

**Transport for the South East
Partnership Board Meeting**

Agenda

Monday 17 March 2025, 14:00-17:00

[ICE, One Great George Street, London](#)

Partnership Board Members

Cllr Keith Glazier (Chair) Leader East Sussex County Council	Cllr Simon Curry (Deputy Chair) Cabinet Member, Climate Change and Strategic Regeneration Medway Council	Cllr Trevor Muten Cabinet member for Transport, Parking and Public Realm Brighton & Hove City Council
Cllr John Ennis Lead Councillor for Climate Strategy and Transport Reading Council <i>(representing BLTB)</i>	Cllr Phil Jordan Leader Isle of Wight Council	Cllr David Robey Deputy Cabinet Member for Highways and Transportation Kent County Council
Cllr Lulu Bowerman Executive Member for Highways and Waste Hampshire County Council	Cllr Peter Candlish Cabinet Member for Transportation Portsmouth City Council	Cllr Eamonn Keogh Cabinet Member for Environment and Transport 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
Daniel Ruiz Business Representative <i>(co-chair Business Advisory group)</i>	Cllr Sophie Cox Leader Worthing Borough Council <i>(jointly representing District and Borough Councils)</i>	Cllr Matt Boughton Leader Tonbridge & Malling Borough Council <i>(jointly representing District and Borough Councils)</i>
Tim Burr Deputy Chair South Downs National Park Authority <i>(Representative from Protected Landscapes)</i>	Stuart Kistruck Network Rail <i>(on behalf of Ellie Burrows)</i>	Richard Leonard Network Planning Director National Highways <i>(on behalf of Richard Leonard)</i>
Gary Nolan Strategic Engagement Lead Transport for London		

Apologies:

Ellie Burrows, Network Rail
Vince Lucas, co-chair Business Advisory Group

Item		Who
1	Welcome and Apologies	Cllr Keith Glazier
2	Minutes from last meeting	Cllr Keith Glazier
3	Declarations of interest	Cllr Keith Glazier
4	Statements from the public	Cllr Keith Glazier
For Decision		
5	Report of the Audit and Governance Committee	Cllr Joy Dennis
6	Finance Update	Keir Wilkins
7	Responses to Consultations	Rupert Clubb
8	Business Planning 2025/26	Keir Wilkins
9	Warehousing and Waterborne Freight Viability Studies	Mark Valleley
10	Wider South East Rail Partnership Position	Mark Valleley
11	Scheme Development Funding	Sarah Valentine
12	Regional Active Travel Strategy and Action Plan	Mark Valleley
For Information		
13	Transport Strategy	Mark Valleley
14	Business Advisory Group	Daniel Ruiz / Vince Lucas
15	Advisory Panel and Transport Forum	Geoff French
16	Delivery of the Strategic Investment Plan	Sarah Valentine
17	Technical Programme	Mark Valleley
18	Communications and Stakeholder engagement	James Boyes
19	AOB	Cllr Keith Glazier
20	Date of Next Meeting	Cllr Keith Glazier

Monday 21st July, 2pm, London (AGM)

Officers in Attendance

Rupert Clubb	Transport for the South East
Sarah Valentine	Transport for the South East
Keir Wilkins	Transport for the South East
Mark Valleley	Transport for the South East
Jessica Lelliott	Transport for the South East
James Boyes	Transport for the South East
Alexander Baldwin-Smith	Transport for London
Antoinette Antoine	Surrey County Council
David Stempfer	Surrey County Council
Matthew Furniss	Surrey County Council
Chris Maddocks	Reading Borough Council
Felicity Tidbury	Portsmouth City Council
Hayley Chivers	Portsmouth City Council
Natalie Wigman	Hampshire County Council
Peter Duggan	DfT
Colin Rowland	Isle of Wight Council
Michelle Love	Isle of Wight Council
Stewart Chandler	Isle of Wight Council
Mark Prior	Brighton and Hove City Council
Bartholomew Wren	Tonbridge & Malling Council
Stuart Kistruck	Network Rail
Matt Davey	West Sussex County Council
Darryl Hemmings	West Sussex County Council
Alex Pringle	SDNPA
Thomas Cornwell	National Highways

TfSE Partnership Board
27 January 2025 – 14:00-17:00
Minutes - draft
ICE, Council Room

Partnership Board Members

Cllr Keith Glazier (Chair) Leader East Sussex County Council	Cllr Simon Curry (Vice Chair) Cabinet Member for Climate Change and Strategic Regeneration Medway Council	Cllr Trevor Muten Cabinet member for Transport, Parking and Public Realm Brighton & Hove City Council
Cllr David Robey Deputy Cabinet Member for Highways and Transportation Kent County Council	Cllr Lulu Bowerman Executive Member for Highways and Waste Hampshire County Council	Cllr Matt Furniss Cabinet Member for Transport and Infrastructure Surrey County Council
Geoff French CBE Chair Transport Forum	Daniel Ruiz Business Representative (<i>Business Advisory Group co-chair</i>)	Vince Lucas Business Representative (<i>Business Advisory Group co- chair</i>)
Cllr Matt Boughton Leader Tonbridge & Malling Borough Council (<i>jointly representing District and Borough Councils</i>)	Cllr Sophie Cox Leader Worthing Borough Council (<i>jointly representing District and Borough Councils</i>)	Tim Burr Deputy Chair South Downs National Park Authority (<i>Representative from Protected Landscapes</i>)
Stuart Kistruck Network Rail (<i>on behalf of Ellie Burrows</i>)		

Apologies:

- Cllr Joy Dennis, West Sussex
- Cllr Eamonn Keogh, Southampton
- Cllr Peter Candlish, Portsmouth
- Ellie Burrows, Network Rail
- Richard Leonard, National Highways

Officers attended:

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

- James Boyes, Transport for the South East
- Steven Bishop, Steer
- Dan Taylor, DfT
- Laura Wells, Brighton
- Chris Maddocks, Reading

Item	Action
1. Welcome and Apologies	
1.1 Councillor Keith Glazier (KG) welcomed Members to the meeting and noted apologies.	
1.2 Apologies were noted from Cllr Joy Dennis, Cllr Eamonn Keogh, Cllr Peter Candlish, Richard Leonard and Ellie Burrows.	
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. Next Steps for Transport for the South East	
5.1 Rupert Clubb (RC) highlighted that the consultation on the next steps for Transport for the South East (TfSE) closed on 15 January.	
5.2 RC explained that due to the recent publication of the Devolution White Paper and the current uncertainty for Local Authorities, it is recommended that we take stock until the Devolution picture becomes clearer.	
5.3 KG highlighted the recent meeting attended with the Secretary of State, Heidi Alexander which provided an opportunity to set out who TfSE are and the role of STBs.	
5.4 Dan Taylor (DT) discussed the role of STBs following devolution. DT noted that STBs will provide consistency in a changing landscape and highlighted that STBs were mentioned as an example of regional collaboration in the Devolution White Paper.	

<p>5.5 Cllr Trevor Muten (TM) noted the devolution announcements which are due this week, highlighting that the TfSE role is important and critical in this context.</p> <p>5.6 RC highlighted the support to our Local Transport Authorities noting the Centre of Excellence and that TfSE are here to support our Local Transport Authorities.</p> <p>5.7 The recommendations was agreed by the Partnership Board.</p> <p>RECOMMENDATION: The members of the Partnership Board are recommended to note the responses Transport for the South East has received on its next steps consultation and note the opportunity to consider next steps at the March partnership board meeting.</p>	
<p>6. Business Planning 2025/26</p>	
<p>6.1 Keir Wilkins (KW) provided an overview of the work that has taken place in producing the Business Plan 2025/26 highlighting the workshop that took place in September 2024 and the funding scenarios signed off by members in October.</p> <p>6.2 KW explained that the Business Plan 2025/26 focuses on supporting delivery, whilst demonstrating how we are also delivering on government's missions.</p> <p>6.3 KW discussed the allocation of the carried forward uncommitted underspend which is forecast at £317,435. The four areas for allocation to be recommended are:</p> <ul style="list-style-type: none"> • Electric Vehicle Charging • Centre of Excellence • Strategic Investment Plan Refresh • Scheme Development <p>6.4 Cllr Sophie Cox (SC) asked about the timescales for the scheme development work identified in the uncommitted underspend. In response to this RC explained this piece of work is not a particular engineering solution, work has been undertaken with a number of private investors and early conversations with the DfT about how we can take this work forwards in partnership.</p> <p>6.5 Cllr Simon Curry asked for more information on the Freight workstream. Action: Mark Valleley will provide an update to Cllr Curry on the Freight workstream.</p> <p>6.6 The recommendations were agreed by the Partnership Board.</p> <p>RECOMMENDATIONS:</p>	

<p>The members of the Partnership Board are recommended to:</p> <ol style="list-style-type: none"> (1) Review the draft Business Plan for 2025/26, noting the technical work that has been delivered in 2024/25; (2) Agree to submit the draft Business Plan for 2025/26 to the Department for Transport; and (3) Agree to spend our forecast uncommitted underspend of £317,435 on delivering additional technical work. 	
7. Technical Call Off Contract – Third Year Extension	
<p>7.1 Sarah Valentine (SV) highlighted that the current Technical Call off Contract was a two year initial contract with the provision for a one year extension. The paper is seeking to enact this one year extension to July 2026. A contract review has been carried out, which recognised the benefit of being able to direct more resources to completing the technical work programme and less call on TfSE and the host authority resources in procurement exercises. The contract is performing well, with high quality work being produced in a more efficient manner. There has been a vast increase in the amount of work from technical programme that has been able to be completed, and this has resulted in a reduction in our carry forward.</p> <p>7.2 SV explained that as set out within the constitution the extension is above the threshold that can be delegated to the Chief Officer (Rupert Clubb). Therefore, the extension will require the Partnership Board’s approval.</p> <p>7.3 Cllr Trevor Muten asked if the contract extension is affected by the new procurement regulation changes. In response to this SV explained that the contract was in place before the changes, and this is an extension. However, SV will ensure this is checked by the accountable body's procurement team.</p> <p><i>Following the meeting SV has checked with the accountable body procurement team who confirmed, this contract was procured under an ESPO Framework which itself was procured under the Public Contract Regulations 2015. The upcoming extension will be governed by the current regulations rather than any new ones.</i></p> <p>7.4 The recommendations were agreed by the Partnership Board.</p> <p>RECOMMENDATIONS:</p> <p>The members of the Partnership Board are recommended to:</p> <ol style="list-style-type: none"> (1) Note the performance of the technical call off contract with the Steer consortium; and the ongoing need for support to deliver the technical programme; and (2) Agree the allowed for extension of the current technical call off contract for a third year until July 2026. 	
8. Electric Vehicle Charging Infrastructure – impact of the electrification of commercial vehicle fleets	
<p>8.1 Mark Valleley (MV) provided an overview of the paper which highlights the impacts of electrification of commercial vehicle fleets on the demand for</p>	

public charge points. The DfT and the Department for Energy Security and Net Zero's Office of Zero Emission Vehicles tasked STBs with looking at this issue.

8.2 MV highlighted the methodology TfSE adopted which is included in appendix 1 of the paper. We are now intending to move this forward to look at commercial opportunities to provide this specific infrastructure for fleet vehicles.

8.3 MV explained we are seeking the opportunity to obtain additional DfT funding to enable this approach to be replicated across the STB network to provide a consistent approach across England.

8.4 Councillor Keith Glazier asked if any mapping has been conducted to look into the electricity that is available. In response to this MV explained that the Distribution Network Operators (DNOs) have been part of the steering group for this work

8.5 Cllr Trevor Muten raised the requirements for rapid charging points for truck drivers and ensuring they are where they need them.

8.6 Cllr Simon Curry raised how we build the bus fleets up in particular within our town centers.

8.7 Tim Burr raised the need to ensure that the landscape impact aspect of the provision of charging sites for commercial vehicles must be taken into account when these facilities are being planned.

8.8 Daniel Ruiz asked how this piece of work will be taken forwards and what part we can play to ensure uptake is optimal. In response to this MV explained within paragraph 5 it is set out the further work we are undertaking, to look into the commercial opportunities to provide charging infrastructure for fleet vehicles. Work is being undertaken with Brighton and Hove City Council and Slough Borough Council who will act as case studies.

8.9 Cllr Matt Furniss asked if we have seen a successful conversion rate. In response to his MV explained that there is emerging evidence, with the potential positive impacts on the uptake of electric vehicles. MV responded that it was important that success stories were identified.

8.10 The recommendations were agreed by the Partnership Board.

RECOMMENDATIONS:

The members of the Partnership Board are recommended to:

- (1) **Note** the report on the impacts of the electrification of commercial vehicle fleets on the demand for public charge points;
- (2) **Note** this report followed a request from the DfT's Office of Zero Emission Vehicles (OZEV); and
- (3) **Agree** to explore the opportunity to obtain additional DfT funding to enable this approach to be replicated across the STB network to provide a consistent approach across England.

9. Audit and Governance Committee Update	
<p>9.1 Cllr David Robey (DR) highlighted that the Committee reviewed the draft Business Plan 2025/26 and the uncommitted underspend allocations were reviewed. DR noted that the Committee agreed with the recommended allocation of funding to the additional technical work outlined.</p> <p>9.2 DR highlighted that the Committee reviewed the financial position spend to December 2024.</p> <p>9.3 DR also highlighted that the Strategic Risk Register was reviewed. In light of the current devolution picture new risks were added. The Committee have also asked for devolution to be a standing item on their agenda so that they can monitor the impacts of devolution and ensure TfSE stays ahead of the potential changes.</p> <p>9.4 The recommendations were agreed by the Partnership Board</p> <p>RECOMMENDATIONS: The members of the Partnership Board are recommended to: (1) Note the discussions and actions arising at the meeting of the Audit and Governance Committee; and (2) Members are also asked to agree the Strategic Risk Register.</p>	
10. Financial Update	
<p>10.1 KW provided an overview of the current spend to date (December 2024) noting the current committed and uncommitted carry forward figures.</p> <p>10.2 Cllr Simon Curry asked about the vacancies being held within the TfSE team. In response to this RC explained that we recognise the challenges local authorities are facing, if we choose to recruit, we will look to the redeployment option via the accountable body. As we get more certainty around devolution the position may change.</p> <p>10.3 Cllr Sophie Cox asked about the reduction in communications spend and what the level of communications support is. In response to this RC introduced James Boyes, TfSE's newly appointed Communications and Public Affairs manager. RC noted the breadth of communications and engagement work including MP meetings, social media posts, TfSE's Your Voices campaign and support on the Transport Strategy Refresh.</p> <p>10.4 The recommendation was agreed by the Partnership Board.</p> <p>RECOMMENDATION: The members of the Partnership Board are recommended to note the current financial position for 2024/25 to the end of December 2024.</p>	
11. Responses to Consultations	
<p>11.1 RC provided an overview of the two consultations that TfSE have drafted responses too.</p>	

<p>11.2 The recommendations were agreed by the Partnership Board.</p> <p>RECOMMENDATIONS: The members of the Partnership Board are recommended to:</p> <ol style="list-style-type: none"> 1) Agree the draft response to Invest 2035: The UK's modern industrial strategy 2) Agree the draft response to Bracknell Forest: Local Plan Transport consultation. 	
12. Transport Strategy Refresh	
<p>12.1 MV provided an update on the current progress with the Transport Strategy Refresh. Following the Partnership Board approval on 9th December for TfSE to go out to consult the launch webinar took place on 10th December. 153 people attended the launch, the consultation closes on 7 March 2025.</p> <p>12.2 MV highlighted the next steps:</p> <ul style="list-style-type: none"> • Roadshows – will take place across seven locations across the South East: Wokingham, Portsmouth, Southampton, Brighton, Canterbury, Guildford and Isle of Wight. • Wider Comms – a press pack has been shared with Local Authorities comms teams. • Approached by a number of organisations to present on the strategy at their regular meetings. <p>12.3 MV explained that once the consultation has closed a consultation report will be produced to identify any amendments to the Transport Strategy that are needed to reflect the outcome of the consultation. This will be brought to the July Partnership Board meeting, alongside the draft final version of the Transport Strategy and Integrated Sustainability Appraisal.</p> <p>12.4 Cllr Trevor Muten asked for the date for the Transport Strategy event in Brighton and asked for clarification on the invite by the DfT to the Integrated National Transport Strategy (INTS) roadshow in Brighton on 27th Feb. In response to this Mark explained that the Brighton event on the TfSE Transport Strategy will be taking place on 5th February. From what we understand of the emerging themes for the INTS there should be a good overlap with the TfSe Transport Strategy. Any refinements that are needed can be identified at the July Board meeting.</p> <p>12.5 The recommendation was agreed by the Partnership Board.</p> <p>RECOMMENDATION: The members of the Partnership Board are recommended to comment on the progress being made with the consultation on the Draft Transport Strategy.</p>	
13. Business Advisory Group	
<p>13.1 Daniel Ruiz highlighted that the Business Advisory Group (BAG) have met twice following the recent Partnership Board meeting. During each</p>	

<p>meeting the members have the opportunity to raise any challenges and opportunities businesses are facing.</p> <p>13.2 Daniel Ruiz also highlighted that a proposal is being drafted to bring together a wider business group.</p> <p>13.3 Vince Lucas highlighted the top challenges and opportunities that have been raised in the recent meetings:</p> <ul style="list-style-type: none"> • Heathrow Western Rail Access • Transport related Social exclusion • Entry exit system EU • Energy Strategy <p>13.4 Vince Lucas noted the discussions on the purpose of TfSE and the benefits of integration across our region and boundaries.</p> <p>13.5 The recommendation was agreed by the Partnership Board.</p> <p>RECOMMENDATION: The Members of the Partnership Board are recommended to note the recent work of the Business Advisory Group.</p>	
14. Advisory Panel and Transport Forum	
<p>14.1 Geoff French (GF) highlighted that the second in person forum took place on 18th November in Southampton. The forum discussed the emerging draft transport strategy and the next steps for TfSE.</p> <p>14.2 The next Transport Forum will take place 30th January and will have a focus on the draft transport strategy.</p> <p>14.3 The Advisory Panel recently met with a focus on the devolution white paper, the panel recognised the important role TfSE has with its collaborative working.</p> <p>14.4 The recommendation was agreed by the Partnership Board.</p> <p>RECOMMENDATION: The members of the Partnership Board are recommended to note the recent work of the Transport Forum and Advisory Panel.</p>	
15. Delivery of the Strategic Investment Plan	
<p>15.1 SV highlighted the scheme development work, noting that the 7 schemes approved for funding this year now underway, as well as TfSE's role managing the MRN / LLM programmes for the region and the support provided to scheme promoters through the recent Centre of Excellence seminars. TfSE also continues to play a key role in the development of RIS3, and dialogue continues with National Highways and DfT on that.</p> <p>15.2 SV highlighted the work of the analytical framework development, with a real focus on addressing gaps from our partners and adding value across the region. The data gathering for the regional travel survey has been completed, this is undergoing validation before we start analysis, we are</p>	

<p>also supplementing this with mobile network data. This data and insight once ready will be shared with all partners.</p> <p>15.3 SV also highlighted the development of our model which is progressing well. We are looking at how we can expand our capability and capacity. We have advertised a potential Masters dissertation project around the economic impact of transport resilience, and are considering how we can work with Universities to provide analysis and insight from the data we have captured.</p> <p>15.4 SV also noted that state of the region report data analysis is underway to update this with a view to publishing the second report later this year.</p> <p>15.5 Cllr Simon Curry highlighted the Strood Interchange feasibility study within the scheme development work which has been completed. As a result of this project, it has now been expanded to create an integrated transport hub.</p> <p>15.6 The recommendation was agreed by the Partnership Board.</p> <p>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.</p>	
16. Technical Programme Update	
<p>16.1 MV noted the updates with the work as part of the technical programme. MV highlighted in relation to the freight work the study to look at the potential to transfer freight to short sea shipping and a study looking at warehousing supply in the South East. MV noted we are aiming report on these pieces of work at the March Board meeting .</p> <p>16.2 MV also noted the intermodal rail freight study, which is currently ongoing, due to be completed March 2025 with the findings of this to be brought back to the Board at a later date. Cllr Sophie Cox asked if the public or businesses are being asked to contribute to the study. In response to this MV explained that it's a desktop study with a steering group. MV will contact Cllr Sophie cox following the meeting to identify whether specific business in her area could be involved with the study.</p> <p>16.3 The recommendations were agreed by the Partnership Board.</p> <p>RECOMMENDATIONS: The members of the Partnership Board are recommended to: (1) Comment on the progress with the ongoing implementation of the Centre of Excellence; (2) Comment on the progress with the work to implement Transport for the South East's electric vehicle charging infrastructure strategy; (3) Comment on the progress with the delivery of the Future Mobility Strategy;</p>	

<p>(4) Comment on the progress with the delivery of the Regional Active Travel Strategy and Action plan;</p> <p>(5) Comment on the progress with the delivery of Freight, Logistics and Gateways strategy;</p> <p>(6) Comment on the work on rail; and,</p> <p>(7) Comment on the progress with work on decarbonisation.</p>	
17. Communications and Stakeholder Engagement update	
<p>17.1 James Boyes (JB) highlighted that we have hit 300 responses to the Transport Strategy Refresh consultation over the weekend. JB has contacted all of the comms contacts in the region, Medway and Portsmouth have responded and are sharing the consultation. JB explained the intention is to contact all comms leads in the region.</p> <p>17.2 JB updated on the MP activity to date and a recent event we attended last week; Future Transport Forum in Southampton where we promoted the consultation.</p> <p>17.3 JB also highlighted the plan for the INTS roadshow on 27th February, noting that invites have been sent.</p> <p>17.4 Cllr Matt Boughton asked to ensure that the consultation has also been shared with District and Borough comms teams too to ensure it is promoted amongst other key organisations.</p> <p>17.5 The recommendation was agreed by the Partnership Board.</p> <p>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.</p>	
18. AOB	
<p>No matters were raised.</p>	
19. Date of Next Meeting	
<p>19.1 KG noted that the next meeting will take place Monday March 17th, 2pm in London with a venue to be confirmed.</p>	

Report to: Partnership Board –Transport for the South East

Date of meeting: 17 March 2025

By: Chair of 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

RECOMMENDATION:

The members of the Partnership Board are recommended to comment on the discussions and actions arising at the meeting of the Audit and Governance Committee.

