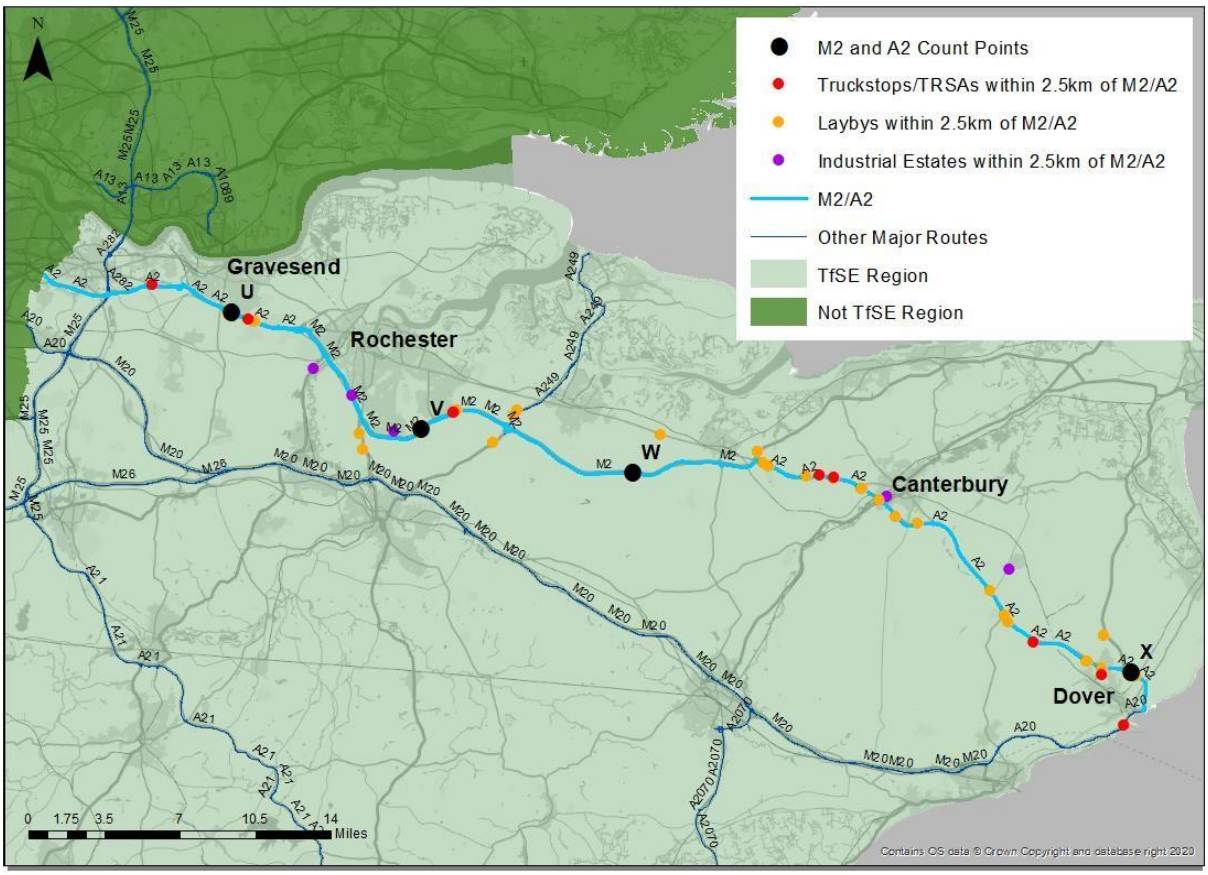


Figure B.18 Routing of the M2/A2 and lorry parking sites along the route

Figure B.19 shows the westbound and eastbound HGV flow at each of the count points. This shows a daily average weekday flow in March 2022 of 5,518 HGVs westbound and 5,893 HGVs eastbound. The average for Count Point U is significantly higher than the other count points, at 11,408 HGVs westbound and 12,632 HGVs eastbound, however this can be explained by the fact that this location is the only count point between the M25/A282 and the key industrial locations of Gravesend and Rochester, as well as the turnoffs for the A228 and A229 which link the M2 and M20.

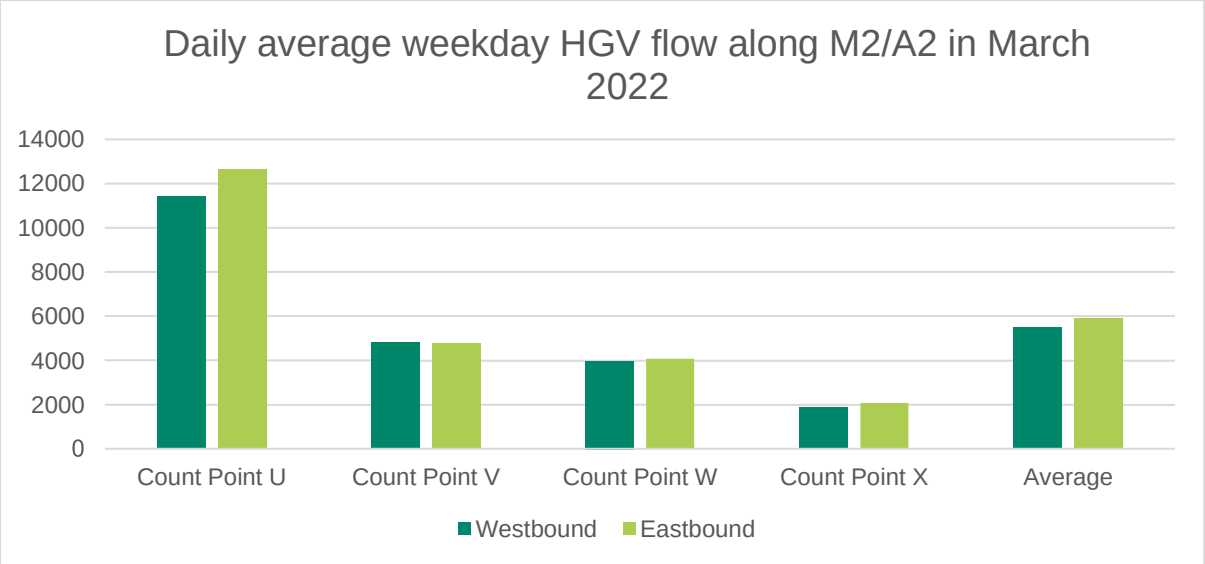


Figure B.19 Daily average weekday HGV flow along M2/A2 in March 2022

Table B.5 shows an overview of key lorry parking statistics for the M2/A2. This shows that there was a 122-space deficit in the total on-site parking capacity versus the number of HGVs recorded as being parked along the corridor. The parking demand factor of 7.0 means that approximately 7% of the weekday 24-hour HGV flow was observed being parked during the 2022 national survey of lorry parking.

Table B.5 Key lorry parking statistics for the M2/A2

	M2/A2
Average HGV flow per 24 hours per weekday in both directions in March 2022	11,411
Total HGVs parked	803
Parked at on-site parking facilities	626
Parked in laybys	125
Parked in industrial estates	52
2022 on-site capacity on route	681
2022 on-site capacity versus total HGVs parked on route	91.9
2022 on-site capacity versus total HGVs parked	-122
Parking demand factor	**7.0**

Figure B.20 shows the forecast daily average weekday flow along the M2/A2. This shows that in the low case daily weekday flows are forecast to increase by around 1,356 vehicles by 2040 to a total of 12,766. In the medium case, daily weekday flows are forecast to increase by around 1,807 vehicles by 2040 to a total of 13,218 and in the high case daily weekday flows are forecast to increase by around 2,259 vehicles by 2040 to a total of 13,670.

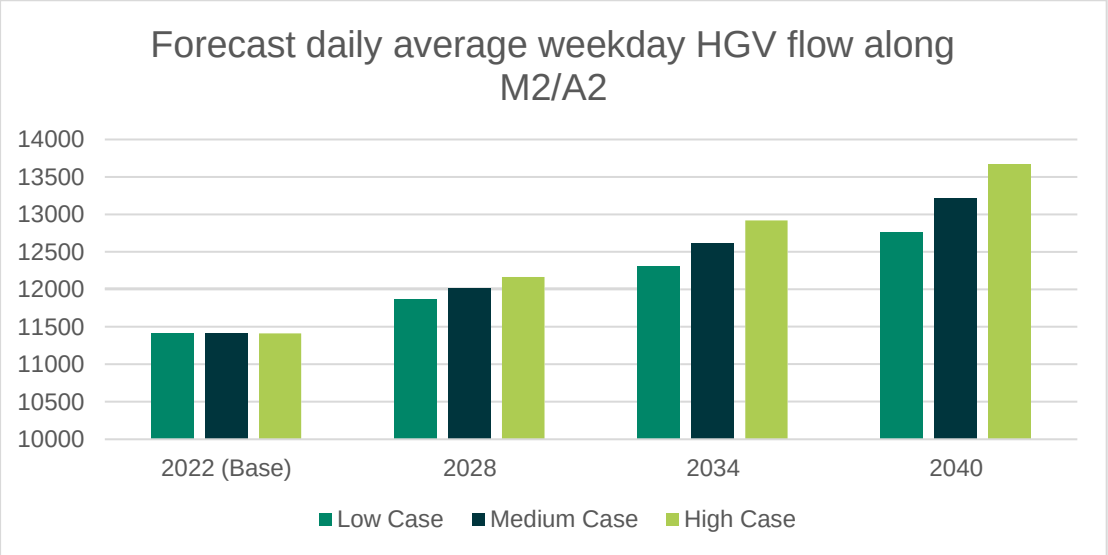


Figure B.20 Forecast daily average weekday HGV flow along M2/A2

Figure B.21 shows the forecast requirement for HGV parking spaces along the M2/A2. This shows that in the low case the required number of HGV parking spaces is forecast to increase by 95 to 898 by 2040. In the medium case, the required number of HGV parking spaces is forecast to increase by 127 to 930 by 2040. And in the high case the required number of HGV parking spaces is forecast to increase by 159 to 962 by 2040.

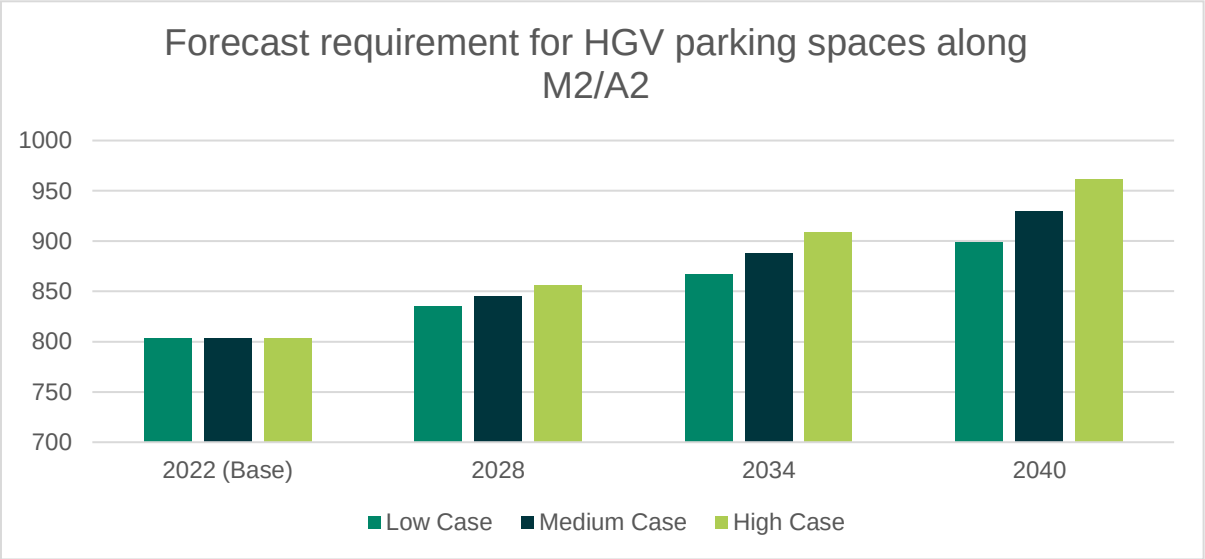


Figure B.21 Forecast requirement for HGV parking spaces along M2/A2

A259/A2070

The A259 and A2070 form a key route between Pevensey and Ashford, routing via Hastings and Rye.

Figure B.22 shows the routing of the A259 and A2070, as well as the on-site parking facilities, laybys and industrial estates within 2.5km. This shows clusters of laybys either side of Rye, as well as a cluster of industrial estates in Ashford.

As outlined in the methodology, the four count points used were at the following locations:

- Near to the village of Guestling Green (marked Y on Figure B.22)
- Near to the village of Winchelsea (marked Z on Figure B.22)
- Near to the village of Rye (marked AA on Figure B.22)
- Near to the village of Brookland (marked BB on Figure B.22)

For this route, as there were no appropriate count points on the A2070, all count points for this route are on the A259.

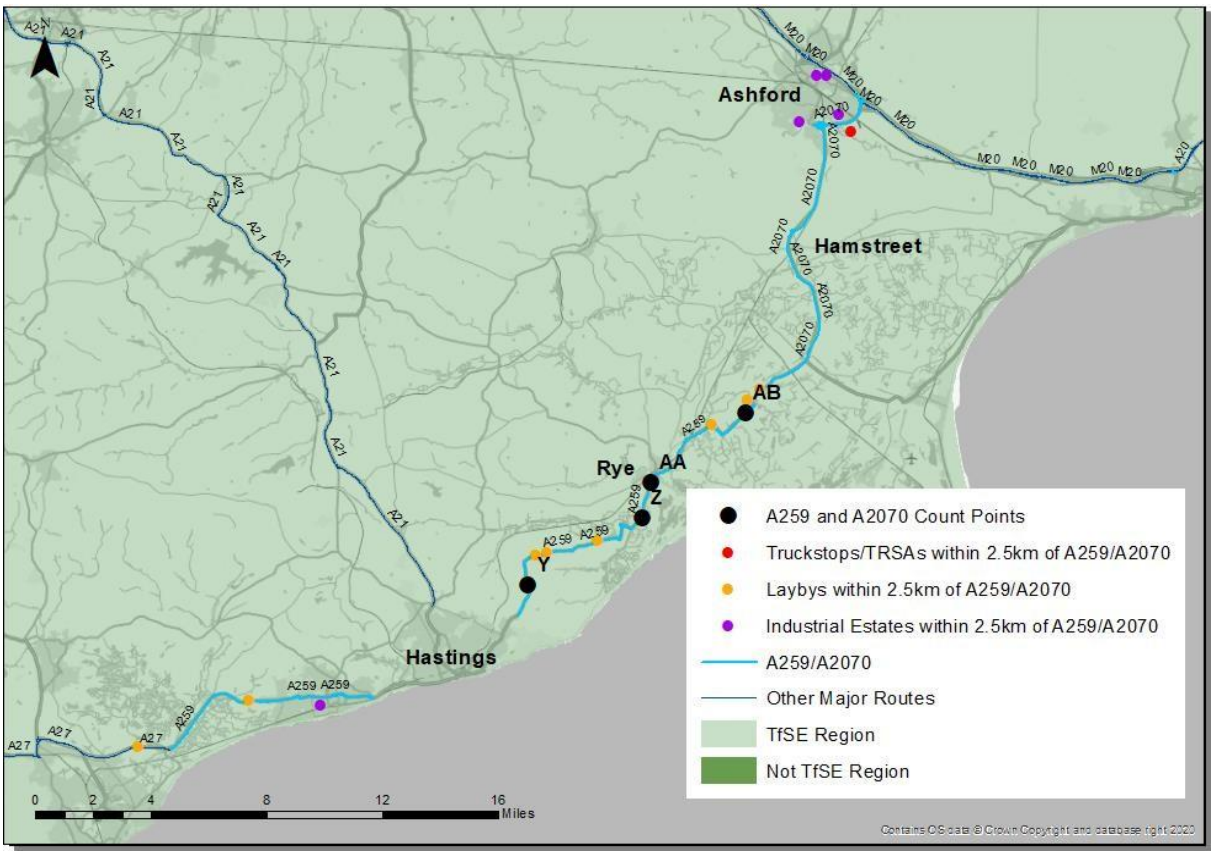


Figure B.22 Routing of the A259/A2070 and lorry parking sites along the route

Figure B.23 shows the westbound and eastbound HGV flow at each of the count points. This shows a daily average weekday flow in March 2022 of 208 HGVs westbound and 257 HGVs eastbound. The eastbound average for Count Point AA is significantly higher than the other count points, at 454 vehicles eastbound, however this can be explained by the fact that this location also enables local traffic within the village of Rye to access and use the village one-way system, which increases eastbound traffic through this count point as a result.

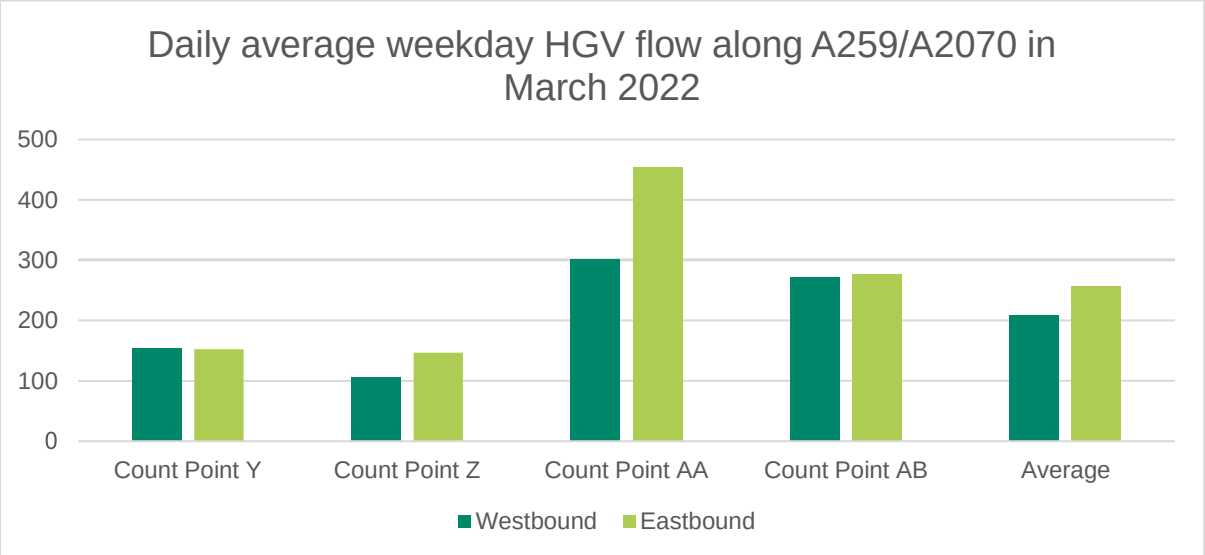


Figure B.23 Daily average weekday HGV flow along A259/A2070 in March 2022

Table B.6 shows an overview of key lorry parking statistics for the A259/A2070. This shows that there was a 32 space deficit in the total on-site parking capacity versus the number of HGVs recorded as being parked along the corridor.

For this route, the parking demand factor of 146.0 means that nearly 1.5 times the weekday 24-hour HGV flow was observed being parked during the 2022 national survey of lorry parking. However, this is due to the Ashford International Truckstop being along the route, which primarily serves the M20/A20 route, therefore skewing the parking demand factor for the A259/A2070.

Table B.6 Key lorry parking statistics for the A259/A2070

	A259/A2070
Average HGV flow per 24 hours per weekday in both directions in March 2022	466
Total HGVs parked	682
Parked at on-site parking facilities	650
Parked in laybys	3
Parked in industrial estates	29
2022 on-site capacity on route	650
2022 on-site capacity versus total HGVs parked on route	100
2022 on-site capacity versus total HGVs parked	-32
Parking demand factor	**146.4**

Figure B.24 shows the forecast daily average weekday flow along the A259/A2070. This shows that in the low case daily weekday flows are forecast to increase by around 55 vehicles by 2040 to a total of 521. In the medium case, daily weekday flows are forecast to increase by around 74 vehicles by 2040 to a total of 540 and in the high case daily weekday flows are forecast to increase by around 92 vehicles by 2040 to a total of 558.

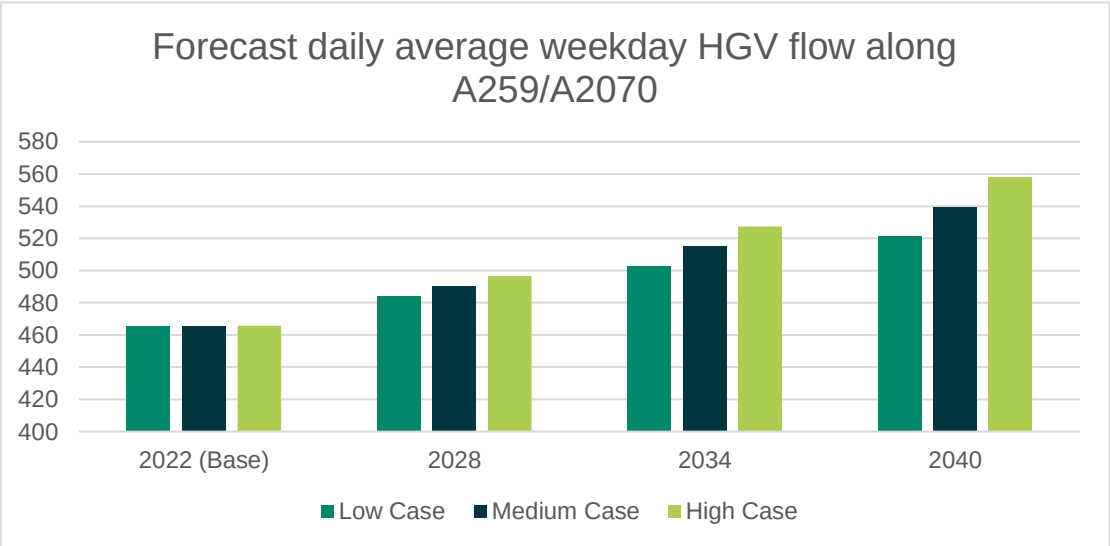


Figure B.24 Forecast daily average weekday HGV flow along A259/A2070

Figure B.25 shows the forecast requirement for HGV parking spaces along the A259/A2070. This shows that in the low case the required number of HGV parking spaces is forecast to increase by 81 to 763 by 2040. In the medium case, the required number of HGV parking spaces is forecast to increase by 108 to 790 by 2040. And in the high case the required number of HGV parking spaces is forecast to increase by 135 to 817 by 2040.

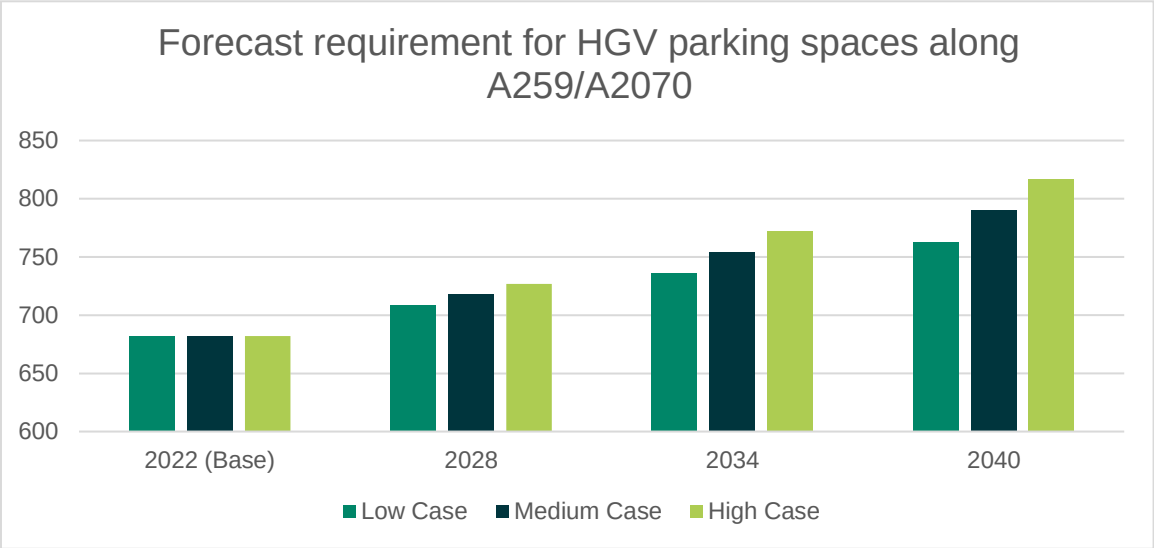


Figure B.25 Forecast requirement for HGV parking spaces along A259/A2070

M23/A23

The M23 and A23 form a key route between London and Brighton and Hove, routing via Gatwick Airport and Crawley.

Figure B.26 shows the routing of the M2 and A2, as well as the on-site parking facilities, laybys and industrial estates within 2.5km. This shows key clusters of on-site parking facilities south of Crawley, as well as a cluster of laybys on the A23 north of Brighton and Hove.

As outlined in the methodology, the four count points used were at the following locations:

- East of Merstham (marked CC on Figure B.26)
- East of Salfords (marked DD on Figure B.26Figure B.26)
- East of Gatwick Airport to the village of Doddington (marked EE on Figure B.26)
- Near to the village of Bolney (marked FF on Figure B.26)

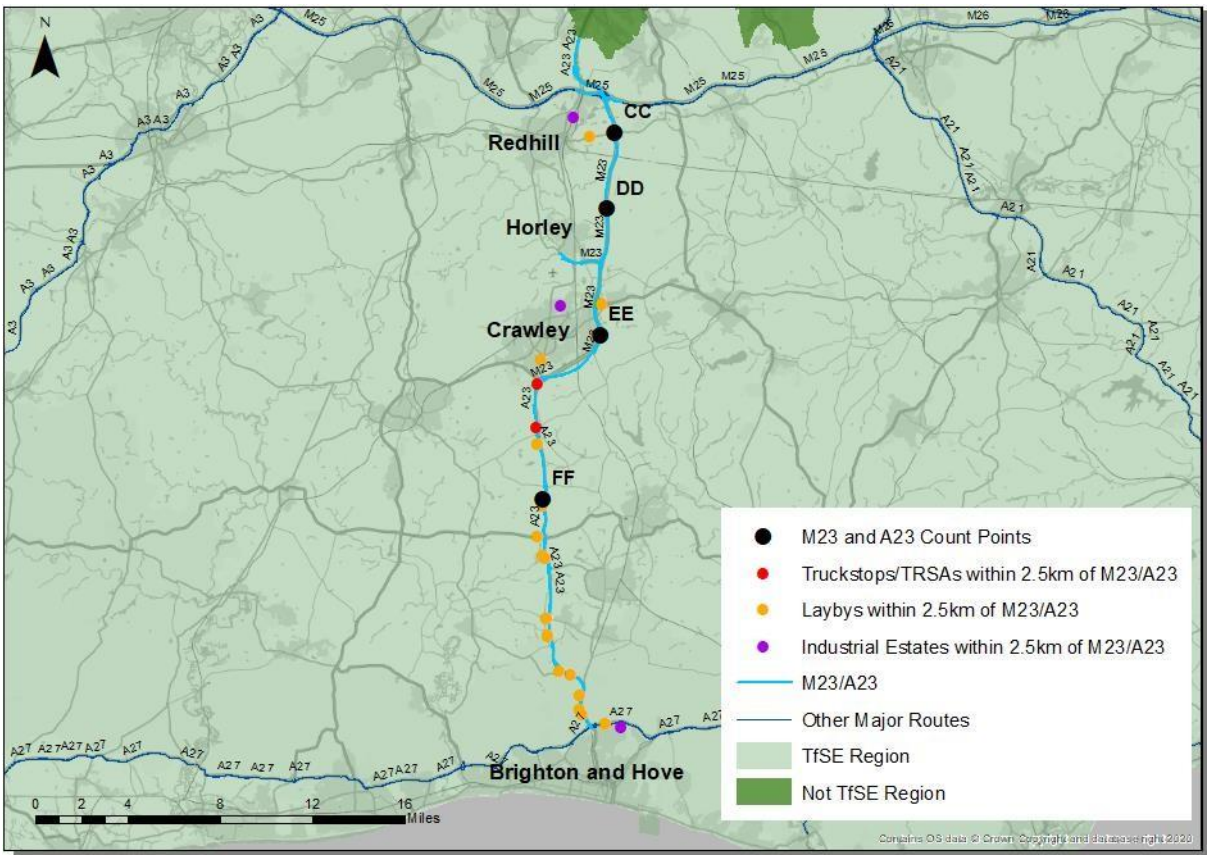


Figure B.26 Routing of the M23/A23 and lorry parking sites along the route

Figure B.27 shows the northbound and southbound HGV flow at each of the count points. This shows a daily average weekday flow in March 2022 of 6,067 HGVs northbound and 5,389 HGVs southbound. At each of the count points there is a higher northbound flow than southbound flow, whilst the overall number of HGVs increases as the route gets closer to London.