1. Introduction

1.1 The Audit and Governance Committee met on Wednesday 26 February 2025. This report provides a summary of the discussions and actions to take forward.

2. Business Plan for 2025/26

2.1 The Committee heard the announcement that the Department for Transport (DfT) have approved TfSE's Business Plan for 2025/26 and awarded TfSE with a funding allocation of £2,161,666, a 4.7% increase on 2024/25.

2.2 The Committee heard that the Business Plan needs to be updated to allocate the increase in funding to technical work areas. The views of Committee members were sought, as part of their role to advise Partnership Board on financial matters.

2.3 Committee members had mixed views on allocating the increase in funding. Members of the Committee expressed a preference for additional Scheme Development funding, and work to support Electric Vehicle Infrastructure Charging, as these work areas support the delivery of their Local Authorities' strategic objectives.

2.4 The Department for transport requested for the funding increase to be allocated to the Centre of Excellence and Analytical Framework. Committee Members agreed for it to be split equally between the Centre of Excellence and Analytical Framework, in accordance with this request.

2.5 TfSE's officers will continue to work with Local Authorities to ensure our work plans for Scheme Development Funding and Electric Vehicle Charging Infrastructure for 2025/26

help to support Local Authorities' ambitions, and that the Centre of Excellence and Analytical Framework provide additional support in these work areas, where possible.

3. Finance

3.1 The Committee reviewed the finance position spend to January 2025 and noted the current underspend. The Committee sought assurance on the carry forward to the next financial year. The Partnership Board paper will be updated with spend to the end of February 2025 to provide a further update.

4. Strategic Risk Register

4.1 The Strategic Risk Register was reviewed by the Committee. The Committee approved the new risks that had been identified in relation to the Spending Review and TfSE's governance following devolution developments.

5. Forward work programme for the Committee

5.1 The Committee reviewed their forward programme of work for 2025/26, noting that their two key focuses will be having oversight over the delivery of TfSE's workstreams and reviewing TfSE's role to ensure it remains aligned with the evolving needs of our members as part of the Government's devolution agenda.

5.2 The Committee asked for a specific piece of work to assure the value for money that TfSE provide, including through its use of external suppliers. The Committee also noted that work will need to follow on TfSE's governance and constitution, as devolution progresses.

6. Conclusions and recommendations

6.1 The Partnership Board is recommended to comment on the discussions and actions arising at the recent meeting of the Audit and Governance Committee.

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

Contact Officer: Jessica Lelliott
Email: Jessica.Lelliott@transportforthesoutheast.org.uk

Report to: Partnership Board –Transport for the South East

Date of meeting: 17 March 2025

By: Chief Officer, Transport for the South East

Title of report: Financial Update

Purpose of report: To update on the budget position for Transport for the South East

RECOMMENDATION:

The members of the Partnership Board are recommended to note the current financial position for 2024/25 to the end of February 2025.

1. Overview

1.1 The purpose of this report is to update the Partnership Board on Transport for the South East's (TfSE) financial position for 2024/25 to the end of February 2025.

2. Background

2.1 As set out in TfSE's Business Plan 2024/25, we aim to spend our full budget apart from our earmarked reserve, on delivering our technical programme this Financial Year. In doing so, we aim to reduce our carry forward to the next Financial Year to the lowest amount possible.

2.2 In January, the Partnership Board was provided forecasts of TfSE's year-end spend against each budget line. This forecast was that TfSE would spend £3,397,172, against an initial budget of £3,925,607, leading to a carry forward of £528,435 to 2025/26. £317,435 of this was uncommitted carry forward, which was assigned to new work at the January Partnership Board, and £211,000 was committed carry forward, which is for technical work that will continue to be delivered in 2025/26.

3. Financial Position to the end of February

3.1 **Appendix 1** sets out the position to the end of February 2025 against the agreed budget for 2024/25.

3.2 In January and February, TfSE spent £568,697 across all budget lines, bringing our total expenditure so far in 2024/25 to £2,325,644.

3.3 We expect expenditure on salaries, training, communications/engagement, governance and operational expenses to be broadly in line with the forecast that we made for the end of the financial year.

3.4. There are risks that spend on the technical work programme will not meet the forecast spend that was made at the January Partnership Board for the end of the year. The biggest risks of significant underspends are on the budget lines for Strategic Investment Plan (SIP) implementation, Analytical framework, and Freight.

3.5 Spend on SIP implementation is lower than expected because of delays in scheme development support work getting underway. This year, more local authorities (LAs) elected to use their own consultants to undertake the work (rather than utilising the TfSE technical call off contract) but there have been delays in specifying the work to be undertaken, procuring those consultants and finalising legal agreements, which has led to work not starting as promptly as would have been desirable. All schemes receiving support except one have now been commissioned, and the revised forecast for this work indicates that approximately £325,000 will be spent in 2024/25, with the remaining £230,000 committed, but needing to be carried forward to 2025/26. To mitigate this risk in future years, a consideration in selecting schemes to receive funding in 2025/26 has been their readiness to proceed and our LAs have been made aware of the expectation that they are “ready to go” if their scheme is awarded funding. There will also be a £60,000 underspend against this budget line, as an allocation was made to work with National Highways on some of the larger business cases for RIS3, but this has not been possible due to the delay in announcing RIS3. It is suggested that this amount is carried forward into 2025/26 and committed to work following the RIS3 publication. The year end forecast in **Appendix 1** has been updated to reflect these changes.

3.6 Work on building the South East Highways Assignment Model (SEHAM) has been slower than expected due to the complexity and sequential nature of the work, with the result that 30% of the work will now be undertaken in next financial year. A further impact on the Analytical Framework budget is the procurement of mobile network data, particularly that negotiations with potential suppliers and our partners have unfortunately not been concluded in time to allow purchase this year. This has resulted in a further increase of carry forward into 2025/26. The year end forecast in **Appendix 1** has been updated to reflect this.

3.7 Spend on freight has been lower than forecast. However, work on warehousing and waterborne freight are approaching completion. Work has started on the intermodal freight study and the freight awareness work which were always planned to continue into the next financial year. The year end forecast in **Appendix 1** has been updated to reflect this.

3.8 Spend on the Transport Strategy has been lower than forecast but work on the analysis of the responses to the public consultation has now commenced and will continue into the next financial year. The year end forecast in **Appendix 1** has been updated to reflect this.

4. Revised Forecasts for Year End Expenditure

4.1 Given the revised forecasts for spend on SIP Implementation, Analytical Framework, Transport Strategy and Freight, our revised forecast is that TfSE will spend £2,819,553 against an initial budget of £3,925,607, leading to a carry forward of £1,106,054 to 2025/26. £317,435 of this is uncommitted carry forward (which was re-allocated at Partnership Board in January) and the remaining £788,619 is committed carry forward, which is for technical work that will continue to be delivered in 2025/26.

4.2 As our accountable body, we use East Sussex County Council's services to process invoices and raise purchase orders. East Sussex County Council are migrating their financial systems from SAP to Oracle, and because of this, the cut off to provide them with invoices was 7th March. This means that several payments that would have been made in March will now be made in April. As a result, our carry forward is likely to be higher than forecast at the January Board, even though we have received these invoices, and they will be paid at the start of the 2025/26 Financial Year.

4.3 Where possible, where payments are ready to be made in March, but cannot be processed until April, we will accrue these payments, so that they are reflected in our end of year accounts for 2024/25, instead of 2025/26.

4.4 Whilst there may be an increase in carry forward from the technical programme compared to our current forecast, any additional underspends will be committed carry forward. This is because the work has been commissioned in line with our business plan, but that for various reasons it has not been possible to complete within the 2024/25 financial year. This money is not available to be re-allocated for additional work.

5. Conclusions and Recommendations

5.1 Partnership Board are recommended to note the position to the end of February 2025.

RUPERT CLUBB
Chief Officer
Transport for the South East

Contact officer: Keir Wilkins
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Appendix 1 – TfSE budget for 2024/25 - Budget position at end of February 2025

EXPENDITURE FOR 2024/25	Budget	Year to Date Spend	Forecast Year-End Spend	Forecast Carry Forward
Salaries (including on-costs)	1,300,000	966,540	1,138,325	161,675
Training	20,000	1,174	1,675	18,325
STAFFING	1,320,000	967,714	1,140,000	180,000
Transport Strategy	500,000	397,847	419,263	80,737
SIP implementation	615,000	195,699	324,244	290,756
Analytical framework	395,000	113,834	164,214	230,786
Future mobility	40,000	0	0	40,000
Active travel	56,000	26,938	34,563	21,437
Decarbonisation	55,000	15,000	15,000	40,000
Freight	185,000	66,623	114,242	70,758
Electric Vehicle Infrastructure	130,000	84,030	86,421	43,579
Centre of Excellence	260,000	236,866	269,177	-9,177
Other costs/technical support	204,997	143,919	171,254	28,746
TECHNICAL PROGRAMME	2,440,997	1,283,464	1,598,378	842,619
Events	41,000	33,458	40,000	1,000
Communications	17,500	730	1,250	16,250
Publications	5,000	1,469	1,250	3,750
Website	21,000	10,276	10,250	10,750
Stakeholder Database	18,000	8,925	8,925	9,075
COMMUNICATIONS/ENGAGEMENT	102,500	54,858	61,675	40,825
TfSE Governance	10,000	0	0	10,000
Operational Expenses	52,110	19,630	19,500	32,610
OTHER	62,110	19,630	19,500	42,610
TOTAL EXPENDITURE	3,925,607	2,325,664	2,819,553	1,106,054*

*The forecast carry forward of £1,106,054 for 2025/26 is split into £317,435 of uncommitted carry forward, which was assigned to new work at Partnership Board in January, and £788,619 of committed carry forward, which is for technical work that will continue to be delivered in 2025/26.

FUNDING FOR 2024/25

Local Contributions	498,000
DfT Grant	2,065,000
Carry Forward from 2023/24	1,362,607
TOTAL FUNDING EXCLUDING RESERVE	3,925,607

TfSE Reserve	406,730
TOTAL FUNDING INCLUDING RESERVE	4,332,337

Report to: Partnership Board –Transport for the South East

Date of meeting: 17 March 2025

By: Chief Officer, Transport for the South East

Title of report: Responses to Consultations

Purpose of report: To agree the draft responses submitted in response to a consultation.

RECOMMENDATIONS:

The members of the Partnership Board are recommended to:

- 1) Agree the draft response to Western Gateway: Draft Strategic Investment Plan Consultation;
 - 2) Agree the draft response to Transport Select Committee's call for evidence on Rail Investment Pipelines: ending boom and bust;
 - 3) Agree the draft response to Kent County Council's A229 Blue Bell Hill Improvement Scheme Consultation;
 - 4) Agree the draft response to the Integrated National Transport Strategy call for ideas; and
 - 5) Agree the draft response to the Department for Transport's – Phasing out sales of new petrol and diesel cars from 2030 and supporting the ZEV transition.
-

1. Introduction

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

- Western Gateway: Draft Strategic Investment Plan Consultation
- Transport Select Committee's call for evidence on Rail Investment Pipelines: ending boom and bust.
- Kent County Council's A229 Blue Bell Hill Improvement Scheme Consultation
- Integrated National Transport Strategy call for ideas
- Department for Transport's – Phasing out sales of new petrol and diesel cars from 2030 and supporting the ZEV transition

2. Western Gateway – Draft Strategic Investment Plan Consultation

2.1 Western Gateway sub-national transport body launched their consultation on their Draft Strategic Investment Plan (SIP) on 20 December 2024.

2.2 TfSE welcomed the opportunity to respond to the consultation which closed on 02 February 2025, and the officer level response that was submitted is contained in **Appendix 1**.

2.3 There is good alignment between Western Gateway's SIP and the goal of TfSE's existing Transport Strategy.

2.4 TfSE supports Western Gateway's methodology as it follows established best practice. The multi-criteria framework assessment approach aligns with TfSE's own evaluation methods.

2.5 The draft response highlights the schemes we have identified in our own strategic investment plan for the neighbouring south east region that are the priorities for TfSE that may impact on the Western Gateway area. TfSE asked that Western Gateway engage in the development of these schemes and potentially support TfSE with their delivery:

- O17: South West Main Line – Digital Signalling
- A10 – West of England Service Enhancements
- O14: Cross Country Service Enhancements

2.6 Finally, in answering the impacts and effects TfSE agrees with Western Gateway's identified impacts, provided they are mitigated where possible. The impact assessment aligns with TfSE's own Integrated Sustainability Appraisal (ISA's). TfSE supports the position that the whole program should achieve net carbon reduction by 2050. The draft response emphasises the need to balance economic growth with social and environmental outcomes.

3. Transport Select Committee – Call for evidence on Rail Investment Pipelines: ending boom and bust.

3.1 The Transport Select Committee sought written evidence addressing a set of questions by 7 February 2025. TfSE submitted an officer level response which is contained in **Appendix 2**.

3.2 The response highlighted how the current 'boom and bust' approach to rail infrastructure planning and funding negatively impacts cost effectiveness. TfSE also noted the short-term, project-by-project planning leads to higher costs and less competitive pricing.

3.3 The response highlights the rail priorities and pipeline of projects that can be planned and delivered over the short and longer term for the next 25 years including:

- Reliable and resilient radial rail connections to and from London
- Enhanced East – West rail connectivity
- Increased ticket integration with reduced costs
- Increased freight on rail to support the Government’s 75% rail freight target.

3.4 In relation to funding and partnership working, TfSE noted that they offer scheme development funding to local authorities and that they recognise the need for both public and private sector funding. The response highlights the private sector investment challenges resulting from a lack of clear long-term policy. The response also identifies issues with DfT’s Rail Network Enhancements Pipeline (RNEP) updates.

3.5 The response called for:

- Better integrated decision-making between national, regional and local rail planning bodies.
- Long-term government commitment to rail investment priorities and project pipeline planning
- Closer integration between government and rail industry for efficient planning and financing.

3.6 Finally, the draft response highlighted the need for regional collaboration noting the work with other bodies through the Wider South East Rail Partnership which aims to develop integrated planning and longer-term investment priorities. The partnership includes Network Rail, GBR Transition Team, Transport for London and DfT.

4. Kent County Council’s A229 Blue Bell Hill Improvement Scheme Consultation

4.1 Kent County Council (KCC) launched their consultation on the A220 Blue Bell Hill Improvement Scheme on 21 January 2025. which closes on 17 March 2025. The response that is due to be submitted is contained in **Appendix 3**.

4.2 The response states TfSE’s support the overall scheme proposals but highlights that it’s not within our remit to comment on the specific scheme options.

4.3 The strategic importance of the A229 Blue Bell Hill is recognised as it forms a key link between M2 (Junction 3) and M20 (Junction 6) connecting Maidstone and Medway. The scheme was identified as a priority in TfSE’s Strategic Investment Plan (SIP) and included in the Major Road Network (MRN) and Large Local Major (LLM) programme submitted to the DfT in 2019. TfSE also noted the current issues and future challenges the scheme faces.

4.4 The following improvements identified are supported in the response:

- Controlled pedestrian/cycle crossings at Running Horse Roundabout
- Widening of existing footpath between Common Road and Salisbury Road Junction

- Enhanced infrastructure for non-motorised users
- Improvements to accommodate expected traffic increases

4.5 Finally, the response highlights in accordance with the Government policy the need to avoid and mitigate environmental impacts, calling for biodiversity net gain throughout.

5. Integrated National Transport Strategy call for ideas

5.1 The Department for Transport (DfT) launched their call for ideas for the Integrated National Transport Strategy (INTS) on 28 November 2024.

5.2 The call for ideas closed on 20 February 2025, and the officer level response that was submitted is contained in **Appendix 4**.

5.3 In response to a question about to how the transport network could be better 'joined-up' the response emphasised that it requires both aligned governance / decision making and practical delivery measures. The response highlighted TfSE's missions-based framework and shift from siloed planning to multimodal packages, noting the focus on inclusion outcomes like reducing social exclusion, improving accessibility, and enhancing safety.

5.4 In response to how could data be used to improve the transport network the response identified several data improvement priorities. The need to address critical data gaps in freight movement, travel demand and spatial coverage was emphasised. Recommendations were included implementing a requirement for transport operators to submit journey data and creating a standardised national planning data portal. The response also highlighted the need to reduce inconsistencies in data used across regions whilst highlighting approaches that could address this.

5.5 In response to how could technology be used to improve the transport network the response emphasised a people and place base approach to deployment. Two priority technology areas were highlighted: Mobility as a Service (MaaS) and Digital Twins. For MaaS, the platform that has been developed in The Solent Future Transport Zone was highlighted in successfully integrating transport choices with payment mechanisms, enabled operator agreements, and facilitated mobility credits trials to influence behaviour change. Digital Twins were identified as a mechanism to develop virtual models incorporating demographic, socioeconomic, and environmental data to identify problems, simulate scenarios, and optimise solutions before implementation.