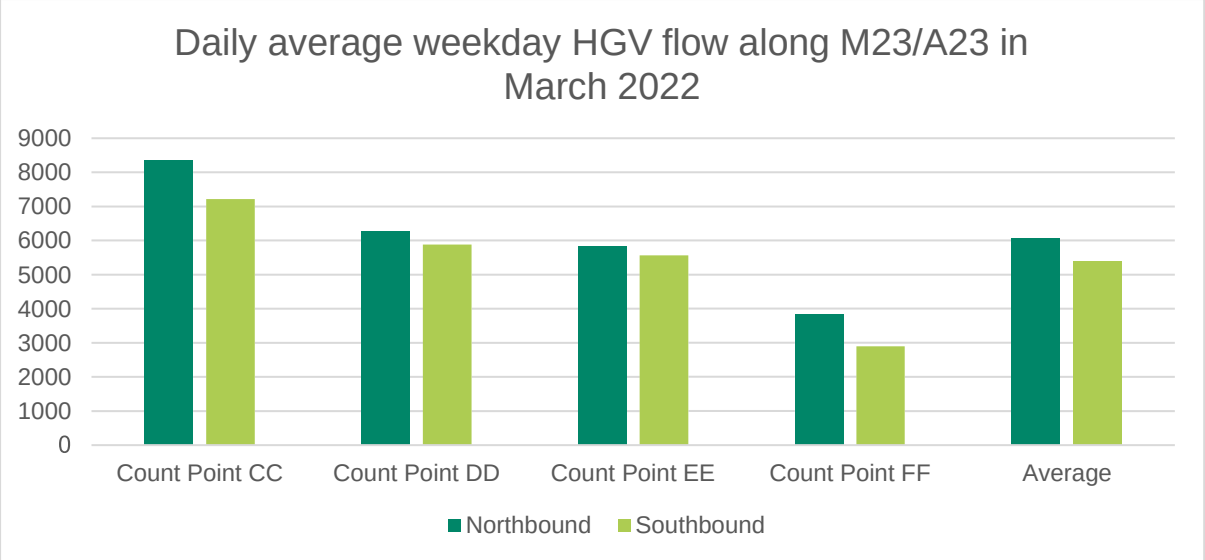


Figure B.27 Daily average weekday HGV flow along M23/A23 in March 2022

Table B.7 shows an overview of key lorry parking statistics for the M23/A23. This shows that there was a 47-space deficit in the total on-site parking capacity versus the number of HGVs recorded as being parked along the corridor. The parking demand factor of 0.6 means that approximately 0.6% of the weekday 24-hour HGV flow was observed being parked during the 2022 national survey of lorry parking.

Table B.7 Key lorry parking statistics for the M23/A23

	M23/A23
Average HGV flow per 24 hours per weekday in both directions in March 2022	11,457
Total HGVs parked	73
Parked at on-site parking facilities	34
Parked in laybys	33
Parked in industrial estates	6
2022 on-site capacity on route	26
2022 on-site capacity versus total HGVs parked on route	130.8
2022 on-site capacity versus total HGVs parked	-47
Parking demand factor	**0.6**

Figure B.28 shows the forecast daily average weekday flow along the M23/A23. This shows that in the low case daily weekday flows are forecast to increase by around 1,361 vehicles by 2040 to a total of 12,818. In the medium case, daily weekday flows are forecast to increase by around 1,815 vehicles by 2040 to a total of 13,271 and in the high case daily weekday flows are forecast to increase by around 2,268 vehicles by 2040 to a total of 13,725.

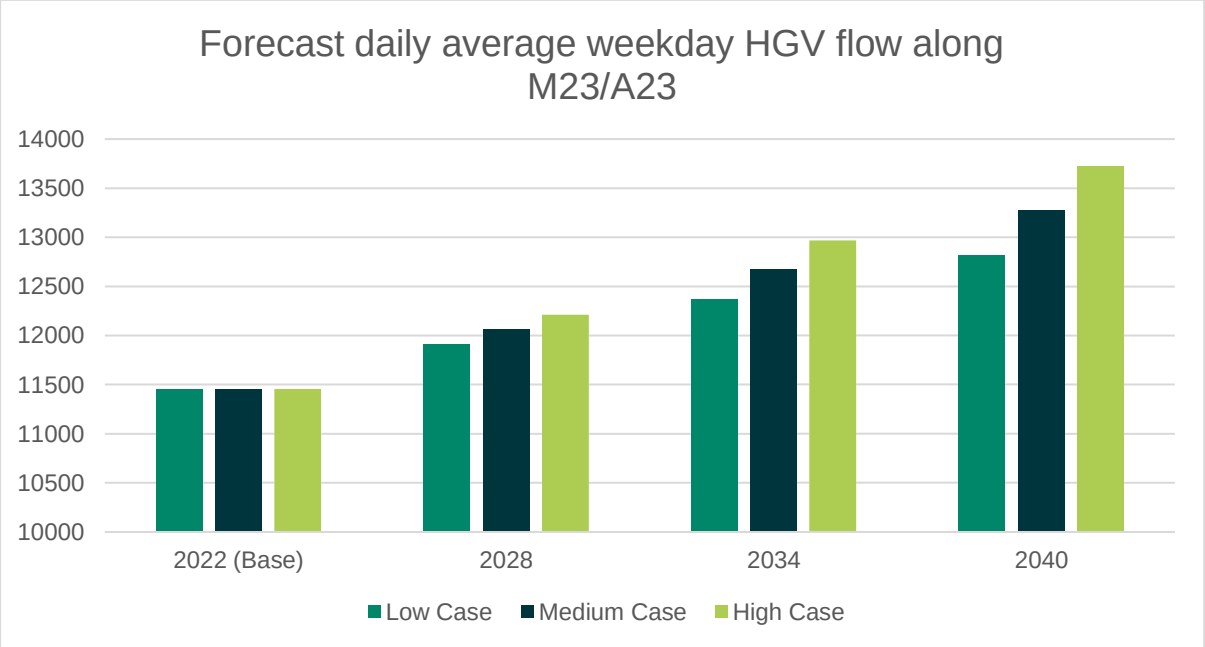


Figure B.28 Forecast daily average weekday HGV flow along M23/A23

Figure B.29 shows the forecast requirement for HGV parking spaces along the M23/A23. This shows that in the low case the required number of HGV parking spaces is forecast to increase by 9 to 82 by 2040. In the medium case, the required number of HGV parking spaces is forecast to increase by 12 to 85 by 2040. And in the high case the required number of HGV parking spaces is forecast to increase by 14 to 87 by 2040.

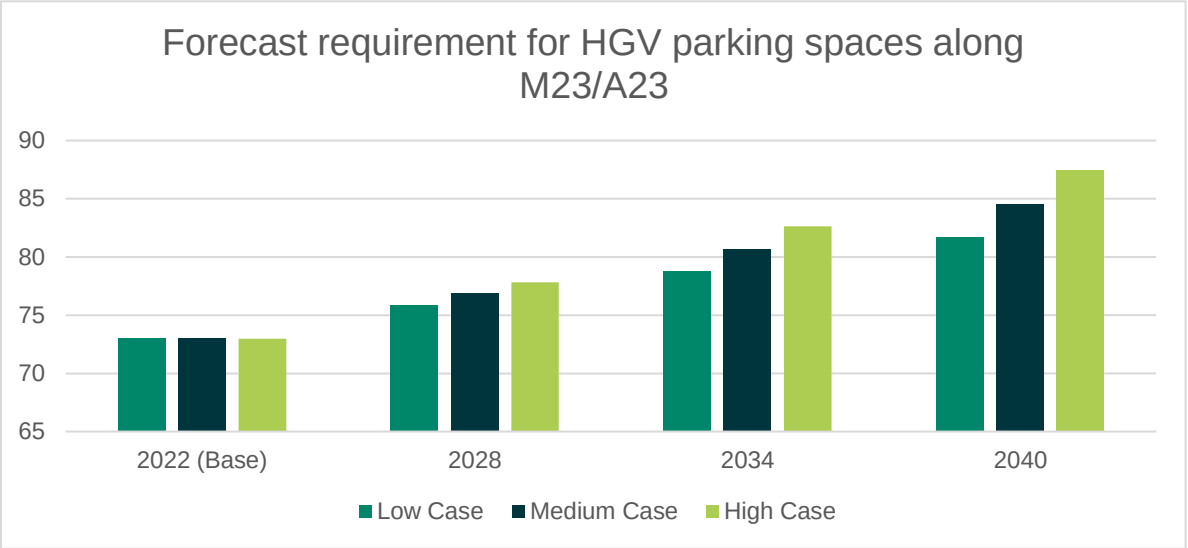


Figure B.29 Forecast requirement for HGV parking spaces along M23/A23

A21

The A21 is a key route between London and Hastings, routing via Tonbridge and Royal Tunbridge Wells.

Figure B.30 shows the routing of the A21, as well as the on-site parking facilities, laybys and industrial estates within 2.5km. This shows key clusters of laybys around Sevenoaks and around Robertsbridge, as well as a cluster of industrial estates in Hastings.

As outlined in the methodology, the four count points used were at the following locations:

- South of Sevenoaks (marked GG on Figure B.30)
- Near to the village of Lamberhurst (marked HH on Figure B.30)
- Near to the village of Hurst Green (marked II on Figure B.30)
- Near to the village of St Johns Cross (marked JJ on Figure B.30)

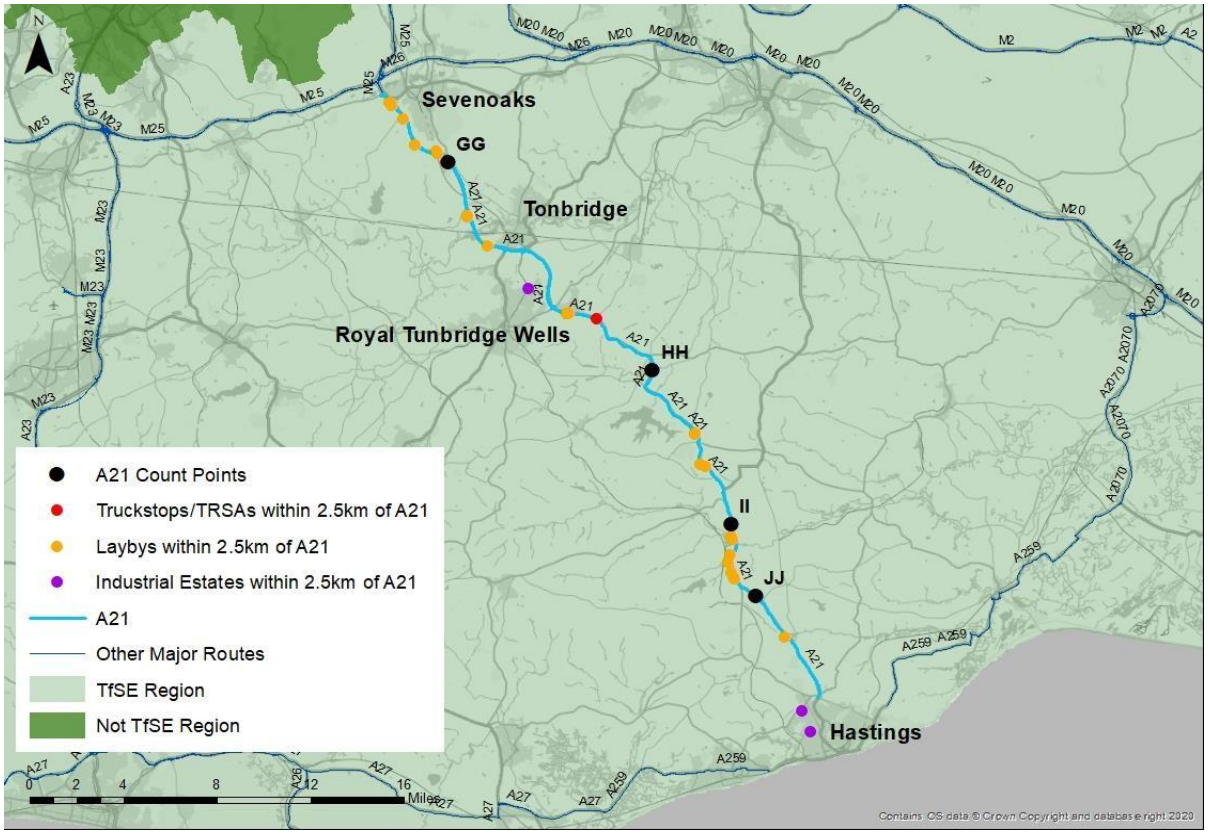


Figure B.30 Routing of the A21 and lorry parking sites along the route

Figure B.31 shows the northbound and southbound HGV flow at each of the count points. This shows a daily average weekday flow in March 2022 of 1,103 HGVs northbound and 1,062 HGVs southbound. The average for Count Point GG is significantly higher than the other count points, at 2,011 HGVs northbound and 1,941 HGVs southbound, however this can be explained by the fact that this location is closest to the M25 and London, and also the only count point between the M25 and the turnoff for the A26, as well as the key urban clusters of Tonbridge and Royal Tunbridge Wells.

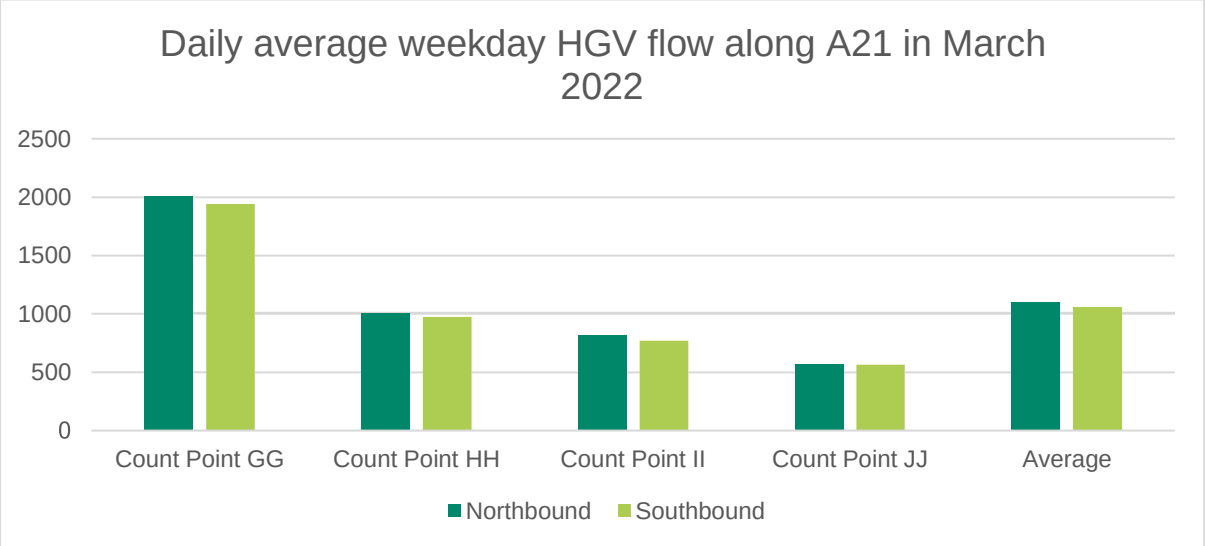


Figure B.31 Daily average weekday HGV flow along A21 in March 2022

Table B.8 shows an overview of key lorry parking statistics for the A21. This shows that there was a 49-space deficit in the total on-site parking capacity versus the number of HGVs recorded as being parked along the corridor. The parking demand factor of 2.6 means that approximately 2.6% of the weekday 24-hour HGV flow was observed being parked during the 2022 national survey of lorry parking.

Table B.8 Key lorry parking statistics for the A21

	A21
Average HGV flow per 24 hours per weekday in both directions in March 2022	2,165
Total HGVs parked	57
Parked at on-site parking facilities	3
Parked in laybys	50
Parked in industrial estates	4
2022 on-site capacity on route	8
2022 on-site capacity versus total HGVs parked on route	37.5
2022 on-site capacity versus total HGVs parked	-49
Parking demand factor	**2.6**

Figure B.32 shows the forecast daily average weekday flow along the A21. This shows that in the low case daily weekday flows are forecast to increase by around 257 vehicles by 2040 to a total of 2,422. In the medium case, daily weekday flows are forecast to increase by around 343 vehicles by 2040 to a total of 2,508 and in the high case daily weekday flows are forecast to increase by around 429 vehicles by 2040 to a total of 2,594.

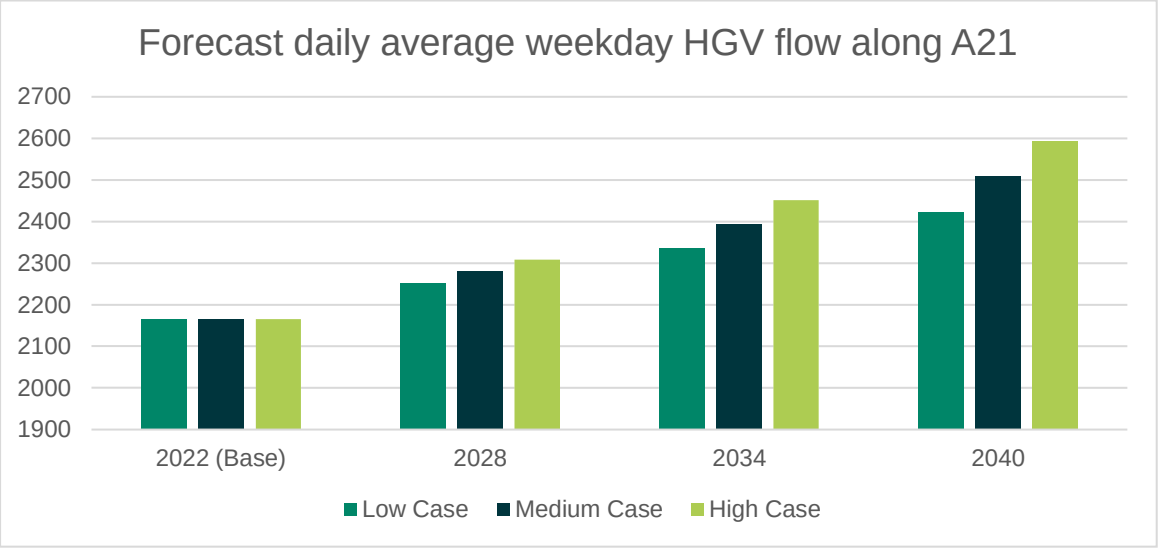


Figure B.32 Forecast daily average weekday HGV flow along A21

Figure B.33 shows the forecast requirement for HGV parking spaces along the A21. This shows that in the low case the required number of HGV parking spaces is forecast to increase by 7 to 64 by 2040. In the medium case, the required number of HGV parking spaces is forecast to increase by 9 to 66 by 2040. And in the high case the required number of HGV parking spaces is forecast to increase by 11 to 68 by 2040.

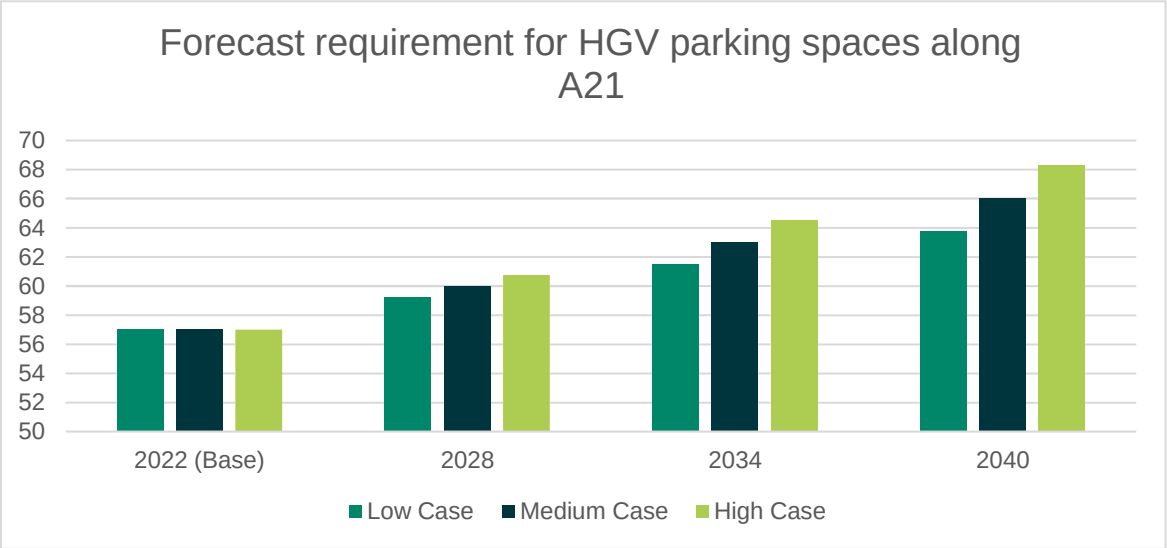


Figure B.33 Forecast requirement for HGV parking spaces along A21

M25/A282

The M25 and A282 form an orbital route around London. Within the TfSE area, this route connects Egham in the south west to Dartford in the south east.

Figure B.34 shows the routing of the M25/A282, as well as the on-site parking facilities, laybys and industrial estates within 2.5km. This shows key clusters of laybys and industrial estates around Egham and on-site parking areas spread along the route.

As outlined in the methodology, the four count points used were at the following locations:

- South of Egham (marked KK on Figure B.34)
- Near to Ashtead (marked LL on Figure B.34)
- Near to Oxted (marked MM on Figure B.34)
- Near to the village of Crockenhill (marked NN on Figure B.34)

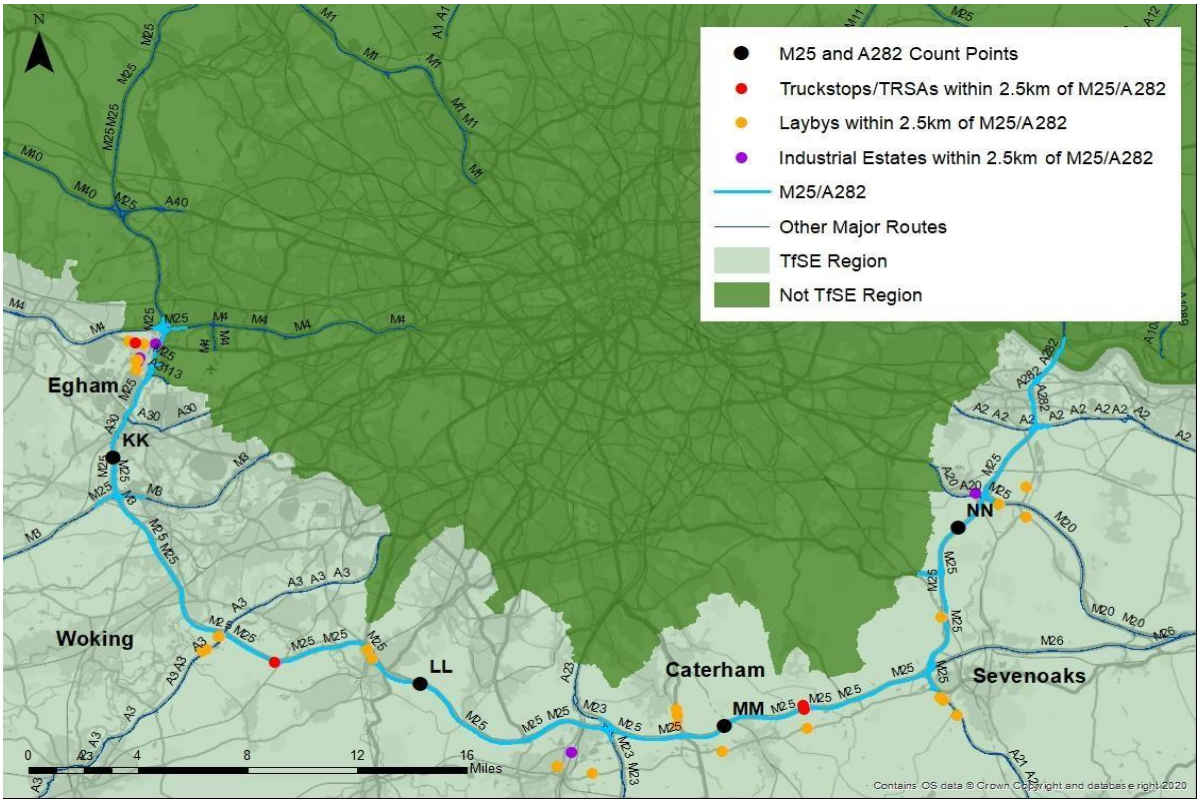


Figure B.34 Routing of the M25/A282 and lorry parking sites along the route

Figure B.35 shows the anticlockwise and clockwise HGV flow at each of the count points. This shows a daily average weekday flow in March 2022 of 12,418 HGVs anticlockwise and 12,242 HGVs clockwise. The average for Count Point NN is significantly lower than the other count points, at 8,568 HGVs anticlockwise and 8,153 HGVs clockwise. This can be explained by the fact that this location is between the junctions of the M25 and M26, and the M25 and M20, where many trucks travelling both anticlockwise and clockwise would turn off to travel towards locations such as the Channel Tunnel and Dover.

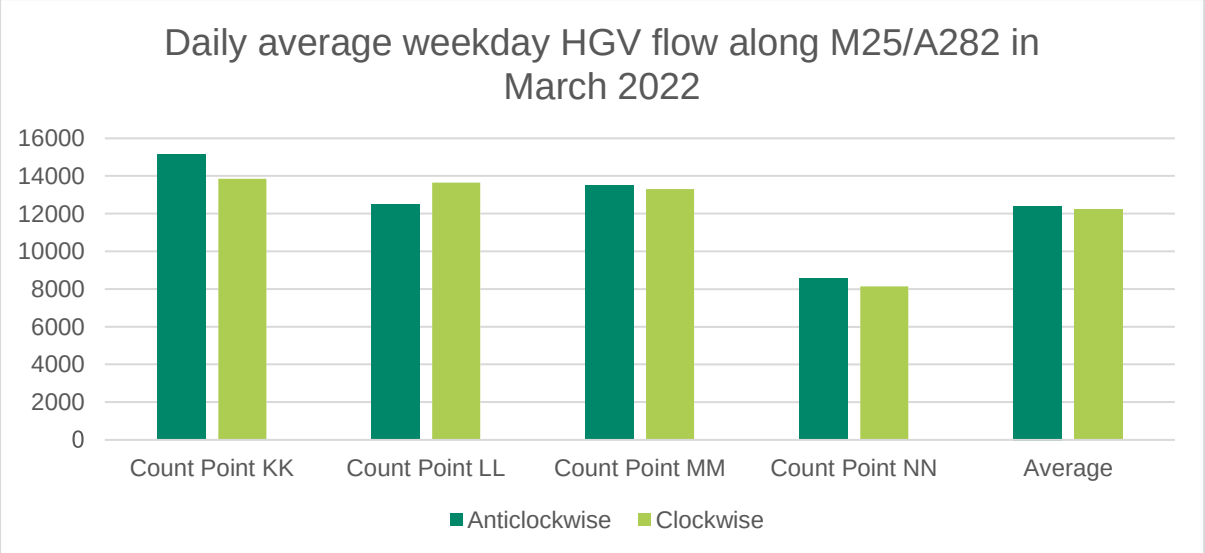


Figure B.35 Daily average weekday HGV flow along M25/A282 in March 2022

Table B.9 shows an overview of key lorry parking statistics for the M25/A282. This shows that there was a 173-space deficit in the total on-site parking capacity versus the number of HGVs recorded as

being parked along the corridor. The parking demand factor of 2.3 means that approximately 2.3% of the weekday 24-hour HGV flow was observed being parked during the 2022 national survey of lorry parking.

Table B.9 Key lorry parking statistics for the M25/A282

	M25/A282
Average HGV flow per 24 hours per weekday in both directions in March 2022	24,661
Total HGVs parked	565
Parked at on-site parking facilities	444
Parked in laybys	113
Parked in industrial estates	8
2022 on-site capacity on route	392
2022 on-site capacity versus total HGVs parked on route	113.3
2022 on-site capacity versus total HGVs parked	-173
Parking demand factor	**2.3**

Figure B.36 shows the forecast daily average weekday flow along the M25/A282. This shows that in the low case daily weekday flows are forecast to increase by around 2,930 vehicles by 2040 to a total of 27,590. In the medium case, daily weekday flows are forecast to increase by around 3,906 vehicles by 2040 to a total of 28,567 and in the high case daily weekday flows are forecast to increase by around 4,883 vehicles by 2040 to a total of 29,544.

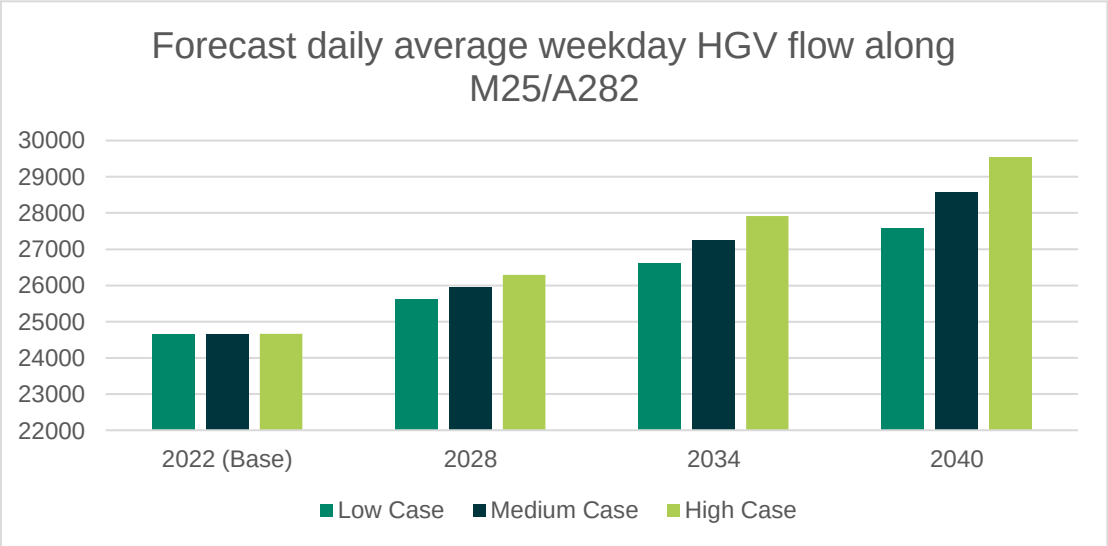


Figure B.36 Forecast daily average weekday HGV flow along M25/A282

Figure B.37 shows the forecast requirement for HGV parking spaces along the M25/A282. This shows that in the low case the required number of HGV parking spaces is forecast to increase by 67 to 632 by 2040. In the medium case, the required number of HGV parking spaces is forecast to increase by 89 to 654 by 2040. And in the high case the required number of HGV parking spaces is forecast to increase by 112 to 677 by 2040.