5.6 Finally, in response to a question about how, the way that decisions are made about the transport network could be improved, the response identified England's fragmented transport policy and delivery system as a key challenge, highlighting how responsibilities are distributed across many different agencies. The response

emphasised that this fragmentation creates a lack of clear strategic multi-modal direction that isn't aligned with funding and implementation powers. The need to break down modal silos was highlighted, while allowing regions flexibility to pursue different paths toward common national outcomes. The Devolution White Paper provides opportunities for better integration of land use and transport planning, noting that STBs are well-positioned to provide regional coordination through their existing strategies, investment plans, and thematic work. The response concluded that successful delivery requires close partnership working across transport sectors, encouraging the INTS to embrace collaboration while respecting regional autonomy.

6. Department for Transport's – Phasing out sales of new petrol and diesel cars from 2030 and supporting the ZEV transition

6.1 The DfT launched their consultation on phasing out sales of new petrol and diesel cars from 2030 and supporting the ZEV transition on 24 December 2024.

6.2 The consultation closed on 18 February 2025, and the officer level response that was submitted is contained in **Appendix 5**.

6.3 The response strongly supports the electrification of the UK car fleet as a vital mechanism for cutting carbon emissions from transport. The response indicates that by 2030, market forces will likely naturally accelerate BEV adoption due to improving battery range, cost parity, and a more developed charging network. Permitting only plug-in hybrids (PHEVs) rather than regular hybrids during the transition period was supported, given their greater environmental benefits.

6.4 In relation to vans the significant challenges in the current market, with BEV uptake at only 6% in 2024 (against a 10% target) was highlighted. The key barrier identified is not technological capability but rather the lack of suitable charging infrastructure for commercial vehicles. The current work that TfSE is undertaking with local authorities was highlighted that seeks to address this through developing demand-driven opportunities for commercially viable charging infrastructure projects and supporting public sector rollout of commercial vehicle charging facilities.

7. Conclusions and recommendations

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

RUPERT CLUBB
Chief Officer
Transport for the South East

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Western Gateway Strategic Investment plan Consultation Response from TfSE

Introduction

This document is the draft Transport for the South East (TfSE) response to the consultation on Western Gateways Strategic Investment Plan (SIP) Public Consultation. This is a draft officer response that will be presented to our Partnership Board on 17 March 2025 for their approval. A further iteration may therefore follow.

TfSE is a sub-national transport body (STB) for the South East of England. Our principal decision-making body, the Partnership Board, brings together representatives from our 16 constituent local transport authorities, district and borough authorities, protected landscapes, business representatives, Highways England, Network Rail and Transport for London.

We have a vision led Transport Strategy in place to influence government decisions about where, when and how to invest in our region to 2050. This strategy is currently in the process of being refreshed with a draft copy of the revised strategy out for consultation until 7 March 2025.

Our Strategic Investment Plan provides a framework for delivering our Transport Strategy setting out transport infrastructure and policy interventions needed in our region over the next three decades.

TfSE welcomes the opportunity to respond to the consultation. We trust that our response will provide value to the work of Western Gateway but also form the basis for further engagement, especially on the refresh of our transport strategy throughout 2025 and the refresh of our SIP which will follow.

Strategy

Do we feel any of the five aims of Western Gateway's adopted Strategic Transport Plan are more important than the others and should be given greater weight in your scoring?

The aims identified by Western Gateway are aligned with those outlined in our own Transport Strategy and Strategic Investment Plan.

The TfSE adopted Transport Strategy sets out our Vision which is broken down into 3 goals which are Economic, Social, Environmental

The revised TfSE draft Transport Strategy (currently also out for consultation) proposes the addition of five missions that also align with the aims Western Gateway have set out.

Western Gateway Strategic Investment plan Consultation Response from TfSE

These missions are:

- Strategic connectivity
- Resilience
- Inclusion & Integration
- Decarbonisation
- Sustainable Growth.

In answer to Western Gateways question TfSE do not consider any single aim, mission or objective to be more or less important than another. Different schemes will all contribute to each objective to a greater or lesser extent but all will be needed in order to achieve the strategic objectives overall.

Assessment and Methodology

Do we feel that the methodology described is appropriate for identification of proposals to meet Western Gateway's aims?

Yes, the methodology aligns with the 5 aims set out in the strategy as well as following a multi criteria framework assessment which is widely recognised as best practice and also aligns with the approach TfSE undertook when reviewing proposals in the south east.

Prioritised proposals

Do we generally agree with the outcomes of this assessment?

Unknown/No Opinion

Do we feel the prioritised proposals meet the needs of Western Gateways region?

Unknown/No Opinion

Do we feel there is anything significant missing from this proposed programme?

No

While we have no comment to make regarding anything that is missing we would like to take the opportunity to highlight schemes we have identified in our SIP for the neighbouring south east region that are the priorities for TfSE and may impact on the Western Gateway area. We would also like to ensure that Western Gateway will be engaged and potentially able to support TfSE with their delivery.

Western Gateway Strategic Investment plan Consultation Response from TfSE

Western Gateway may wish to consider any potential impact or benefits of these schemes to the western Gateway region which are:

O17: South West Main Line - Digital Signalling

Introduction of digital signalling on the South West Main Line. This will increase the capacity for (and safety of) rail passenger and freight movements.

Package	Wessex Thames Railway
Phasing	Medium (2030s)
Current programme	South West Mainline Strategic Study/ Main Line Phase 2 Strategic Study
Project stage completed	-
Project stage underway	-
Project stage next step	Feasibility Study
Next step leader	Network Rail

A10: West of England Service Enhancements

Service frequency enhancements between Salisbury and Yeovil Junction. This will support local trips between adjacent centres on the line to be made by rail and reduce the need to travel using private car.

Package	South Hampshire Rail (Core)
Phasing	Medium (2030s)
Current programme	Yeovil Junction to Salisbury Service Enhancement SOBC
Project stage completed	Feasibility Study
Project stage underway	Strategic Outline Business Case
Project stage next step	Outline Business Case
Next step leader	Network Rail

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. This will reduce journey times between Portsmouth, Southampton and other national centres and support inbound tourism.

Package	Wessex Thames Railway
Phasing	Short (2020s)
Current programme	Main Line Phase 2 Strategic Study
Project stage completed	Feasibility Study
Project stage underway	-
Project stage next step	Feasibility Study
Next step leader	Network Rail

All of the schemes identified in the TfSE SIP can be reviewed in GIS format using our online story map which can be found [here](#).

Western Gateway Strategic Investment plan Consultation Response from TfSE

Impacts and effects

Do we think the identified impacts are acceptable?

Yes, if mitigated where possible.

The impacts identified are comparable to those TfSE's assessed in our Integrated Sustainability Assessments (ISA'S) for both our adopted Transport Strategy and SIP (and also with those applied for the Draft Transport Strategy).

TfSE's ISA combines several sustainability appraisal processes, so that environmental and social impacts were identified and mitigated as part of our strategy development. The components of our ISA process were:

- Strategic Environmental Assessment (SEA)
- Habitats Regulations Assessment (HRA)
- Health Impact Assessment (HIA)
- Equalities Impact Assessment (EqIA)

Which are aligned to those undertaken by Western Gateway.

It is also important to understand that at the strategic planning stage a precautionary approach is required as any actual impacts will be mostly unknown until the schemes reach option selection and design, at which time it will likely not only be possible but likely a requirement to ensure mitigations are included to minimise or eradicate the impacts where possible.

Western Gateway's assessment of the priority proposals indicates that, in combination, the recommended schemes are likely to have a net beneficial effect on the level of other carbon and greenhouse gases emitted, particularly from active travel and public transport proposals.

Which of the following most closely aligns with our view on the assessment of climate change impacts?

- **Unknown/No opinion**
- **Carbon emissions are not significantly important, or other factors are more important**
- **Carbon emissions have same level of importance as other factors e.g. economic or social**
- **Carbon emissions should be treated as more important than other factors**
- **The whole programme of priority proposals should result in a net reduction in carbon emissions by 2050**
- **Every individual proposal in the recommended programme should reduce carbon emissions by 2050**
- **Other**

Western Gateway Strategic Investment plan Consultation Response from TfSE

The Whole programme of priority proposals should result in a net reduction in carbon emissions by 2050

It is important that STB SIP's support the transition to net zero by 2050. Carbon should always be assessed in whole life terms but This is not possible until schemes reach optioneering and design. It is likely to be similar in Western Gateway area as it is in TfSE where some schemes will support each objective to a varying degree. TfSE support sustainable economic growth which seeks to achieve a balance with social and environmental outcomes. This means economic growth must be viewed as a means to improving the long-term quality of life for residents. There are areas of our own transport strategy that focus explicitly on encouraging economic growth. However, where it does so, it also considers the potential social and environmental consequences this may bring.

Do we think there are any impacts that Western Gateway have overlooked, or have any other comments on the sustainability appraisal?

No, In TfSE's Integrated Sustainability Appraisal we state that we examined the potential impacts our strategy could have on a range of sustainability objectives, including economic, social, and environmental aspects. These include, but are not limited to biodiversity, the historic environment, habitats, carbon, health, and equality of access to opportunities. We feel that our appraisal and Western Gateways are broadly aligned with each other and government objectives.

Do we think the cost (approx. £4 billion) is broadly appropriate for a 10-year regional strategic investment plan?

No Opinion

06 February 2025

Transport for the South East's Response to the Transport Select Committee's call for evidence on Rail Investment Pipelines: ending boom and bust – call for evidence

This is Transport for the South East's (TfSE) draft response to the Transport Committee's call for evidence into its inquiry 'Rail Investment Pipelines: ending boom and bust'. This is a draft officer response that will be presented to our Partnership Board on 17 March 2025 for their approval therefore a further iteration may follow.

TfSE is a sub-national transport body (STB) for the South East of England. Our principal decision-making body, the [Partnership Board](#), brings together representatives from our 16 constituent local transport authorities, district and borough authorities, protected landscapes, business representatives, Highways England, Network Rail and Transport for London.

We have a vision led [Transport Strategy](#) in place to influence government decisions about where, when and how to invest in our region to 2050. This strategy is currently in the process of being refreshed with a draft copy of the revised strategy out for consultation until 7 March 2025.

Our [Strategic Investment Plan](#) (SIP) provides a framework for delivering our Transport Strategy setting out transport infrastructure and policy interventions needed in our region over the next 25 years.

As a strategic transport body, we are not directly involved in the delivery of track enhancements, station upgrades or rolling stock orders. However, we work with our partner local authorities, Network Rail and Great British Railways Transition Team (GBRTT) to identify the rail interventions needed in our area. We are aware from our own experience and discussions with these partners that a 'boom and bust' approach to the planning and funding of rail infrastructure projects has significant negative effects. It severely inhibits their ability to deliver rail infrastructure projects at a cost that represents good value for money for the tax payer.

It is well understood that when contractors are engaged to deliver agreed and pre-planned projects on a long term basis they can provide their supply chain with certainty in terms of what they will need to produce or supply over that planning horizon. This enables the suppliers to offer more competitive unit costs and/or rates that benefit from the resulting economies of scale. In addition they

can hire permanent staff to deliver services at a more competitive cost than those procured on a short term, temporary, one-off or irregular basis.

For the rail industry this planned approach provides the opportunity to develop a pipeline of projects that can give both short and longer term security to contractors and suppliers.

This is particularly relevant during periods of financial constraint in the public sector which tend to result in very short project by project planning horizons, leading to the delivery of fewer projects and lower orders. This can mean suppliers end up looking for more profitable markets elsewhere, including those overseas. In severe economic downturns, they may also reduce their output overall leading to increases in their unit costs.

When the rail industry bodies do get funding for projects they must then negotiate new contracts resulting in those costs being higher and less competitive. This is because the contractors and suppliers either have to increase supply quickly at short notice which is costly or charge higher costs to secure similar profits to those they have previously experienced in alternative markets.

If central government could commit to a longer planning horizon for the rail sector's capital projects and outline funding insofar as is possible, this would allow public authorities to plan ahead with contractors and suppliers. This would mean contractors and suppliers would be ready and waiting for projects to go ahead rather than having to ramp up production at short notice which inevitably costs more.

Sub-national transport bodies, including TfSE, have already set out in their transport strategies and investment plans a series of rail priorities and pipeline projects that can be planned and delivered over the short and longer term for the next 25 years.

For TfSE this pipeline includes:

- Reliable and resilient radial rail connection to and from London
- Enhanced E-W rail connectivity
- Increased ticket integration while reversing real terms increase in cost of public transport
- Increased freight on rail to support the Government's 75% rail freight target.

These priorities would be delivered through eight packages of rail interventions set out in our SIP, consisting of 79 schemes at a capital cost of approximately £24bn at 2020 prices. We also offer scheme development funding to our local authorities and Network Rail to prepare either strategic outline business cases,

feasibility studies and other preparatory work to enable them to progress schemes as soon as government funding becomes available. As such, we have a pipeline of projects that has been agreed by our local authority and other delivery partners such as Network Rail ready and waiting to be delivered. However, this scheme development is currently only limited to a few projects.

A more integrated approach to decision making on establishing priorities and planning between the local transport authorities represented by STBs and Network Rail/GBRTT would provide more opportunities to deliver more shared public sector investment priorities. This would also facilitate better integration between the transport and spatial planning undertaken by national, regional and local bodies to enable the delivery of rail passenger and freight improvements, alongside other priorities such as economic growth and house building.

As suggested above, it would also be more helpful if central government funding commitments, at least at an outline level, could also be made by other potential sponsors who stand to benefit from the interventions. We recognise that long term investment will increasingly need to be funded by both the public and private sectors. However, from our experience, trying to interest the private sector in the full or shared funding of transport infrastructure is very difficult even when fare revenue is available to finance this. This is because there is a lack of a clear long term policy and a transparent and stable pipeline of projects agreed by both the government and its rail delivery bodies. This would provide the private sector with the confidence and certainty it needs to make long term financial commitments. Without this, future investment opportunities will continue to present challenges for investors.

The DfT's 'Rail Network Enhancements Pipeline A New Approach for Rail Enhancements' (RNEP) published in March 2018 is a case in point. It originally included an ambition that the 'Government will consider opportunities for alternative sources of funding and private finance options at each stage of the pipeline.' (page 9). Although issued by the previous government, RNEP was supposed to be updated annually but since 2019 has only been issued once.

We also recognise that there may be opportunities for the newer devolved authorities to use the community infrastructure levy in the way that the London Mayor does but it is not clear that in the shorter term whether this can raise sufficient funds for the level of investment required particularly for larger projects.

In the south east, Transport for the South East, England's Economic Heartland and Transport East are now working with Network Rail, the GBR Transition Team, Transport for London and the DfT in the Wider South East Rail Partnership. The Partnership aims to provide an opportunity to develop a wider integrated planning horizon to enable longer term agreements on investment priorities. The STBs act as a unified, pan-regional voice for the rail needs of the wider south east

through our Partnership Boards and constituent local transport authorities (LTAs), as well as representing the interests of passengers and wider economic stakeholders in our area. We aim to bridge the gap between local, regional, and national priorities, ensuring that the agreed priorities of the wider south east are recognised in decision-making. Our partnership therefore aims to complement LTAs, TfL, Network Rail, GBRTT, and the Department for Transport by offering a strategic and regional perspective that aligns investments with broader economic and environmental goals with our own.

Through this Partnership we aim to support the delivery of closer integration between strategic rail partner decision-making about priorities and their subsequent delivery planning. This would facilitate the preparation of a pipeline of projects for the short and longer planning horizon in our areas. This should result in more competitive pricing by suppliers who can also plan and be involved at an earlier stage with the rail sector bodies responsible for procurement.

In summary, to enable the rail industry to establish clear investment pipelines which could help end the turbulent years of boom and bust and give more certainty to passengers, suppliers and investors, TfSE would like to see:

- a better integrated approach to decision making between strategic public sector bodies involved in rail planning at a national, regional and local level;
- a central and regional government short and long term commitment to rail investment priorities, project pipeline planning and funding; and
- a closer integration between the central government and the rail industry to allow it to plan its involvement more efficiently and secure adequate resources and financing for rail projects on a longer term basis.

[Ends]

Kent A229 Blue Bell Hill Improvement Scheme Consultation Response from TfSE

Transport for the South East welcomes the opportunity to respond to Kent County Council's consultation on A229 Blue Bell Hill Improvement Scheme. This is a draft officer response that will be presented to our Partnership Board on 17 March 2025 for their approval. A further iteration may therefore follow.

TfSE is a sub-national transport body (STB) for the South East of England. Our principal decision-making body, the [Partnership Board](#), brings together representatives from our 16 constituent local transport authorities, district and borough authorities, protected landscapes, business representatives, Highways England, Network Rail and Transport for London. High-quality transport infrastructure is critical to making the South East more competitive, contributing to national prosperity and improving the lives of our residents.

We have a vision led [Transport Strategy](#) in place to influence government decisions about where, when and how to invest in our region to 2050. This strategy is currently in the process of being refreshed with a draft copy of the revised strategy out for consultation until 7 March 2025. Our [Strategic Investment Plan](#) (SIP) provides a framework for delivering our Transport Strategy setting out transport infrastructure and policy interventions needed in our region over the next three decades. Securing the right investment in the MRN is a crucial part in delivering our transport strategy.

The A229 Blue Bell Hill improvements scheme was identified by TfSE as a priority scheme for inclusion within the SIP and was also prioritised for inclusion in the Major Road Network and Large Local Major (MRN/LLM) programme which we submitted to the DfT in 2019, leading to its inclusion in the current programme.

The A229 Blue Bell Hill runs between Junction 3 of the M2 and Junction 6 of the M20. It is a key link between the M2 and M20, and between Maidstone and Medway.

Blue Bell Hill often experiences high volumes of traffic resulting in significant congestion and road safety concerns. These are likely to be made worse by future housing developments in the surrounding area and the proposed Lower Thames Crossing (LTC), which will both generate additional traffic. We support the implementation of improvements that are required to improve journey time reliability, reduce delays and improve road safety

across this section of the road network. Should the LTC scheme go ahead, traffic on Blue Bell Hill will increase. The proposed A229 Blue Bell Hill Improvement Scheme will be vital to accommodate these expected future increases in traffic,

TfSE welcomes the proposed enhancements including the installation of controlled pedestrian / cycle crossings at the Running Horse Roundabout and the widening of the existing footpath along Blue Bell Hill, between Common Road and the footbridge at the Salisbury Road Junction. We support any opportunities to provide enhanced infrastructure and provision for non-motorised users, which should be included in the design of the preferred option. These opportunities should be delivered as part of the current scheme proposals rather than being subject to separate funding applications that may not be successful.

We consider that in accordance with Government policy every effort must be made to avoid and mitigate environmental impacts and ensure that biodiversity net gain is achieved through the design of this project. We would therefore expect that a high-quality package of environmental mitigation measures will be developed and delivered as part of the scheme.

Whilst TfSE supports the A229 Blue Bell Hill Improvement Scheme, it is not within our remit to comment on the detail of any particular scheme option. As such, we have no comment on the questions in the consultation questionnaire regarding the scheme options and construction/disruption elements.

Integrated National Transport Strategy- call for ideas

Response from Transport for the South East

1. Introduction

1.1 This document is the draft Transport for the South East (TfSE) response to the call for ideas for the Integrated National Transport Strategy (INTS). This is a draft officer response that will be presented to our Partnership Board on 17 March 2025 for their approval. An updated response may, therefore, follow.

1.2 TfSE is a sub-national transport body (STB) for the South East of England. Our principal decision-making body, the [Partnership Board](#), brings together representatives from our 16 constituent local transport authorities, district and borough authorities, protected landscapes, business representatives, Highways England, Network Rail and Transport for London.

1.3 We have a vision led [Transport Strategy](#) in place to influence government decisions about where, when and how to invest in our region to 2050. This strategy is currently in the process of being refreshed with a draft copy of the revised strategy out for consultation until 7 March 2025.

1.4 Our [Strategic Investment Plan](#) provides a framework for delivering our Transport Strategy setting out transport infrastructure and policy interventions needed in our region over the next three decades.