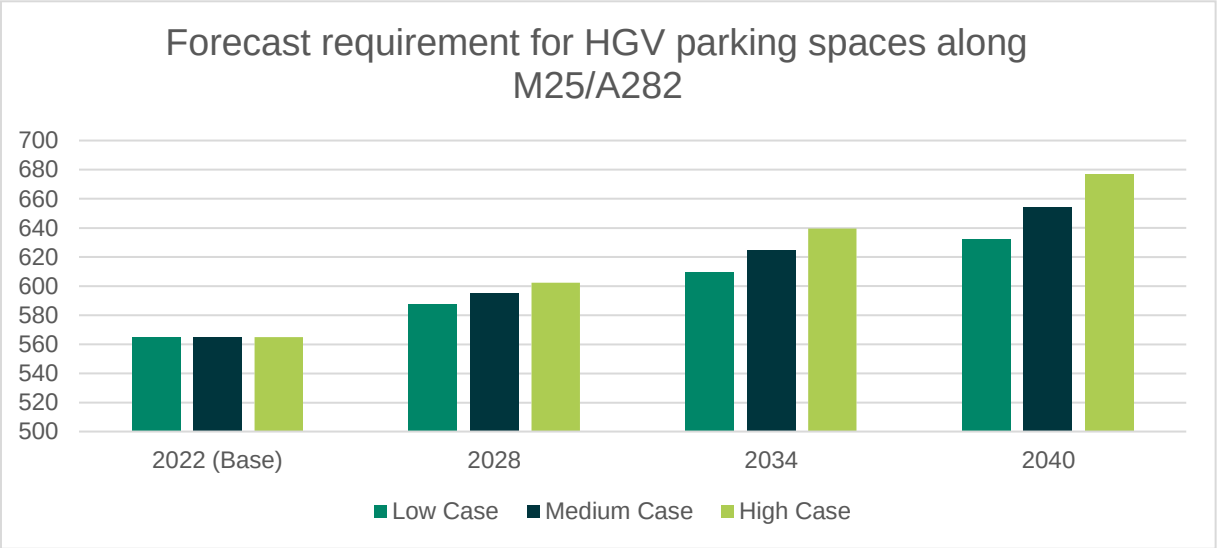


Figure B.37 Forecast requirement for HGV parking spaces along M25/A282

A34

The A34 is a key route between Winchester and the Midlands. Within the TfSE area it links locations including Winchester, Whitchurch and Newbury.

Figure B.38 shows the routing of the A34, as well as the on-site parking facilities, laybys and industrial estates within 2.5km. This shows several laybys along the entire route, as well as a cluster of industrial estates around Winchester.

As outlined in the methodology, the four count points used were at the following locations:

- Near to the village of Enborne Row (marked OO on Figure B.38)
- Near to the village of Burghclere (marked PP on Figure B.38)
- Near to the village of Sutton Scotney (marked QQ on Figure B.38)
- Near to the village of South Wonston (marked RR on Figure B.38)

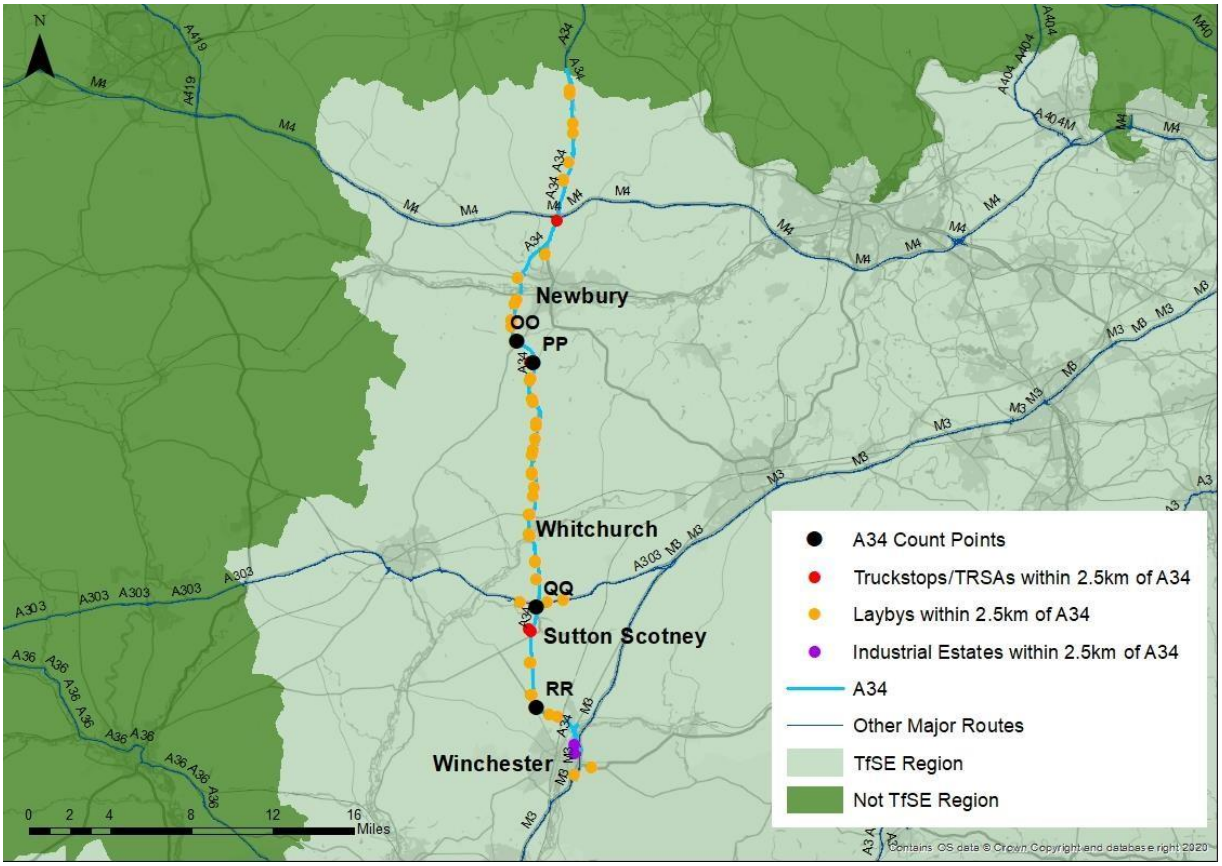


Figure B.38 Routing of the A34 and lorry parking sites along the route

Figure B.39 shows the northbound and southbound HGV flow at each of the count points. This shows a daily average weekday flow in March 2022 of 5,217 HGVs northbound and 4,605 HGVs southbound. The northbound figure for Count Point PP is significantly higher than the southbound figure, with 6,682 HGVs northbound and 4,672 HGVs southbound. One explanation for this may be that large vehicles travelling north to Newbury may find it easier to travel one junction further north up past this count point on the A34 to avoid having to navigate the double gyratory at the previous junction with the B4640 which is quite tight, and easier to navigate for vehicles travelling southbound.

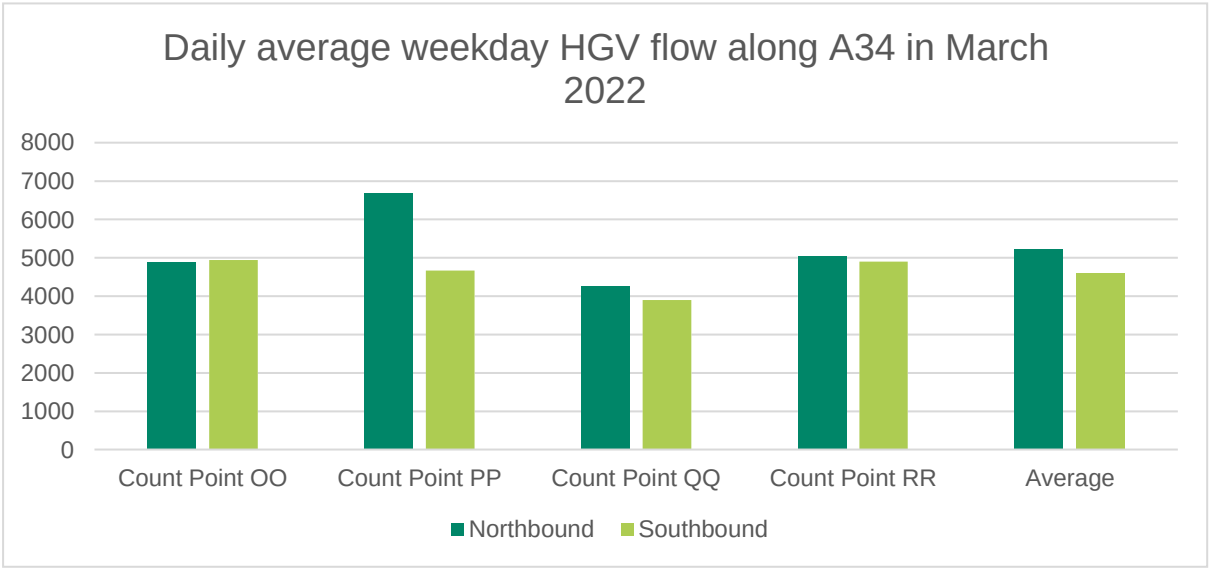


Figure B.39 Daily average weekday HGV flow along A34 in March 2022

Table B.10 shows an overview of key lorry parking statistics for the A34. This shows that there was a 132-space deficit in the total on-site parking capacity versus the number of HGVs recorded as being parked along the corridor. The parking demand factor of 2.9 means that approximately 2.9% of the weekday 24-hour HGV flow was observed being parked during the 2022 national survey of lorry parking.

Table B.10 Key lorry parking statistics for the A34

	A34
Average HGV flow per 24 hours per weekday in both directions in March 2022	9,822
Total HGVs parked	284
Parked at on-site parking facilities	187
Parked in laybys	80
Parked in industrial estates	17
2022 on-site capacity on route	152
2022 on-site capacity versus total HGVs parked on route	123
2022 on-site capacity versus total HGVs parked	-132
Parking demand factor	**2.9**

Figure B.40 shows the forecast daily average weekday flow along the A34. This shows that in the low case daily weekday flows are forecast to increase by around 1,167 vehicles by 2040 to a total of 10,988. In the medium case, daily weekday flows are forecast to increase by around 1,556 vehicles by 2040 to a total of 11,377 and in the high case daily weekday flows are forecast to increase by around 1,945 vehicles by 2040 to a total of 11,766.

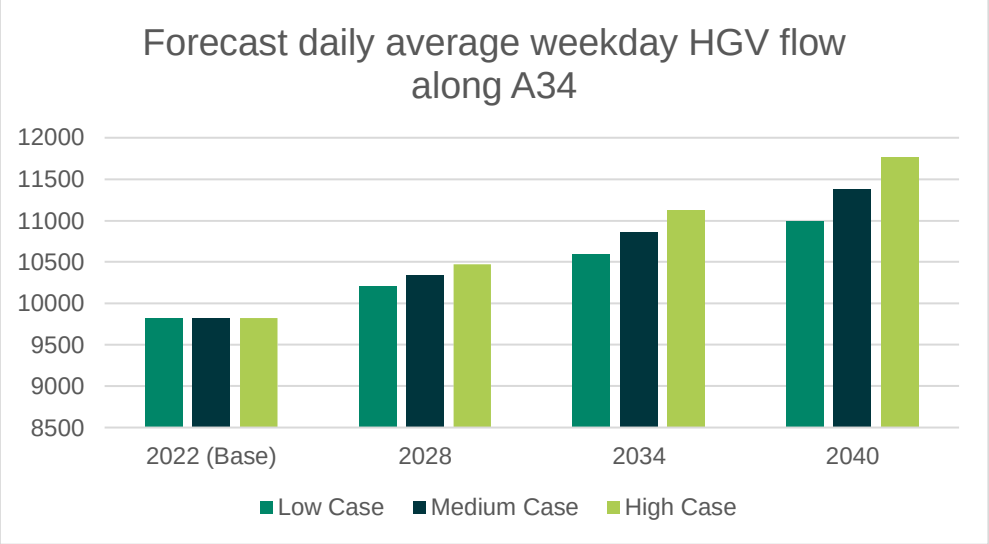


Figure B.40 Forecast daily average weekday HGV flow along A34

Figure B.41 shows the forecast requirement for HGV parking spaces along the A34. This shows that in the low case the required number of HGV parking spaces is forecast to increase by 34 to 318 by

2040. In the medium case, the required number of HGV parking spaces is forecast to increase by 45 to 329 by 2040. And in the high case the required number of HGV parking spaces is forecast to increase by 56 to 340 by 2040.

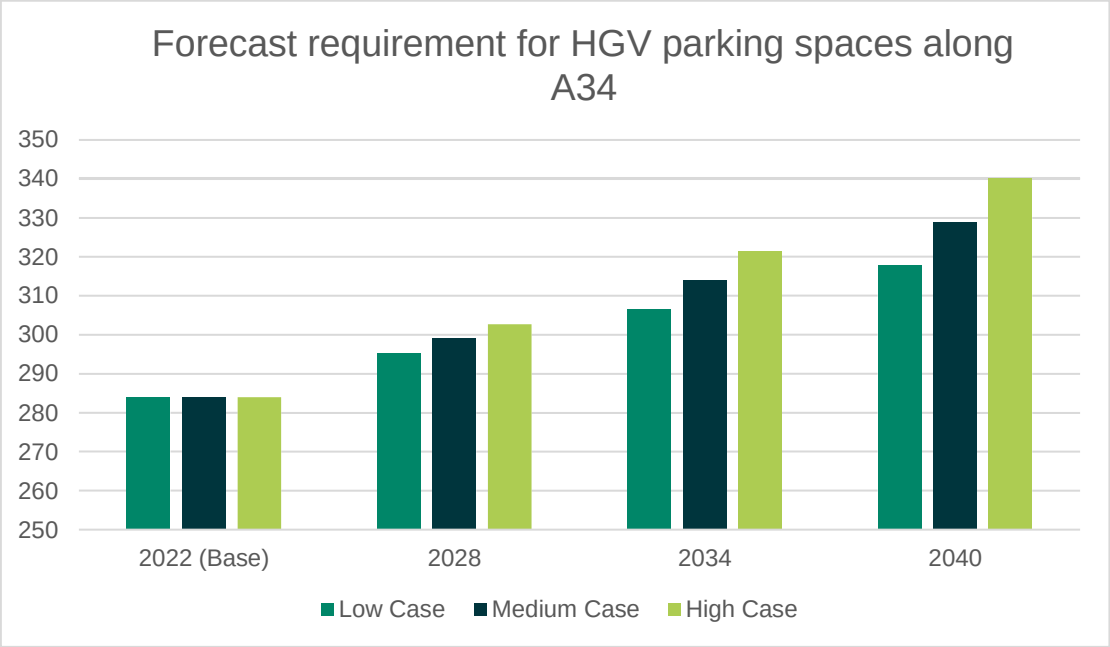


Figure B.41 Forecast requirement for HGV parking spaces along A34

M4

The M4 is a key route between London and South Wales. Within the TfSE area it links locations including Slough, Maidenhead and Reading.

Figure B.42 shows the routing of the A34, as well as the on-site parking facilities, laybys and industrial estates within 2.5km. This shows a cluster of facilities east of Slough, as well as several on-site parking facilities spread along the route.

As outlined in the methodology, the four count points used were at the following locations:

- Near to the village of Enborne Row (marked SS on Figure B.42)
- Near to the village of Burghclere (marked TT on Figure B.42)
- Near to the village of Sutton Scotney (marked UU on Figure B.42)
- Near to the village of South Wonston (marked VV on Figure B.42)

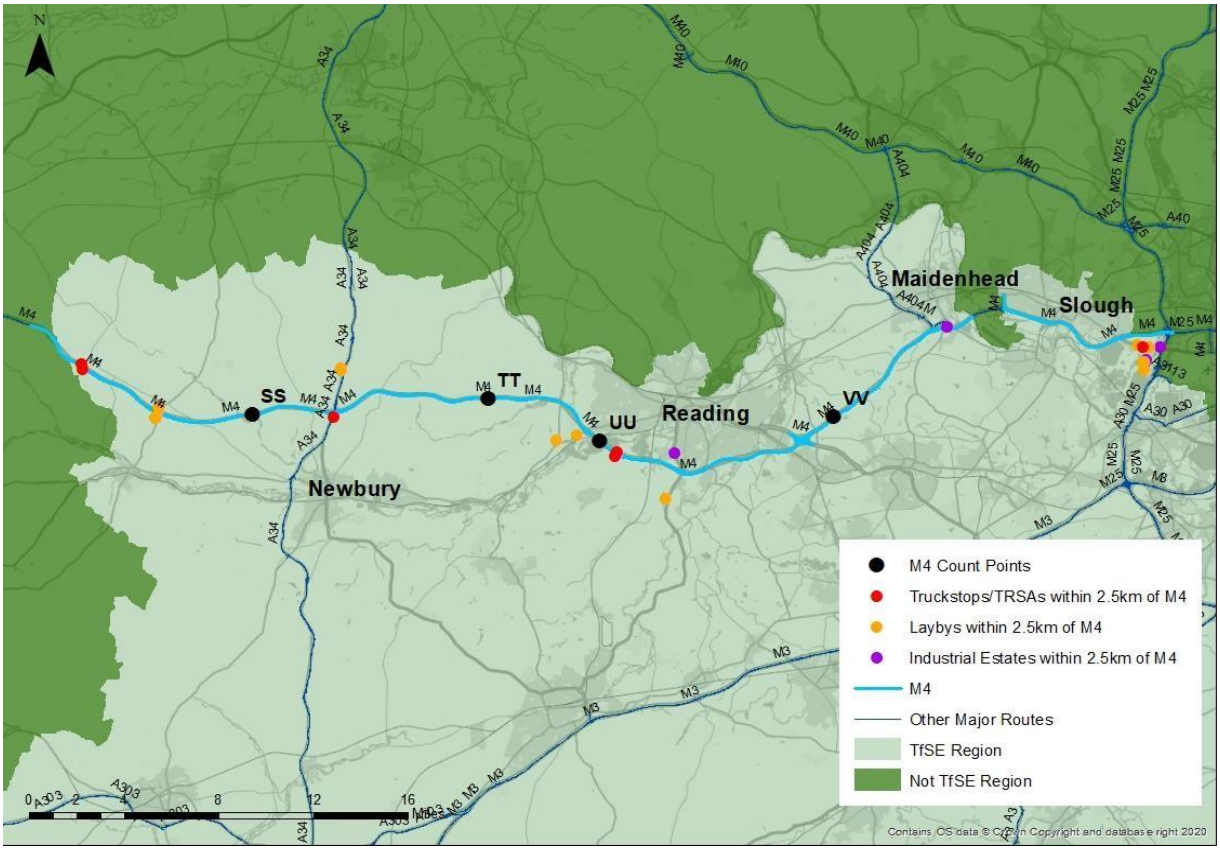


Figure B.42 Routing of the M4 and lorry parking sites along the route

Figure B.43 shows the westbound and eastbound HGV flow at each of the count points. This shows a daily average weekday flow in March 2022 of 6,092 HGVs westbound and 6,715 HGVs eastbound. At each of the count points there is a higher eastbound flow than westbound flow, whilst the overall number of HGVs travelling westbound decreases as the route gets further from London.

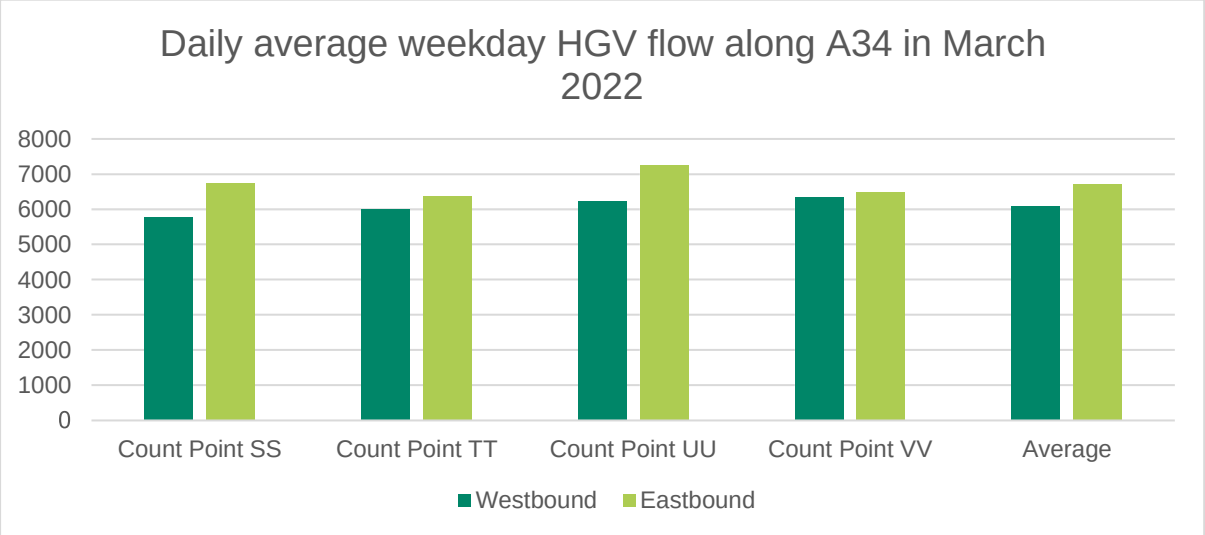


Figure B.43 Daily average weekday HGV flow along M4 in March 2022

Table B.11 shows an overview of key lorry parking statistics for the M4. This shows that there was a 58-space surplus in the total on-site parking capacity versus the number of HGVs recorded as being parked along the corridor. The parking demand factor of 2.6 means that approximately 2.3% of the

weekday 24-hour HGV flow was observed being parked during the 2022 national survey of lorry parking.

Table B.11 Key lorry parking statistics for the M4

	M4
Average HGV flow per 24 hours per weekday in both directions in March 2022	12,807
Total HGVs parked	328
Parked at on-site parking facilities	297
Parked in laybys	23
Parked in industrial estates	8
2022 on-site capacity on route	386
2022 on-site capacity versus total HGVs parked on route	76.9
2022 on-site capacity versus total HGVs parked	58
Parking demand factor	**2.6**

Figure B.44 shows the forecast daily average weekday flow along the M4. This shows that in the low case daily weekday flows are forecast to increase by around 1,521 vehicles by 2040 to a total of 14,328. In the medium case, daily weekday flows are forecast to increase by around 2,029 vehicles by 2040 to a total of 14,835 and in the high case daily weekday flows are forecast to increase by around 2,536 vehicles by 2040 to a total of 15,343.

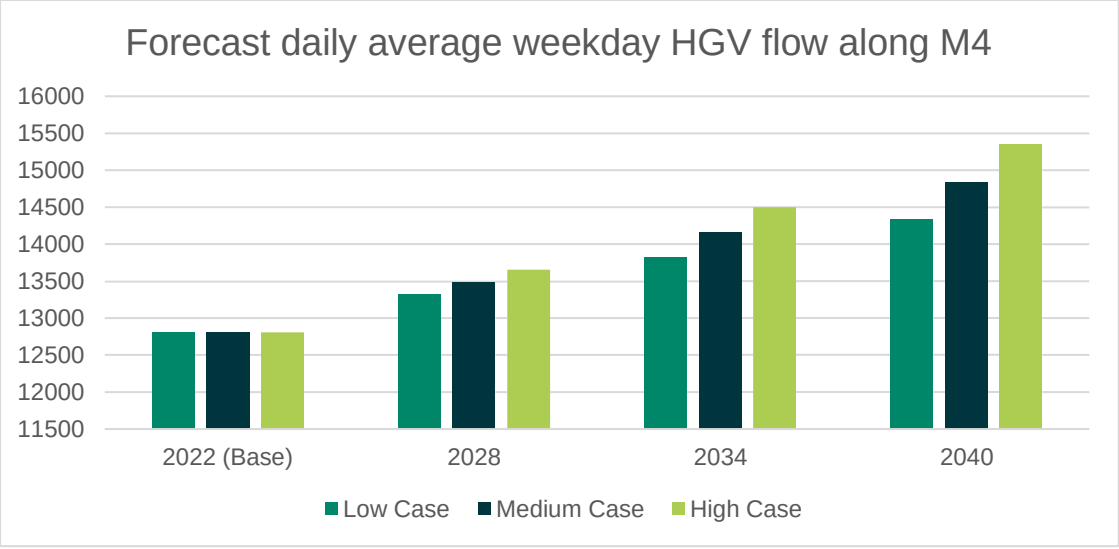


Figure B.44 Forecast daily average weekday HGV flow along M4

Figure B.45 shows the forecast requirement for HGV parking spaces along the M4. This shows that in the low case the required number of HGV parking spaces is forecast to increase by 39 to 367 by 2040. In the medium case, the required number of HGV parking spaces is forecast to increase by 52 to 380 by 2040. And in the high case the required number of HGV parking spaces is forecast to increase by 65 to 393 by 2040.

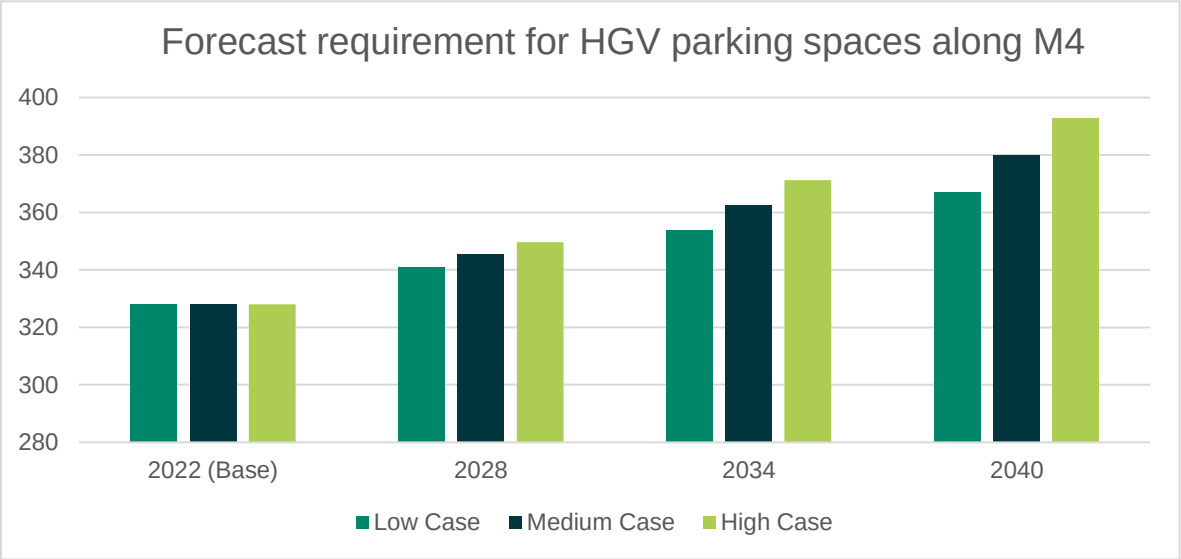


Figure B.45 Forecast requirement for HGV parking spaces along M4

A31

The A31 forms a key route between Winchester and Guildford, routing via Alton.

Figure B.46 shows the routing of the A31, as well as the laybys and industrial estates within 2.5km. There were no on-site parking facilities within 2.5km of the A31. This shows key clusters of industrial estates around Alton and laybys around Alton and east of Winchester.

As outlined in the methodology, the four count points used were at the following locations:

- West of Guildford (marked Q on Figure B.46)
- East of Farnham (marked R on Figure B.46)
- West of Alton (marked S on Figure B.46)
- East of Winchester (Marked T on Figure B.46)

Also, as noted in the methodology, the flows data for the A31 comes from DfT Road Traffic Statistics from 2019, whilst the lorry parking count data is from 2023. This is different from the other routes, which use WebTRIS data from 2022 and lorry parking counts data from 2022.

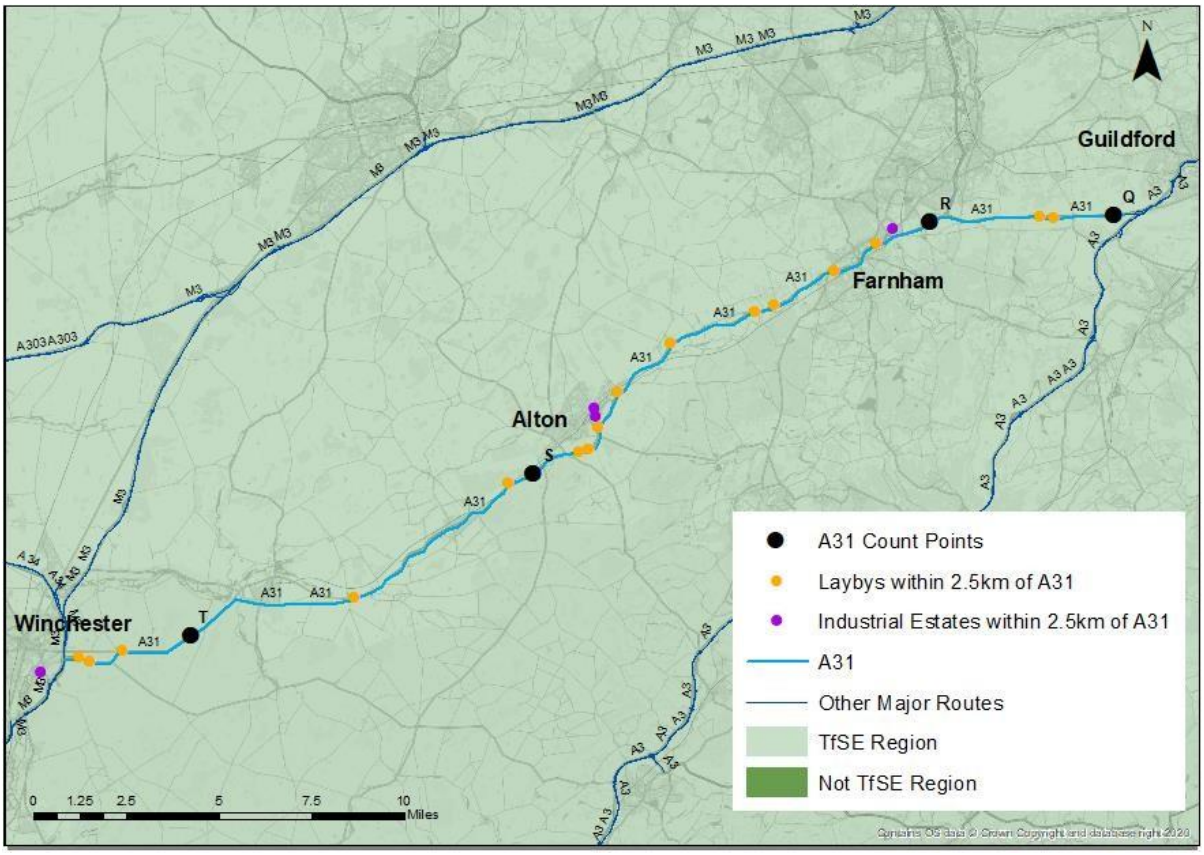


Figure B.46 Routing of the A31 and lorry parking sites along the route

Figure B.47 shows westbound and eastbound HGV flow at each of the count points. This shows a daily average weekday flow in March 2022 of 523 HGVs westbound and 482 HGVs eastbound. The averages for Count Point S and T are slightly higher than the other count points, however this can be explained by traffic passing this count point that is only running between the port of Southampton and the cluster of industrial estates around Alton.