1.5 TfSE welcomes the opportunity to respond to the call for ideas. Alongside the other STBs, we have assisted the Department for Transport in identifying stakeholders to invite to the regional roadshows that are taking place to help inform the development of the INTS.

2. Question Responses

2.1 This document is the draft Transport for the South East (TfSE) response to the call for ideas for the Integrated National Transport Strategy (INTS). This is a draft officer response that will be presented to our Partnership Board on 17 March 2025 for their approval. An updated response may, therefore, follow.

2.2 These questions are those posed by the call for ideas, as shown on [the Department for Transport website](#) as of 4 February 2024.

What is the approximate total number of employees in your organisation?

2.3 10 to 49.

What best describes your organisation?

2.4 Another type of organisation (specify) – Sub-national Transport Body

In your opinion, how could the transport network be better 'joined-up'?

2.5 Joining up the transport systems requires work at two levels. The first is about aligning governance and decision making so that the transport system operates as an integrated whole. The second involves practical measures to deliver this.

2.6 The Integrated National Transport Strategy must set out a policy framework that effectively integrates national, regional, and local policies to ensure that integrated transport systems are delivered on the ground. This is not about central government dictating what must be included in regional transport strategies and local transport plans, either by policy or by guidance. Rather, the Integrated National Transport Strategy should, alongside setting out national level missions for transport, establish minimum standards that ensure integration of services and modes at a national level, and set out how the Department for Transport and national agencies such as National Highways and Great British Railways will shift their focus away from modal silos towards focussing on end users.

2.7 The transport strategies and their associated investment plans developed by the STBs establish regional priorities and provide a golden thread between national and local priorities. This ensures that needs of local communities are well understood, and that projects at every scale complement one another, avoiding duplication of effort.

2.8 Existing transport strategies and strategic investment plans produced by the STBs demonstrate the merit of a regional approach to transport planning. They have enabled the development of coherent multi-modal transport strategies that serve the needs to people, businesses, and places within their areas. TfSE has adopted a missions-based framework in its [Draft Transport Strategy](#), to provide a focus for the actions of TfSE and its partners in delivering against a number of major challenges facing the region. Furthermore, in identifying the interventions needed in our region in our Strategic Investment Plan we have moved away from a siloed approach based on modes and networks, to one which identifies multimodal packages of interventions that will better serve the needs of the people and places in our region.

2.9 The delivery of an integrated transport service offering is dependent upon the types of outcomes that government wishes to achieve. In the Inclusion and Integration Mission of our Draft Transport Strategy, TfSE identifies a series of outcomes that encompass different aspects of integration, to achieve its mission of creating “an inclusive and integrated transport network in the South East that offers affordable, safe, seamless, door-to-door connectivity for all users.” These are:

- Reduce transport-related social exclusion
- Increased customer satisfaction across all user groups
- Increased proportion of accessible and step-free stations and hubs
- Improved safety across the transport network
- Improved air quality
- Reduction in severance and improvement of the public realm
- Reduced real-term percentage of household income spent on housing and transport costs

2.10 In many cases, the solutions required have been known about for many years. The Inclusion and Integration Policy Route Map, set out in our Draft Transport Strategy contains

many examples of such interventions. These include implementing integrated fares and ticketing systems, delivering improvements identified in Bus Service Improvement Plans, and offering affordable fares.

2.11 TfSE itself is seeking to build upon work undertaken as part of its work with socially excluded groups to better understand its role in providing an integrated and inclusive transport system across the South East. Reflecting this, we would anticipate that, as a minimum, the Integrated National Transport Strategy covers the following areas:

- Focussing investment on new infrastructure and services, including integrated systems, in areas at the highest risk of transport-related social exclusion;
- Upgrading interchange facilities and implementing step-free access at stations and public transport hubs
- Designing transport infrastructure and services to better serve socially excluded groups

How could data be used to improve the transport network?

2.12 Data plays a significant role in improving the transport network in a variety of ways. Whilst data is not a substitute for sound transport planning and good governance, it provides both the evidence to support sound decisions and the means to identify new and improved transport services that will benefit the users of the system.

2.13 Work is needed in several areas to improve the use of data in decision making. Amongst the most important areas are filling existing data gaps, this includes both thematic data gaps such as freight data and travel demand data, and spatial gaps, for example, more detailed bus passenger data and local travel survey data.

2.14 Some data would benefit from central collection by DfT, while others might be more suitable for collection at regional or local level, where DfT could provide guidance and funding support to ensure consistent data standards. Failure to address these issues results in additional data collection costs, duplication of data, not to mention higher costs to the taxpayer.

2.15 As a case in point, TfSE has undertaken a regional travel survey, specifically focussing on the travel habits of people within our region. This is partly because TfSE has sought to understand in more detail the travel habits of the people using its transport network, and whilst regional data from the National Travel Survey and traffic count data is useful, it is limited in scope and coverage, necessitating further data collection and consequently additional cost.

2.16 Throughout our work, we have also identified specific datasets that we consider would fill existing data gaps or benefit from more consistent data standards. These are as follows:

- **Statutory submission of journey data from transport operators.** The Department for Transport already has good experience through the Bus Open Data Service of opening up data sources from private operators. Our experience is that, despite nearly 15 years of advocating for open data, the level of co-operation on opening up

data sources from private operators varies markedly. The government could consider placing a statutory duty on all transport operators (public transport and new mobility services especially) to make available, openly and freely, data on operations and fares that can be used by all, with a gold standard for this being via an Application Programming Interface (API). As a minimum requirement, it would be useful to include passenger count data (e.g. broken down by origin and destinations, hourly), fares, and real time operational data.

- **A national planning data portal.** Planning data, setting out the proposed locations and quantities of new homes and employment sites, is essential to enable the transport infrastructure needs to development to be properly planned for. The experience of TfSE is that planning data based on the information contained in local plans is not collected consistent basis and the quality of data is also very variable. Providing such data is not a statutory duty for planning authorities. This means securing data from local planning authorities on development sites already in their local plans is very time consuming. The completion of a [Development Log \(D-Log\)](#) similar to that pioneered by Transport for the North, should be made a statutory duty for all local planning authorities, so that data on locations and quantities of planned development is openly available. These data should be made available in a variety of data standards, such as in a spreadsheet (CSV or ODS) or API. As well as being useful to those engaged in both transport and land use planning these data would also be useful for utility companies and statutory agencies such as National Highways and Network Rail.
- **Freight data.** Data on the movement of freight is difficult to obtain due to concerns of freight and logistics operators about commercial confidentiality. Such data is useful to public authorities to help them better understand key freight flows (as opposed to inferences made from traffic count data) and journey patterns, including patterns of stops for driver breaks and rest periods. Having access to this data would help authorities better understand the needs of freight and logistics sector, enabling them to plan much better for associated infrastructure for freight and logistics, including driver rest places and appropriate locations for different types of freight operations. Improvements to the quality and availability of freight data are needed to help address the 'freight blindness' suffered by national, regional and local government bodies. This issue would be best addressed through the development of a national freight data strategy led by the Department for Transport. The current Freight Analysis and Modelling Environment (FAME) study led by DfT provides a good opportunity for regional partners including STB's to collaborate on this issue.
- **Focus on people-centred analysis.** Understanding travel from the perspective of the people using the system is essential to deliver a more integrated national transport system that better serves their needs. Currently, inferences have to be made from existing data sets, including ticketing data, travel surveys, attitudinal surveys, and passenger interviews. Some blending of different datasets is often required to understand individual travel behaviour and choices, This means that significant effort is needed to create useful insights, especially at a local level where achieving a sufficient sample size is more challenging. In addition to opening up existing data sources, effort needs to be expended on identifying data gaps and pioneering new approaches such as the use of AI to analyse data and provide insights into human behaviour.

- **Ensuring data continuity by blending continuous and project specific data.** Transport data is often collected on a project by project basis. Whilst this may be useful in terms of monitoring scheme impacts, continuous monitoring is needed to understand changes in travel patterns and system operations. As well as providing consistent data collection such as traffic and passenger counts, the Department for Transport could work with its partners to identify recommended standards for consistent, project level data collection, so that data can be collected on an ongoing basis.
- **Overcoming barriers to data sharing.** Data sharing between public authorities is more complicated than it should be. There should be a requirement placed on all local authorities to make all of their transport data freely available to the public sector in accessible formats, unless there is a compelling privacy or commercial reason not to do so. Where that is the case, the reason should be clearly and publicly articulated. This could be facilitated through promoting the use of the Creative Commons and Open Data licencing arrangements.
- **Procuring data at scale.** Potentially useful data sources, such as mobile phone data, are under-utilised due to the significant costs associated with purchasing them. The Department for Transport could collaborate with STBs to explore the possibility of procuring such data at scale, and make this data accessible to local authorities who wish to use it.

2.17 At TfSE, we are working closely with our local transport authorities (LTAs) to help address their identified common data gaps. As a result we are currently engaging with various mobile network data providers to explore opportunities for procuring data at a regional level and making it available to all LTAs in the region. By doing so, we can not only achieve significant cost savings compared to individual procurement by LTAs but also ensure data consistency at the regional level. However, to benefit from these economies of scale, funding for the procurement of these data at regional scale needs to be made available.

How could technology be used to improve the transport network?

2.18 The TfSE area is fortunate to be home to several trials of new technologies, notably the Solent Future Transport Zone, and the combined learning of authorities and organisations across the area has influenced our view on the use of technology.

2.19 Our Future Mobility Strategy places an emphasis on delivering new technologies and solutions using a people and place-based approach. Innovation and deployment of new technologies stand the greatest chance of being successful and of scaling up when it is purposeful. For example, our Future Mobility Strategy undertook an assessment of different people and place types to identify a series of “Place-based bundles” where specific types of future mobility solutions have the greatest likelihood of success.

2.20 What this work has indicated is that all manner of different types of technology have the opportunity to be deployed, given the right place and people to make them successful. Much work has already been done to enable the delivery of such technologies and practically deploy them in the field, such as opening up transport data. We are of the view that, in addition to this current work, more specific action is required in two particular areas.

2.21 **Mobility as a Service (MaaS) & Behaviour Change:** MaaS provides a customer-focused platform which integrates information about available transport choices with a payment mechanism. This allows operators of the platform to encourage transport choices and journeys that are optimum for the network, while also being dynamic and flexible to real world conditions. MaaS, as well as other forms of technology (targeted ads, real time info, etc.), can assist with behaviour change measures for short- and longer-term shifts to sustainable modes.

2.22 A MaaS platform has been developed in The Solent Future Transport Zone that not only provides integrated transport choices and journeys, but also has allowed local authorities to leverage agreements with operators, such as consolidating their shared mobility schemes to a single provider. The MaaS platform has given local authorities the opportunity to undertake a mobility credits trial, where participants get a £50 credit each month for 12 months to buy tickets to use on local transport services. This not only taps into behaviour change measures but is also a method of engagement for scheme implementation. Using this technology enhances data availability, allowing local authorities and operators to make informed decisions based on consumer choices and feedback.

2.23 There is the opportunity for the Department for Transport to collaborate more closely with its regional partners to experiment with **new analytical methods**. For example, as part of our regional travel survey, TfSE is investigating the use of traditional analytical methods, such as statistical analysis, alongside new technologies, such as AI, which are well-suited to understanding people's travel decision-making processes. We also plan to explore how these analyses can be used to inform the planning decision-making process.

2.24 **Digital Twins:** These are virtual models of the transport network, incorporate demographic, socioeconomic, and environmental data to identify problems and solutions, simulate scenarios, and optimise options before implementing changes. Their use ultimately leads to more effective planning outcomes. As an STB operating at a regional scale, we are well-positioned to trial the use of digital twins. The scale at which we operate enables us to develop digital twins that would achieve the right balance between spatial coverage and local detail whilst maintaining reasonable demands on computing power.

How, if at all, would you improve the way that decisions are made about the transport network?

2.25 Currently, transport policy and delivery across England is highly fragmented. Within the TfSE area, for example delivery of transport functions sits at a variety of levels, with different levels of responsibility and different abilities to act. For example:

- The Department for Transport sets nationally significant priorities, establishes rules and common standards in a variety of transport domains, and provides funding necessary for most organisations to deliver, either directly through grants or indirectly through subsidy.
- National agencies, such as Network Rail and National Highways, manage, enhance and maintain strategic road and rail networks, even when the connectivity provided by such networks is primarily local.
- Local transport and highway authorities manage local highway infrastructure, and in some cases procuring public transport services, or influencing public transport services through partnerships with operators.

- Local planning authorities making decisions on planning applications, as well as some limited transport powers such as taxi licencing. This is not just District, Borough and Unitary Councils, but also National Park Authorities
- Local public transport operators, who run local public transport services either commercially or under contract.

2.26 This results in a lack of clear, strategic multi-modal direction, that importantly is not aligned with funding and powers to take action. A learning experience from our strategy development work is that policy outcomes can be poorly understood, and in trying to achieve a multi-modal strategic and integrated direction for transport across the country, they sometimes make no sense. This is especially true for decision makers who may not be transport experts, but instinctively understand the value that good transport provides.

2.27 Achieving this direction does not just require consistent objectives and outcomes across all modes of transport. It requires breaking down the modal silos in the planning and delivery of services. Whilst a transport strategy cannot directly tackle matters such as working culture and attitudes, it can set out the missions that the government expect local, regional and national bodies to work on, and set out the approach expected towards delivering these missions. STBs have sought to address this issue through the development of their transport strategies and investment plans by adopting a multimodal approach rather than one based on individual modes and networks.

2.28 Even with an Integrated National Transport Strategy in place, there will continue to be ongoing challenges associated with co-ordinating priorities. Different regions and local areas will continue to have different priorities, even if the outcomes that they seek may be consistent (for example achieving net zero by 2050). The Integrated National Transport Strategy needs to take account of this. Whilst there may be outcomes defined at a national level, the path taken in different areas of the country in achieving those outcomes is likely to be different, and as a result regions and local areas need to have the flexibility to continue plot their own path.

2.29 There is a significant opportunity to do this within the new arrangements for devolution set out in the Devolution White Paper. This places greater emphasis on local areas, especially new Strategic Authorities, to deliver significant improvements to their transport networks and local economies. The new powers proposed also offer the opportunity to better integrate land use and transport planning through Local Transport Plans and Spatial Development Strategies that will be developed by the newly formed strategic authorities. The White Paper also recognises the need for Mayors of Mayoral Combined Authorities to continue to come together co-ordinate their approach to the planning and delivery of transport, planning, energy, water and other infrastructure. The STBs are already well placed to be able to continue to provide the mechanism for this regional coordination on transport matters through their transport strategies, strategic investment plans and their work in a number of thematic areas including decarbonisation, freight, rural transport, and electric vehicle charging infrastructure. They also work to improve capability in their areas through their centres of excellence and the analytical frameworks they have developed provide the evidence to support the development of business cases for larger scale interventions.

2.30 The delivery of strategic planning and priorities requires close partnership working across transport sectors and different organisations with unifying goals and outcomes in mind. The Integrated National Transport Strategy can embrace, and encourage, ideas on partnership working and collaboration, and establish these as means by which goals in the

Integrated National Transport Strategy can be achieved. It can set an expectation that achieving common goals and delivering true partnership working is what government is seeking whilst respecting the rights of regions and local areas to choose their own path in achieving these goals through regional transport strategies developed by STBs and local transport plans developed by strategic authorities.

Any other comments?

2.31 No comments.

DRAFT

Department for Transport Public Consultation - Phasing out sales of new petrol and diesel cars from 2030 and supporting the ZEV transition

Response from Transport for the South East

1. Introduction

1.1 This document is the draft Transport for the South East (TfSE) response to the Department for Transport's consultation on phasing out sales of new petrol and diesel cars from 2030 and supporting the ZEV transition. This is a draft officer response that will be presented to our Partnership Board on 17 March 2025 for their approval. A further iteration may therefore follow.

1.2 TfSE is a sub-national transport body (STB) for the South East of England. Our principal decision-making body, the [Partnership Board](#), brings together representatives from our 16 constituent local transport authorities, district and borough authorities, protected landscapes, business representatives, Highways England, Network Rail and Transport for London.

1.3 We have a vision led [Transport Strategy](#) in place to influence government decisions about where, when and how to invest in our region to 2050. This strategy is currently in the process of being refreshed with a draft copy of the revised strategy out for consultation until 7 March 2025.

1.4 Our [Strategic Investment Plan](#) provides a framework for delivering our Transport Strategy setting out transport infrastructure and policy interventions needed in our region over the next three decades.

1.5 TfSE welcomes the opportunity to respond to this consultation which requests feedback on proposals for supporting the UK's transition to zero emission vehicles. We trust that our response will provide value to the work of the Department for Transport, but also form the basis for further engagement, especially on the refresh of our transport strategy throughout 2025, as well as our ongoing work regarding the rollout of EV charging infrastructure across the south east of England.

2. Consultation Response

Part 1: 2030 phase out of new ICE cars, and CO₂ requirements for vans

Question 1: Do you agree with the Government's view that full hybrid and plug-in hybrid technologies only should be considered? Please explain your answer.

TfSE supports the electrification of the UK car fleet as a vital mechanism for cutting carbon emissions from the transport sector.

The trajectory in the ZEV Mandate compels penetration of BEV in annual new car registrations to meet or exceed 80% by 2030 and 100% by 2035. The decision to allow only a declining

percentage of diesel, petrol or hybrid vehicles to be newly registered between 2030 and 2035 will have little impact on the overall penetration of net zero vehicles within the car fleet.

Supply - To satisfy their long-term production planning, manufacturers will have had to take decisions by 2030 as to which mix of drivetrains optimise production efficiency. On their journey to the 2035 phase out date, it may well be that a second option (whether hybrid or ICE) may not deliver such efficiency.

Demand – By 2030, there is likely to be little consumer resistance to BEV based on (i) improving battery range and fuel efficiency, (ii) cost parity, (iii) the presence of a much more developed public charging network and (iv) growing scarcity of convenient petrol/diesel supply.

For both of these supply and demand focussed observations, it is likely that the market itself will both accelerate the adoption of BEV and take decisions as to specific fuel requirements (i.e., petrol, diesel or hybrid) for specialty vehicles and use cases (e.g., blue light fleet, etc) that may not at that time have been addressed by BEV.

Question 2: Do you prefer a technological definition that permits both HEVs and PHEVs, or a technological definition that permits PHEVs only? Please explain your answer.

We prefer a technological definition that permits PHEV only. This is because there is little difference in carbon emissions between HEV and petrol or diesel vehicles (whether the HEV be “light” hybrid or other). Based on the trajectories specified within the ZEV Mandate, and our assessment of market conditions by 2030, there is likely to be little appetite either from manufacturers (“supply”) or consumers/commercial drivers (“demand”) for HEV over and above what may be present for diesel and petrol vehicles.

Question 3: Do you support no further CO₂ requirements, a vehicle level CO₂ cap, or a fleetwide CO₂ requirement? Please explain your answer.

No Response.

Question 4: Should a minimum range be required for new PHEVs and, if so, at what level should it be set? Please explain your answer.

No Response.

Question 5: Do you agree with the Government’s intention not to establish a technological definition for the specification of new non-ZE vans that may be sold from 2030? Please explain your answer.

Yes, there is no benefit in establishing a technical definition for the specification of new non-ZE van variants (i.e., a “Euro 7” standard) that may be sold from 2030 outside that already established for BEV. In establishing the 75% benchmark for penetration of BEV in new van registrations by 2030, government has signalled its conviction that BEVs already demonstrate sufficient technical capabilities to satisfy most commercial van use cases.

However, the absence of charging facilities for fleet vehicles is seriously inhibiting the uptake of BEV by commercial fleet operators with the result that in 2024 the penetration of new van

registrations is only 6%, well below the ZEV trajectory of 10%. Rather than establishment of a reduced CO₂ requirement for vans from 2030, the market would be better served by government intervention in reinforcing the charging network for commercial vehicles.

[Our recent work](#) in anticipating the emergence of demand for BEV charging resources from commercial fleet operators demonstrates the need to establish additional supply of 'en route' charging infrastructure. We are now working with local transport authorities in our area to address both (i) demand-driven opportunities for commercially viable charging infrastructure projects that will deliver conveniently located facilities to commercial fleet operators and (ii) the challenges faced by the public sector in rolling out commercial vehicle-focussed charging resources on publicly owned land.

We anticipate that this intervention by the public sector will enhance the appetite of commercial van operators to accelerate adoption of BEV within new van registrations in compliance with the ZEV trajectory.

Question 6: What are your views on establishing a CO₂ requirement for vans from 2030? What is your preferred measure, if any, and at what level should the target be set? Please explain your answer.

We acknowledge that questions 5, 6 and 7 refer only to the period between 2030 and 2035 and that the ZEV Mandate is to remain in its current form through to 2030.

Whilst we cannot comment on the technical opportunity for manufacturers to satisfy a newly defined CO₂ cap, we are concerned with the regulatory cost of enforcing a more ambitious non-ZEV fleet average CO₂ requirement. We further observe that:

- *BEV penetration of commercial vans is far below that specified by the ZEV Mandate's trajectory,*
- *BEV technical specifications satisfy most commercial van use cases,*
- *BEV adoption by commercial van operators is inhibited by:*
 - *An as yet, underdeveloped recharging solution,*
 - *Challenges in financing and depreciating higher priced BEV vans,*
 - *Delayed formation of a robust second hand market both to make BEV available to small-and-medium-sized-enterprises (SME) that dominate operation of vans over 36 months old, and to validate residual values on which newly registered vehicles are financed, and;*
 - *Other factors not impacted by the lack of a hybrid option in newly registered BEV vans.*
- *Decisions taken around that declining allowance for non-ZEV new van registrations from 25% to 0% between 2030 and 2035 has little impact on the overall penetration of BEV and indeed non-ZEV into our registered van fleet.*

Therefore, while we cannot comment on the definition of a new or additional non-ZEV requirement and we do acknowledge the absence of compelling hybrid variants, we also acknowledge the potential for commercial van use cases that may not be entirely satisfied by BEV vehicle specifications and concede that there may be market requirement to allow the sale of diesel-powered vans (whether to the existing 2011 emissions standard or otherwise) within that declining allowance for non-ZEV new van registrations from 25% to 0% between 2030 and 2035.

Question 7: What would be the impact to the economy and to UK society of any new or additional non-ZEV CO₂ requirements in the van sector from 2030? Please explain your answer and provide evidence where possible.

Economic sectors served by commercial van operations are vital to the UK. Furthermore, according to government statistics, vans comprised only about 12% of the registered vehicle fleet in 2023¹, but they represent 18% of total miles driven and a comparable amount of greenhouse gas emissions from road transport². Therefore, their conversion to ZEV is vital if these emissions are to be reduced.

The inhibitor to BEV uptake by commercial van operators is not the absence of a hybrid alternative, but rather the “key asks” included in the Zero Emission Van Plan created by BVRLA, Logistics UK, Recharge UK, the Association of Fleet Professionals and the EV Café ([Zero Emission Van Plan 2024.pdf](#)) including:

- *Increased fiscal support including grants to make new and used e-vans affordable,*
- *Regulatory and fiscal support for accessible, affordable and fit for purpose chargepoints and*
- *Full alignment of 4.25t ZEVs with diesel vans and classified as a van not an HGV.*

Question 8: What are your views on current measures to support demand for zero emission vehicles? What additional measures could further support the transition?

The penetration of BEV within new car registrations in 2024 of approximately 20% has been largely in line with the ZEV trajectory. Transport and Environment goes so far as to indicate that the automotive industry has complied with the mandate ([Car industry complied with UK ZEV mandate... | Transport & Environment](#)). However, the Society of Motor Manufacturers and Traders (SMMT) indicates that the sector may have discounted pricing by £4.5 billion to achieve such sales ([Record EV market share but weak private demand frustrates ambition - SMMT](#)).

¹ VEH0105: [Licensed vehicles at the end of the quarter by body type, fuel type, keepership \(private and company\) and upper and lower tier local authority: Great Britain and United Kingdom](#)

² TRA0101: [Road traffic \(vehicle miles\) by vehicle type in Great Britain](#)

The table to the right reflects information from SMMT’s January 2025 report of 2024 performance. Whilst the penetration of BEV within new car registrations is far stronger in the fleet market than in the private and business sectors, the stronger uptake by fleets reflects the availability of the tax incentives available to beneficiaries of company car and salary sacrifice schemes.

EV Penetration of Total New Registrations 2024

figures in thousands	Fleet	Personal and Business
Total New Car Registrations	1,164	789
New BEV Registrations	303 (26%)	79 (10%)

Source: Derived from SMMT

On closing its plug-in car grant scheme in 2022, government asserted that the program had, “succeeded in creating a mature market for ultra-low emission vehicles”. Now, the Department for Transport asserts that, “in many cases ZEVs are significantly cheaper to run, maintain and repair than their petrol and diesel counterparts”.

The value of tax incentives delivered through company car and salary sacrifice schemes and price discounting of £4.5 billion indicated by SMMT, already defray customers’ exposure to retail price premium of BEVs.

In the face of increasing levels of EV adoption specified by the ZEV Mandate, government could elect to reinstate some form of plug-in grant scheme (or extend and increase the scheme for vans). However, to avoid artificial price inflation for BEVs (including transfer of value directly to manufacturers reducing their exposure to market pricing), such scheme should incorporate acknowledgement and even promotion of identified total cost of operation (TCO) that underlies government’s statement within “Phasing out the sale of new petrol and diesel cars from 2030 and Support for the Zero Emission Transition”.

As well as support for the vehicles, support is also needed to develop the right charging infrastructure in the right place. Vans are less likely to have access to private charging and need to recharge more frequently due to their higher mileages and lower efficiency than cars. The provision of publicly available infrastructure is therefore crucial to their adoption. Sub-national transport bodies (STBs) are well placed to develop and make available accurate regional forecasts for demand to support the development and supply of commercial fleet focused charging infrastructure.

Over the course of 2023/2024, TfSE undertook a 12 month project with the support of specialist consultancies Steer and Mitie to develop forecasts for electric-fleet vehicle, energy and charging infrastructure demand. Unlike other national forecasts that use registration data, this forecast was based on where vehicles actually operate. We used ONS UK Business Workbook data to segment the van fleet based on the size of business and different industry sectors and to assign assumptions about their mileage and about where they might have access to charging. The resulting aggregated energy demand suggests that 42% of energy needs will need to be met at publicly accessible chargepoints. We would like to rollout out this methodology across all the other STB geographies and continue to develop and refine the outputs of this work. We will also continue to support our constituent authorities in their utilisation of this resource to take the next steps in supporting the development of van-friendly charging infrastructure.

Question 9: What are your views on whether small volume manufacturers (between 1,000 and 2,499 registrations) should be subject to the 2030 requirements for cars and/or vans?

No Response.

Question 10: What are your views on whether micro-volume manufacturers (fewer than 1,000 annual registrations) should be subject to the 2030 requirements for cars and/or vans?

No Response.

Question 11: What is your opinion on exemptions for Special Purpose Vehicles from the 2030 requirements for cars and vans?

No Response.

Question 12: What is your opinion on exemptions for kit cars from the 2030 requirements for cars and vans?

No Response.

Part 2: Vehicle Emissions Trading Schemes Updates

Question 13: Are the time limits on the current flexibilities in the ZEV Mandate for cars and for vans still appropriate? Please explain your answer.

Yes for Cars - Based on uptake of BEV cars in 2024 that very nearly met the ZEV standard of 22%, we see no imperative to adjust current flexibilities. While many manufacturers have been compelled to access these flexibilities, we understand that no manufacturer was fined in 2024. It appears likely that all manufacturers will be able to accelerate production of BEV and promotion to the UK market to avoid fines throughout the term of the ZEV Mandate.

No for Vans - At roughly 6%, the 2024 uptake of BEV vans in the UK fell below the ZEV Mandate's standard of 10%. This shortfall can be attributed to a number of factors outside of manufacturer's control including:

- *A yet underdeveloped recharging solution – the majority of the publicly accessible charging infrastructure rolled out to date has not been designed for vans that require larger bay sizes;*
- *Challenges in financing and depreciating higher priced BEV vans;*
- *Delayed formation of a robust second-hand market both to make BEV available to small-and-medium-sized-enterprises (SME) that dominate operation of vans over 36 months old and to validate residual values on which newly registered vehicles are financed; and*
- *Other factors not impacted by supply of new BEV vans.*

Question 14: What are your views on the proposal to implement a van-car transfer in VETS? Please explain your answer.

The implementation of a one-way transfer of excess van allowance to the car scheme would not incentivise manufacturers to increase supply of BEV vans creating a small average annual CO₂ saving. The adoption of BEV vans by commercial fleet operators is currently inhibited by a range of factors outlined in our responses to questions 7 and 13 above rather than a shortage of supply.

Furthermore, a bi-directional model may further inhibit BEV van uptake as manufacturers are far more likely to over-achieve in creating CRTS allowances than VRTS allowances, creating an opportunity to “shield” shortfalls in compliance with the van trajectory in the ZEV Mandate.

Question 15: Are there other flexibilities that should be considered within VETS for cars and vans?

No for cars – We observe that the performance of manufacturers against the 2024 trajectory in the ZEV Mandate has been satisfactory and that any additional flexibilities might obstruct the market’s incentive to fulfil government’s objective that all new car registrations will be zero-emission by 2035.

Yes for vans – We observe that uptake of BEV vans is currently obstructed by factors other than supply and that manufacturers are unlikely to achieve compliance with the van trajectory of the ZEV Mandate. These factors addressed in our response to questions 7 and 13 generally comprise:

- Increased fiscal support including grants to make procurement and finance of new and used e-vans affordable,*
- Regulatory and fiscal support for accessible, affordable and fit for purpose chargepoints addressing the current under-development of a refuelling solution for commercial van operators,*
- Formation of a robust second hand market both to make BEV available to small-and-medium-sized-enterprises (SME) that dominate operation of vans over 36 months old and to validate residual values on which newly registered vehicles are financed and*
- Full alignment of 4.25t ZEVs with diesel vans and classified as a van not an HGV.*

While we anticipate that government may need to add incremental flexibilities or more broadly adjust the van trajectory within the ZEV Mandate, we also observe a regulated trajectory to be fundamental to manufacturer’s facilitation of government’s objective of ensuring that all new vehicles registered after 2035 will be zero-emission. Such trajectory is a significant improvement over comparable regulation in the EU, which is not supported by such a trajectory.

Question 16: Do you agree that VETS should be amended to account for the UF change? If so, do you agree with the proposal set out? Please explain your answer.

No Response.

Question 17: Do you agree with the proposal to allow UK derived or EU derived WLTP specific emission reference targets to apply from 2021-2023 in the United Kingdom, and in 2024 in Northern Ireland? If not, why?

No Response.

[Ends]

Report to: Partnership Board –Transport for the South East

Date of meeting: 17 March 2025

By: Chief Officer, Transport for the South East

Title of report: Business Planning 2025/26

Purpose of report: To approve Transport for the South East’s Business Plan for 2025/26, following the announcement of Government funding.

RECOMMENDATION:

The members of the Partnership Board are recommended to approve Transport for the South East’s updated Business Plan for 2025/26, following the announcement of Government funding.

1. Introduction

1.1 An updated Business Plan 2025/26 is presented to the Partnership Board for approval, following sign-off from the Transport Secretary and the announcement of Government funding of £2,161,666 for 2025/26.

2. Background

2.1 TfSE’s Partnership Board approved the draft Business Plan in January 2025 and agreed for it to be submitted to the Department for Transport, to enable the Transport Secretary to set Sub-National Transport Bodies funding settlements for 2025/26.

2.2 At that time, the Business Plan was profiled against a funding settlement of £2,065,000, which was the same funding settlement that TfSE received from the Government in 2024/25.

2.3 The Transport Secretary wrote to TfSE’s chair on 24 February 2025, to confirm sign-off of TfSE’s Business Plan (Appendix 1). In this letter, the Transport Secretary awarded TfSE a funding allocation of £2,161,666, an increase of £96,666 compared to the amount that we had originally profiled for. The Transport Secretary said that this funding settlement was in recognition of the work TfSE has done to support Government’s Missions and the way in which TfSE have worked collaboratively with Government and its delivery bodies as a supportive partner.

3. Updates to the Business Plan

3.1 The updated Business Plan 2025/26 is attached in **Appendix 2**. The most significant update to the Business Plan is the addition of £96,666 to new technical work. In the original Business Plan, we set out four work areas where TfSE could do additional work if more funding was available (Electric Vehicle Charging Infrastructure,

Analytical Framework, Scheme Development and Centre of Excellence). The Department for Transport asked TfSE to allocate the uplift in funding to Analytical Framework and Centre of Excellence, so we have increased the allocation for each of these work areas by £48,333 respectively. Detail on the additional work TfSE will conduct in these work areas is attached in **Appendix 3**.

3.2 The section on what TfSE could do if more funding is made available has been removed, as we now have our final funding settlement.

3.3 The text on how TfSE will support the delivery of the Government's missions has been updated, to reflect the Transport Secretary's steer that TfSE should focus on:

- Delivering a pan-regional approach through developing regional transport strategies
- Focussing on pan-regional connectivity and integration.
- Supporting local authorities' capacity and capability through providing access to STB modelling and analysis tools and expertise.

3.4 As the Business Plan sets out, the carry forward figure in the Business Plan is based on the forecast underspend that we made in January. Board Members will note that in this month's finance update, we now forecast that underspend is likely to be higher, meaning a higher carry forward into 2025/26. As the Business Plan states, these figures will be updated following the end of year finance process which will be completed at the end of March 2025. The final Business Plan will be brought to the Board in July for approval, alongside TfSE's Annual Report for 2024/25. Both documents will then be published on the TfSE website.

4. Next Steps

4.1 Once Partnership Board have signed off the updated Business Plan, this will confirm how funding is allocated to each budget line for 2025/26. This will allow TfSE to start work as early as possible the start of the new financial year.

4.2 Following the end of the Financial Year, we will know the final carry forward figure that we begin the 2025/26 year with. Any additional carry forward that has not been forecast will be committed carry forward, for technical work that has begun and will continue to be delivered in 2025/26. A final Business Plan, which includes this carry forward figure, will be brought to the next Partnership Board for approval in July. This Business Plan will then be published on the TfSE website.

5. Conclusions and recommendations

5.1 The Partnership Board is recommended to approve Transport for the South East's updated Business Plan for 2025/26, following the announcement of Government funding.

RUPERT CLUBB
Chief Officer
Transport for the South East

Contact Officer: Keir Wilkins

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Department
for Transport

From the Secretary of State
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Councillor Keith Glazier
Chair, Transport for the South East
Via email

cc: Rupert Clubb, CEO

24 February 2025

Dear Councillor Glazier,

Transport for the South East Funding Allocation 2025/2026

I wanted to write to confirm the funding allocation for Transport for the South East, following the approval of your business plan for the next financial year 2025/2026 of **£2,161,666**.

This is in recognition of all the work you have done supporting the Government's Missions and the way in which you have worked collaboratively with the Department for Transport and our delivery bodies as a supportive partner.

I recognise the role Sub-national Transport Bodies (STBs) can play in supporting both local and national government priorities such as economic growth and housing. Going forward I ask that you focus on:

- Delivering a pan-regional approach through developing regional transport strategies.
- Focussing on pan-regional connectivity and integration.
- Supporting local authorities' capacity & capability through providing access to STB modelling and analysis tools and expertise.

Now that I have agreed your business plan, my officials will send you a funding and governance agreement and a Grant Determination Form for your accountable Section 151 officer to sign and return. Following this, the funding will be granted under Section 31 of the Local Government Act 2003, in the financial year 2025/2026.

Yours sincerely,

Rt Hon Heidi Alexander MP
SECRETARY OF STATE FOR TRANSPORT



TRANSPORT FOR THE
South East



Business Plan 25/26

CONTENTS

Looking to the future.....	2-3
About us.....	4-5
The difference we made last year.....	6
Draft Transport Strategy.....	7
Centre of Excellence.....	8
Strategic Investment Plan.....	9
Analytical Framework.....	10
TfSE Workstreams.....	11
What we are going to do in 2025/26.....	12-16
Our vital work that supports delivery.....	17-23
Engaging with stakeholders.....	24-26
Resources.....	27-31
Our Team.....	32-33
Moving even further forward.....	34-35
Appendix 1.....	36-41

LOOKING TO THE FUTURE

COUNCILLOR KEITH GLAZIER, CHAIR, TFSE

The next few years are likely to bring changes in how transport is delivered in the South East.

Whilst the South East begins 2025 with no directly elected mayors and no combined authorities, the English Devolution White Paper provides a framework for the future arrangements in our region. We do not yet know exactly when combined authorities will form, what their geographies will be, or the transport powers different authorities will seek. But we know that the government will encourage combined authorities to develop – and that every combined authority will have their own ambitious agenda for transport.

Transport was the first power listed in the English Devolution White Paper – and Centre for Cities research shows that it is transport powers that resonate most with members of the public. This chimes with our experience at Transport for the South East (TfSE). We're currently refreshing our Transport Strategy – and we've had significant interest from local authorities, stakeholders and members of the public, with over 1,500 responses to our initial call for evidence.

It is going to be difficult to deliver the kind of change that local areas want, in order for the government to achieve its missions. Public finances are stretched at every level of government. The demand on our transport networks is greater than ever – and is likely to continue to grow with increased housebuilding. Climate change is increasing the frequency and severity of flooding and storms, meaning the resilience of our transport system is being tested.

All these challenges need urgent delivery: more transport infrastructure, that's more integrated, and better meets the needs of people. This is where TfSE are playing a critical role. We are helping move delivery forward.

Our Transport Strategy sets the basis for the region's future transport system – and our Strategic Investment Plan sets out the investment needed to achieve this. Working with partners, we have been progressing business cases and building a pipeline of schemes. Now is the time for the government to invest in those schemes – and TfSE stands ready to help, including by leveraging private funding and financing to bring down the cost to the taxpayer.

LOOKING TO THE FUTURE

COUNCILLOR KEITH GLAZIER, CHAIR, TFSE

Going forward, as combined authorities are formed, TfSE will provide them with the support they need to hit the ground running. TfSE's Analytical Framework, Centre of Excellence (CoE) and evidence base will be there on day one, meaning our authorities do not have to lose time before delivering improvements to transport they need in their local area.

Transport will not stop at local authority boundaries. TfSE can bring together local authorities at a regional level, supporting strategic transport that connects the whole of our region to London, the rest of the country and the world. The Wider South East Rail Partnership, bringing together TfSE, England's Economic Heartland, Transport East and Transport for London is an example of this. We're bringing the right people together to deliver tangible improvements to the rail network that cuts across all four geographies.

TfSE is here to help government and partners to deliver, providing the leadership and expertise needed to build a transport system that drives growth, supports communities, and meets the needs of the South East.



A handwritten signature in black ink, appearing to be 'K Glazier'.

Councillor Keith Glazier

ABOUT US

As a Sub-national Transport Body (STB), TfSE forms a vital partnership dedicated to addressing the strategic transport needs of the South East. We work closely with our 16 constituent local transport authorities (LTAs), business groups, transport providers and stakeholders to identify transport solutions that meet the region's priorities.

Our mission is to grow the South East's economy through the delivery of a safe, sustainable and integrated transport system. We aim to improve the quality of life for residents, visitors and business while preserving the region's unique and diverse environment.