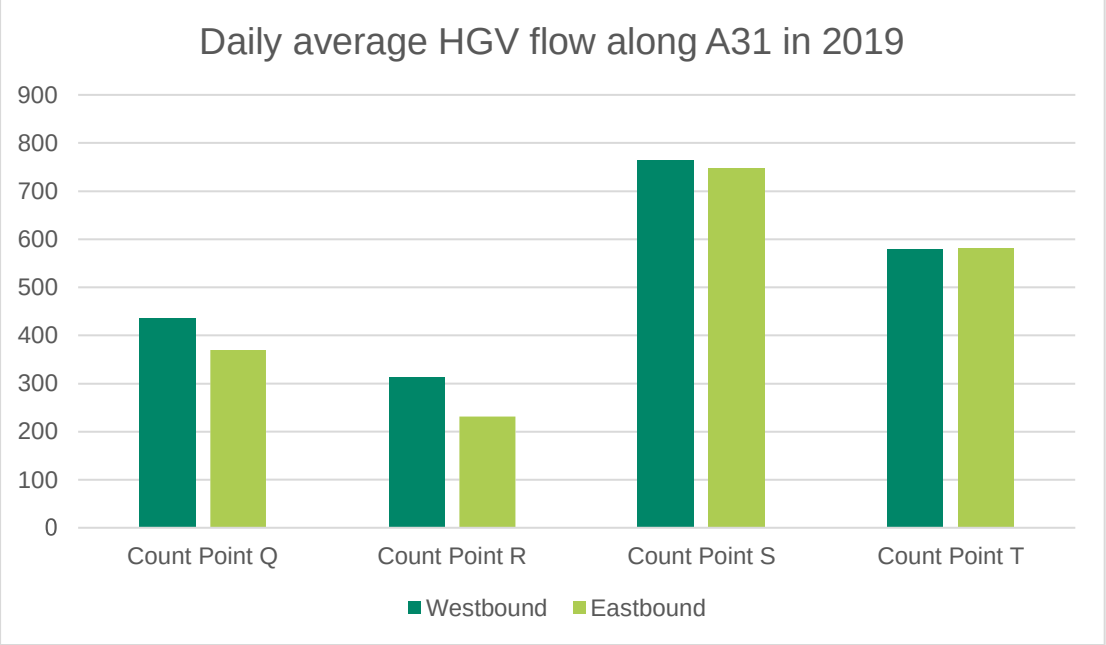


Figure B.47 Daily average HGV flow along A31 in 2019

Table B.12 shows an overview of key truck parking statistics for the A31. This shows that there was an 85-space deficit in the total Truckstop capacity vs the number of HGVs recorded as being parked

along the corridor. The parking demand factor of 2.9 means that approximately 2.9% of the weekday 24-hour HGV flow was observed being parked during the 2022 national survey of lorry parking.

Table B.12 Overview of key lorry parking statistics for the A31

	A31
Average HGV flow per 24 hours per weekday in both directions in 2019	1,005
Total HGVs parked	14
Parked at on-site parking facilities	0*
Parked in laybys	9
Parked in industrial estates	5
2023 on-site capacity	0*
2022 on-site capacity versus total HGVs parked on route	N/A*
2023 on-site capacity versus total HGVs parked	-14
Parking demand factor	**1.4**

*There are no on-site facilities within 2.5km of the A31

Figure B.48 shows the forecast daily average flow along the A31. As noted in the methodology, for continuity, the 2023 A31 survey counts and the 2019 flows data have been used as the basis for the 2022 base year. The data shows that in the low case daily weekday flows are forecast to increase by around 119 vehicles by 2040 to a total of 1,124. In the medium case, daily weekday flows are forecast to increase by around 159 vehicles by 2040 to a total of 1,164 and in the high case daily weekday flows are forecast to increase by around 199 vehicles by 2040 to a total of 1,204.

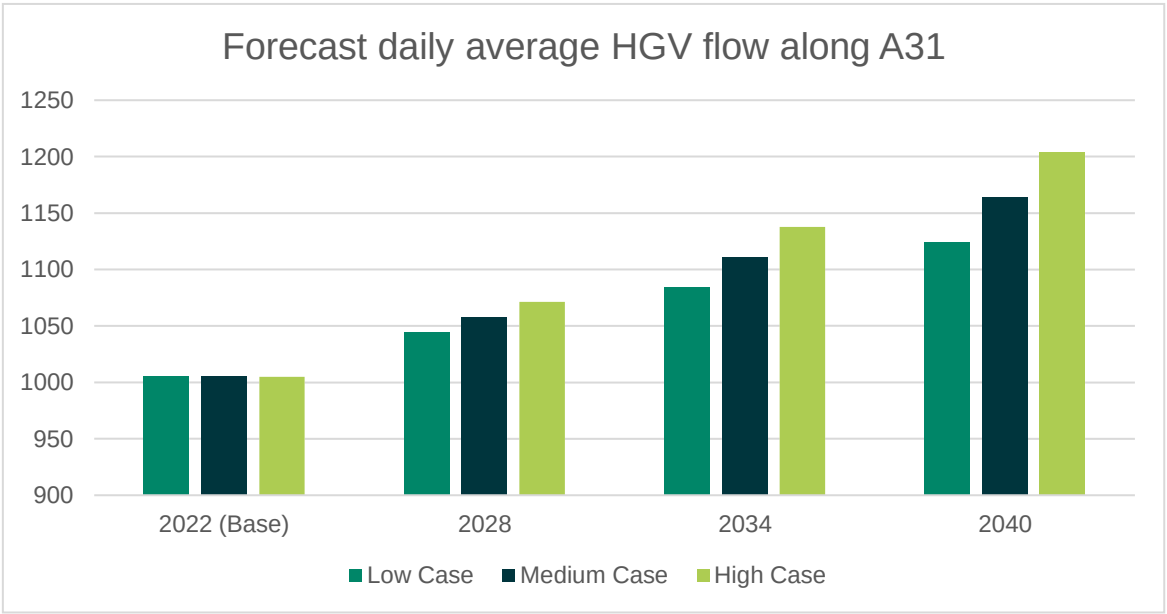


Figure B.48 Forecast daily average HGV flow along A31

Figure B.49 shows the forecast requirement for HGV parking spaces along the A31. This shows that in the low case and medium case the required number of HGV parking spaces is forecast to increase

by 2 to 16 by 2040. And in the high case the required number of HGV parking spaces is forecast to increase by 3 to 17 by 2040.

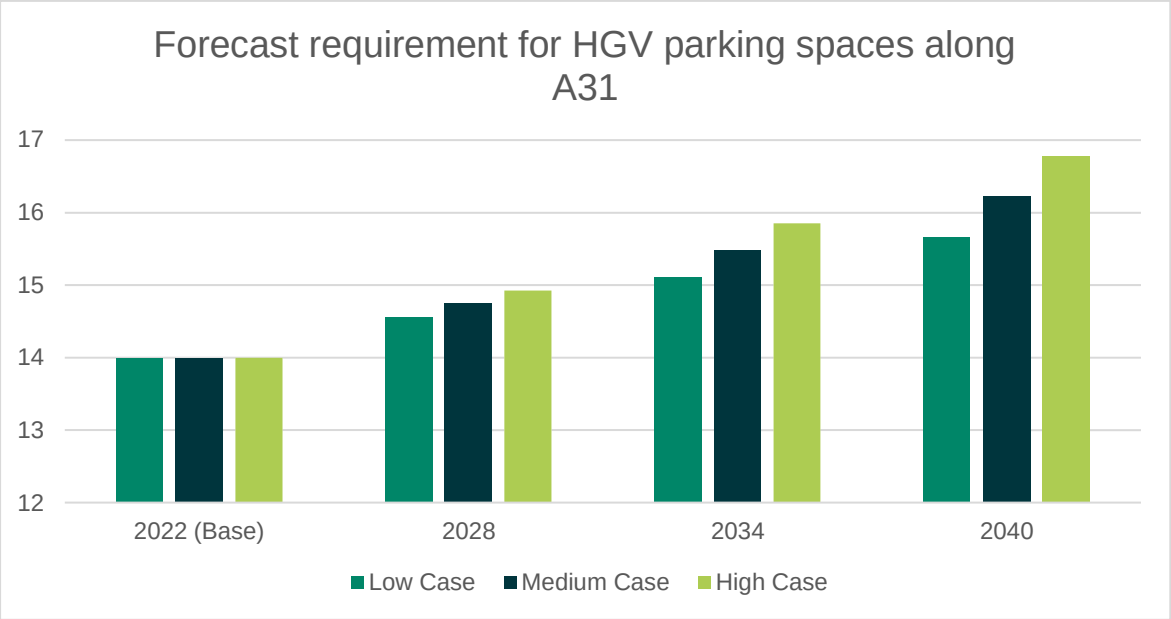


Figure B.49 Forecast requirement for HGV parking spaces along A31

Summary of routes

Table B.13 provides an overview comparison table for all routes that have been studied. This helps to illustrate the diverse nature of the routes, with interesting and significant differences in flows and requirement for lorry parking between them. However, there were also similarities, especially that all but one of the routes had a lower capacity within the on-site parking facilities when compared with the number of vehicles parked on the route, showing a need for drivers to use off-site parking (laybys and industrial estates) on each.

It is worth noting that for the A259/A2070, the parking demand factor of 146.0 means that nearly 1.5 times the weekday 24-hour HGV flow was observed being parked during the 2022 national survey of lorry parking. However, this is due to the Ashford International Truckstop being along the route, which primarily serves the M20/A20 route, therefore skewing the parking demand factor for the A259/A2070.

Table B.14 Comparison of routes investigated

	M20/ A20	M3	A3/ A3(M)	M27/ A27	M2	A259/ A2070	M23/ A23	A21	M25/ A282	A34	M4	A31
Average HGV flow per 24 hours per weekday in both directions	13,044	12,245	3,875	4,453	11,411	466	11,457	2,165	24,661	9,822	12,807	1,005
SRN/Non-SRN	SRN	SRN	SRN	SRN	SRN	SRN	SRN	SRN	SRN	SRN	SRN	Non-SRN
Total HGVs parked	1,463	339	113	360	803	682	73	57	565	284	328	14
Parked at on-site parking locations	1,336	266	55	233	626	650	34	3	444	187	297	0
Parked in laybys	86	46	50	57	125	3	33	50	113	80	23	9
Parked in industrial estates	41	27	8	70	52	29	6	4	8	17	8	5
Recorded on-site capacity	1,318	258	85	257	681	650	26	8	392	152	386	0
Recorded on-site % of HGVs parked versus capacity	101.4	103.1	64.7	90.7	91.9	100	130.8	37.5	113.3	123	76.9	N/A
On-site capacity versus total HGVs parked	-145	-81	-28	-103	-122	-32	-47	-49	-173	-132	58	-14
Parking demand factor	11.2	2.8	2.9	8.1	7.0	146.4	0.6	2.6	2.3	2.9	2.6	1.4
2040 Forecast Flows (Low Case)	14,594	13,699	4,335	4,982	12,766	521	12,818	2,422	27,590	10,988	14,328	1,124
2040 Forecast Flows (Medium Case)	15,110	14,184	4,488	5,158	13,218	540	13,271	2,508	28,567	11,377	14,835	1,164
2040 Forecast Flows (High Case)	15,627	14,669	4,642	5,334	13,670	558	13,725	2,594	29,544	11,766	15,343	1,204
2040 Forecast HGV spaces required (Low Case)	1,634	379	126	403	898	763	82	64	632	318	367	16
2040 Forecast HGV spaces required (Medium Case)	1,692	393	131	417	930	790	85	66	654	329	380	16
2040 Forecast HGV spaces required (High Case)	1,750	406	135	431	962	817	87	68	677	340	393	17

It is important to highlight the parking demand factors, for example the M3 which is significantly lower (2.8) compared to the M20/A20 (11.2) despite them both having similar average HGV flows over 24 hours (12,245 and 13,044). This is due to the difference in the number of vehicles seen parking on the M3 as a result of there being less HGV parking spaces available on the SRN, 1,366 onsite locations on the M20/A20 compared to just 266 on the M3. The site surveys looked at whether non-SRN parking was increased around this route as a result, but this does not appear to be the case. It is likely that HGV drivers may be finding early places to park either around or before the M25 as a result. It is recommended that some further work is undertaken to identify where HGVs are parking instead.

Table B.15 shows the forecast additional on-site capacity requirement for each route, based on the low, medium and high forecast cases for each route and based on the recorded on-site capacity.

Table B.15 Forecast additional on-site capacity requirement for routes analysed

	M20/ A20	M3	A3/ A3(M)	M27/ A27	M2	A259/ A2070	M23/ A23	A21	M25/ A282	A34	M4	A31
Total HGVs parked versus recorded on-site capacity	145	81	28	103	122	32	47	49	173	132	-58	14
2040 Forecast additional HGV spaces required (Low Case)	316	121	41	146	217	113	56	56	240	166	-19	16
2040 Forecast additional HGV spaces required (Medium Case)	374	135	46	160	249	140	59	58	262	177	-6	16
2040 Forecast additional HGV spaces required (High Case)	432	148	50	174	281	167	61	60	285	188	7	17

Outputs from Non-SRN Summary

Table B.16 shows an overview of key lorry parking statistics for the non-SRN. This shows that there is an estimated 674 space deficit in the total on-site parking capacity versus the number of HGVs recorded as being parked along the non-SRN. The parking demand factor of 5.8 means that approximately 5.8% of the 24-hour HGV flow was estimated as being parked.

Table B.16 Overview of key lorry parking statistics for the non-SRN

	Non-SRN
Average HGV flow per 24 hours per weekday in both directions in 2019	21,608
Total HGVs parked	1,245
Parked at on-site parking facilities	445
Parked in laybys	381
Parked in industrial estates	419
2023 on-site capacity	571
2023 on-site % of HGVs parked versus parking capacity at sites	78
2023 on-site capacity versus total HGVs parked	-674
Parking demand factor	**5.8**

Figure B.50 shows the forecast daily average flow along the non-SRN. The data shows that in the low case daily weekday flows are forecast to increase by around 2,567 vehicles by 2040 to a total of 24,175. In the medium case, daily weekday flows are forecast to increase by around 3,423 vehicles by 2040 to a total of 25,031 and in the high case daily weekday flows are forecast to increase by around 4,278 vehicles by 2040 to a total of 25,886.

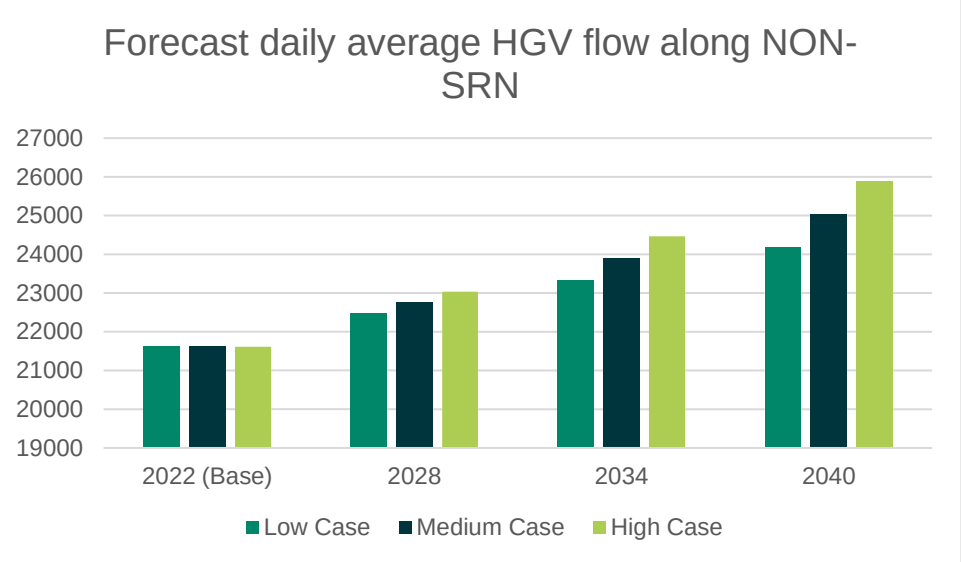


Figure B.50 The forecast daily average flow along the non-SRN

Figure B.51 shows the forecast requirement for HGV parking spaces along the A31. This shows that in the low case the required number of HGV parking spaces is forecast to increase by 148 TO 1,393 by 2040 and for medium case the required number of HGV parking spaces is forecast to increase by 197 to 1,442 by 2040. And in the high case the required number of HGV parking spaces is forecast to increase by 247 to 1,492 by 2040.

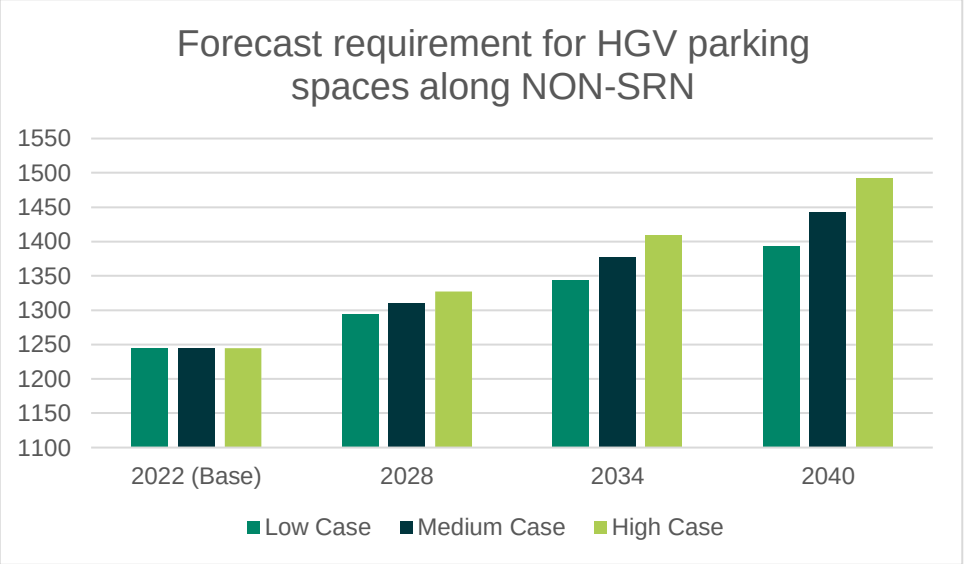


Figure B.51 The forecast requirement for HGV parking spaces along the non-SRN

Appendix C Qualitative Analysis

In addition to the quantitative forecast, a qualitative narrative has also been developed regarding trends and changes likely to influence HGV parking supply.

There are several factors and influencers that will be explored as part of this qualitative analysis. These are:

- Port growth
- Road upgrades
- Change in freight originators and attractors
- Growth in Channel Tunnel intermodal freight

Port growth

The TfSE area is home to several key seaports including Dover, Newhaven, Portsmouth, and Southampton. These ports are of strategic importance for trade with Europe, offering key routes with the rest of Europe, including direct links to France, Belgium and Spain[23]. The UK port market is very competitive, and therefore many ports are looking to diversify and expand their operations. Port expansion can lead to additional requirement for lorry parking on corridors leading to these ports. This is the case both during the construction phase (with vehicles from the construction requiring parking whilst travelling to ports) as well as parking for higher number of HGVs visiting ports during the operational phase once expansion is complete.

The March 2021 budget announced that the Solent was successful in its bid to become one of eight new freeports in England. This will provide several incentives relating to customs, tax, planning, regeneration, infrastructure and innovation. It is hoped that the Solent freeport will create over 30,000 jobs for the UK, with over 15,000 in the Solent region itself[24]. The expansion of Southampton Port is also referenced in TfSE's own transport strategy[25]. The growth associated with the Solent freeport may have an impact on the lorry parking provision for the roads that connect it with the rest of the TfSE area, including the M3 and M27.

The most recent masterplan for Newhaven Port was published in 2012 and points to several proposals for the different sub-areas of the port. This includes cargo and waste recycling for the North Quay and a centre for trade and offshore wind for the East Quay[26]. As part of this, the Rampion Offshore Wind Farm Operations and Maintenance Base opened in 2018. With this masterplan due for renewal, increased development at Newhaven Port may require an increase in lorry parking provision on routes leading to the port.

For the Port of Portsmouth, the most recent masterplan was released in 2020 focusing on growth for the next 20 years[27]. This includes improving the site layout to help freight flows through the port as well as expanding facilities on site to cater for a range of different cargo operations. The diversification and increase in cargo operations may require an increase in lorry parking provision on key routes such as the M3 and the M27/A27. Additionally, for the Solent freeport and the Portsmouth freeport, not only will the ports expand but there are tax free areas that will be used for industrial and manufacturing and therefore the requirement for lorry parking provision may increase even more.

For the Port of Dover, consultation is underway on the development of the port masterplan to 2045. Key goals that have been identified include increasing space and efficiency in the eastern docks as well as facilitating growth for cruise and cargo activities[28]. An increase in port activity relating to movement of construction materials is also expected to take place[29], alongside the more established

[23] https://www.newcivilengineer.com/ice/viewpoint-south-east-ports-are-key-to-growth-06-04-2020/
[24] https://solentfreeport.com/
[25] https://transportforthesoutheast.org.uk/app/uploads/2020/09/TfSE-transport-strategy.pdf
[26] https://www.lewes-eastbourne.gov.uk/_resources/assets/inline/full/0/276522.pdf
[27] https://portsmouth-port.co.uk/wp-content/uploads/2022/02/Masterplan-web.pdf
[28] https://www.doverport.co.uk/port/about/port-of-dover-master-plan-for-2045/
[29] https://www.investindover.co.uk/News/2022/Port-of-Dover-builds-for-the-future-as-construction-hub.aspx

roll on-roll off operations. These increases in activity will lead to greater demand for lorry parking on key routes to the port, including the M20 and the M2/A2.

Road upgrades

Both the SRN and non-SRN in the TfSE area are vital for enabling freight to be transported efficiently around the region, as well as linking key international gateways and industrial hubs.

Road upgrades can cause an additional requirement for lorry parking, both during the construction phase and post upgrade. HGVs travelling to and from sites where upgrades are taking place will cause additional parking demand, and upgraded routes may attract additional freight traffic, leading to a requirement for additional parking capacity.

There have been several priority SRN schemes that have been approved for construction in the 2020-2025 period[30] as part of the DfT's five-year Road Investment Strategy 2 (RIS2), although these have now been pushed back to 2025-2030 period and some of these may be extended further depending on the outcomes of RIS3. These include:

- The Lower Thames Crossing between Kent and Essex, as well as supporting roads that link to the M25, A13 and M2
- A27 East of Lewes, which includes improvements between Lewes and Eastbourne such as improving junctions around Eastbourne and dualling south of the Polegate roundabout
- A27 Worthing and Lancing, which includes several enhancements between Worthing and Lancing to improve the capacity and flow of traffic

There are several non-SRN priority schemes within the TfSE area, as outlined on the TfSE website[31]. These are:

- Northam Rail Bridge Replacement and Enhancement (Southampton City Council)
- A284 Lyminster Bypass (West Sussex County Council)
- Redbridge Causeway (Hampshire County Council)
- A249 at M2 Junction 5 (Kent County Council)
- A22 Corridor Package (East Sussex County Council)
- A320 North Corridor (Surrey County Council)
- A259 (King's Road) Seafront Highway Structures Renewal Programme (Brighton & Hove City Council)
- A28 Birchington, Acol and Westgate-on-Sea Relief Road (Kent County Council)
- A259 Bognor Regis to Littlehampton Enhancement (West Sussex County Council)
- A259 South Coast Road Corridor (East Sussex County Council)

With works or upgrades making any of these roads more attractive to HGV drivers, redistribution of demand within the network and potential increase in lorry parking demand on certain routes may be inevitable. It is also important that diversion routes in place during construction offer suitable lorry parking provision if parking sites become unavailable due to works. It may also make sense for lorry parking provision to be included in key documents such as road plans and route strategies.

Change in freight originators and attractors

Lorry parking demand is influenced by the number and types of businesses near the route, as well as generators of freight activity such as ports and airports. Demand along certain routes is also often dependent on businesses operating along these corridors which cause additional HGV journeys to and from their premises.

[30] https://transportforthesoutheast.org.uk/our-work/major-road-network/
[31] https://transportforthesoutheast.org.uk/our-work/major-road-network/

Any increase in the number or size of freight originators and attractors will also have a further long-term impact on lorry parking demand. This can come in the form of impacts while types of sites such as housing (construction), shops, factories, etc. are being built and expanded, which will attract HGVs from the construction sector that will require parking, as well as the eventual additional HGVs and subsequent lorry parking requirement for when sites are built.

National Infrastructure Planning, managed by the Planning Inspectorate, provides information on proposed Nationally Significant Infrastructure Projects (NSIPs) within England and Wales[32]. This includes projects within the TfSE area. Information on specific dates of opening/operation are not given because of the early stage of these projects. At time of writing, there are several developments that are listed as being at the decided or pre-application stage which may become key freight originators and attractors during the construction phase, the operational phase, or both.

The following projects are marked as 'decided', meaning that a decision has been made by the relevant body or individual, such as the Secretary of State, on whether development consent is accepted or refused. The following projects include those for which development consent was granted:

- Manston Airport (RiverOak Strategic Partners Ltd)
- Thurrock Flexible Generation Plant (Thurrock Power Ltd)
- Southampton to London Pipeline Project (Esso Petroleum Company, Ltd)
- Cleve Hill Solar Park (Cleve Hill Solar Parl Ltd)
- Tilbury2 (Port of Tilbury London Ltd)
- Richborough Connection Project (National Grid)

Projects marked as 'pre-application' include:

- Gatwick Airport Northern Runway (Gatwick Airport Limited)
- Stonestreet Green Solar (EPL 001 Limited)
- Rampion 2 Offshore Wind Farm (Rampion Extension Development Limited)
- Hampshire Water Transfer and Water Recycling Project (Southern Water Services Limited)
- Sea Link (National Grid Electricity Transmission)
- Perrys Farm Hazardous Waste Management Facility (Peel Environmental)

It will be important that suitable provision of lorry parking is considered during the construction and operational phases of these projects to ensure adequate provision and facilities are available for lorry drivers.

Growth in Channel Tunnel intermodal freight

Network Rail forecasts predict that Channel Tunnel intermodal freight tonnage will grow by an average of 3.88% per year up to 2033/34 (based on the central scenario)[33]. The TfSE Transport strategy notes that the key railway corridor for accessing the Channel Tunnel "could carry more freight and is underutilised at present", with most rail freight currently operating from Kent running through busy areas of London using suburban lines to reach key terminals such as Willesden. Eurotunnel has also called for upgrades on rail lines in Kent to boost the amount of freight traffic that uses the Channel Tunnel, with the potential to convert passenger paths to freight path given the growth of people working from home[34].

Upgrades to suburban lines in Kent to facilitate an increase in Channel Tunnel intermodal freight will lead to an increase in the requirement for lorry parking spaces. This is both during the construction phase with lorry parking required for HGVs visiting the site as part of the upgrades as well as a greater number of spaces for lorries making increased numbers of journeys to and from terminals once upgrades are complete.

[32] https://infrastructure.planninginspectorate.gov.uk/projects/south-east/
[33] https://www.networkrail.co.uk/wp-content/uploads/2020/08/Rail-freight-forecasts-Scenarios-for-2033-34-and-2043-44.pdf
[34] https://www.transportinfrastructurenews.com/2022/06/21/channel-tunnel-operator-pushes-for-kent-rail-upgrade/

The potential increase in Channel Tunnel intermodal freight may lead to a rise in the number of lorry journeys from intermodal terminals located within the TfSE area, and consequently to greater demand for lorry parking near these terminals. The various terminals in the region also have different status levels and are documented by Network Rail[35].

Active terminals include:

- Port of Southampton Maritime, Millbrook and 107-108 berth
- Tilbury 1a/1b/2

There are also other Railfreight interchange sites which are operational but have infrequent or no rail services at present. These include:

- Fratton
- Thamesport

An increase in intermodal freight using the Channel Tunnel is also likely to mean more freight journeys to and from the Eurotunnel terminal, and consequently greater demand for lorry parking on roads near this location. This may also be the case if there is expansion of businesses in the TfSE area close to this site as a result.

[35] https://www.networkrail.co.uk/wp-content/uploads/2022/02/Network-Rail-freight-map-intermodal-sector.pdf

Appendix D Non-SRN audits

The AECOM audit team undertook several in-depth nighttime investigations on a number of non-SRN routes to record the number of UK and foreign HGVs parked sites along this route. These routes were chosen as a small selection to collect information on areas where further information was required.

Background to non-SRN audits

The Department for Transport (DfT) commissioned AECOM to undertake a national survey of lorry parking[36], which was a comprehensive audit of lorry parking within five kilometres of the strategic road network (SRN) in England. This took place in March 2022 and was conducted with the aim of supporting the DfT in producing an accurate assessment of lorry parking provision and demand.