Our Role

TfSE remains focused on our role, which is set out in legislation.¹ We are here to develop a Transport Strategy for the South East and use that strategy to advise the government on the transport priorities for our region.

While local authorities retain responsibility for the delivery of transport in their area, TfSE has a role to support them, helping them to be more effective and efficient. We remain flexible. We will respond to our LTA's needs and support them on the areas they most need help with, as the government's policy agenda changes.

Our ongoing commitment to supporting LTAs is demonstrated through initiatives such as our Centre of Excellence, which provides access to industry-leading data, expertise, and resources. This enhances transport planning and design at the local level, empowering authorities to implement innovative and effective solutions.

TfSE's technical expertise and regional outlook enables us to bring together industry partners and key stakeholders. We champion the region's needs at the national level, aligning local and central government priorities wherever possible to create cohesive and effective transport strategies in collaboration with our LTA partners.

Working closely with our Audit and Governance Committee, we will ensure that everything we undertake delivers maximum value for money for government, constituent authorities and, most importantly, the taxpayer.

Our Region

We represent 16 local transport authorities: West Berkshire, Reading, Wokingham, Bracknell Forest, Windsor and Maidenhead, Slough, Kent, Medway, Hampshire, Southampton, Portsmouth, Isle of Wight, Surrey, East Sussex, West Sussex and Brighton and Hove.

¹ Section 5A of the Local Transport Act 2008, as amended by the Cities and Local Devolution Act 2016.

ABOUT US

Our Region cont...

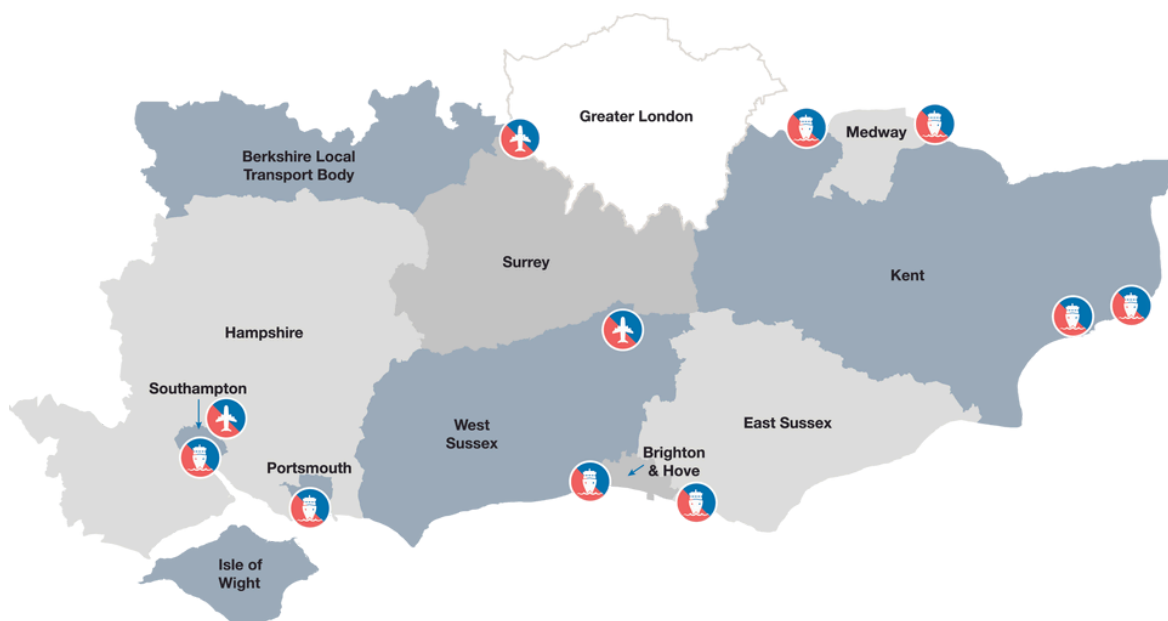
The South East is a region of national and global significance, serving as a crucial hub for connectivity and commerce. It is home to the country's two biggest airports, Heathrow and Gatwick, which together handle millions of passengers and freight tonnage annually.

Our transport network includes some of the busiest motorways in the UK such as the M25, as well as vital railway connections linking London, the rest of Britain and mainland Europe. Additionally, the South East hosts several of the nation's busiest seaports, underscoring our role as the UK's primary international gateway for people and goods.

Beyond its economic success and global status, the South East is home to world-renowned universities and research institutes, vibrant and diverse towns and cities and stunning coasts and countryside. It is a great place to live, work, study, visit and do business. With a growing population of over 7.8 million residents and the base for around 350,000 businesses, the region continues to thrive and expand.

Our vision is that by 2050 the South East will be the world's leading region for sustainable economic growth. To achieve this, we aim to provide a clean, safe, seamless transport system that enhances connectivity for people and businesses, while safeguarding the environment. This will mean more jobs, more opportunities to trade in the global marketplace and a better quality of life for everyone.

Since our establishment in 2017, we have made significant strides in supporting the region's LTAs and partners on key transport issues.



THE DIFFERENCE WE MADE LAST YEAR

In last year's Business Plan, we set out our plans to deliver four core work areas, with a focus on making a difference for government and our local authorities.

We are pleased to report that we have delivered all our priority areas in last year's Business Plan.

April - June 2024

- 📌 Launch of the Regional Centre of Excellence Platform
- 📌 Start to implement data management plan to support updated evidence base
- 📌 Complete work on our Regional Active Travel Strategy
- 📌 Complete work on the Future Scenarios that will inform the vision for the Transport Strategy
- 📌 Complete work on the forecasting of the impact of the electrification of vehicle fleets on the demand for charging infrastructure
- 📌 Progress Common Analytical Framework work on common data standards
- 📌 Provide support to LA delivery partners for business cases for Strategic Investment Plan interventions

July - September 2024

- 📌 Complete work on the waterborne freight study and study of future warehousing requirements
- 📌 Provide enhanced modelling capability for the South East
- 📌 Support strategic cases for larger Strategic Investment Plan schemes

October - December 2024

- 📌 Commence work on the delivery on the action plan for the Regional Active Travel Strategy
- 📌 Complete the drafting of the draft Transport Strategy and the integrated sustainability appraisal for it and commence the public consultation on it
- 📌 Complete work on the study of opportunities for intermodal transfer of freight from road to rail
- 📌 Complete work on a mode propensity tool
- 📌 Deliver updated map-based data viewing platform for the presentation of TfSE datasets
- 📌 Commence evaluation of the Regional Centre of Excellence

January - March 2025

- 📌 Finalise the Transport Strategy following the public consultation
- 📌 Refresh the "State of the Region Report"
- 📌 Refresh the Delivery Action Plan
- 📌 Measure the impact of the Regional Centre of Excellence

DRAFT TRANSPORT STRATEGY

We developed a **draft Transport Strategy** for the South East, which successfully went out for public consultation. This sets out the strategic direction for transport and provides a policy framework for the South East. The strategy is based around five missions which TfSE and the local authorities will need to deliver against in the future.

The Transport Strategy is based upon a comprehensive evidence base. Its development included a Need for Intervention report and scenario development work, as well as extensive engagement with a variety of stakeholders through workshops, a task and finish group consisting of TfSE Partnership Board members, and specific work with socially excluded groups.



CENTRE OF EXCELLENCE

In June, we launched the Transport for the South East Centre of Excellence, which now boasts over 200 registered users. The site has become a critical resource for skills development, knowledge sharing, and practical support for LTAs and beyond.

Key achievements include:

- ① Delivering targeted training in business case development, modelling and transport planning.
- ① Providing access to advanced data sets and in-house tools.
- ① Publishing over 250 resources, including toolkits for reducing carbon emissions and improving sustainability.
- ① Establishing a collaborative chat forum for real-time problem solving and idea sharing amongst peers.

Centre of Excellence objectives:

- ① Focus on building expertise and maximising LTAs' capability and capacity in core work areas.
- ① Provide advice, support and practical help with shortfalls and on the ground delivery.
- ① Be a forum for better communication between LTAs. It can facilitate idea exchange and enable LTAs to work together to solve common problems.
- ① Support better strategic case-making to help obtain more investment from government and deliver funding for schemes.
- ① Bespoke guidance to reflect different and specific needs of LTAs across the TfSE area.
- ① Create economies of scale through sharing resources and best practices to create consistency and reduce duplication.

The CoE has also become a valuable resource for the Department for Transport (DfT), facilitating the collection of insights and enabling LTAs to navigate challenges more effectively. We have partnered with organisations such as Network Rail, Active Travel England, and National Highways, alongside universities and professional institutions, to share best practice, lessons learned, helpful processes, and to encourage innovation. This collaborative approach reduces reliance on consultants, increases productivity, and most importantly, helps save money for the local authorities at a time when finances are constrained.

STRATEGIC INVESTMENT PLAN

We have continued to support the implementation of our Strategic Investment Plan.

We provided funding to support our LTAs to develop eight schemes in the Strategic Investment Plan.

- ④ £100,000 of support for West Sussex County Council to develop a Strategic Outline Business Case for A259 Chichester to Bognor Regis enhancements
- ④ £75,000 of support for West Berkshire, Reading, Wokingham, Royal Borough of Windsor and Maidenhead and Slough to develop a feasibility study for A4 Berkshire - Quality Bus Corridor and active travel improvements.
- ④ £50,000 of support for Surrey County Council to develop a feasibility study of London to Sussex Coast Highways (A22 N Corridor (Tandridge) South Godstone to East Grinstead.)
- ④ £50,000 of support for Hampshire County Council to develop a feasibility study of active travel in South East Hampshire.
- ④ £50,000 of support for East Sussex County Council to develop a Strategic Outline Business Case for the A22 North of Hailsham to Maresfield (MRN Pipeline) corridor.
- ④ £50,000 of support for Brighton and Hove Council to develop a feasibility study for A27/A23 Patcham Interchange & Falmer Strategic Mobility Hub.
- ④ £50,000 of support for Solent Authorities to develop a Strategic Outline Business Case for A2 Botley Line Double Tracking & A3 Netley Line signalling and rail service enhancements.
- ④ £25,000 of support to Kent County Council to develop a Strategic Outline Business Case for Gatwick to Kent service enhancements.



Value Provided: £425,000 across our local authorities

ANALYTICAL FRAMEWORK

We have continued to develop our Analytical Framework, to build our evidence base, and allow us to provide more support to help our local authorities deliver.

We have updated our roadmap, initially drawn in 2021, which sets out the plan for developing our Analytical Framework over the next three years. This updated roadmap was approved by the Partnership Board in May. Following the plan, we have successfully hosted three South East Transport Modelling and Appraisal Forums. These forums provide a platform for technical officers to share experiences, best practices, and discuss challenges related to technical projects, particularly those involving modelling and business case development.

During the forums, LTA officers identified several data gaps. To address one of these gaps, we commissioned a regional travel survey which will establish a robust database to better understand travel behaviour in the region, enabling more evidence-based decision-making.

Following last year's South East Modelling Capabilities and Capacities Review, we have begun developing the South East Regional Assignment Model. This model will serve as a critical tool to support the refresh of the Strategic Investment Plan and provide inputs for other analytical tools. Furthermore, we are in the process of procuring a Transport Planning Analytical Toolkit. This tool will enhance our analytical capabilities, particularly for public transport, and provide journey time data by transport mode—another data gap identified by our LTAs.

We continue to collaborate with other STBs in the development of the Common Analytical Framework (CAF). We have implemented a Development Data Collection Log (D-Log) for collecting local plan data, adopted Transport for the North's (TfN) Electric Vehicle Charging Infrastructure (EVCI) Visualiser Tool in the South East, and, in partnership with England's Economic Heartland and Transport East, rolled out the Carbon Assessment Playbook.

With the help of our host authority, we have identified a preferred solution for a central system database. This will enable us to better manage modelling outputs and integrate with our Geographic Information System (GIS) environment. We will progress with the build and migration next financial year, which will result in enhanced capability to share data with stakeholders.

TFSE WORKSTREAMS

In addition, we have also supported the government and local authorities on a number of other thematic workstreams:



Electric Vehicles

We rolled out TfSE's version of the STB Electric Vehicle Charging Infrastructure Visualiser Tool to local authorities across the area, through the Centre of Excellence platform.

We continued to facilitate TfSE's Regional Electric Vehicle Charging Infrastructure Forum, bringing together local authorities, fleet trade bodies, and distribution network operators to share best practice.

**Value Provided:
Over £30,000 per
Local Authority**



Active Travel

We developed a Regional Active Travel Strategy and Action Plan which, subject to the Partnership Board's final approval, supports the active travel work being undertaken by LTAs, by setting a regional framework for active travel, identifying opportunities for joint working and cross-border schemes and sharing best practice.

We continued to facilitate TfSE's Regional Active Travel Steering Group consisting of representatives from all 16 LTAs and national partners.



Freight

We completed work on our studies on the potential for modal shift from road to waterborne freight, the future requirements for warehousing and the development of Intermodal Rail Freight Interchanges (IRFI) to support increases in rail freight in our area.

We held three successful meetings of our Wider South East Freight Forum at which members discussed topics including infrastructure planning for lorry parking and driver facilities, and addressing the challenges of decarbonising the freight and logistics sector.



Decarbonisation

We rolled out the cross-STB developed Carbon Assessment Playbook, through the Centre of Excellence, which helps local authorities make decisions about which transport interventions to implement to reduce carbon emissions.






Future Mobility

We continued to facilitate the South East Future Mobility Forum with meetings on community transport and Digital Demand Responsive Transport (DDRT), shared mobility, sustainable logistics, and procurement & funding.

WHAT WE ARE GOING TO DO IN 2025/26

In a letter signing off our Business Plan, the Transport Secretary recognised the role TfSE plays supporting both local and national government priorities such as economic growth and housing. The Transport Secretary asked TfSE to focus on:

-  Delivering a pan-regional approach through developing regional transport strategies.
-  Focussing on pan-regional connectivity and integration.
-  Supporting local authorities' capacity & capability through providing access to STB modelling and analysis tools and expertise

The Transport Secretary highlighted TfSE's work to enable the Government to achieve its missions, which we will continue in 2025/26:

-  Kickstarting Economic Growth
-  Building an NHS Fit for the Future
-  Safer Streets
-  Breaking Down Barriers to Opportunity
-  Making Britain a Clean Energy Superpower

The transport system in the South East is central to delivering economic growth, breaking down barriers to opportunity, and delivering a transition to clean energy.

Kickstarting Economic Growth

The South East is home to 7.8m residents. There are 3.8m jobs in our region, and a number of our residents live in the South East and work in London. The South East adds £230bn in Gross Value Added (GVA) to the economy and is one of the only STB regions that is a net contributor to the taxpayer, helping to pay for vital public services across the country.

The South East is Britain's gateway to Europe and the rest of the world, with 18% of the UK's freight tonnage served by South East ports; 40m passengers travelling through Gatwick Airport; 18m Channel Tunnel passengers; and 13m ferry passengers. Kickstarting economic growth in the South East will kickstart it for the rest of the country too.

WHAT WE ARE GOING TO DO IN 2025/26

Kickstarting Economic Growth cont...

The South East is a place that people want to trade with, invest in, and live in. But poor strategic connectivity holds the South East back. Whilst connections into London are mostly strong, many orbital and East-West corridors are poorly served. Often, it is faster to travel from one part of the South Coast to another via London than directly along the South Coast's highway or railway corridors.

These connectivity gaps prevent communities along the South Coast benefiting from agglomeration – the pooling and sharing of resources and talent that drives prosperity. This issue is particularly acute within the region's largest urban centres. For example, it takes longer to travel from Southampton to Portsmouth by train than from Southampton to Bournemouth, despite the latter being a greater distance.

Despite being relatively prosperous as a region, parts of the South East suffer from severe deprivation. There is a clear opportunity to make significant in-roads in kickstarting economic growth by connecting more deprived communities to economic opportunities. The GVA per capita of less well-connected areas is less than half that of other areas in the South East. People in coastal, rural, and island communities are particularly affected, with over 75% of Hastings' residents being in the top 2 highest risk groups of Transport Related Social Exclusion nationwide.

Joining up the South East's towns and cities with better transport would help to increase productivity, create more high-skilled jobs in the region, and attract more overseas investment. TfSE has a key role in identifying the investment needed, supporting the development of schemes' business cases, and working with government to unlock private sector funding and financing.

Making Britain a Clean Energy Superpower

To become a clean energy superpower, we need to decarbonise our transport system. The rapid decarbonisation of the UK's energy networks has been a critical success story, with a shift towards renewable sources like wind and solar power.

However, despite this momentum, the UK's transport system is still significantly behind many of its peers. For example, only 38% of Britain's railways are electrified, in stark contrast to countries like Sweden, where over 75% of the rail network runs on electricity. Furthermore, the UK currently trails many European countries in the provision of electric vehicle chargers – including Scandinavian countries, the Low Countries, and France.

WHAT WE ARE GOING TO DO IN 2025/26

Making Britain a Clean Energy Superpower cont...

To make Britain a clean energy superpower, we need to improve rail connectivity between the South East's major cities, towns, ports and airports. Heathrow is currently not served by rail connections from the South, and Gatwick is poorly served by direct rail connections from Kent. Rail needs to be decarbonised, and the railway's assets need to facilitate clean energy generation where possible. Electric vehicles (EVs) will also play a critical role, particularly in places where public transport provision is poor. To make EVs work, charge point provision needs to improve in the South East, to better match current demand and facilitate the future uptake of EVs.

TfSE can play a key role in helping to advise the government on prioritising investment and supporting local authorities to deliver EVCI in the right places, in the right sequence. TfSE's Carbon Assessment Playbook is also supporting local authorities to decarbonise their transport network.

We also need to make sure that we continue to grow the supply of decarbonised energy to match the demand of the region's transport network. To that end, we work with OFGEM – and look forward to increasing engagement through OFGEM's Regional Energy Strategic Plans, which will mirror the STB geographies.

The government's other missions

Transport also plays a supporting role in delivering the government's other missions. A reliable, well-connected transport system is key to getting patients and staff to NHS appointments. TfSE work with the NHS as part of our Transport Forum, to ensure they can feed into our plans.

Safety on public transport is critical to delivering a safer country. As part of our Transport Strategy, TfSE is working with socially excluded groups, to ensure we capture their views about how to address and improve this important issue.




Transport is also a key part of the 'Breaking Down Barriers to Opportunity' mission. Students often depend on reliable public or home-to-school transport to get to school and college. These are challenges for LTAs' budgets. Whilst the answer to fix these is increased funding for local transport, TfSE can play a key supporting role through our Centre of Excellence.

WHAT WE ARE GOING TO DO IN 2025/26

TfSE's Role in a Changing Landscape

Since we first came together to form a voluntary partnership in 2017, TfSE has had a clear role: helping to grow the South East's economy, by progressing strategic investment in transport across the region.

In doing so, we have always been cognisant that we're here to support delivery of the government's missions and our local authorities' objectives. We know that the recent English Devolution White Paper will mean changes to local government structures in our region. These changes will take effect at the same time as several other policy developments:

-  The government is increasing housebuilding, with changes to the National Planning Policy Framework recently consulted on, in advance of the Planning and Infrastructure Bill.
-  Local authorities will be asked to drive forward buses, active travel and electric vehicle charge point provision in their area, with significant funding from government, and devolution of powers.
-  The government is developing an Integrated National Transport Strategy, covering all of England.
-  The government is taking the rail network back into public ownership, and is creating Great British Railways to bring together passenger rail operations with management of rail infrastructure.
-  The government and local authorities are facing financial pressures, meaning funding for new infrastructure is limited.

Given the number of policy changes, we will continue to adapt to the needs of government and local authorities, so that all our work is focused on helping them to deliver.

WHAT WE ARE GOING TO DO IN 2025/26

We see ourselves as having three clear roles to support delivery:

1. Driving Strategic Investment Forward Now

While any changes resulting from the Devolution White Paper will take some time to take full effect, TfSE's core role is now more important than ever.

We will continue to make the case and provide advice to government for investment in strategic transport, through our Regional Transport Strategy, Strategic Investment Plan, and Analytical Framework. We will continue to drive investment forward by progressing business cases, supporting delivery organisations and identifying private sector funding.

Investment in strategic transport is essential to enable housebuilding and the government's broader growth agenda, and TfSE will play a vital role in making sure it continues to happen over the next few years.

2. Helping Combined Authorities hit the ground running

As combined authorities are formed, each will develop its own ambitious transport agenda. TfSE can play a key role in helping emerging combined authorities hit the ground running.

Instead of having to develop their own evidence base and analytical frameworks before delivering anything, which would take valuable time, combined authorities will be able to make use of TfSE's Analytical Framework, evidence base and tools on day one.

Combined authorities will also be able to benefit from TfSE's Centre of Excellence, which helps them with tools, training and case studies. This will help authorities to build better local transport plans, business cases, and a pipeline of schemes.

3. Convening stakeholders at a regional level

As the English Devolution White Paper sets out, there is power in combined authorities coming together to work at a wider, regional level, through organisations like STBs.

Many of the issues that affect one combined authority in the South East will affect all combined authorities across our region, and TfSE can continue to play a useful role in bringing together leaders and transport professionals to solve problems.

Most of the key strategic transport corridors in the South East cut across local authority geographies, and this is likely to continue to be the case after combined authorities are formed, with most of the South East's key corridors going East-West, or into London.

TfSE is already playing a key role in bringing together authorities through our Wider South East Rail Partnership, which brings together England's Economic Heartland, Transport East and Transport for London to work on rail issues that cut across our boundaries.

OUR VITAL WORK THAT SUPPORTS DELIVERY

Analytical Framework

In the coming year, the development of the Analytical Framework will prioritise collecting data to address the gaps identified by LTAs and alleviate financial burdens on our partners during their model developments. We will continue to enhance our analytical capability to provide as much support as possible to our LTAs.

- ① We will procure **mobile network data (MND)** at the regional level, and share insights with our LTA partners - a robust source for understanding travel demand and addressing one of the main data gaps in the region. This data will be used to rebase the South East Highway Assignment Model, and potentially other more local models, ensuring they are fit for its intended applications.
- ① We will also continue to explore opportunities to **collaborate** with the DfT and academia, focusing on areas where analytical methodologies are less established. For example, we are partnering with the Consumer Data Research Centre through their Masters dissertation scheme, inviting Masters' students to contribute to the Analytical Framework with research targeting transport resilience. We plan to trial DfT initiatives, such as the connectivity tool and population synthesiser, once they are developed.
- ① Our quarterly **Regional Modelling and Appraisal Forum** continues to enhance regional collaboration among LTAs. Nationally, we will maintain our work with other STBs to develop and contribute to the CAF. This initiative will eliminate duplication and provide common data, modelling, and analytical standards, ensuring a consistent approach across the region and among STBs.
- ① We will build the **data architecture** that has been identified through our requirements gathering. This is essential as it will be required to store the outputs from our enhanced modelling capabilities.
- ① Finally, **planning data** originally collected in 2023/4 will be refreshed. The timing of the original data collection was not optimum as many planning authorities were working on their updated local plans. A data collection exercise in 2025 will offer more accurate planning data to be used for SIP refresh, and for use as a modelling input in the future.

OUR VITAL WORK THAT SUPPORTS DELIVERY

Strategic Investment Plan Implementation

This year we will continue the work, outlined in our Delivery Action Plan, that commenced in 2023/24. We will continue to support our LTAs develop a pipeline of schemes and make the case for funding in alignment with the new government's objectives and our updated Transport Strategy.

We will also continue to support our LTA partners through the CoE, developing new content and providing a place for best practice to be shared.

Through collaboration with delivery partners and the DfT, we will continue to provide direct support to partners to fund the development of Feasibility Studies and Strategic Outline Business Cases for schemes named in the Strategic Investment Plan (SIP) that would not otherwise be able to progress. The economic situation is still difficult and this work will help to ensure that LTAs in the South East have a strong pipeline of schemes, which allows them to access capital funding as soon as it is available. We will continue to bring together government and industry leaders through our Funding and Finance Working Group to explore how we can unlock greater private sector investment in transport infrastructure.

We stand ready to provide advice to Ministers on the priorities for investment in transport across the south east. Our strategic prioritisation framework and tool will allow us to tailor that advice to fit different criteria depending on the ask from government.

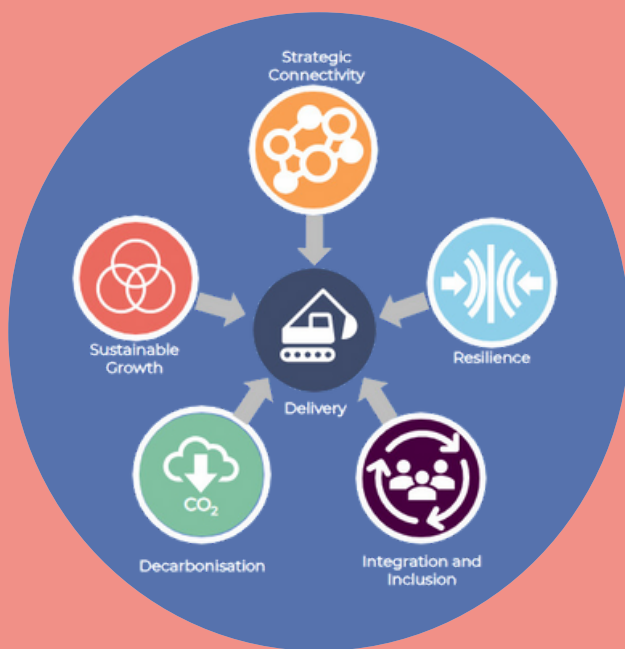
We will report on the progress on delivery and the benefits arising from both schemes and global interventions in the SIP through our Monitoring and Evaluation Framework and Annual Report.



OUR VITAL WORK THAT SUPPORTS DELIVERY

Transport Strategy

The work we began on the strategy refresh in 2023/24 will continue this year as we move from draft into a final version. A 3 month, public consultation on the strategy was launched in December 2024 to help provide feedback and insight from users, LTAs and stakeholders. Following this process, a consultation report will be published alongside the final version of the strategy. This is currently planned to be submitted to government by October 2025.



During 2025 we will review our technical work programme to ensure it is fully aligned with these missions and will also identify the scope of new work programme elements focussed on both the Resilience and the Inclusion and Integration missions.

-  **Strategic Connectivity.** We will boost connectivity in the South East by enhancing strategic regional corridors and ensure all communities can access high-quality transport links and key services.
-  **Resilience.** We will safeguard the South East's connectivity and enhance the reliability and resilience of our transport systems for future generations.
-  **Inclusion and Integration.** We will create an inclusive and integrated transport network in the South East that offers affordable, safe, seamless, door-to-door connectivity for all users.
-  **Decarbonisation.** We will lead the South East to a net zero future by 2050 by accelerating the shift to zero-emission travel, incentivising sustainable travel choices, and embracing new technologies to reduce emissions and combat climate change.
-  **Sustainable Growth.** We will champion transport interventions that unlock investment opportunities, enable sustainable growth, and create healthy, vibrant, and well-connected communities.

OUR VITAL WORK THAT SUPPORTS DELIVERY

Centre of Excellence - Looking Ahead

Future activities will include bespoke support, including one-to-one guidance on scheme development alongside the dissemination of analytical, research, data, strategic, and technical expertise.

The platform's reach continues to grow, attracting interest from district and borough councils, operators, and national agencies. This increased demand highlights the CoE's effectiveness and capacity to deliver scalable, value-added solutions.

By equipping LTAs to navigate complex challenges despite limited resources, the CoE plays an important role in strengthening local transport capabilities. With continued support, it can sustain and grow its contribution to local authorities and the broader transport sector, ensuring alignment with national priorities and driving continued progress.

What will the CoE offer for the technical work programme of TfSE?



Transport Strategy Refresh:

All data, webinars and relevant resources will be shared through the CoE. This includes the work underpinning scenario development, lessons learned from engagement, and work with socially excluded groups.



Electric Vehicle Infrastructure:

Data that is collected through this workstream will be provided to LTAs on the CoE. Any future iterations of the tool will be updated live on the site, to ensure that LTAs are using the most up to date version of the tool .



Active Travel:

This workstream will offer engagement opportunities to partners. It will go further than just local authority officers, and discussions can be facilitated between partners within the Chat Forum. Any relevant resources, webinars, events and case studies will be shared through the CoE to maximise reach and impact.



Future Mobility:

Development of a first and last mile strategy/toolkit will be hosted on the CoE for officers' use. Any relevant webinars or events that will be hosted relevant to future mobility will be advertised and recorded for future use. Best practice and lessons learned will be collated through this engagement and provided to officers via the CoE.

OUR VITAL WORK THAT SUPPORTS DELIVERY

Centre of Excellence cont...



Decarbonisation:

The Carbon Assessment Playbook tool is hosted on the Centre of Excellence, alongside the training webinars. Future support is being provided and facilitated through the CoE. Any software updates will be provided through the site, to further enhance the support provided. All data that is collected as part of this workstream will be hosted on the CoE Data Hub.



Freight:

Collected data will be stored on the CoE through the CoE Data Hub. The site can also host engagement activities, their outputs, developed tools, and case studies.



Rail:

This workstream will offer engagement to partners and will go further than just local authority officers, and discussions can be facilitated between partners within the Chat Forum.



SIP Implementation:

Through this workstream, we will be able to provide seminars and walk throughs to approaches in a classroom format for more technical officers, to supplement the business case training series that was offered in 2024. Additionally, case studies and full business cases will be published on the CoE, and revisited in twelve months to understand how the schemes are being monitored and evaluated, and hear more on the local impacts. Any data or evidence collected through these projects will be made available through the CoE.



SIP Refresh:

New data that is collected as part of this workstream's development will be published on the CoE.



Analytical Framework:

All the data and analysis (i.e. Regional Travel Survey, journey times, origin destination travel matrices, synthetic travel demand) and tools (South East Regional Highway Assignment Model, Travel Market Synthesiser) will be made available to LTAs via the CoE. With the continued development of our analytical toolkit and the expansion of in-house analytical capabilities, we will be well-positioned to offer more analytical advice and support to our partners. The CoE will serve as the primary platform for communicating with and addressing queries from LTAs.

OUR VITAL WORK THAT SUPPORTS DELIVERY









Electric Vehicle Infrastructure

This year we will continue with the action plan developed as part of our **Electric Vehicle Charging Infrastructure (EVCI) Strategy and Action Plan** adopted in 2023. We will continue to host TfSE's Regional EVCI Forum on a quarterly basis to bring together key stakeholders from across the region to share best practice and discuss the challenges and issues that are being with regards to the rollout of EVCI.

We will complete phase 2 of TfSE's fleet electrification work, which will develop guidance for LTA's to support them with planning EVCI that will be accessible for commercial fleet vehicles.

Active Travel

Once the Partnership Board has considered and agreed the **Regional Active Travel Strategy and Action Plan** (RATSAP), we will:

-  Continue to facilitate meetings of the Regional Active Travel Steering Group to ensure accountability and provide guidance on the implementation of the RATSAP.
-  Encourage and support collaboration on cross-boundary active travel corridors and joint working across LTAs.
-  Support progression of the Strategic Active Travel Network through scheme development funding to conduct feasibility studies and business cases.
-  Hold discussions with transport operators (bus, rail, and micromobility/hire schemes) to identify ways to break down barriers and capitalise on opportunities to better integrate their use with active travel.
-  Work with the NHS to support and identify ways to encourage shift to active travel and other sustainable modes for staff, patient, and business travel.
-  Scope development of a First & Last Mile Strategy and Hubs Assessment Approach, both of which also complement tasks within the Future Mobility Action Plan.
-  Continue to develop the repository of active travel data through coordination with partners on existing datasets and primary data collection through a regional survey.
-  Develop knowledge sharing and learning opportunities through webinars, training, site visits, and case studies.

OUR VITAL WORK THAT SUPPORTS DELIVERY

Freight

This year will see the continuation of our programme of activity to increase freight awareness within the local transport authorities and local planning authorities. We will also be developing the work undertaken by Midlands Connect on the Alternative Freight Fuel Infrastructure tool to enable us to identify potential locations where multiple freight functions could be hosted such as public HGV recharging, parking, and modal interchange hubs. We will also be holding further meetings of our **Wider South East Freight Forum**.

Rail

We will develop a **Rail Strategy** to enable TfSE to provide advice to Secretary of State, Great British Railways and the Office for Road and Rail about our priorities for rail investment in the TfSE area. The strategy will identify rail priorities for our area's passengers and freight operators that improve connectivity and unlocking growth. The work will see the development of a focussed evidence base alongside extensive stakeholder engagement. We will continue to actively participate with England's Economic Heartland and Transport East in the **Wider South East Rail Partnership**, which aims to work with the newly created Great British Railways, DfT, Network Rail and Transport for London to secure the identification of shared priorities and better strategic planning that maximises the potential of our wider rail network, ensuring integration between our respective national and regional transport strategies and our constituent local authority's Local Transport Plans.

Future Mobility

We will continue to convene our **Future Mobility Forum** on a quarterly basis involving key stakeholders from across the region involved in this sector. The themes that will be explored include Mobility Hubs, Integrated Transport, Data, Mobility Credits/Incentives, Transport Resilience, and Public-Private Collaboration.

We will develop a First & Last Mile Strategy or Toolkit and Hubs Strategy both of which also complement actions identified with the Regional Active Travel Strategy and Action Plan.

Decarbonisation

During this year we will be undertaking further refinements and improvements to the **Carbon Assessment Playbook Tool** that we launched in August 2024. This work will include updating the base year data in the tool from 2019 to 2024 and enhancement to enable the impact of transport interventions on emissions from freight traffic to be assessed.

ENGAGING WITH STAKEHOLDERS

Successful and mutually beneficial **partnerships** are imperative to the ongoing success of what we do. This has been previously demonstrated throughout the work we have done in developing our Transport Strategy and SIP and continues to be a vital aspect of our work as we continue the implementation of the interventions contained within our SIP.

Looking ahead, engagement will continue to be at the heart of our communications activity. We will continue to seek new and foster existing partnerships, particularly with regards to our Transport Strategy Refresh activity under the banner of **'Your Voices'**. Plans include attendance at a variety of events, online surveys, social media activity and dedicated podcasts as we support the consultation.

Naturally, we will continue to communicate regularly with all stakeholders regarding all aspects of our work in a variety of ways. This includes physical and virtual meetings, social media, and regular website updates, along with our monthly newsletter and monthly podcast.

Bespoke engagement sessions will remain the backbone of much of our activity to ensure stakeholders are always fully briefed on our work programme as it develops in a timely and relevant fashion.

The Website Revamp

In Autumn 2024, we undertook a refresh for the TfSE website to improve navigation and prepare for additional web traffic as a result of the Transport Strategy consultation.

A steering group including members of the TfSE team and website users, was convened to understand the key elements of the site and identify any new areas for inclusion. This was overseen by our communications team and the updated website was launched in October.



ENGAGING WITH STAKEHOLDERS

The TfSE Podcast

As part of our aim to engage a more diverse audience, the 'TfSE Podcast' was launched in September 2023. Since then, we have published monthly episodes on a variety of topics, including data, transport scheme development, accessibility in public transport, and healthy streets.

Looking ahead to 2025, planned topics include the 'Your Voices' survey, Active Travel, and highlights of the work carried out by TfSE teams, such as the Transport Strategy. The podcast is continuously reviewed to ensure it remains relevant and engaging, with a focus on identifying areas for improvement.



'Your Voices' Survey

The public consultation on our draft Transport Strategy invited input from residents, businesses, and interest groups across the South East, seeking their perspectives on our transport vision.

In addition to gathering feedback on the strategy itself, we asked for views on key transport priorities, including driving economic growth, connecting communities, and achieving net zero in the coming decades.

Planned engagement activities to support the consultation included TfSE roadshows, Transport Strategy surgeries, social media campaigns, press releases, and dedicated podcast episodes, ensuring a wide reach and meaningful input which will be evaluated after the March deadline.

Business Advisory Group

TfSE established a Business Advisory Group (BAG) in quarter 3 of 2024. The BAG provides the business voice to support, advise and contribute to the Partnership Board. It allows TfSE to stay up to-date with the top transport-related challenges and opportunities that businesses face in the South East.

ENGAGING WITH STAKEHOLDERS

Public Affairs Activity

With 76 MPs across our region, an increase from 71 following a recent Boundary Commission review, it is vital we continue to create a dialogue with MPs about the work of TfSE, including projects in their own constituencies. This has become even more important since the 2024 general election which saw 50 new MPs across the region.

We have continued with the programme of MP engagement which began last year, meeting MPs to introduce TfSE and discuss relevant constituency transport issues. In 2024 we met 12 MPs, 8 of which took place after the general election.

Our constituency factsheets, detailing local work that features in our SIP, were refreshed in 2024 are sent to MPs following our TfSE meetings and available on the TfSE website.

We also attended the Liberal Democrat Conference in Brighton in September 2024. We met the majority of the 18 new regional Lib Dem MPs at this event. We represented all the STBs at this conference, and in turn, the other STBs represented us at the party conferences that were held in their regions.

Joint working with other STBs

Meeting regularly and working closely with the other 6 STBs across England ensures the sharing of best practice and delivers efficiencies in our collective work. We have already worked together on a variety of issues including decarbonisation, the Electric Vehicle Charging Infrastructure roll out, the development of a Common Analytical Framework and our Centre of Excellence.

Notable collaborations include working jointly with England's Economic Heartland and Transport East on our Bus Back Better support programme; developing a Carbon Assessment Playbook; and our work programme to increase public sector freight awareness. We also continue our work with the Wider South East Freight Forum and the Wider South East Rail Partnership. Moving forward, we are keen to seek out further opportunities to work collaboratively with other STBs, so that we continue to ensure that we deliver best value for the taxpayer.

RESOURCES

TfSE operates a mixed funding model. Operational and staff costs are in part funded by contributions from LTAs, while our technical programme relies on grant funding from the DfT. This approach reflects our commitment to delivering best value for our partners and taxpayers.

This Business Plan is based on the Department for Transport's announcement that they will provide us with £2.16m of grant funding for 2025/26.

Funding from our 16 LTAs, which for 2025/26 amounts to just under £500,000, is used to support our staff costs. The approach for calculating contributions was developed with members and reflects the relative sizes of different member authorities. We are committed to maximising value for money – and have frozen the cost of local authority contributions for the last 7 years.

Our total income for the year will be approximately £3.6 million. This is based on an estimated carry forward of £528,435 for technical work and a carry forward of £406,730 for TfSE's reserve for 2024/25.



RESOURCES

Income	£
DfT Grant	2,161,666
Local Contributions	498,000
Technical Programme Carry Forward 2024/25 (Estimated)	528,435*
Carry Forward for TfSE Reserve	406,730
Total Income Including Reserves	3,594,831
Expenditure	£
Staffing	1,250,000
Technical Programme for 2025/26	1,121,666
Completing 2024/25 tech programme	528,435
Governance	25,000
Operational Expenses	75,000
Communications and Engagement	98,000
TfSE Reserve	496,730
Total Expenditure Including Reserves	3,594,831

¹ TfSE is obligated to hold a reserve that would cover all our staff redundancy costs, in the event of being wound up as an organisation. The money we hold back for a reserve will increase in 2025/26, as redundancy costs increase.