Whilst this was a comprehensive study of on-site and off-site parking locations within five kilometres of the SRN, including routes in the TfSE area, there are several other important routes for freight which were not included as they were outside of the DfT study area. Therefore, as part of this TfSE lorry parking study, additional nighttime audits were undertaken on non-SRN routes and areas where further investigation was needed within the TfSE area.

Audits included two types of on-site and off-site parking locations, as defined in the DfT 'National survey of lorry parking 2022 – Part one' report, including:

On-site parking facilities

- Independent truckstops
- Trunk road service areas (TRSAs)

Off-site parking locations

- Industrial estates
- Laybys

There are several aims and benefits of additional region-specific audits being undertaken, including:

- Helping to identify any locations used for parking by HGVs away from the SRN
- Building a more comprehensive picture of lorry parking across the TfSE area, by looking to add to (and not duplicate) the data pool from the March 2022 DfT national survey
- Identifying potential 'rat-runs' and cut-through routes that HGVs are using in the TfSE area
- Looking at whether any non-SRN routes are close to or over lorry parking capacity and whether there are any key hotspots
- Understanding what lorry parking facilities are available to drivers using non-SRN routes in the TfSE area

Audits took place during weeknights in February and May 2023. A number of routes were selected representing a small sample for the TfSE area. The routes were chosen to supplement the existing data captured for the SRN freight routes and to answer some of the questions raised during the project. This included a review of a number of locations to understand whether trucks were parking overnight on non-SRN routes due to the lack of truck-park facilities on the M3 approach to Southampton.

[36] https://www.gov.uk/government/publications/national-survey-of-lorry-parking-part-one-2022

The routes surveyed included sections of the following roads and areas:

- A31 (Guildford to Winchester)
- A272 (Winchester to Hadlow Down)
- A322 (Lightwater to Reading via Bracknell)
- A265 (Heathfield to Hurst Green)
- A229/A268/A28/A262/A274 (Hurst Green to Maidstone)
- A32 (Fareham to Alton)
- A30 (Basingstoke to Farnborough)
- A24 (Dorking to Horsham)
- A25 (Reigate to Sevenoaks)
- A257 (Sandwich to Canterbury)
- A26 (Uckfield to Lewes)
- A29 (Fontwell to Clemsfold)
- A283 (Pullborough to Milford)
- A22 (Polegate to East Grinstead)
- A264 (Royal Tunbridge Wells to Crawley)
- A339 (Alton to Basingstoke)
- A226 (Dartford to Wainscott)
- A228 (Wainscott to Grain)
- A227 (A2 to A25)
- Industrial estate clusters, for example the Riverside Industrial Estate, Crossways Business Park, Crete Hall, Northfleet Industrial Estate, Medway City Estate and Knight Road around Dartford and the Medway Towns

Figure D.1 shows a map of the TfSE area with the lorry parking sites visited as part of these additional audits, and the routes taken.

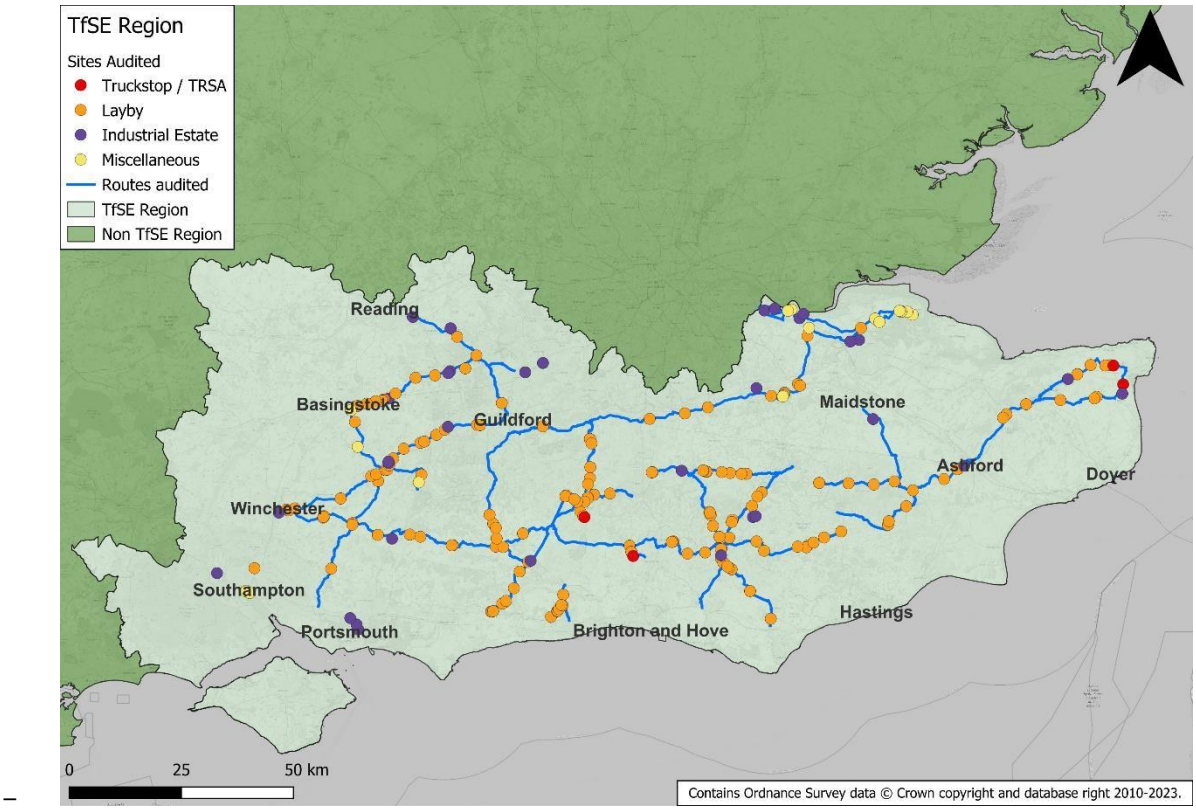


Figure D.1 Lorry parking sites visited, and routes taken as part of non-SRN 2023 audits

Key findings

Figure D.2 shows the breakdown of lorry parking locations audited, by type. Overall, 251 sites were audited, of which 191 were laybys (76% of all locations), 34 were industrial estates (13% of all locations), 9 were on-site parking facilities (independent truckstops and TRSAs) (3% of all locations) and 17 were other miscellaneous locations, such as bus stops and on the side of the road (7% of all locations).

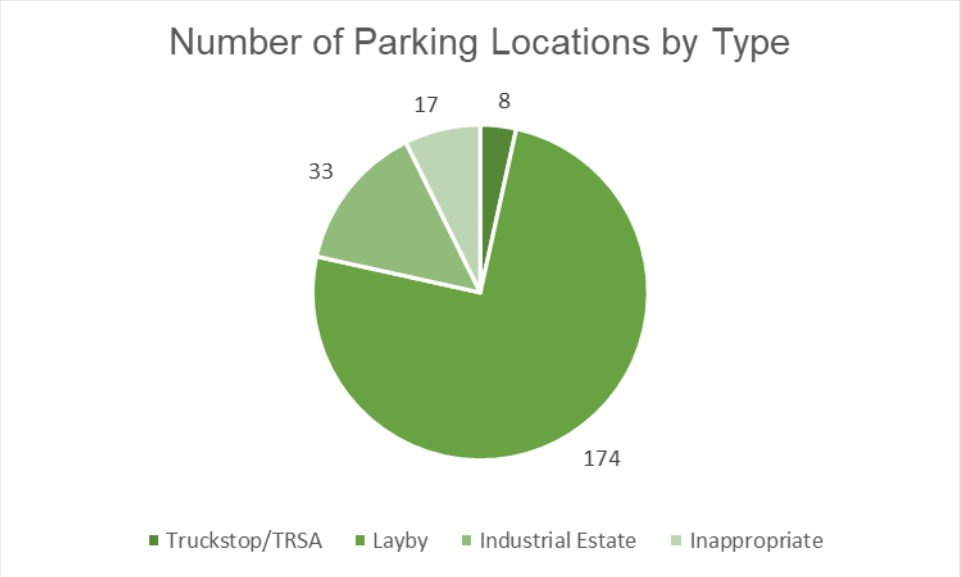


Figure D.2 Number of parking locations audited by type

Figure D.3 shows the locations of the sites audited. There are clusters of laybys in locations such as around Uckfield, Horsham, and along roads such as the A29 and the A31. Additionally, there are long sections of road with no locations for lorries to park, such as the section of the A272 between Billingshurst and the A23, and the A283 between Petworth and the A3 (though it is noted that the A283 runs through a number of small towns and villages before reaching the A3 which likely reduces the number of potential parking locations).

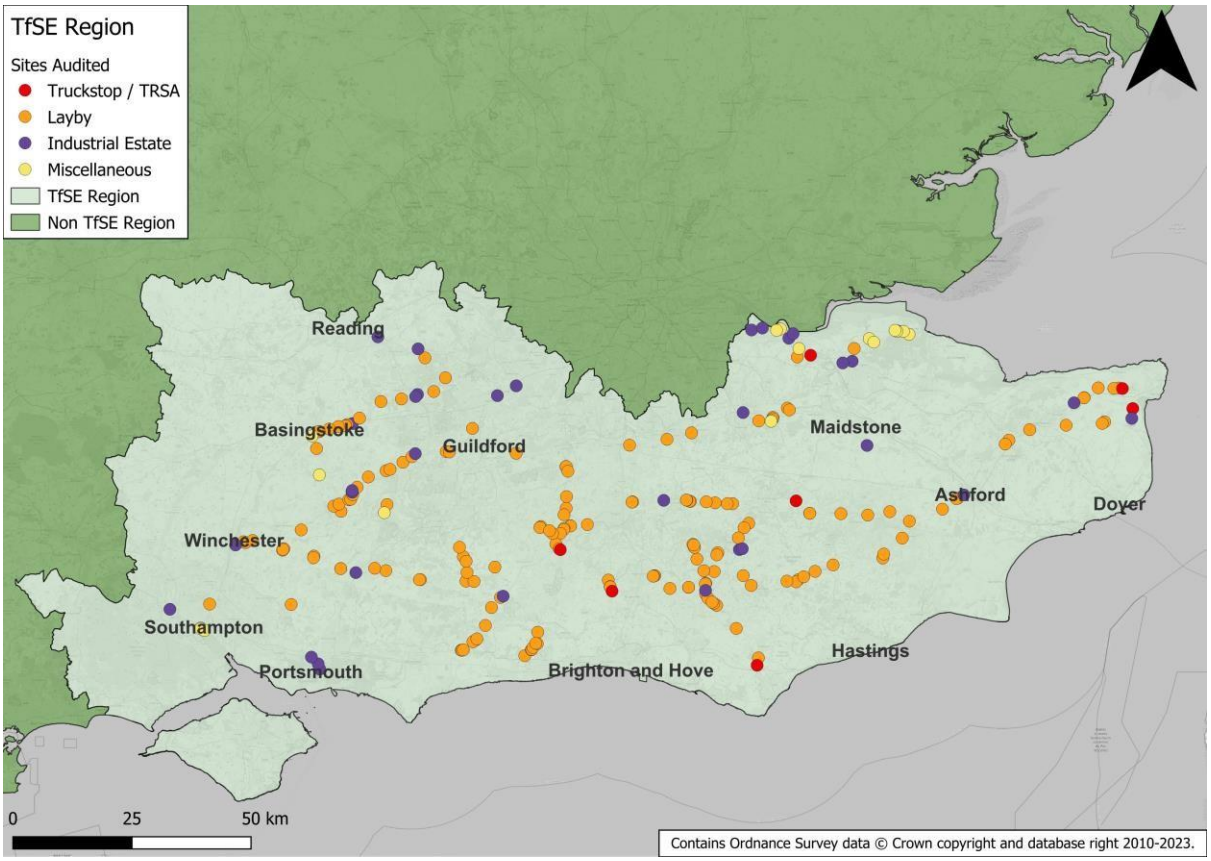


Figure D.3 On-site and off-site lorry parking locations visited as part of non-SRN audits

Figure D.4 shows the capacity of the on-site parking facilities audited. Many of the on-site parking locations audited were TRSAs and, as such, have limited capacity. While conducting audits, an HGV was observed parking inappropriately at a site near Uckfield where there were no formal parking spaces for HGVs.

Figure D.4 Capacity of on-site parking facilities visited as part of non-SRN audits

Figure D.5 shows the percentage of HGVs parking compared to the parking capacity of the on-site parking facilities audited. The number of HGVs observed parking at Embassy Truck Park was low compared to the site capacity as there are currently works being undertaken at the site.

Figure D.6 shows an overview of the percentage of HGVs observed parking compared to the available capacity at the on-site parking facilities audited. Of the nine on-site parking locations audited, around 44.5% of them (4 sites) were found to have an acceptable level of parking compared to capacity, 11% (1 site) was found to have a serious level of parking compared to capacity, and around 44.5% of them (4 sites) were found to have a critical level of parking compared to capacity.

This is broadly in line with the findings of the March 2022 DfT national audit which found that 42% of all on-site parking facilities audited (138 sites) had an acceptable level of parking compared to capacity, 14% (45 sites) were found to have an acceptable level of parking compared to capacity, and 44% (143 sites) were found to have a critical level of parking compared to capacity.

Figure D.5 Percentage of parking capacity being used at on-site parking facilities visited as part of non-SRN 2023 audits

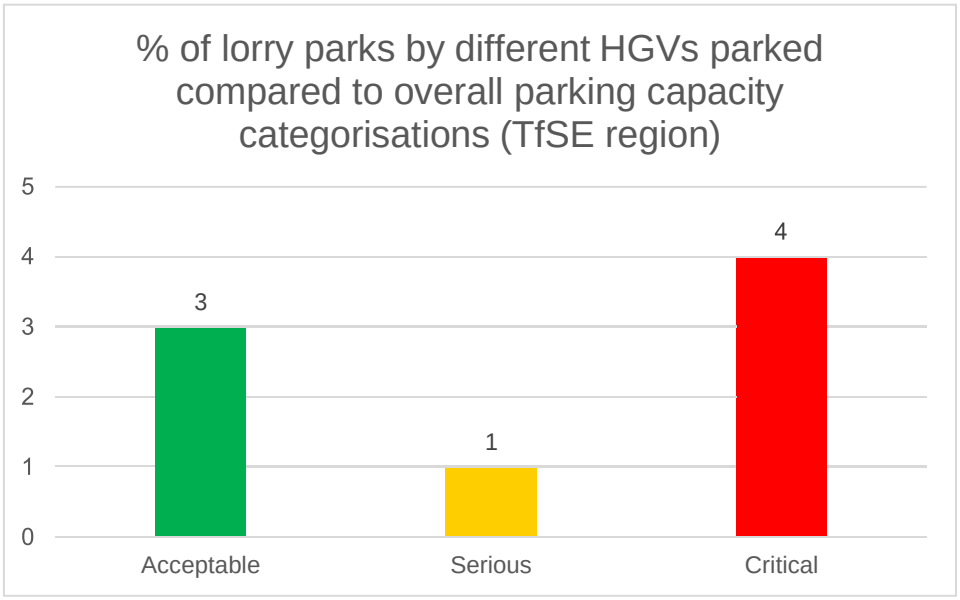


Figure D.6 Truck stops visited as part of audits by usage status

Figure D.7 shows the number of vehicles observed at each site audited. Clusters of HGVs were observed around locations such as Horsham, where five out of the 11 laybys audited near the town were occupied. Another cluster of trucks was observed on the A272 at New Cheriton, where four HGVs,

split between two successive westbound laybys, located approximately 300m apart, were the only vehicles observed at laybys on the A272 between Winchester and Billingshurst.

A number of vehicles were also observed at sites on, or near, the A31 between Winchester and Guildford. HGVs were observed at 10 of the 21 sites on audited on this corridor.

In general, vehicles were observed at sites near to the SRN, or on larger roads connecting two strategic roads, such as the A272 between the A3 at Petersfield and the M3 at Winchester, the A31 between the M3 at Winchester and the A3 at Guildford, and the A322 between the A3 at Guildford and the M4 at Reading. However, within the areas not covered by the SRN, vehicles were observed on the outskirts of larger settlements, such as Horsham and Uckfield.

Figure D.7 Number of vehicles observed at each location visited as part of non-SRN audits

Figure D.8 shows the number of vehicles observed by parking site type. 118 vehicles in total (around 29% of all vehicles observed) were parked at the 191 laybys audited, 138 at the nine on-site parking facilities audited (around 34%), and 130 (around 32%) at the 34 industrial estates audited. The on-site facility figure includes two independent truckstop (Embassy and United Truckstops) which accounted for 101 of the 138 vehicles (73%) observed at on-site parking facilities.

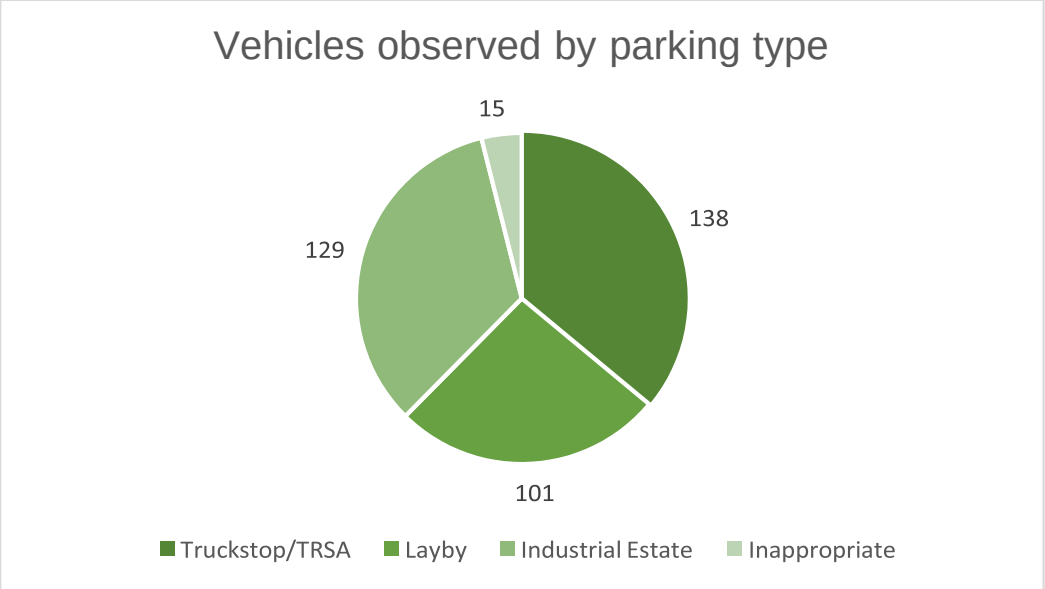


Figure D.8 Number of vehicles observed by parking site type at each location visited as part of audits

Appendix E Driver Surveys

To better understand the overnight parking preferences of drivers, driver interviews were undertaken at eight MSAs across the TfSE area. A minimum of five interviews were undertaken at each MSA, to total a minimum of 40 drivers surveyed; in total, 42 drivers were surveyed. The locations of each of the MSAs visited within the TfSE area is shown in Figure E.1.

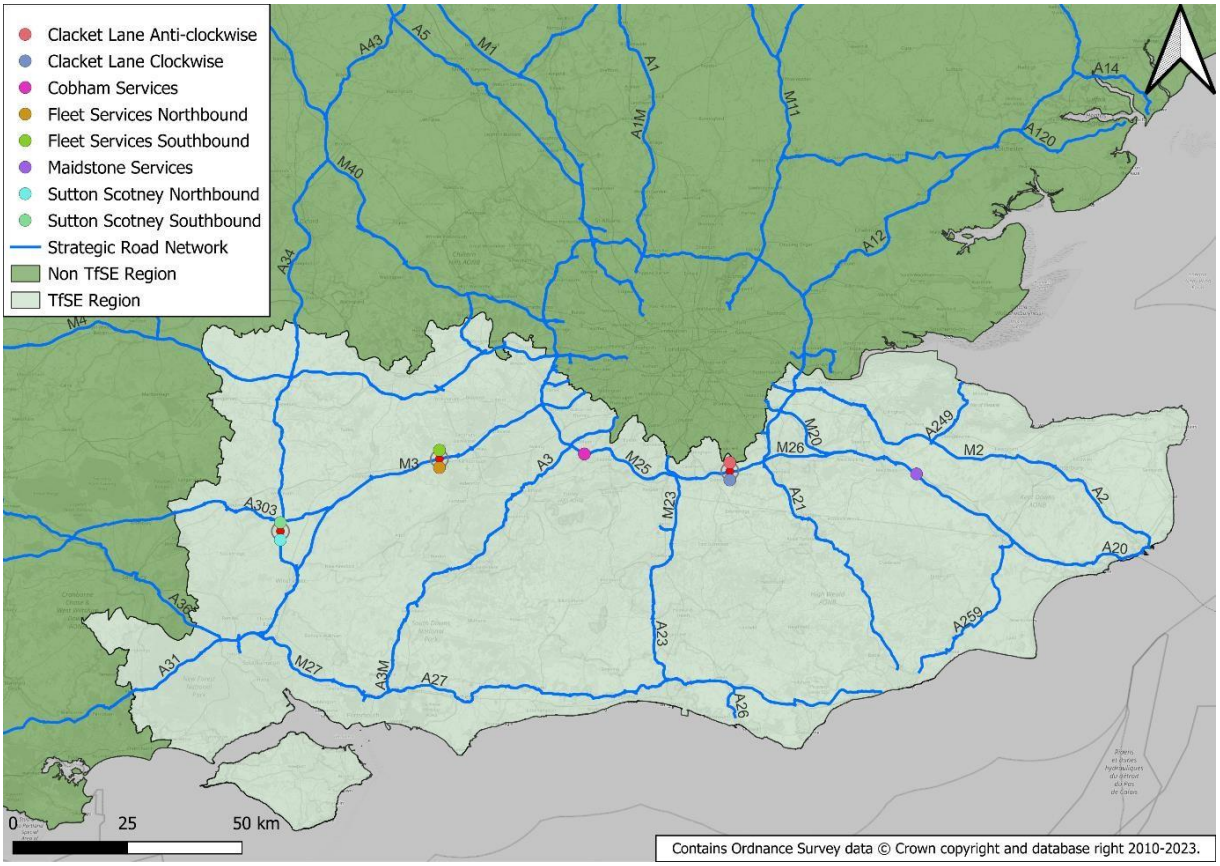


Figure E.1 Locations of MSAs where surveys were conducted

In terms of the type of overnight parking facility:

- the majority of responses (32 out of 42) displayed a clear preference for utilising on-site parking facilities (MSAs and designated truck stops) as their preferred choice.
- Laybys, on the other hand, were generally avoided by drivers, except as a last resort, with only two responses saying that it was their preferred choice.
- One of the reasons given for this preference was that drivers may be compelled by their company, or the customer, to park at on-site facilities for security purposes. This occasionally leads to drivers resorting to double parking, parking on slip lanes, or further inappropriately parking to ensure that they are on-site.
- Similarly, inappropriate parking practices by cars, caravans, and other vehicles at MSAs were found to restrict the availability of spaces for HGVs.

Figure E.2 shows the responses given by drivers, however it is important to note that these are not unique responses (many drivers said designated truck stop and MSA for example)

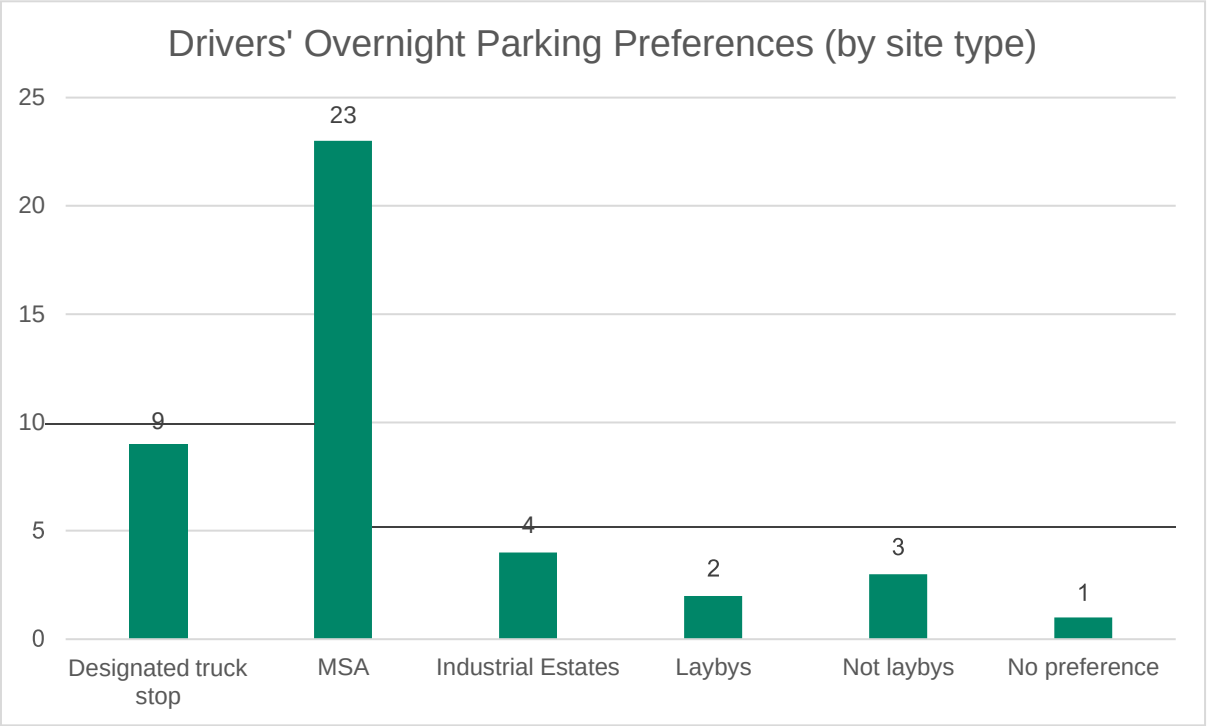


Figure E.2 Drivers' preferred overnight parking preferences by site type

When their desired Motorway Service Area (MSA) was at capacity, drivers demonstrated a preference for actively seeking alternative parking locations rather than settling for inappropriate parking. However, if time constraints were a factor, drivers would park wherever a spot was available, even if it meant parking in unconventional areas such as bus stops or on double yellow lines, or parking inappropriately at the MSA. Drivers expressed a willingness to risk receiving a parking ticket rather than facing a driving infringement notice from the Driver and Vehicle Standards Agency (DVSA) for exceeding their driving hours. This indicates a perceived preference for the consequences associated with parking violations over those stemming from driving infringements.

Site selection was primarily driven by immediate availability, as there were no distinct preferences among drivers regarding specific MSA sites. One driver mentioned that, given sufficient time, they would continue driving until they found a suitable location that accepted Snap. Drivers relied heavily on their local knowledge of the area when planning and selecting overnight parking locations, indicating the significance of their familiarity with their surroundings in making informed decisions. Proximity to the strategic road network (SRN) was a crucial factor for drivers when selecting locations for overnight parking as there could be difficulties re-joining the SRN.

Cobham services were identified by a number of drivers as an MSA that tends to fill up quickly, with drivers saying that they were best avoided after 18:00 due to the lack of capacity. Weekend parking habits at Cobham services were also noted to be a concern amongst the drivers surveyed, with HGVs often occupying parking spaces for the entire weekend, restricting the availability of spaces for other drivers.

The respondents also identified several common issues with overnight parking locations, of particular concern were the lack of security measures, such as the absence of CCTV, lighting, and fences at a number of locations, and inadequate facilities such as toilets and showers. Furthermore, the high costs associated with parking at MSAs led some companies to consider it more cost-effective to risk occasional fuel theft rather than paying for parking; one company determined that it was cheaper to have fuel stolen from an HGV once a month than pay for on-site overnight parking for their drivers.

The scarcity of MSAs and other on-site parking locations within the South East of England was also highlighted by respondents as an issue as it increased the likelihood of drivers receiving infringements while searching for locations to take their mandatory breaks. The closure of laybys due to issues with litter and the increasing prevalence of double yellow lines in industrial estates further limited parking options.

Appendix F References to lorry parking from the TfSE Freight, Logistics and Gateways Strategy

Within Strategic Action Area F (Enhance Infrastructure and Connectivity) Key action KA F7 is:

- Review and raise awareness of current and future demand for HGV parking

In addition, Measure F7.1 is:

- Develop truck parking sub-group of the TfSE Freight Forum

Within Measure F7.1, part of the remit of this measure is to:

- Understand existing capacity v demand and future likely demand, with a focus on innovative solutions to accommodate volumes and improve quality of provision and driver welfare

Appendix G Technical appendix including glossary and acronyms

Glossary

Terminology	Description
On-site parking	Includes ■ Independent truckstops ■ Local authority truckstops ■ Motorway service areas (MSAs) ■ Trunk road service areas (TRSAs)
Off-site parking	Includes ■ Industrial estates ■ Laybys
On-site parking facility/locations	Refers to provision of dedicated lorry parking at the above four types of on-site parking facilities
Off-site parking locations	Refers to lorries parking at the above two types of off-site parking locations

Acronyms

Kent county council - KCC

Motorway service area - MSA

National vehicle crime Intelligence service -NaVCIS

Strategic road network - SRN

Trunk road service area - TRSA

aecom.com

Agenda Item 8

Report to:	**Partnership Board –Transport for the South East**
Date of meeting:	**29 January 2024**
By:	**Lead Officer, Transport for the South East**
Title of report:	**Development of a Regional Centre of Excellence**
Purpose of report:	**To provide an update on work to deliver a Regional Centre of Excellence.**

RECOMMENDATIONS:

The members of the Partnership Board are recommended to note the progress with the development of the TfSE Regional Centre of Excellence.

1. Introduction

1.1 This report provides an update on the progress in delivering a Regional Centre of Excellence (RCoE).

2. Background

2.1 In February 2022, the Levelling Up White Paper set out proposals for Regional Centres of Excellence to be established. Subsequently, the Department for Transport have set out expectations that Sub-national Transport Bodies (STBs) take responsibility for developing and operating Centres of Excellence in their region, to provide bespoke support to Local Transport Authorities (LTAs) to help them deliver 'clear project pipelines and comprehensive strategies to improve local transport for people and reduce carbon emissions'.

2.2 For 2023/24, Transport for the South East (TfSE) allocated £250,000 to develop a RCoE , after the roadmap was agreed by the Partnership Board in March 2023. A permanent Project Manager was recruited, dedicated to this workstream.

2.3 Since August 2023, TfSE have been working with Arup as part of the Technical Call Off consortium contract, to deliver the RCoE

2.4 May 2024 will see a web based platfom established, to host resources, tools, webinars and several other support methods to improve capacity and capability for the region. A key element of the first phase of delivery will be the delivery of a chat function on the platform, enabling knowledge sharing on a self access basis.

3. Technical Call Off Contract

3.1 At the March 2023 Partnership Board meeting, Board members agreed to delegate responsibility to undertake the procurement exercise to the Lead Officer, in

consultation with the Chair.

3.2 The procurement process commenced on 03 May 2023 when the brief was issued in the form of an invitation to tender (ITT) via a further competition conducted under the Eastern Shires Purchasing Organisation (ESPO) framework agreement and following the accountable body procurement rules. Board members can request a copy of the ITT from the TfSE secretariat.

3.3 At 03 July 2023 Partnership Board meeting, it was agreed that the consortium bid of Steer and its supply chain partners would be awarded the contract of work. Arup were appointed as the consultancy resource for the Regional Centre of Excellence.

4. Regional Centre of Excellence Progress Update

4.1 The RCoE project consists of five separate Tasks, which are outlined in the Appendix 1. Task 1 to confirm Alignment and Prioritisation was completed end of Spetmber, and Task 2 to complete detailed Planning and Engagement was delivered at the end of December 2023. This included delivery of **Summary Report** outlining details of all findings from engagement to date and a **Management Plan**, outlining how the future RCoE will be managed at a high level.

4.2 Appendix 2, provides an overview of progress to date based on the ourcome from Task 1 and 2.

5. Governance

5.1 One of the key tasks for the set up of a RCoE was to establish a governance structure. Initially, the intention was to have two groups established: a steering group, and a user group. It was agreed that as the stakeholders would largely be the same, that these would be combined, with an option for some of the user testing to be circulated wider than the members who would sit on the steering group.

5.2 The governance model was updated to highlight the role of the Transport Strategy Working Group as well as the more direct input from the Advisory Panel into the work of the RCoE delivery team. A diagram summarising these governance arrangements is included in Appendix 3.

5.3 We recognise the importance of the governance model being able to evolve, and for members to change as appropriate. The Steering Group will be utilised most during the development and implementation phase, and will become less frequent during its existence, but used as a feedback mechanism.

6. Stakeholder engagement

6.1 There is a desire for the RCoE to be co-designed with LTAs and the DfT to ensure that the content is appropriate, supported and makes good use of the existing tools and guidance available at a national and local level.

6.2 Since mobilisation of the technical call off contract, TfSE and Arup have held one workshop on 11 September 2023, to ensure that the roadmap remains fit for purpose, and to validate the next steps.

6.3 One of the recurring requests from LTAs was the need for the RCoE platform to provide access to academics. To that end TfSE hosted a Regional Universities meeting, to understand their level of support for an RCoE, and what they may be able to input in terms of their capacity and capability. A survey was then issued to all members of the group, to understand what skills they have that would be of benefit for the platform. We only received one submission, so further assessment will need to be undertaken to further understand their specialist skills areas.

6.4 Thirteen 1-2-1s have been held with the LTAs who sit on the steering group, to discuss the key components, structure, functionality, and partners for the Regional Centre of Excellence. The outputs of these discussions have been collated and utilised to form a specification for a digital consultant to understand what options are feasible for all of the essential requests from LTAs.

6.5 The first Steering Group meeting was held on 13 December, and the Terms of Reference were agreed. The group were presented with the confirmed outputs from the engagement to date, and further clarity offered via Miro Board. It was noted that the subsequent meeting would be held in January, with a request to consider their data gaps and be able to present this at the next meeting.

7. Summary report

7.1 As part of Task 2, Arup were required to develop a summary report to outline th e scope of requirements for the Regional Centre of Excellence. The report summarises the findings of all stakeholder engagement to date. A summary of this report is presented in Appendix 2.

8. Management of the platform

8.1 The initial RCoE's operating processes and principles have been set out in the Management Plan. This includes: outline of processes that will need to be covered throughout the different stages (Stage 1 - Planning, Stage 2 – Launch, Stage 3 – Initial Management, Stage 4 - Long-term management) such as sponsorship, platform development, managing and uploading content, running training, events and physical collaboration, communications and promotion, monitoring usage and KPIs, and Stakeholder engagement and governance and capturing user needs.

8.2 The management plan also includes details of: staff roles and responsibilities, communications and engagement, data strategy, partnership approach and engagement and success measurement (Key Performance Indicators).

8.3 This management plan can be shared upon request.

9. Next steps

9.1 The findings from the recent engagement activity will be used to produce a digital specification for the web platform. This will commence the the building of the initial virtual platform, including testing via the user group. Task 3 will also begin and involve research on options for physical locations to provide in person training, conferences and events, and to further knowledge sharing.

9.2 Surveys will be circulated to LTAs in early 2024, to begin capturing capability gaps, so that resources and training can be developed and provided as part of the first iteration of the platform.

9.3 The intention is to have the first phase of the platform ready for launch in May 2024. This will form Task 4, which will see the launch and management of virtual platform, including launch plan, launch event, activities, monitoring and evaluation, new content.

9.4 As the project develops and moves into the management phase, future funding arrangements, including establishing future funding will be considered and work will be undertaken to put in place a procurement framework.

10. Fiscal benefits

10.1 A key ambition of the Regional Centre of Excellence is to deliver economies of scale, through sharing of resources and best practice to create consistency and remove duplication. We are working with all STBs to understand what is available for us to signpost to and what they will be developing in future that will be of benefit to our local transport authorities, but doesn't come with an additional cost to us. This demonstrates our conscientious attitude towards tax payers money and making best use of existing resources.

10.2 One of our key performance indicators will be to measure the cost savings for local authorities as a result of the centre of excellence. These could include the provision of licences, reduction in training costs, access to expertise, and knowledge sharing, to name a few.

10.3 In addition to the examples above, work will be ongoing throughout the life of the Regional Centre of Excellence to plug the gaps in data. This will help to improve business cases and evidence bases for local authorities, but also means that all our local authorities will be working from the same version of the truth, which should lend itself to improved joined up thinking.

10.4 We will be happy to share these results with local authorities to help them make the case for continuing their local contributions to TfSE.

11. Conclusions

11.1 As a co-design approach was adopted, extensive engagement has happened to date to ensure that the RCoE is being developed and consequently delivered in line with LTAs expectations and needs.

11.2 January 2024 will see the project into Task 3, which is the build and test segment of the platform's delivery. This will ensure that come launch in May 2024, the platform will be familiar, and robust.

11.3 Board Members are recommended to note progress with the development of a Regional Centre of Excellence.

RUPERT CLUBB

Lead Officer
Transport for the South East

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Appendix 1 – Key tasks of the Regional Centre of Excellence

Project Context

Key Tasks, Sub-tasks & Milestones

Appendix 2

Overview of summary report, delivered as part of Task 2.

Objectives

There was general confirmation that the Regional Centre of Excellence will: be housed in the virtual platform and supporting networks; enable the cross-sharing of knowledge across geographies and respond to the unique needs and requirements of the South East transport authorities.

Components of the virtual RCoE

It has been identified that the RCoE Virtual Platform should consist of 14 components including: home/about pages, chat forum, space to foster external relationships, webinars, resources, qualifications/courses, events, area for those new to the sector, key tools repository, case studies, funding/procurement, news/blogs, consultations and data.

Engagement during Task 2 highlighted that the case studies, chat forums and space for those new to the sector are particularly important components to develop and are priorities. Additionally, the chat forum should be set up in a way that is a safe space to encourage open discussion amongst the core users, LTAs.

Prioritisation of the components will be undertaken at January's Board, which will be necessary to enable the digital consultants to lay out the platform appropriately.

It was noted that for each of the components to be successful, all local transport authorities will be required to provide input.

Functionality of the web-based platform

The functionality requirements have five confirmed principles. These are for the platform to have restricted access rather than open access and for it to be collaborative, modular, encourage both self-learning and learning from others and manageable into the long term, beyond the support from Arup. Engagement with LTAs also confirmed that it should be simple, intuitive, and also visually engaging.

Prioritised Skills for the RCoE platform

It has been highlighted that skills focused on in the RCoE will need to link to themes from the DfT objectives. How skills relate to skills maps held by the professional institutes should also be considered.

As part of skills model development, there will be a need to create an expertise matrix/heatmap of skills amongst the LTAs to be used for Training Needs Analysis (TNA) activities and to determine key priorities.

Some of the initial requirements for skills to be focused on in the RCoE are as follows: considering unique modes such as freight, decarbonisation/carbon assessment, EVs, modelling, business cases, finance/procurement, active and sustainable transport, scheme delivery, and policy making including LTPs in particular.

Users and Partners

One of the key elements of the RCoE is the potential external partners to be involved with the RCoE, and their level of involvement and access to the virtual platform. This has been discussed at length during the first round of the project team's 1:1 discussions with LTA officers.

The key types of users and partners are as follows:

- **Sponsor:** Department for Transport and TfSE
- **Core users:** Key RCoE users (TfSE and LTAs) and that will obtain most value and make collaborative contributions to aid its success. Core users may have restricted access areas only for themselves. Represented via Steering Group and also SOG/Partnership Board.
- **Key partners:** Interested in the RCoE and will obtain some value from it and will actively contribute to providing specialist/targeted support. Includes professional institutions (CIHT, TPC, ICE, CECA), key Universities, Active Travel England, National Highways and Network Rail, and other STBs.
- **Other stakeholders**: Adegree of interest in the RCoE and should be aware of its existence but will not actively contribute to it or use it on a regular basis. Includes elected members, transport operator groups (RDG and CPT), business groups (e.g. Chambers of Commerce) and Interest/User Groups (e.g. Sustrans, Transport Focus).

Through round 1 of the 1:1 LTA discussions it was identified that the RCoE platform could enable two-way relationships between LTAs and the identified key partners such as via sharing of information and developing joint solutions to address any skills gaps.

A high level plan for engaging with partners and other stakeholders moving forward has been developed.

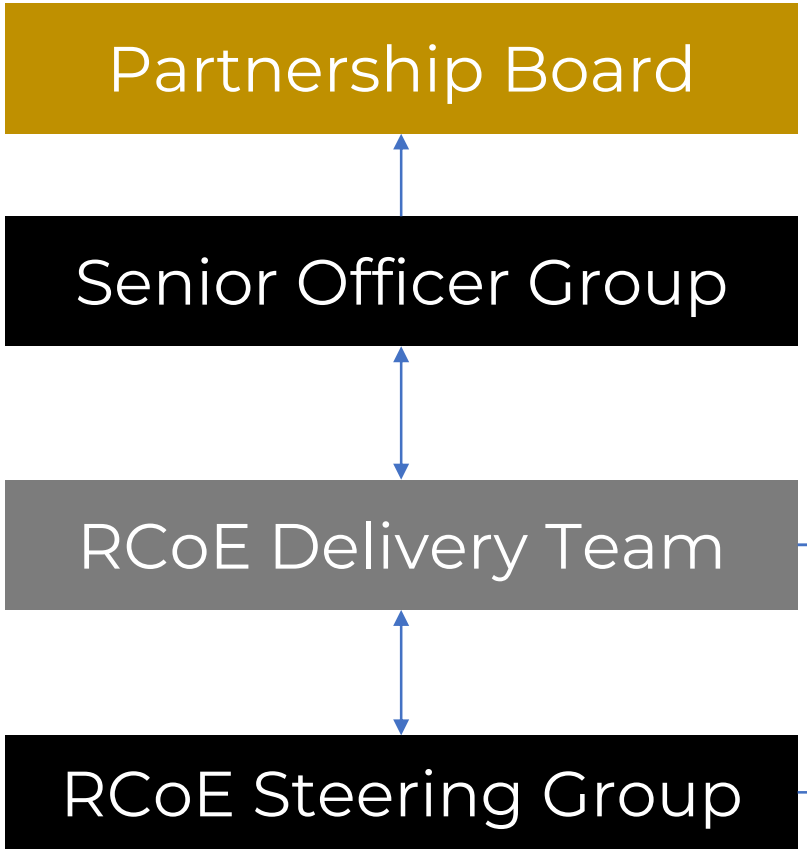
Access management processes will need to be managed through the RCoE Steering Group, to ensure there is no conflict of interest or risk to commercial sensitive information.

Technology

As part of LTA discussions, potential technology options for the virtual platform were discussed alongside ideas of other solutions that could be integrated into this. Key updates are as follows:

- Miro/other whiteboard providers viewed positively
- The simpler the technology that is used the better
- GIS/Mapping technology are useful
- PowerBI functionality could be considered
- Moodle has strong capabilities but not the best for navigation and Teams is functional but does not have the best interface for RCoE and has several access issues.

Regional Centre of Excellence Governance Model



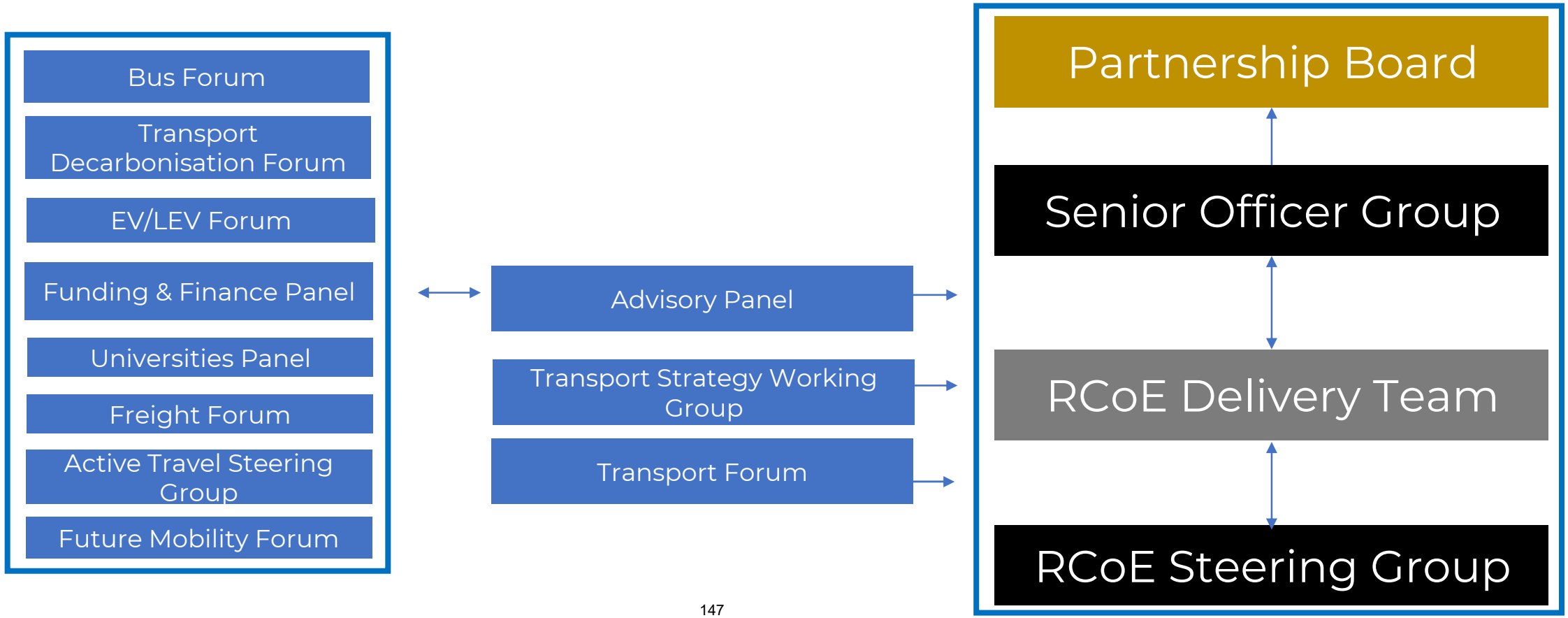
The **RCoE Delivery Team** are made up of the officers within TfSE and the consultants at Arup. They will be responsible and accountable for the successful delivery of the platform.

The **RCoE Steering Group** will be utilised to help shape and feedback on the progress of the Regional Centre of Excellence, and will be imperative to the content creation through ideas generation and surveys.

Regional Centre of Excellence Governance Model

RCoE governance

- The RCoE Steering Group also incorporates a User Group with representation from LTAs
- Forums provide opportunities for possible partnership working



Agenda Item 9

Report to: **Partnership Board –Transport for the South East**

Date of meeting: **29 January 2024**

By: **Chair of the Audit and Governance Committee**

Title of report: **Audit and Governance Committee Update**

Purpose of report: **To provide an update on the Audit and Governance Committee**

RECOMMENDATIONS:

(1) The members of the Partnership Board are recommended to note the discussions and actions arising at the meeting of the Audit and Governance Committee;
(2) Members are also asked to agree the Strategic Risk Register.

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1. Overview

1.1 As previously agreed by the Board, Transport for the South East (TfSE) has established an Audit and Governance Committee. This recognises the increasing responsibilities that TfSE holds for fiscal management of government grant funding.

1.2 The Committee recently met on Thursday 11 January 2024. This report provides a summary of the discussions and actions to take forward.

2. Audit and Governance Committee

2.1 At the Thursday 11 January 2024 meeting, the Audit and Governance Committee reviewed value for money reports prepared by officers following actions from the previous meeting. Two reports were considered: one setting out the procurement process TfSE follows and the second how TfSE delivers value for partners. The reports were welcomed, with the Committee requesting that further work be included within the value for partners document, including a fiscal assessment on the financial savings TfSE helps Local Authorities to make and the outputs TfSE and Local Authorities aim to deliver. In addition, the Committee asked officers to use the Business Plan to focus on where TfSE adds value and use the Annual Report to measure how much investment there is in the south east, compared to other parts of the country. Officers will develop the value for money document and report to the Committee at their next meeting on 9 April 2024 with a view to this being presented to the Board at the 13 May meeting.

2.2 The Committee also reviewed a report detailing the impact of inflation on projects and how this is impacting Local Authorities. The Committee noted that the report gave a good overview and asked for further information to be included on contractor/supply chain availability, market confidence, value for money on scheme investments and opportunities for avoiding duplication for Local Authorities. The

report will be further developed and shared with the Committee at their next meeting on 9 April 2024.

2.3 The Committee reviewed the outline to the Annual Report 23/24, agreeing its structure. The Committee also agreed that the Annual Report 23/24 will be presented to the Board as a standalone item at the 13 May 2024 meeting.

2.4 The Committee reviewed the finance position to the end of Q3, they also noted the draft budget for 24/25 which was established as part of the Business Plan submitted to the DfT at the end of December 2023.

2.5 The Committee heard the progress of the Transport Forum, noting that the first digital engagement will be recorded in February, the Advisory Panel is being established and the first face to face meeting will take place Thursday 11 April 2023. Committee members are invited to attend.

3. Strategic Risk Register

3.1 The Committee reviewed the Strategic Risk Register which has been maintained by TfSE since its inception in 2017. The risk register is used for quarterly reporting purposes to the Department for Transport (DfT) and for internal management processes.

3.2 It was agreed in the terms of reference for the Audit and Governance Committee that they should have oversight and that the Partnership Board should consider the risk register on a bi-annual basis.

3.3 The risk register is focused on strategic risks facing the organisation and includes some high-level risks.

3.4 The risk register is updated on a quarterly basis and has been reviewed by the Committee and is attached as Appendix 1.

3.5 The risk register contains four risks that have a high probability and impact after mitigation activity. Nine risks remain medium probability and impact after mitigation. The mitigation measures for these are reviewed regularly.

4. Conclusions and Recommendations

4.1 The Partnership Board are recommended to note the discussions at the meeting of the Audit and Governance Committee.

4.2 Members are also asked to agree the Strategic Risk Register.

Councillor Joy Dennis
Chair
Audit and Governance Committee
Transport for the South East

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Risk Register

Programme Overview

January 2024

TRANSPORT FOR THE South East

#	Risk Description	Score if no action taken (1-4)		LxI =	Mitigating action	Score post action (1-4)			Owner	Review date	Escalation route
		Likelihood	Impact	Risk score		Likelihood	Impact	Risk score			
2	Government policy around STBs is uncertain, particularly in light of national changes.	2	4	8	Continue to monitor developments. Work with other STBs to produce a strategy for potential national changes.	1	4	4	All	Ongoing	SOG
3	Local MPs do not support TfSE and its strategy.	2	4	8	Regular MP briefings to be scheduled. Members of Partnership Board to undertake engagement activities on regular basis.	2	3	6	DB	Ongoing	PB
4	Maintaining the TfSE partnership without statutory status.	3	3	9	Ongoing engagement with Leaders. Secure indicative funding for future years to demonstrate DfT commitment to TfSE.	2	3	6	RC	Ongoing	PB
6	Wider stakeholders do not recognise value of TfSE.	2	3	6	Use appropriate stakeholder forums as a route to engage stakeholders. Communications Strategy to be implemented.	1	2	2	DB/JMS	Ongoing	SOG
8	Reduced funding in 2024/25 may impact on work programme as set out in Business Plan.	4	4	16	Adjust work programme to reflect revised grant allocation. Business Plan for 24/25 has included examples of what TfSE can deliver with less / more funding received with our grant.	2	3	6	All	Ongoing	PB
9	Focus on levelling up directs investment away from the South East. Grouping of London & SE not an accurate representation.	4	4	16	Continue to make the case for investment in the South East. We will monitor distribution of project funding across STB regions	4	3	12	SOG/ Secretariat	Ongoing	PB
10	Levelling Up & Regeneration bill received royal ascent in October 2023. Provisions of Act may have implications for TfSE's activities	2	4	8	Briefing to be prepared on potential impact impact TfSE activities and any actions required.	2	3	6	RC	Ongoing	PB

#	Risk Description	Score if no action taken (1-4)		LxI =	Mitigating action	Score post action (1-4)			Owner	Review date	Escalation route
		Likelihood	Impact	Risk score		Likelihood	Impact	Risk score			
11	Retaining staff in TfSE and plans to replace staff if the need arises.	2	2	4	Ensure succession planning is in place. Regular supervisions with staff, opportunities for further development and training. Advertising roles in key publications. Making roles region-wide and flexible approach to working. Using recruitment consultants as and when appropriate.	2	1	2	SV / MV & KW	Winter 2024	PB
12	Procurement unable to respond to adhoc needs from TfSE	1	3	3	Develop forward plan with procurement for future work. Majority of work will go through the technical call off contract.	1	2	2	Secretariat	Ongoing	PB
13	Constituent authorities do not support the SIP delivery plan.	2	4	8	Continued engagement with SIP delivery partners.	1	4	4	SV	Mar-24	SOG
14	Additional work is identified that has not been accounted for in the budget.	4	2	8	Prioritisation process to be put in place. Small contingency allocated in budget.	2	2	4	MV / SV & KW	Mar-24	TSWG
15	Challenge to infrastructure investment proposals from stakeholders.	3	4	12	Robust evidence and processes to demonstrate approach. Exploring how to unlock private investment through our Funding & Finance Working group	2	4	10	SV/JMS/ KW	Mar-24	SOG
16	Frequent changes in government policies and priorities in the run up to a general election lead to uncertainty in long-term transport planning and infrastructure investment for the South East region. This results in suboptimal outcomes, wasted resources, and inability to meet strategic goals.	4	4	16	Maintain open and regular communication with DfT to get early insight into emerging policies and priorities. Develop scenario plans for policies and priorities. Discussions with senior officers through Senior Officers Group for appropriate actions	4	3	12	RC	Oct-24	SOG
17	Local Contributions are not secured from constituent authorities for 2024 onwards.	3	3	9	Early agreement at Partnership Board. SOG members advised to work into operational budgets. Certainty from DfT re: ongoing grant. Business Plan 24/25 submitted Dec 2023 Officers are completing some work on value for money, demonstrating how TfSE delivers value for partners.	2	3	6	KW / Secretariat	Apr-24	SOG / PB

#	Risk Description	Score if no action taken (1-4)		LxI =	Mitigating action	Score post action (1-4)			Owner	Review date	Escalation route
		Likelihood	Impact	Risk score		Likelihood	Impact	Risk score			
18	Managing the 24/25 Budget to ensure the DfT grant and carry forward from 23/24 is fully spent	3	3	9	Effective budget monitoring on a monthly basis and demonstrate TfSE's performance to DfT through regular review meetings and annual report.	2	3	6	KW	Ongoing	SOG / PB
19	Transport Forum members engagement with the new proposal	2	3	6	Members will receive their first digital engagement in February. The first face to face meeting will take place April 2024. Advisory Panel pulling together the thematic groups will meet quarterly throughout the year in advance of Board meetings. Engagement Manager will ensure feedback is captured and monitored	2	2	4	JL & JMS	Ongoing	PB
20	TfSE members are not prepared to be scheme promotors to larger schemes with large risks. This could lead to failing to deliver the TfSE transport strategy.	4	4	16	Report on the impact of inflation on schemes, we will use the report to continue discussions with DfT and advocate for a resolution. Officers will explore private sector funding for schemes through the funding and finance meetings. Centre of Excellence work will support early scheme development. Continue development of the common analytical framework with other STBs	4	3	12	RC	Ongoing	PB
21	The dissolution of Local Enterprise Partnerships (LEPs) in March 2023 leaves a gap in business representation within the Transport for the South East governance structure.	3	3	9	Identify alternative options for business represenation on the Partnership Board. Lead Officer to prepare a report for the Partnership Board with possible options.	1	1	2	RC	Jul-24	PB

Annual report – 2023-24

1. Chair's welcome

- The Chair's reflection on the year we've faced and the importance of Transport for the South-East going forward.

2. Lead Officer's foreword

- The Lead Officer's reflections on the achievements of Transport for the South East and how we are developing and maturing as an organisation to grow our impact.

3. About Transport for the South East

- A brief summary of Transport for the South East's structure, our membership, and our funding.

4. Year in review

- A timeline of Transport for the South-East's most significant achievements over the previous year.

5. State of the south east

- An informative update on the state of the region, with statistics on economic changes, and information about investment decisions that have been announced.

6. Delivering our Strategic Investment Plan

- An update on our delivery action plan, schemes which are in development, and progress on the analytical framework and other tools.

7. Developing our Transport Strategy

- An update on our Transport Strategy Refresh and its next steps.

8. Supporting Local Authority Partners

- An update on our Regional Centre of Excellence and the other support we have provided to Local Authorities.

9. Strengthening our relationships

- An update on how we've strengthened our communications and engagement work, and built deeper relationships with other STBs and delivery bodies.

10. Consultation responses

- An update on how we've responded to government and parliamentary consultations in the previous year.

11. Finances

- A high-level update on our income and expenditure, with more detailed accounts attached in the appendix.

12. Our governance

- An update on our Partnership Board and our other governance structures, including our Advisory Panel, Thematic Groups and Forum.

13. Our team

- An update on our team and how we are developing as an organisation to deliver more value for partners.

Appendix 1 – Financial Accounts

Agenda Item 10

Report to:	**Partnership Board –Transport for the South East**
Date of meeting:	**29 January 2024**
By:	**Lead Officer, Transport for the South East**
Title of report:	**Financial Update – Quarter 3**
Purpose of report:	**To update on the budget position for Transport for the South East**

RECOMMENDATIONS:

The members of the Partnership Board are recommended to:

(1) Note the current financial position for 2022/23 to the end of December 2023, including the forecasts for end of year spend;

(2) Note that the business plan for 2023/24 has now been submitted to the DfT.

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1. Overview

1.1 The purpose of this report is to update the Partnership Board on the revenue budget for Transport for the South East (TfSE).

1.2 The paper provides an update on the financial position for 2023/24 to the end of December 2023 (quarter 3), including forecasts for the projected spend at the end of the financial year.

1.3 The paper also provides an update on the business plan for 2024/25.

2. Quarter 3 – Budget Update

2.1 Appendix 1 sets out the spend position to the end of December 2023 against the revised agreed budget for 2023/24.

2.2 The main elements of expenditure to date relate to delivering the technical programme, including delivery of the Strategic Investment Plan, developing the analytical framework, thematic studies and staffing costs. Expenditure to date is just under £1.5m with just over £700k on the technical programme.

2.3 Staffing costs are as expected following the successful recruitment of the full complement of staff.

2.4 Spend on the technical work programme had been slower than anticipated but is significantly increasing now that the technical call off contract is in place and technical work is being commissioned. The current forecast highlights that just over £1.8m is likely to be spent on the technical programme by the end of March 2024. The forecast will be reviewed monthly as the financial year end approaches and reported to the Board at the May 2024 meeting.

2.5 The budget also makes provision for operational costs and communications and engagement activities, including events, website development and stakeholder management tools. Spend to date on these budget lines is just over £50k, with just under £100k underspend anticipated from communications and governance budget lines. This is due to a decision not to produce any significant quantities of printed documents, and less requirement than anticipated for expert legal advice relating to TfSE governance.

2.6 At present, there is £700k of technical programme spend that is expected to be carried forward to 2024/25. This is a significant reduction on previous years carry forward (£2m), aided by having indicative funding allocations for future years which has enabled better planning of resources, although not receiving final funding confirmation until July 2023 has still meant some workstreams started later than anticipated and as a result will not fully complete within this financial year. £226k of the carry forward is already committed for workstreams that are underway but span across into next financial year. The remaining technical programme carry forward (£475k) has been ringfenced for specific activities in the budget plan for next financial year, whilst the £100k carry forward from the operational and communications budgets has been allocated in the development of the 2023/24 budget reported to the Board in December 2023.

3. Grant funding bid for 2024/25

3.1 The DfT provided a multi-year indicative funding allocation in March 2022. This was intended to be used for business planning purposes and the department have confirmed that STBs should use this as the basis for business planning for 2024/25.

3.2 The indicative allocation for TfSE is £2.24m, and this figure together with the forecast carry forward described above have been used to develop the business plan for 2024/25.

3.3 At an extraordinary meeting on 18 December 2023, the Partnership Board approved the TfSE Business Plan for 2024/25 and this has now been submitted to the DfT.

4. Conclusions and recommendations

4.1 The Partnership Board are recommended note the financial position to the end of December 2023/24 and the end of year forecast.

4.2 The Partnership Board are also recommended to note that following their approval at the extraordinary meeting on 18 December 2023 the TfSE Business Plan for 2024/25 has been submitted to the DfT.

RUPERT CLUBB
Lead Officer
Transport for the South East

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Appendix 1 – TfSE budget position at Q3 2023/24

Q3 Budget Monitoring - 2023/24

	Budget	Q3 Actual YTD	Forecast	Carry forward	
EXPENDITURE					
Salaries (including on-costs)	1,110,000	727,863	1,110,000		
Training	7,000	5,231	7,000		
STAFFING	**1,117,000**	**733,094**	**1,117,000**	**0**	
Transport Strategy	300,000	60,475	280,779	19,221	*
SIP implementation	350,000	71,118	311,697	38,303	
Analytical framework	323,700	141,382	322,500	1,200	
Future mobility	168,455	18,455	28,455	140,000	
Active travel	100,000	25,800	51,000	49,000	
Decarbonisation	207,000	107,000	139,997	67,003	
Freight	162,832	40,893	129,716	33,116	*
Bus Back Better	143,336	99,277	95,343	47,993	
Electric Vehicle Infrastructure	150,000	28,990	85,773	64,227	
Project View and PV2	50,000	970	46,155	3,845	
Centre of Excellence	450,000	45,260	275,805	174,195	*
Other costs/technical support	68,000	8,626	8,000	60,000	
C/F for committed workstreams	63,000	55,410	59,340	3,660	
TECHNICAL PROGRAMME	**2,536,323**	**703,656**	**1,834,560**	**701,763**	**
Events	40,000	23,676	40,000	0	
Communications	50,000	2,506	20,000	30,000	
Publications	30,000	0	0	30,000	
Website	15,000	492	15,000	0	
Stakeholder Database	7,000	918	7,000	0	
Media Subscriptions	2,500	1,075	2,500	0	
COMMUNICATIONS/ENGAGEMENT	**144,500**	**28,667**	**84,500**	**60,000**	
TfSE Governance	45,000	0	10,000	35,000	
Operational Expenses	50,000	23,602	50,000	0	
OTHER	**95,000**	**23,602**	**60,000**	**35,000**	
TOTAL EXPENDITURE	**3,892,823**	**1,489,019**	**3,096,060**	**796,763**	
FUNDING					
Local Contributions	498,000	497,997	498,000		
DfT Grant	1,725,000	1,725,000	1,725,000		
Carry Forward	2,076,553	2,076,553	2,076,553		
TOTAL FUNDING	**4,299,553**	**4,299,550**	**4,299,553**		

CARRY FORWARD

TfSE Reserve **406,730**

Notes

*** indicates committed carry forward**

**** £226,532 of carry forward is already committed for workstreams that span into next financial year.**

Agenda Item 11

Report to: **Partnership Board - Transport for the South East**

Date of meeting: **29 January 2024**

By: **Lead Officer, Transport for the South East**

Title of report: **Responses to consultations**

Purpose of report: **To agree the draft responses submitted in response to various consultations**

RECOMMENDATIONS:
The members of the Partnership Board are recommended to agree the draft responses to the following consultations:

(1) Govia Thameslink Railway (GTR) –
Public engagement on potential changes to Southern's West Coastway services

(2) Reading Borough Council –
Reading Transport Strategy 2040

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1. Introduction

1.1 Transport for the South East (TfSE) has prepared responses to a number of recent consultations. This paper provides an overview of the responses to the following consultations:

- **Govia Thameslink Railway (GTR) –**
  Public engagement on potential changes to Southern's West Coastway services
- **Reading Borough Council –**
  Reading Transport Strategy 2040

2. Govia Thameslink Railway (GTR) – Public engagement on potential changes to Southern's West Coastway services

2.1 Govia Thameslink Railway held a period of engagement on proposals to change Southern services on the West Coastway from 2024, detailing scope and intentions of proposals and first phase of the engagement.

2.2 This consultation closed on 25 September 2023 and the officer level response that was submitted is contained in Appendix 1.

2.3 In our response we have pointed to the importance of the rail network in supporting delivery of the TfSE transport strategy and Strategic Investment Plan

(SIP), the network also providing travel solutions with much lower emissions than road-based alternatives; TfSE's technical modelling suggesting significant contribution to economic growth and decarbonisation by investment in rail network enhancements.

2.4 We have highlighted the value of existing positive and cooperative working relationships between TfSE and GTR's operating network in the south east, confirming broad support for improvements to the timetable on the West Coastway service that form part of the SIP Sussex Coast Rail package and referring to specific recommendations from the West Coastway Strategic Study.

2.5 Our response seeks assurances regarding the implementation of further phases for continued improved services on the West Coastway line and building on these initial changes, noting certain concerns in relation to proposed changes with suggested areas for consideration including in-station and to/from station access.

3. Reading Borough Council – Reading Transport Strategy 2040

3.1 Reading Borough Council held a period of consultation on their new Local Transport Plan.

3.2 This consultation closed on 11 December 2023 and the officer level response that was submitted is contained in Appendix 2.

3.3 TfSE notes with interest the influence of the Reading 2040 Vision and the Reading Local Plan vision in developing the overall vision for transport in Reading; welcoming this in its provision of opportunity to ensure that the impacts of transport are seen from a place-based and user perspective, and not simply on transport's own terms.

3.4 Further comment recognises the Reading 2040 vision as exhibiting a good translation of TfSE's own vision for the south east to the local context in Reading; highlighted in our response are a number of areas with close alignment between these.

3.5 A number of suggestions are made by TfSE, including mention of strategic connectivity to nearby areas as well, highlighting TfSE's transport strategy reference to trips into and out of other areas and proposing additional text for inclusion at the end of the vision.

3.6 A review of alignment of Reading's transport strategy 2040 objectives and TfSE's transport strategy strategic priorities has been provided; in addition, TfSE has recommended a number of specific changes relating to listed Strategic Priorities in TfSE's own strategy (either through additional objectives or expanded sub-text that clarifies the meaning of specific objectives).

3.7 We recognise challenges and opportunities faced by Reading in the preparation of this transport strategy, referring in detail to these and policies and implementation and proposing the addition of certain detail; noting importance of alignment of this strategy with the SIP.

3.8 TfSE has confirmed its willingness to work with Reading Borough Council on detailed text in relation to strategic connectivity for proposed inclusion, summary text provided at this point.

3.9 Also proposed is inclusion of a package of schemes established in the SIP that will improve strategic infrastructure (summary table provided). Where such schemes are already mentioned in the strategy (notably Reading Mass Transit), it has been noted that TfSE would welcome supporting text within the document itself to highlight that such schemes are also contained within TfSE's SIP as a priority scheme for this area.

4. Conclusion and recommendations

4.1 The members of the Partnership Board are recommended to agree the draft responses to consultations that are detailed in this report.

RUPERT CLUBB
Lead Officer
Transport for the South East

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TRANSPORT FOR THE South East

Martin Darby
Stakeholder Manager
Govia Thameslink Railway

By email to: GTRPublicAffairs@gtrailway.com

25 September 2023

Dear Martin,

Public engagement on potential changes to Southern's West Coastway services

I am writing to you as Lead Officer for Transport for the South East (TfSE) in response to the consultation you launched in June on Govia Thameslink Railway's (GTR) proposals to improve Southern services on the West Coastway from 2024.

TfSE is a sub-national transport body (STB) for the South East of England, bringing together leaders from across the local government, business and transport sectors to speak with one voice on our region's strategic transport needs. Since its inception in 2017, TfSE has quickly emerged as a powerful and effective partnership for our region. We have a 30-year transport strategy in place which carries real weight and influence and will shape government decisions about where, when and how to invest in our region to 2050. The Secretary of State has confirmed that they will have regard to our strategy in developing new policy. We work closely with the Department for Transport (DfT) to provide advice to the Secretary of State and our ambition is to become a statutory body with devolved powers over key strategic transport issues.

Our principal decision-making body, the Partnership Board, brings together representatives from our 16 constituent local transport authorities, five Local Enterprise Partnerships, district and borough authorities, protected landscapes, Highways England, Network Rail and Transport for London.

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Our Strategic Investment Plan (SIP) for South East England provides a framework for investment in strategic transport infrastructure, services, and regulatory interventions in the coming three decades. The plan provides a framework for delivering our Transport Strategy, which:

- Is a blueprint for investment in the South East.
- Shows how we will achieve our ambitions for the South East.
- Is owned and delivered in partnership.
- Is a regional plan with evidenced support, to which partners can link their own local strategies and plans – a golden thread that connects policy at all levels.
- Provides a sequenced plan of multi-modal investment packages that are place based and outcome focused.
- Examines carbon emissions impacts as well as funding and financing options.

The plan presents a compelling case for action for investors, including government departments – notably the Treasury and Department for Transport (DfT) – as well as private sector investors. It is written for and on behalf of the South East's residents, communities, businesses and political representatives.

The rail network has an important role to play in supporting delivery of the TfSE transport strategy and SIP. Rail can provide travel solutions with much lower emissions than road-based alternatives (whether passenger or freight). Our technical modelling suggests that investment in rail network enhancements can make significant contributions to both economic growth and decarbonisation.

The TfSE area contains GTR's operating network south of Greater London. TfSE values the positive and cooperative working relationships it has with different representatives from the rail sector, including GTR.

Specified in our SIP as part of our Sussex Coast Rail package we broadly support improvements to the timetable on the West Coastway service. We are keen to see delivery of recommendations from the West Coastway Strategic Study, including increased service frequencies and timetable optimisation for local and strategic movements between Southampton, Havant, Chichester and Brighton.

We understand this is phase one and would like assurance that further phases will be implemented in order to continue improving services on the West Coastway line and build on these initial changes.

We are concerned about the loss of direct services and some longer journey times in the proposal. If the service change goes ahead, a good quality interchange experience will be essential at the relevant stations in terms of accessibility, convenience (e.g., maximising same-or cross platform interchange), quality of waiting areas, interchange time and providing supporting information.

GTR should continue to look at improving in-station accessibility and at encouraging more access to/from stations by foot and by cycle by considering the first mile/last mile element of their passengers' journeys.

Yours sincerely

Rupert Clubb
Lead Officer
Transport for the South East

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Reading Transport Strategy 2040
Response from Transport for the South East

1. Introduction

1.1 Transport for the South East (TfSE) welcomes the opportunity to respond to Reading Borough Council's Reading Transport Strategy 2040 – Draft for Consultation.

1.2 TfSE is a sub-national transport body (STB) for the South East of England, bringing together leaders from across the local government, business and transport sectors to speak with one voice on our region's strategic transport needs. Since its inception in 2017, TfSE has quickly emerged as a powerful and effective partnership for our region. We have a 30-year transport strategy in place which carries real weight and influence and will shape government decisions about where, when and how to invest in our region to 2050. The Secretary of State has confirmed that they will have regard to our strategy in developing new policy. We work closely with the Department for Transport (DfT) DfT to provide advice to the Secretary of State and our ambition is to become a statutory body with devolved powers over key strategic transport issues.

1.3 Our principal decision-making body, the Partnership Board, brings together representatives from our 16 constituent local transport authorities, five Local Enterprise Partnerships, district and borough authorities, protected landscapes, Highways England, Network Rail and Transport for London.

1.4 Our Strategic Investment Plan (SIP) for South East England provides a framework for investment in strategic transport infrastructure, services, and regulatory interventions in the coming three decades. The plan presents a compelling case for action for investors, including government departments – notably the Treasury and Department for Transport (DfT) – as well as private sector investors. It is written for and on behalf of the South East's residents, communities, businesses and political representatives. The plan provides a framework for delivering our Transport Strategy, which:

- is a blueprint for investment in the South East;
- shows how we will achieve our ambitions for the South East;
- is owned and delivered in partnership;
- is a regional plan with evidenced support, to which partners can link their own local strategies and plans – a golden thread that connects policy at all levels;
- provides a sequenced plan of multi-modal investment packages that are place based and outcome focused; and
- examines carbon emissions impacts as well as funding and financing options.

1.5 TfSE welcome this opportunity to respond to the Reading Transport Strategy 2040 – Draft for Consultation – June 2023. We trust that our response will provide value to the work of Reading Borough Council in this area, but also form the basis for further engagement, especially as TfSE is undertaking a refresh of its own transport strategy throughout 2024/5. Specifically, we are keen to establish a 'golden thread' in policy terms so that Reading – as well as other Local Transport Authorities (LTAs) – is able to achieve its own goals whilst playing a significant role in achieving a wider vision for the South East.

2. Vision and Objectives

2.1 TfSE notes with interest the influence of the Reading 2040 Vision and the Reading Local Plan vision in developing the overall vision for transport in Reading. We welcome this, in that it provides an opportunity to ensure that the impacts of transport are seen from a place-based and user perspective, and not simply on transport's own terms.

2.2 The Reading 2040 vision exhibits a good translation of TfSE's vision for the South East to the local context in Reading. We have highlighted some of the areas where there is close alignment between our own vision and that of Reading's in the below table.

Reading Transport Strategy 2040 Vision	**TfSE Transport Strategy Vision**
Our vision is to deliver a sustainable transport system in Reading that creates an attractive, green and vibrant town with neighbourhoods that promote healthy choices and wellbeing. Future mobility options will enable everyone in Reading to thrive, enjoy an exceptional quality of life and adapt to meet future challenges and opportunities.	By 2050, the South East of England will be a leading global region for net-zero carbon, sustainable economic growth where integrated transport, digital and energy networks have delivered a step-change in connectivity and environmental quality. A high-quality, reliable, safe and accessible transport network will offer seamless door-to-door journeys enabling our businesses to compete and trade more effectively in the global marketplace and giving our residents and visitors the highest quality of life.

2.3 An element that we consider would add a lot of value to this vision is a mention of strategic connectivity to nearby areas as well, reflecting the fact that as the transport strategy itself concedes there are many trips into and out of other areas. We would recommend the following additional text be inserted at the end of the vision:

"Fast, convenient and sustainable strategic transport links will enhance the quality of life of Reading residents and visitors, as well as provide a welcome economic boost."

2.4 Reviewing the objectives of the transport strategy, again, it is apparent that they broadly align with the Strategic Priorities in our own transport strategy, as shown in the below table.

Reading Transport Strategy 2040 Objectives	**TfSE Transport Strategy Strategic Priorities**
Creating a clean and green Reading	A reduction in carbon emissions to net zero by 2050, at the latest, and minimise the contribution of transport and travel to climate change. A transport network that protects and enhances our natural, built and historic environments
Supporting Healthy Lifestyles	A network that promotes active travel and active lifestyles to improve our health and wellbeing
Enabling Sustainable and Inclusive Growth	Better connectivity between our major economic hubs, international gateways (ports, airports and rail terminals) and their markets
Connecting People and Places	A seamless, integrated transport network with passengers at its heart, making it simpler and

	easier to plan and pay for journeys and to interchange between different forms of transport
Embracing Smart Solutions	A 'smart' transport network that uses digital technology to manage transport demand, encourage shared transport and make more efficient use of our roads and railways

2.5 Not all of TfSE's Strategic Priorities are covered explicitly by the objectives in the Reading strategy. Specifically, we would recommend changes, either through additional objectives or expanded sub-text that clarifies the meaning of specific objectives, relating to the following Strategic Priorities in TfSE's own strategy:

- A transport network that is more resilient to incidents, extreme weather and the impacts of a changing climate;
- A safely planned, delivered and operated transport network with no fatalities or serious injuries among transport users, workforce or the wider public;
- Use of the principle of 'biodiversity net gain' (i.e. development that leaves biodiversity in a better state than before) in all transport initiatives;
- Minimisation of transport's consumption of resources and energy;
- An affordable, accessible transport network for all that promotes social inclusion and reduces barriers to employment, learning, social, leisure, physical and cultural activity.

2.6 Such changes we feel would significantly enhance the alignment between our policy documents, and demonstrate further a solid strategic case for securing investment in the transport network of Reading.

2 Challenges and Opportunities

3.1 The challenges and opportunities facing Reading and its transport network are well-founded, and are based on sound evidence and a clear understanding of local priorities. The main challenges within Reading accord generally with our own understanding of the situation locally, as identified from our own evidence base.

3.2 There are opportunities to align more closely with the TfSE Strategy through the inclusion of an additional challenge and opportunity relating to strategic connectivity. Whilst some of these matters are considered as part of the other challenges and opportunities (notably Reducing Congestion which mentions through-movements), a specific mention of this does not detract from those mentioned in the strategy, whilst closely aligning the strategy with that of TfSE's. We welcome the opportunity to work with you on detailed text for this purpose, but for now we propose the following by way of a summary:

"Strategic Connectivity.

The residents of Reading significantly benefit from good access to a variety of strategic transport networks, such as the Great Western Mainline and M4. This provides good connectivity not only locally with nearby other major centres such as Slough and Basingstoke, but it provides residents with good national connectivity as well – with the associated economic opportunties. However, strategic connections running from West to East are of higher quality than those running from North to South, and these connections can frequently be congested. Furthermore, whenever there is disruption on these key routes, this has significant implications for Reading."

3 Policies and Implementation

3.1 Similar to previous chapters, we haven't identified any fundamental issues with the policies and implementation plan provided. The policies as a whole accord with the priorities within our Strategy, and we realise that for some policies (e.g. Network Management) they are likely to be of greater relevance at a local level and consequently warrant further detail which, while of general interest to TfSE, do not warrant specific comment. .

3.2 What is of most interest to us, especially when it comes to implementation, is the alignment of this strategy with the Strategic Implementation Plan (SIP). Within this document, Reading is within the 'Wessex Thames' area, and the SIP has established a package of schemes that will improve strategic infrastructure worth £10.4 billion, adding £1.2 billion in economic value each year should they be delivered. These schemes are summarised in the table below.

3.3 We would welcome the inclusion of these schemes within the Transport Strategy . Where such schemes are already mentioned in the strategy (notably Reading Mass Transit), we would welcome supporting text within the document itself along the lines of "This scheme is also contained within the Strategic Investment Plan produced by Transport for the South East as a priority scheme for this area."

3.4 Additionally, the SIP refers to the need to deliver a number of 'global' policy interventions across the TfSE area. Namely:

- **Decarbonisation**. We aspire to deliver a faster trajectory towards net zero than current trends, including rapid adoption of zero emission technologies, to avoid the worst effects of human-induced climate change. This includes: working with partners at all scales of government and the private sector through the regional transport decarbonisation forum, to decarbonise energy production; and provide infrastructure for electric vehicles and green hydrogen refuelling.
- **Public Transport Fares**. We wish to reverse the increase in real terms of the cost of public transport compared to motoring and increase ticket integration to reduce barriers.
- **New Mobility**. We see great potential for new mobility technologies (e.g. electric bikes and scooters) and access opportunities (e.g. subscription models, car clubs and Mobility as a Service) to support decarbonisation of travel in the south east.
- **Road User Charging**. We encourage central government to develop a national road user charging system to provide an alternative source of funding to fuel duty and to help manage demand in parallel to integrated local measures. Local authorities also have the opportunity to investigate measures such as workplace parking levies and low emission zones in their areas where appropriate.
- **Virtual Access**. The past two decades, amplified by the global Covid pandemic, have shown how virtual working can help reduce demand for transport services, and we support this transition where appropriate.
- **Integration**. We wish to see improvements in integration across and between all modes of transport in terms of infrastructure, services, ticketing, and accessibility, as well as transport and land use integration, supporting seamless journeys and improved first and last mile connectivity.

Map Ref.	Intervention name	What is the scheme?	What will the scheme do?	Phasing
O1*	Western Rail Link to Heathrow	A new direct rail link from the Great Western Main Line (between Iver and Langley) to Heathrow Airport.	Enable direct connectivity and reduce journey times to Heathrow Airport from key locations, including Bristol, Swindon, Oxford and Reading.	Medium term (2030s)
O2*	Southern Access to Heathrow	A new direct rail link from Berkshire (Bracknell, Ascot), Surrey (Woking, Guildford) and Hampshire (Blackwater Valley, North/Mid-Hampshire, the Solent) to Heathrow Airport.	Help to resolve the long-term problem of rail inaccessibility to Heathrow Airport from the south, particularly from Surrey and South West London.	Long term (2040s)
O3	Reading to Basingstoke Enhancements	Electrification of the Reading to Basingstoke Line.	Support the decarbonisation of the rail network and enable sustainable rail freight movements along the corridor.	Long term (2040s)
O4	North Downs Line - Decarbonisation	Electrification of the unelectrified sections of the North Downs line.	Support the decarbonisation of the rail network and enable sustainable rail freight movements along the corridor.	Long term (2040s)
O6	North Downs Line - Service Level and Capacity Enhancements	Station upgrades and level crossing removals to enable four trains per hour to run at peak times on the North Downs Line.	Increase rail service frequencies which will increase capacity, helping to attract more local residents onto the railway.	Short term (2020s)
O14	Cross Country Service Enhancements	Reinstatement of Cross Country services between Portsmouth and the Midlands and increased service frequencies and span between Southampton and the Midlands.	Reduce journey times between Portsmouth, Southampton and other national centres and support inbound tourism.	Short term (2020s)
O18	Theale Strategic Rail Freight Terminal	Development of a rail freight hub at Theale.	Support more efficient rail freight operations and contribute to business growth.	Short term (2020s)
O20	Reading to Waterloo Service Enhancements	Increased line speeds on the Reading to Waterloo Line.	Reduce journey times between London, Bracknell and Ascot and enhance onward connectivity from locations on the Ascot to Guildford Line, e.g. Camberley and Bagshot.	Medium term (2030s)
P3	Bracknell/Wokingham Bus Enhancements	Urban bus enhancements connecting centres within Bracknell, Wokingham and adjacent economic hubs, including bus priority infrastructure where appropriate.	Improve journey times and reliability for public transport by increasing service frequencies, extending operating hours and delivering timetable integration.	Short term (2020s)
P9	Reading Mass Rapid Transit	An integrated network of new bus-based rapid transit routes across Reading.	Connect major employment and population areas locally, building on the successful South Reading Mass Rapid Transit initiative.	Short term (2020s)

P13	A329/B3408 Reading - Bracknell/Wokingham Mass Rapid Transit	Inter-urban bus enhancements along the A329/B3408, including bus priority measures where appropriate.	Increase bus service frequencies, reduce journey times and improve reliability for residents between Reading, Bracknell, Wokingham and nearby centres.	Short term (2020s)
P18	Berkshire, Hampshire and Surrey Inter-urban Bus Enhancements	Inter-urban bus enhancements, including bus priority measures.	Enable frequent, reliable, express services to run along roads connecting major economic hubs, e.g. Guildford to the Blackwater Valley via the A31.	Short term (2020s)
Q1	Berkshire, Hampshire and Surrey Urban and Inter-urban Active Travel Infrastructure	Inter-urban walking and cycling enhancements, utilising and enhancing the National Cycle Network.	Connect points of interest and provide safer, faster and more accessible segregated cycle infrastructure to encourage cycling and help to diversify residents' travel options.	Short term (2020s)
R6	New Thames Crossing East of Reading (LLM)	A third bridge across the river Thames in Reading, including supporting infrastructure.	Relieve existing congestion in Reading town centre and provide additional capacity for access to new housing developments.	Long term (2040s)
R8	M4 Junction 10 Safety Enhancements	Changes to M4 Junction 10 with the A329(M).	Support the increased safety of all road users.	Short term (2020s)
R13	A322 and A329(M) Smart Corridor	Introduction of smart motorway interventions along the A322 and A329(M).	Support the more efficient use of existing capacity using real-time information.	Short term (2020s)
R15	M4 Junction 3 to Junction 12 Smart Motorway (SMP)	Smart motorway extension from M4 Junction 3 to M4 Junction 12.	Increase capacity and road safety and improve reliability along this section.	Short term (2020s)

3.5 In some instances the transport strategy contains schemes and initiatives that map directly against these overall policy interventions. A notable example being a desire to deliver a local Mobility as a Service solution mapping well against New Mobility. However, some others are notable by their absence.

3.6 We realise that much work needs to be done between Reading and TfSE on major projects and global policy interventions contained within the SIP. Consequently, whilst a direct reference to these within the Reading transport strategy would be desirable, we would recommend that as part of the implementation section of the strategy the following text be added:

"Working with regional agencies

Other agencies such as Transport for the South East, National Highways, Network Rail, and the Department for Transport, are working on developing the case for a variety of strategic transport schemes and policies that will directly affect Reading. Some of these major schemes are included within this Transport Strategy, and within the relevant policy documents of those agencies.

The Council will act as a positive partner in the development of such schemes, where they align with the objectives of this transport strategy."

Agenda item 12

Report to:	**Partnership Board –Transport for the South East**
Date of meeting:	**29 January 2024**
By:	**Lead Officer, Transport for the South East**
Title of report:	**Lead Officer's Report**
Purpose of report:	**To update the Board on the recent activities of Transport for the South East**

RECOMMENDATION:

The members of the Partnership Board are recommended to note the activities of Transport for the South East between October - December 2023.

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1. Introduction

1.1 The focus of work for Transport for the South East (TfSE) in the last quarter has been on focussed on the thematic projects and activities contained within the board pack including the transport strategy refresh work.

1.2 The drafting of the annual business plan 24/25 has been completed and following board approval in December has been submitted to the Department for Transport (DfT). The annual report for 23/24 drafting is underway and will be presented to the Partnership Board at the next meeting.

2. National Policy

2.1 The King's Speech contained a pledge for investment in better connections in England. The King announced the Draft Rail Reform Bill, which would provide the legal framework to set up Great British Railways (GBR). An announcement was also made for plans to introduce new legal frameworks to support the development of emerging industries, such as self-driving vehicles.

2.2 The Autumn Statement saw the Chancellor announce a long-term cash freeze in investment spending.

2.3 The Government also announced their plans to amend HS2 to reflect the changing business case and their plan to transform transport through Network North.

3. Work of Transport for the South East

3.1 As outlined above, the 14 projects have gone through the call off contract. 3 have been completed with 5 in the pipeline. Completed projects' themes include freight and planning and the transport strategy refresh scoping and mobilisation.

3.2 The SIP delivery plan has been well received and we are currently offering our delivery partners the opportunity to test out the story map function.

3.3 Work has also begun on the refresh of the transport strategy.

Joint STB Work

3.4 The joint STB chief executives met in November and were joined by officials from DfT.

3.5 As previously identified, all the STBs are also collaborating on a variety of different projects, those involving TfSE are outlined below:

- TfSE, Transport East (TE) and England's Economic Heartland (EEH) joint work on producing a decarbonisation toolkit
- 7 STBs working on alternative fuelling station locations for road freight vehicles
- 7 STBs working jointly on decarbonisation

3.6 All projects are proceeding well, and more information can be found in the technical programme update report - Agenda Item 14.

Events

3.7 Highways UK took place on 18 October 2023. TfSE spoke on a panel - Roads as catalysts: Unleashing local transformative growth through strategic investment.

3.8 Work is underway on the upcoming National STB conference in February 2024.

South East Rail Partnership

3.9 TfSE, TE and EEH chairs wrote to the Secretary of State on 08 December seeking out a nominated representative of the Department to join the Partnership.

3.10 A response to the letter was received on 22 December from Minister Merriman. The letter commended the proactive approach and commitment to working closely with Government.

3.11 The Wider South East Rail Partnership meetings have now been established and are in the calendar. The first will take place on 9 February 2024. An update from the meetings will be presented to the Board.

TfSE Team

4.1 Keir Wilkins, Head of Programme and Policy started on 01 December on secondment from DfT.

4.2 Jaimie McSorley, Engagement Manager started 13 December and Joshua Jiao, Analysis Manager started 18 December.

5. Conclusions and recommendations

5.1 The Partnership Board is recommended to note the activities undertaken by TfSE between October - December 2023.

RUPERT CLUBB
Lead Officer
Transport for the South East

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Agenda Item 13

Report to: **Partnership Board –Transport for the South East**

Date of meeting: **29 January 2024**

By: **Chair of the Transport Forum**

Title of report: **Transport Forum Update**

Purpose of report: **To update the Partnership Board on the plan for 2024 following the review undertaken.**

RECOMMENDATIONS:

The members of the Partnership Board are recommended to:

(1) Note the plan for the Forum for 2024 following the recent Transport Forum review.

---

1. Introduction

1.1 The Partnership Board agreed the proposal for reviewing the Transport Forum at the 30 October 2023 meeting.

1.2 Following this review, officers have been planning the 2024 Transport Forum.

2. Transport Forum 2024

2.1 We can confirm that the first face to face Transport Forum will take place on Thursday 11 April at a suitable central location.

2.2 The digital engagement will be a live Question and Answer session with Lead Officer, Rupert Clubb and Chair, Councillor Keith Glazier. Transport Forum members were contacted in December and asked to submit their questions. The Q&A session will be recorded early February 2024, with the aim for this to be available to Forum members mid-late February 2024. The second piece of digital engagement will follow the same format in September 2024.

3. Advisory Panel

3.1 As part of the Transport Forum agreed proposal an Advisory Panel was established.

3.2 The Thematic Groups have been asked to confirm who will be their representative to sit on the Advisory Panel by the end of February 2024.

3.3 The Thematic Group Terms of Reference are currently being drafted by officers. The first Advisory Panel meeting will be held w/c 29 April, 2024.

4. Conclusions and recommendations

4.1 It is recommended that the Board note the plan for the Forum for 2024 following the recent Transport Forum review and note the work on forming the Advisory Panel.

GEOFF FRENCH
Chair of the Transport Forum
Transport for the South East

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Agenda Item 14

Report to: **Partnership Board –Transport for the South East**

Date of meeting: **29 January 2024**

By: **Lead Officer, Transport for the South East**

Title of report: **Transport Strategy Refresh Update**

Purpose of report: **To provide an update on progress with the refresh of the transport strategy**

RECOMMENDATION:

The members of the Partnership Board are recommended to note the progress with the work to refresh the transport strategy.

---

1. Introduction

1.1 At the July 2023 meeting, the Partnership Board agreed that a refresh of Transport for the South East's (TfSE) transport strategy should be undertaken. The overall timeline for the delivery of the refresh is shown in Appendix 1. The purpose of this report is to provide an update on the work that has taken place since July 2023 and the work that is due to take place over the next three months.

2. Progress with technical work

2.1 A main focus of the ongoing technical work has been the development of an overall work programme for the refresh, a copy of which is included in Appendix 2. The activities that are being undertaken to complete the initial tasks set out in this work programme include the following:

- updating the evidence base that underpins the strategy;
- refreshing the Economic Connectivity Review that was undertaken as a precursor to the existing transport strategy;
- collecting evidence to inform the Integrated Sustainability Appraisal;
- convening Working Groups to identify the key questions that need to be answered if the outcomes that the strategy is seeking to achieve are to be realised; and
- undertaking the first scenario planning workshops.

2.2 Updating the evidence base will involve reviewing existing evidence collected during the development of the Area Studies and the Strategic Investment Plan. This will include updating key indicators to reflect new data from the 2021 Census such as revised demographic projections. The work to refresh the Economic Connectivity Review will update the evidence base on the economic profile of the TfSE area.

2.3 We have recruited suitably qualified experts to join four Working Groups that will be focussed on identifying the key questions that need to be posed to realise the outcomes that the strategy is seeking to achieve. The four Working Groups are as follows:

- Realising economic opportunities;
- Delivering a just transition;
- Planning for healthy and connected places;
- Embracing the future.

2.4 The Working Group meetings will take place in January, February, and March 2024. An update on the outcomes of the Working Group meetings and ongoing technical work will be presented to the April 2024 Partnership Board meeting.

2.5 Looking forward, a number of important task are due to be completed before the next meeting of the Board in April, including the following:

- the development of a 'Need for Intervention' report based upon the updated evidence base and the feedback from the Working Groups;
- commencement of the Scenario Development Workshops, to which Board members will be invited;
- development of an initial revised vision and goals for the transport strategy; and
- commencement of work to engage with socially-excluded groups.

3. Update on engagement activity

3.1 As set out in the report to the Partnership Board on the Transport Strategy refresh in July 2023, the approach to engagement during its development will be based on the principles of 'co-creation'. This involves working openly and collaboratively with stakeholders, subject matter experts and other interested parties to help develop the evidence base and priorities for the strategy.

3.2 Whilst much of the planned engagement on the transport strategy refresh is taking place through existing TfSE Working Groups and Forums, the need for more focused engagement work with a number of specific groups was identified during initial scoping work.

3.3 Specific engagement with representatives of socially-excluded groups will be undertaken using a 'social model' approach to exclusion that focusses upon how the way our strategic transport network can operate in an exclusionary way. For example, rather than someone in a wheelchair facing exclusion because of this, it is a lack of level access across the transport network that is exclusionary. This work will recognise that the effects of this exclusion can work in different ways for different people.

3.4 A Communications Plan for the Transport Strategy Refresh has been produced. As part of this we will be using TfSE's existing media channels and means of engagement to share key messages throughout the year. We also plan to attend

speaker events to raise awareness of the transport strategy refresh and to encourage key stakeholders to participate.

3.5 Finally, an online platform ‘Engage 360’ has been procured that will provide the capability for online engagement through bespoke surveys and feedback requests from website visitors on questions that we may wish to pose during the development of the strategy.

4. Financial considerations

4.1 In the July 2023 Partnership Board report on the transport strategy refresh the total estimated cost of the work was forecast to be £646,000. Since then, Steer consultants have been engaged to undertake the refresh through the call off contract and have provided costs for undertaking each of the required tasks. Based on this updated information and the outcomes of initial scoping work the total outturn cost of the refresh is now estimated at £724,000. The main reasons for the uplift in the total cost are the additional costs associated with undertaking the public consultation and the consultancy framework management costs that were not included in the original estimate. The total projected cost will be met from the Department of Transport grant allocations for 2023/24 and 2024/25.

5. Conclusions and recommendations

5.1 In conclusion, work on the transport strategy refresh is now well underway, with progress on a number of elements of technical work and on consultation and engagement activity Members of the Partnership Board are recommended to note the progress on the transport strategy refresh.

RUPERT CLUBB
Lead Officer
Transport for the South East

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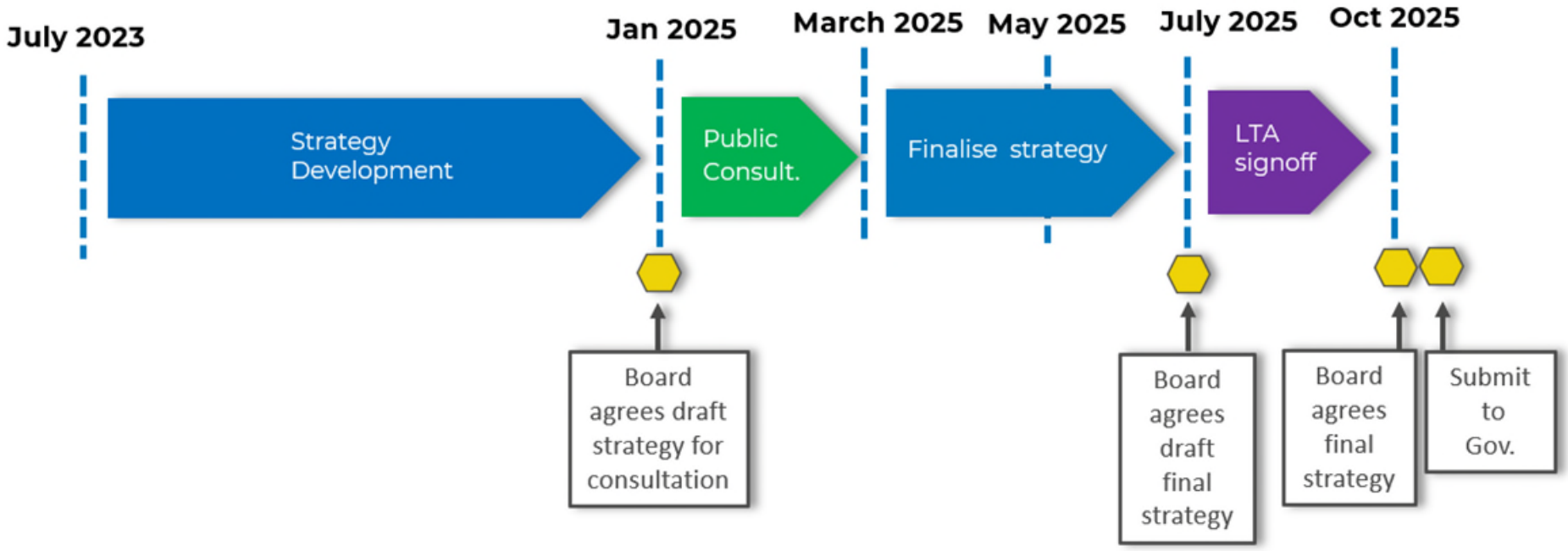
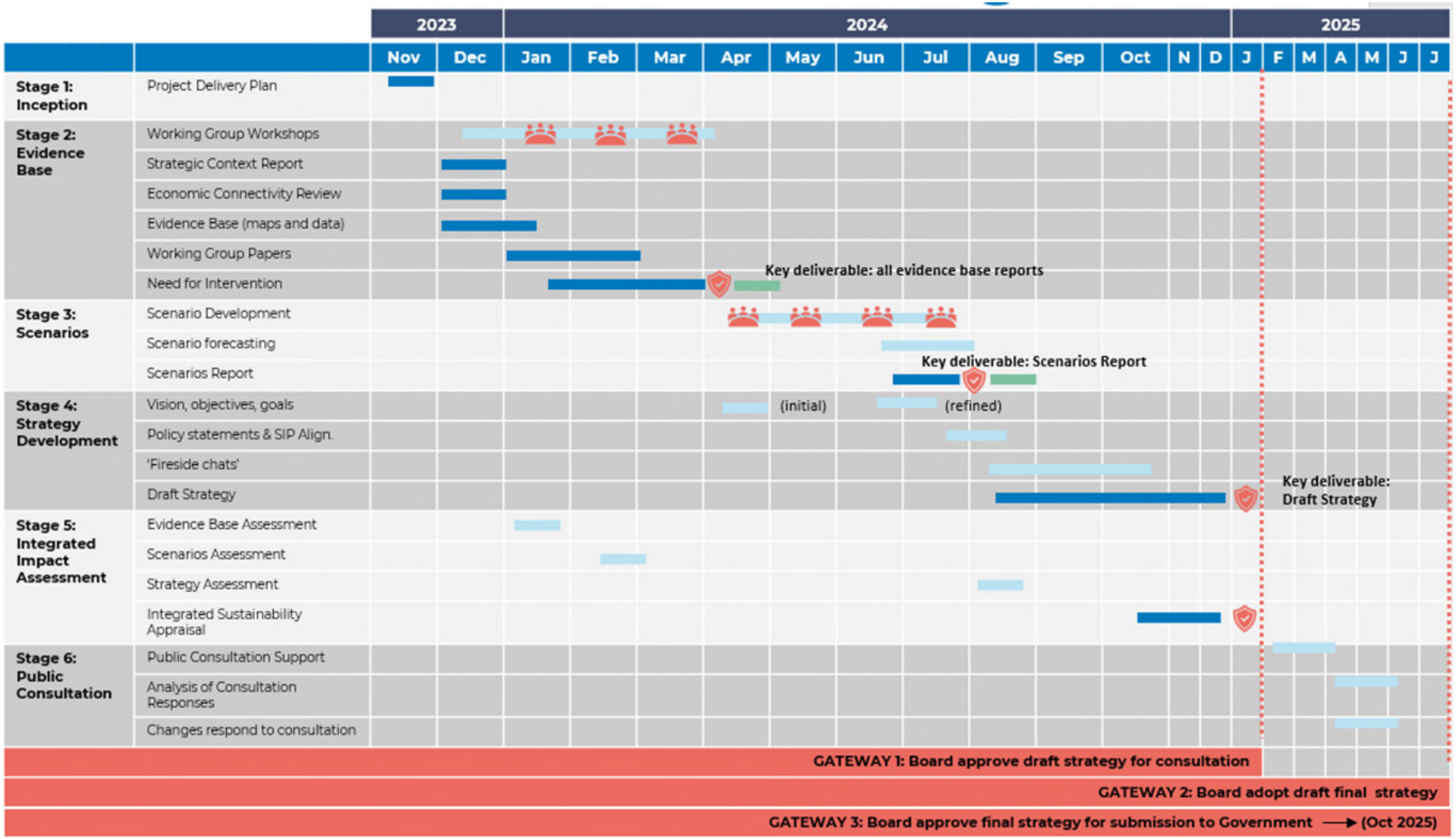
Appendix 1 – Timeline for delivery of the transport strategy refresh



Appendix 2 – Work programme for the transport strategy refresh



Agenda Item 15

Report to:	**Partnership Board –Transport for the South East**
Date of meeting:	**29 January 2024**
By:	**Lead Officer, Transport for the South East**
Title of report:	**Delivery of the Strategic Investment Plan (SIP)**
Purpose of report:	**To provide an update on work to support delivery of the SIP**

RECOMMENDATION:

The members of the Partnership Board are recommended to note the progress of a range of workstreams that support the delivery of the Strategic Investment Plan.

1. Introduction

1.1 This report provides an update on a range of workstreams that support the delivery of the Strategic Investment Plan (SIP).

2. Background

2.1 Delivering the SIP will require a number of partners, including Transport for the South East (TfSE), local transport authorities, National Highways, Network Rail and DfT, to work closely together to develop and deliver the schemes and policy interventions it sets out. A number of different approaches to bring forward schemes will also be required, taking account of the different stages of development that schemes are already at and the resources available to TfSE and the delivery partners to progress the work.

2.2 This report provides an update on the work that supports delivery of the interventions, ensuring the required analytical tools are available, supporting our partners as they develop and deliver schemes, and reporting on benefits realisation arising from both place-based and global interventions included in the SIP.

3. SIP Delivery Action Plan

3.1 The SIP contains nearly 300 multi-modal scheme and policy interventions that are required to be delivered across the South East over the next 27 years, to realise the vision for 2050 as set out in the TfSE Transport Strategy. Delivery of this programme of interventions will require the input of a number of different partners working together, and the exact arrangements will need to vary from scheme to scheme.

3.2 The information within the Delivery Action Plan for the SIP has been updated with delivery partners. As well as supporting scheme delivery, this information feeds into the strategic prioritisation tool, and so it is essential it remains current.

3.3 To aid and better direct TfSE's support towards scheme delivery we have not only noted progress but also where schemes appear to be stuck. We have also taken the opportunity to gain a greater understanding of scheme ownership where more than one partner is named, and the scheme owners ability to actively progress the scheme.

4. Interactive Story Map

4.1 To ensure it remains current, the Interactive Story Map will also be updated with revised information from the updated Delivery Action Plan once that is complete.

5. Scheme Development Work

5.1 The TfSE budget for 2023/24 includes allocations to work with partners to undertake and support scheme development work to deliver SIP schemes.

5.2 The four schemes offered assistance this financial year (shown in the table below) are now in progress.

Authority	Scheme	Support for	Funding
Kent County Council	Fastrack Optimisation and Extension	Feasibility Study	£51,297
Medway Council	New Strood Interchange	Feasibility Study	£20,000
Portsmouth City Council	Cosham Station Mobility Hub	Strategic Outline Business Case	£30,000
Southampton City Council	West Quay Road Realignment	Strategic Outline Business Case	£100,000

5.3 We will be continuing to work with delivery partners to identify a pipeline of schemes for support funding in forthcoming financial years. Schemes will be prioritised based on the knowledge within the Delivery Action Plan and using the scheme prioritisation work, alongside discussions with delivery partners to ensure that limited resources are not only shared across the region, but also targeted to priority schemes.

5.4 TfSE continue to manage the Major Road Network (MRN) and Large Local Majors (LLM) programmes for the region, providing support to our local transport authority promoters and liaising with DfT on the overall programme.

5.5 All MRN/LLM schemes are required to submit monitoring returns to DfT, we can confirm that all schemes within the TfSE area submitted their 2023/24 Q2 returns with no major changes from Q1. There are currently 11 MRN and LLM schemes progressing through the business case process in the TfSE region. Since the last board meeting A229 Blue Bell Hill Improvements (Kent), Northam Rail Bridge (Southampton) and A31 Farnham Corridor (Surrey) have been approved at Strategic Outline Business Case (SOBC) stage and are now eligible for DfT development funding support as they progress through Outline Business Case (OBC) stage.

5.6 The Prime Minister's announcement of Network North on 4th October included provision for increased funding for most existing Major Road Network and Large Local

Major road schemes. These schemes, subject to successful business case approval, could benefit from an uplift in government contribution of their costs based on the Outline Business Case stage. DfT can also provide upfront funding to assist in developing the OBC, subject to the following:

- DfT require a detailed costed breakdown of the activities that are planned to be undertaken in developing the OBC.
- DfT cannot provide upfront funding for land purchase or advance construction works (e.g. diversion of utilities). DfT grant to cover these can only be reimbursed once an FBC has been approved.
- DfT can assist with the cost of developing the OBC, including design work, surveys, public consultation etc.
- DfT expect Councils to contribute a minimum of one third of the development costs.
- DfT can only pay for activities directly related to the scheme and the expenditure must be capital spend and not revenue costs.

6. Monitoring and Evaluation Framework

6.1 A clear robust approach to monitoring and evaluation is needed to ensure the successful delivery of the interventions included in the SIP. It is important to ensure this mechanism provides a clear line of sight from the transport strategy's vision through to intervention level objectives, via the Strategic Investment Plan. It is also important to discern the outcomes and impacts of interventions at a regional level to understand how much they contribute to the SIP's (and wider TfSE) objectives.

6.2 The Delivery Action Plan forms the baseline from which monitoring and evaluation of delivery of schemes within the SIP will be measured. The information has been updated with the current position of each of the proposed schemes with delivery partners in readiness for reporting progress in the TfSE annual report.

7. Analytical Framework

7.1 Regardless of the delivery route or partner, it is likely that the majority of the schemes within the SIP will require a business case to secure their funding. Developing the business cases will require a suite of analytical tools (an analytical framework) that are collectively capable of assessing the impacts, benefits, and costs of the schemes to provide the necessary assurance to DfT and other funding/delivery partners that the schemes are worthy of delivery.

7.2 A range of updates to our SEELUM model have now been completed which will provide greater functionality to allow the assessment of wider economic impacts and an enhanced quantified carbon impact assessment. The updated model is ready to support the modelling work required for the refresh of the transport strategy.

7.3 We are also working with Transport for the North (TfN) on the roll out of TfN's D-Log system which will provide a standard method for collecting and maintaining local plan data, and the roll out of TfN's EVCI (electric vehicle charging infrastructure) tool, as part of the development of the STB common analytical framework.

7.4 Following a successful recruitment exercise, a new Analysis Manager Joshua Jiao, who will provide expertise in this area and be responsible for developing our analytical capability, joined the TfSE team in December 2023.

8. Conclusions

8.1 Board Members are recommended to note the progress of a range of workstreams that will support the delivery of the Strategic Investment Plan.

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Agenda Item 16

Report to:	**Partnership Board – Transport for the South East**
Date of meeting:	**29 January 2024**
By:	**Lead Officer, Transport for the South East**
Title of report:	**Technical Programme Progress Update**
Purpose of report:	**To provide a progress update on the ongoing work to deliver the technical work programme set out in the 2023/24 business plan**

RECOMMENDATIONS:

The members of the Partnership Board are recommended to:

(1) Note the progress with the work to implement the regional electric vehicle charging infrastructure strategy;

(2) Note the progress with the work to develop a regional active travel strategy;

(3) Note the progress with the delivery of TfSE's future mobility strategy;

(4) Note the progress with the delivery of TfSE's freight logistics and gateways strategy; and

(5) Note the progress with the joint work on decarbonisation.

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1. Introduction

1.1 The purpose of this report is to provide a progress update on the delivery of a number of elements of the Transport for the South East (TfSE) technical work programme.

2. Electric Vehicle Charging Infrastructure Strategy

2.1 In March 2023, the Partnership Board approved TfSE's regional electric vehicle charging infrastructure (EVCI) strategy. Following on from the publication of the strategy and accompanying action plan, TfSE has identified a number of tasks to commence delivery of the action plan.

2.2 Work has recently been completed on developing a forecasting methodology that will be used to help assess the future impact on a public charging infrastructure network from vehicle fleets across the TfSE area. Following on from the development of this methodology, TfSE has recently commenced the process for delivering a series of forecasts that will look to understand the additional demand that vehicle fleet operations could place on the south east's future publicly available

charging network. A further update on the development of this forecasting activity will be shared with the Partnership Board in due course.

2.3 The next meeting of TfSE's regional EV Charging Infrastructure Forum will take place on Tuesday 23 January. This forum has been a successful platform for bringing together different organisations from across the south east, providing members with the opportunity to develop strong working relationships between members and has allowed attendees to share best practice with one another on how potential issues regarding EVCI rollout can be mitigated. A series of presentations were delivered to attendees which provided regional and national insight regarding the rollout of EV charging infrastructure.

2.4 Transport for the North (TfN) are currently in the process of rolling out the EVCI Visualisation Tool that they have developed to other STBs. The tool provides users with localised information on projected electric vehicle uptake and charging infrastructure requirements. TfSE will be the first STB to receive a version of this tool and following roll out, the national data sets that support the tool will be regularly updated by TfN. The process of sharing access to the tool with local authority officers in the TfSE area will take place in the early spring, through a training workshop facilitated by TfSE and TfN.

2.5 A further update on the progress of TfSE's work on EVCI will be given at the Partnership Board Meeting in May 2024.

3. Regional Active Travel Strategy

3.1 As reported to the Board in October 2023 work began on the development of TfSE's Regional Active Travel Strategy and Action Plan (RATSAP) in July 2023, with the work due to be completed by July 2024.

3.2 The aim of the RATSAP is to make walking, wheeling, and cycling an attractive, accessible, and realistic choice for more journeys undertaken across the TfSE area. The strategy will complement the work being undertaken by the local transport authorities (LTAs) through the delivery of their Local Cycling and Walking Infrastructure Plans.

3.3 To date the RATSAP Steering Group has held three outcome-driven meetings. The Steering Group is comprised of representatives from each of the 16 constituent LTAs, as well as national and strategic partners including Active Travel England, Homes England, National Highways, Network Rail, Sustrans, and Transport Action Network. The project team has also worked with all 16 LTAs to gather data for the strategy's evidence base.

3.4 During the last 3 months the project team has produced the first of three Technical Reports which is the Evidence Base Report. The draft of this report was reviewed by Steering Group members in December and revisions for the final version of the report are underway.

3.5 In the coming three months, the project team will produce two further technical reports . These are the Strategic Network Identification Report and Scheme

Prioritisation Report. An Engagement Summary Report will also be produced as part of this project.

4. Future Mobility Strategy

4.1 An in person meeting of TfSE's Future Mobility Forum was held on 15 November 2023. The theme for the meeting was alternative fuels. There was a presentation from Hydrogen Sussex on the use of hydrogen, as well as a presentation from TfSE about our ongoing electric vehicle charging infrastructure workstream. The meeting also featured a workshop for initial engagement on future mobility priorities within our Transport Strategy Refresh. This involved the attendees working in smaller groups of representatives from the public, private, and third sectors about transport challenges and opportunities in the south east.

4.2 We are currently in discussions with other STBs about joint pieces of work in the coming year on mode propensity, mobility hubs, and DDRT. A further update on the progress of the work on future mobility will be given at the Partnership Board Meeting in May 2024.

5. Freight, Logistics and Gateways Strategy

5.1 A final technical report has been completed for the TfSE lorry parking study which is presented to the Board in a separate item on the agenda.

5.2 A mapping tool to identify current and future alternative recharging and refuelling sites for HGV vehicles along the strategic and major road network will be trialled with a number of local transport authorities during January and February 2024. It is anticipated that it will be completed by the end of March 2024 and ready to be rolled out in April 2023. An update on the progress of this work will be given at the Partnership Board Meeting in May 2024.

5.3 The first Wider South East Freight Forum was held on 7 December 2023. It was held in conjunction with England's Economic Heartland (EEH) and Transport East (TE) to take forward common actions identified as part of the freight and logistics strategies that have been developed in the three areas.

5.4 The meeting had 35 attendees from the freight and logistics sector, businesses and local authorities from across the region. A discussion was held to identify the topics the members would like to discuss further at future meetings, and some priorities were identified. These will now inform a work programme that will be developed in time for the next meeting in March 2024. An update on the progress of this work will be given at the Partnership Board Meeting in May 2024.

5.5 Two of three freight related studies have now been commissioned through the technical call off contract; the study investigating the potential for short sea shipping and the study reviewing the level of warehousing provision in the region. Both are due to be completed in Spring 2024. A proposal for the programme of work to address public sector freight blindness is in development with an expected start date of February 2024. A study on the potential for greater intermodal transfer of freight

from road to rail is due to commence in April 2024. An update on the progress with the freight forum and the study work will be given at the Partnership Board Meeting in May 2024.

6. Decarbonisation

6.1 As reported to the Board in October 2023 the Government's Transport Decarbonisation Plan (TDP), published in July 2021, places a requirement on local transport authorities to identify how their Local Transport Plans (LTPs) will deliver ambitious, quantifiable carbon reductions in transport to achieve net zero emissions.

6.2 TfSE, Transport East (TE) and England's Economic Heartland (EEH) are working collaboratively to develop a Carbon Assessment Playbook. This will identify baseline carbon emissions and trajectories to net zero in each of the LTAs in the three STB areas. Each LTA will then be able to assess the carbon reduction potential of the proposals to be included in their local transport plans. Work on the development of the tool was completed in November 2023 but further pilot testing has revealed some anomalies in the relative impact that different interventions will have on emissions. The DfT have also now come forward with comments on the tool, so further work will be needed to address both these issues. It is unlikely that the tool will be ready for release until February/March 2024.

6.3 There is still no firm date for the release of the draft guidance on the development of Local Transport Plans, which will incorporate guidance on how LTAs should assess the carbon reduction impacts of their proposals. It is now looking increasingly unlikely that the guidance will be issued before a general election. The STBs are of the view that we should proceed with the finalisation of the release of the tool as it is good practice for LTAs (the majority of who have declared climate emergencies) to be in a position to assess the carbon reduction impacts of the initiatives in their local transport plans.

7. Financial considerations

7.1 The decarbonisation work set out in this report been funded from the additional in-year funding awarded to TfSE in January 2022. The future mobility strategy, freight strategy, electric vehicle strategy implementation work, regional active travel strategy development are being funded from the DfT grant funding for 2023/24.

8. Conclusions and recommendations

8.1 The Partnership Board is recommended to note the progress that has been made with the various elements of the TfSE technical programme set out in this report. A further progress update report will be presented to the Board at their meeting in May 2024.

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Agenda Item 17

Report to:	**Partnership Board – Transport for the South East**
Date of meeting:	**29 January 2024**
By:	**Lead Officer, Transport for the South East**
Title of report:	**Communications and Stakeholder Engagement update**
Purpose of report:	**To update the board on communications and stakeholder engagement activity**

RECOMMENDATION:

The members of the Partnership Board are recommended to note the engagement and communication activity that has been undertaken since the last board meeting.

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1. Introduction

1.1 This paper provides an update on communications and engagement activity undertaken since the last board meeting, including support provided to technical projects, the induction of new political representatives and recent and upcoming events.

2. Recent communications and engagement activity

2.1 We continue to support the planning and implementation of communication and engagement activity across the technical work programme. Recent press releases issued have promoted our first State of the Region report and our interactive Story Map which allows users to our website to search for TfSE supported schemes in their areas. Both press releases were picked up by trade and local media.

2.2 Our MP engagement plan continues to result in meeting MPs across the region. Several meetings have now taken place. We continue to form good relationships with the offices of MPs across the south east as part of our ongoing engagement.

2.3 We are delivering against the objectives set in the 2023/24 communications and engagement plan, with activity supported by web content and social media coverage. Our social media numbers continue to increase monthly in terms of followers and viewings.

2.4 We worked alongside our technical colleagues to pull together the Business Plan for 2024/25 and design a document that fully showcases our ambitions for the future.

3. New Engagement Manager appointed

3.1 We have appointed a new Engagement Manager who joined the team last month. Jaimie McSorley joins from a role at Brighton & Hove City Council, where she worked for ten years within the City Transport team leading on large-and-small scale engagement and consultation across strategy and delivery.

4. Transport Strategy Refresh stakeholder engagement

4.1 We have a created a sub-brand to support the engagement work around our Transport Strategy Refresh to enforce the importance of hearing from those across the region. **'Your Voices'** will be used to market and brand every piece of engagement work including literature, social media, virtual and face-to-face events. Working groups for this engagement work were established in December with invites being issued. Work is underway to structure workshops to ensure we obtain the views of those across the south east with a special focus on hard-to-reach groups.

5. Transport Forum digital engagement

5.1 As part of the refreshed Transport Forum, we are developing new ways of engaging with members of our Transport Forum and related groups. This will see a bi-annual digital engagement session taking place with TfSE's Chair and Lead Officer answering questions that have been previously submitted by forum members. This will allow our Chair and Lead Officer to ensure their answers are detailed and comprehensive. The plan is to film these sessions and then make them available to watch on demand on our YouTube channel.

6. Upcoming events and speaker slots

6.1 Future events/speaker slots

- 13 February 2024 – Chartered Institute of Logistics and Transport SE Region Talk. Mark Valleley presenting a webinar entitled: 'TfSE - Supporting the freight sector in the UK's International Gateway'
- 28 February 2024 – STB Conference in Manchester. Details of speakers TBC.

We are actively pursuing opportunities for TfSE staff to speak at events and fill speaker slots to further raise awareness of the organisation and of Sub-national transport bodies.

7. The TfSE Podcast

7.1 The TfSE Podcast continues to gain new listeners every month. Recent monthly episodes have included discussions regarding electric vehicles, climate change and women in transport. The podcast is available on the TfSE website and on Spotify and Apple Podcasts. Hosted by Tia Shelley, our Comms and Public Relations Assistant (who is also our apprentice), the latest episode features a look ahead to the challenges and

opportunities for TfSE in 2024 as Chair Keith Glazier and Lead Officer Rupert Clubb share their thoughts.

8. MP engagement and public affairs

8.1 TfSE Chair Keith Glazier and Lead Officer Rupert Clubb recently had a virtual meeting with Gosport MP Dame Caroline Dinenage where they briefed her on the background of TfSE and outlined the schemed we were supporting in her constituency. Rupert Clubb met with Kent MPs Tracey Crouch (Chatham) and Kelly Tolhurst (Rochester and Strood) face-to-face in Chatham and shared with them our background and plans.

8.2 Our Communications and Public Affairs Manager Duncan Barkes had a virtual meeting with the Constituency Support Manager for Maidstone & The Weald MP Helen Grant to discuss our background and regional role. Duncan and TfSE's Head of Programme and Policy Keir Wilkins had a similar virtual meeting with the Constituency Manager for East Surrey MP Claire Coutinho.

8.3 A delegation from TfSE will be meeting Bexhill and Battle MP Huw Merriman in Westminster on 30 January. Huw is also a transport minister and we will be updating him on our plans for the 2024/25.

9. Conclusion and recommendations

9.1 In conclusion, we will continue to keep our communications and engagement activities under review following the priorities and objectives outlined in the communication and engagement plan.

9.2 The Partnership Board are recommended to note and agree the engagement and communication activity that has been undertaken since the last Partnership Board meeting.

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