**This figure is a forecast as of January 2025 and will be updated following the end of year finance process which will be completed at the end of March 2025.*

RESOURCES

Technical Programme for 2025/26

We set out what we deliver for each workstream in **Section 5: Our Vital Work that supports delivery**. This table shows the breakdown of our technical programme spend using DfT funding for 2025/26.

Expenditure	£
Transport Strategy	40,000
Future Mobility	40,000
Active Travel	45,000
Freight	115,000
Electric Vehicle Infrastructure	45,000
Rail	75,000
Strategic Investment Plan Implementation	150,000
Strategic Investment Plan Refresh	50,000
Analytical Framework	313,333
Centre of Excellence	98,333
Other Costs and Technical Support	150,000
Total	1,121,666

RESOURCES





Completing 2024/25 Technical Programme

We also have a carry forward that is expected to come in at £528,435*. This will be spent as follows:

Committed Carry Forward	
Expenditure	£
Transport Strategy	101,000
Analytical Framework	20,000
Decarbonisation	40,000
SIP Implementation <i>Supporting Kent-Gatwick Strategic Outline Business Case (SOBC)</i>	50,000
Sub-Total	211,000
Reallocated Carry Forward	
Electric Vehicle Charging <i>Procuring the second version of the Electric Vehicle Charging Infrastructure tool</i>	45,000
Centre of Excellence <i>Providing additional support to Local Authorities in 2025/26</i>	120,000
SIP Refresh <i>Doing a more intensive version of the SIP refresh, allowing us to identify top schemes and build an evidence base on resilience</i>	48,000
Scheme Development <i>Developing a funding and finance model for the A27 / M27 corridor, for submission to government</i>	104,435
Sub-Total	317,435
Total	528,435*

RESOURCES

This carry forward is expected to come in at £528,435* because in 2024/25, we have driven down costs in every area of our business, seeking savings wherever possible.

-  We forecast an underspend on salaries and training of £180,000, as we have held vacancies in the team, and minimised spending on training.
-  We predict an underspend on our technical programme of £265,000. £211,000 of this is committed carry forward, to finish work on the Transport Strategy, Analytical Framework, decarbonisation, and to support the Kent-Gatwick SOBC. The other £54,000 will be uncommitted carry forward, due to underspends on thematic work areas, as we sought cost efficiencies.
-  We forecast an underspend of £40,825 on communications and engagement, as we have reduced our communications spend and cancelled our planned Connecting the South East event for 2024.
-  We forecast an underspend of £42,610 on governance and operational expenses, as we have sought to save money by foregoing attendance at events and conferences and have delayed planned work to review TfSE's governance structures.

These savings allow us to undertake more technical work on behalf of government and our local authorities, and we will continue to pursue them in 2025/26.

**This figure is a forecast as of January 2025 and will be updated following the end of year finance process which will be completed at the end of March 2025.*

OUR TEAM

We know that all our funding comes from the taxpayer, whether that is through grant funding from the DfT, or contributions from our local authorities.

Because of this, we maintain a laser-focus on maximising value for money. We keep a lean structure and start 2025/26 with just 17 full-time employees. In line with government guidance, our staff complement is to deliver our Business Plan, where it would be more expensive to use consultants.

It can be a real challenge to recruit skilled staff in many areas of the transport sector. The impact of this is far reaching and being unable to recruit the right talent to fill vacancies or skills gaps can affect the work capacity and growth of an organisation. To grow capacity both within TfSE and the wider industry, we have a staff member who is undertaking a Project Management Apprenticeship, and we are partnering with the Consumer Data Research Centre through their Masters dissertation scheme, inviting Masters' students to contribute to the Analytical Framework with research targeting transport resilience.

The team works closely with and draws additional support from officers from our constituent authorities and other stakeholder groups. This approach to partnership working ensures TfSE provides best value to our partners and taxpayers.

Our team is highly skilled, agile, and responsive to the changing needs of government and local authorities.



OUR TEAM



Rupert Clubb
Chief Officer

Rupert leads the development of Transport for the South East. He chairs the Senior Officer Group and supports the Chairman and Partnership Board.

Mark Valleley
Head of Strategy

Manages the technical work programme including the development and delivery of the Transport Strategy.



Sarah Valentine
Head of Analysis and Appraisal

Manages the development of our analytical framework including the data analysis, modelling and appraisal tools that support scheme business cases and the implementation of our Strategic Investment Plan.



Keir Wilkins
Head of Programme and Policy

Manages TfSE's finance, programme, governance, communications and engagement. Responsible for TfSE's policy and work on TfSE's future role. Manages TfSE's Centre of Excellence.



MOVING EVEN FURTHER FORWARD

RUPERT CLUBB, CHIEF OFFICER

The new government has outlined its priorities for a 'mission-driven' agenda, promoting a programme of national renewal across the nation's health, education and criminal justice systems, alongside ambitious goals transitioning to low-carbon electricity by 2030 and achieving the highest sustained economic growth in the G7.

Transport plays an important role in this vision. Five strategic priorities covering improved performance on the rail and bus networks, tackling regional inequality, promoting social mobility, delivering greener transport and improving integration across transport networks were announced by the government in the summer.

New legislation on transport delivery coupled with comprehensive devolution plans for local government, signals a period of significant change and opportunity. At TfSE we are ready to meet these challenges and opportunities head-on.

The government's transport priorities align closely with our own, reinforcing the strategic direction we have taken since our formation in 2017, and will continue in 2025.

We want transport to attract investment and drive sustainable economic growth throughout the South East. Furthermore, we need to improve connectivity for communities as well as prioritising a transition to net zero carbon emissions by 2050.

Collaboration is at the core of our work. In December 2024, we launched a public consultation on our evidence-based draft Transport Strategy—a bold vision for the South East's transport infrastructure and services in the decades ahead.

This strategy outlines how transport can be a catalyst for economic growth, stronger communities, and a greener environment. Through the consultation, we will engage local users, businesses and stakeholders to inform and shape a strategy that reflects the diverse needs of the region, which we will publish by the end of 2025.

Empowering local leaders and fostering collaboration is central to the government's approach to transport provision. However, these are testing times. Rising costs and financial pressures demand value-for-money solutions that will benefit households and businesses alike.

MOVING EVEN FURTHER FORWARD

RUPERT CLUBB, CHIEF OFFICER

Supporting LTAs to meet these challenges is a cornerstone of TfSE's work. Our Centre of Excellence, which we launched in 2024, has been created to enhance the capabilities of local transport authorities, helping them to deliver innovative approaches to local transport.

The outcome — improved infrastructure, greater investment, and better outcomes for residents and businesses — will see benefits right across the region.

Our success is built on strong partnerships. From providing strategic advice on freight logistics and EVCI to ensuring the South East's transport priorities are heard at the national level, TfSE works hand-in-hand with regional leaders, MPs, and other key stakeholders.

Only by coming together with our local authority partners and stakeholders can we meet today's challenges and address the opportunities of tomorrow, as we strive to create a transport system fit for the decades ahead.



A handwritten signature in black ink, appearing to be 'Rupert Clubb', written in a cursive style.

Rupert Clubb

APPENDIX 1

FULL BREAKDOWN OF TFSE FUNDING BY WORK AREA

Income	£
DfT Grant	2,161,666
Local Contributions	498,000
Technical Programme Carry Forward 2024/25 (Estimated)	528,435*
Carry Forward for TfSE Reserve	406,730
Total Income Including Reserve	3,594,831
Expenditure	£
Staffing	1,250,000
Technical Programme for 2025/26	1,121,666
Completing 2024/25 tech programme	528,435
Governance	25,000
Operational Expenses	75,000
Communications and Engagement	98,000
TfSE Reserve	496,730
Total Expenditure Including Reserves	3,594,831

APPENDIX 1

Work Programme for 2025/26 and allocation of DfT grant to individual work areas

Budget Line	Expenditure	DfT Grant
Staffing	1,250,000	992,000
Transport Strategy	141,000	40,000
Future Mobility	40,000	40,000
Active Travel	45,000	45,000
Freight	115,000	115,000
Electric Vehicle Infrastructure	90,000	45,000
Rail	75,000	75,000
Decarbonisation	40,000	0
Strategic Investment Plan Implementation	304,435	150,000
Strategic Investment Plan Refresh	98,000	50,000
Analytical Framework	333,333	313,333
Centre of Excellence	218,333	98,333
Other costs and technical support	150,000	150,000

APPENDIX 1

Work Programme for 2025/26 and allocation of DfT grant to individual work areas cont...

Technical Programme	£1,650,101	£1,121,666
Events	40,000	15,000
Communications	12,000	5,000
Publications	5,000	0
Website	21,000	0
Stakeholder Database	18,000	0
Media Subscriptions	2,000	0
Communications/ Engagement	98,000	20,000
TfSE Governance	25,000	0
Operational Expenses	75,000	28,000
Total Expenditure	3,098,101	2,161,666
Held for TfSE reserve	496,730	
Total budget including reserve	3,594,831	

APPENDIX 1

Technical Programme Breakdown New funding for 2025/26

This table shows how the £1,121,666 of new DfT funding for our technical programme will be spent.

Expenditure	£
Transport Strategy	40,000
Future Mobility	40,000
Active Travel	45,000
Freight	115,000
Electric Vehicle Infrastructure	45,000
Rail	75,000
Strategic Investment Plan Implementation	150,000
Strategic Investment Plan Refresh	50,000
Analytical Framework	313,333
Centre of Excellence	98,333
Other Costs and Technical Support	150,000
Total	1,025,000

We set out what we deliver for each workstream in **section 5 : What we will deliver in 2025/26**

APPENDIX 1

Funding from 2024/25

We also have a carry forward that is currently forecast to come in at £528,435*.

£211,000 of that funding has already been committed in our Business Plan for 2024/25 – and will be spent as follows:

Committed Carry Forward	
Expenditure	£
Transport Strategy	101,000
Analytical Framework	20,000
Decarbonisation	40,000
SIP Implementation <i>Supporting Kent-Gatwick Strategic Outline Business Case (SOBC)</i>	50,000
Sub-Total	211,000



APPENDIX 1

We also estimate £317,435 of additional uncommitted carry forward, that is because of cost savings elsewhere in our 2024/25 Business Plan.

This will be spent as follows, following Partnership Board's approval at their meeting on 27 January 2025.

Reallocated Carry Forward	
Electric Vehicle Charging <i>Procuring the second version of the Electric Vehicle Charging Infrastructure tool</i>	45,000
Centre of Excellence <i>Providing additional support to Local Authorities in 2025/26</i>	120,000
SIP Refresh <i>Doing a more intensive version of the SIP refresh, allowing us to identify top schemes and build an evidence base on resilience</i>	48,000
Scheme Development <i>Developing a funding and finance model for the A27 / M27 corridor, for submission to government</i>	104,435
Sub-Total	317,435
Total	528,435*

**This figure is a forecast as of January 2025 and will be updated following the end of year finance process which will be completed at the end of March 2025.*

Appendix 3 – Work that will be delivered using the increase in funding

In our business plan, we identified four options for additional work that we could undertake if we received extra funding from the Department for Transport (Electric Vehicle Infrastructure, Centre of Excellence, Analytical Framework, Scheme Development Support.)

The Transport Secretary has granted Transport for the South East an increase in funding of £96,666 for 2025/26. The Department for Transport have requested that we use this uplift to increase funding for the Centre of Excellence and Analytical Framework.

Work that will be delivered using the increase in funding

Centre of Excellence

Additional funding will allow the Centre of Excellence to deliver two pieces of additional support for Local Authorities between April and June. Funding will be used to support Local Authorities on buses, with bespoke support provided on the impacts of devolution, managing bus routes that cross local authority boundaries, and cross-subsidising bus routes. Funding will also be used to provide enhanced modelling support to Local Authorities, upskilling them on making the most of TfSE's Analytical Framework, and other data and models that are available to them.

Analytical Framework

Additional funding will be used to procure freight movement data from MDS Transmodal, an important piece of information for the ongoing development of the South East Highway Assignment Model. This data would also support freight related studies conducted by the technical team, such as the Alternative Freight Fuel Infrastructure tool. Furthermore, this data would be shared with Local Authorities through the Centre of Excellence, allowing TfSE's Local Authorities to more robustly analyse freight movements, when required.

Report to: Partnership Board –Transport for the South East

Date of meeting: 17 March 2025

By: Chief Officer, Transport for the South East

Title of report: Transport for the South East Warehousing Provision and Viability of Waterborne Freight Studies

Purpose of report: To agree the study reports for the Warehousing Provision and Viability of Waterborne Freight studies

RECOMMENDATION:

The members of the Partnership Board are recommended to agree the study reports for the Warehousing Provision Study and Viability of Waterborne Freight Study

1. Introduction

1.1 The purpose of this report is to ask the members of the Partnership Board to agree the draft Warehousing Provision Study and Viability of Waterborne Freight Study.

2. Background

2.1 The Freight, Logistics and Gateways Strategy agreed by the Partnership Board in January 2022, identified key actions in relation to warehousing provision and waterborne freight in the TfSE area. It identified the need to:

- Improve the awareness of existing and available logistics land and property (warehousing) by undertaking a detailed market review to understand existing trends in logistics property take-up and explore potential future demand.
- Identify the potential role for inland waterway and coastal shipping options for freight movements across the TfSE area as an alternative option to moving goods by road.

2.2 To take forward these actions, two studies were commissioned through TfSE's call-off contract.

3. Warehousing Provision Study

3.1 The objectives of the warehousing study were to:

- Using market intelligence establish the current and future quantum, type and suitability of the warehousing stock in the TfSE area.

- Analyse whether the current and future stock is sufficient for the efficient functioning of the freight and logistics sector.
- Identify where it might be necessary to increase the supply of warehousing stock to improve the operational efficiency of the freight and logistics sector.

3.2 As part of the study discussions were held with a range of stakeholders, including Dartford Council and Portsmouth City Council, Logistics UK, Network Rail, the Port of Southampton and the UK Warehousing Association (UKWA).

3.3 The main focus of the study was an analysis of data supplied by Savills Economics, who provide advice on commercial property, including the industrial and logistics warehousing sector. The analysis looked at the size, quality, types of users, current stock and future forecast of warehousing land availability in the TfSE area. For the purposes of the analysis, the TfSE area was divided into nine Property Market Areas (PMAs) consisting of groupings of local planning authority areas. The authorities included in each PMA are presented in **Appendix 1**.

3.4 Key findings of the study include the following:

- the largest quantities of warehousing can be found alongside the Strategic Route Network (SRN) and Major Road Network (e.g. M2, M20, M4, M3, M27, A27 and the M23) as shown on the map in Appendix 2. These contain 84% of the total warehousing stock in the TfSE area;
- there is a current excess of demand over supply across the region which is resulting in the cost of renting facilities increasing exponentially;
- the main drivers for demand for warehousing is related to the amount of housing in the region (generating demand for groceries and other household products), online deliveries (e.g. Amazon) and general freight growth;
- the largest amount of warehousing floorspace across the region is leased by the logistics sector, followed by manufacturing and professional services, technical and scientific services;
- a high proportion of the warehousing supply consists of small buildings (between 0-30k ft² which is approximately the size of a large supermarket), whilst the M4, M27 and Thames Medway PMAs have a higher proportion of large buildings (30-100k ft², - approximately the size of 0.5 – 1.5 football pitches);
- 91% of the TfSE area's warehouse inventory is either of average or poor quality. As a consequence new, high quality or refurbished stock is required, in some areas including Rother, Hastings, Wealden, Eastbourne Ashford and Dover;
- Savills' estimate a significant shortfall in the next 10 years in the availability of warehousing land due to the continuing rise in online shopping, population and household growth; and
- Feedback from the freight and logistics sector and an analysis of local plans suggest that the current planning system does not make sufficient provision for the supply of suitable land which is appropriately located to ensure that future demand can be met.

3.5 A copy of the report on the warehousing provision study is attached at **Appendix 3**. A draft copy of the report was circulated to Transport Strategy Working Group and

district and borough representatives for comment. Comments from these groups have been incorporated into the final draft.

Recommendations from the Warehousing Provision study:

3.6 Whilst the building and design of warehouses is market led, there is a need for better strategic planning and proactive measures to ensure that there is an adequate supply of land to address the future increase in warehouse demand within the TfSE area. These measures include:

- improved co-ordination across local planning authorities to help address regional warehousing needs by optimising land use;
- working with government to support the strengthening of planning policy and guidance to ensure that warehousing is considered as a critical component of regional infrastructure and as an enabler of housing delivery;
- exploring alternative methods for calculating warehousing need to better account for warehousing's role in enabling efficient supply chains and its role supporting distribution to and servicing of population centres, particularly new ones; and
- encouraging the wider availability and utilisation of data on warehousing trends, demand, supply, and quality performance by the public and private sectors to facilitate more informed planning and decision making.

3.7 As a next step TfSE will share this report with central government and our local authority, business and freight and logistics partners, including the Wider South East Freight Forum and identify ways in which we can take forward these recommendations.

4. Viability of Waterborne Freight Study

4.1 The purpose of the waterborne freight study was to:

- Evaluate the viability of integrating short sea shipping (SSS), (this being shipping that moves between UK ports), and inland waterways (IWW) into the freight transport system as a mechanism to reduce carbon emissions, mitigate road network congestion and stimulate economic growth in the coastal towns in the TfSE area.
- Identify any opportunities and the constraints on using SSS and IWW, for example the additional costs of developing additional road, rail and interchange facilities at the ports where it might prove possible to introduce or expand waterborne freight activity.

4.2 The scope of the study's analysis included:

- The identification the freight market segments most suitable for transfer to waterborne methods.
- An assessment of whether there is a substantial volume of freight, currently moved by road, which could be efficiently and viably shifted to waterborne methods.
- Projections of the future trajectories of relevant market segments.
- An evaluation of the viability and competitiveness of establishing a SSS service connecting ports along the coast.
- Identification of the infrastructure enhancements and modifications that would be required to facilitate the transition to waterborne freight.
- Investigate the economic viability of the transition to waterborne freight.

- Analyse, whether in light of the above information, a transition to waterborne freight is currently financially viable in the TfSE area.

4.3 Two stakeholder workshops were held with representatives from DfT, Portsmouth City Council, Portico Shipping, Portsmouth Port, the Road Haulage Association, Logistics UK, Solent Transport, AB Ports, Southampton City Council, Brighton & Hove Council, UK Major British Ports, Shoreham Port, Port of London Authority and Amazon. These workshops discussed:

- The challenges and opportunities presented through the possible expansion of the volume of waterborne freight in and around the TfSE area; and
- The key local opportunities and constraints, what the short-term priorities are for the organisations involved and what the potential next steps should be.

4.4 Key findings of the study included the following:

- Expanding waterborne freight could create new job opportunities around ports.
- Overall, waterborne freight could improve road congestion and air quality, however, there is a possibility that additional activity at the ports may increase local road congestion.
- There is a significant volume of goods that are well-suited for waterborne transport including aggregates, metals, and petroleum products. Their less urgent delivery times and their bulk mean it could be more cost effective to transport these goods by water.
- For other goods such as groceries and online purchases, road transport remains the most cost effective method of delivery because of the flexibility and speed of delivery demanded by customers.
- There would be a number of challenges with expanding short sea shipping in the TfSE area. There would be significant infrastructure costs, particularly in upgrading port facilities to handle increased cargo and warehousing needs. In addition most ports in the TfSE region specialise in specific cargo types, which limits their ability to diversify without significant additional investment.
- The fragmented nature of the inland waterway network in the TfSE area limits the amount of continuous freight movement that could be provided for.
- Significant investment would be needed to make it a viable alternative to road transport.
- An absence of specific government incentives, long-term regulatory frameworks and/or supportive policies, particularly in planning, all serve to make waterborne freight less competitive than other modes.
- There is a lack of understanding about the benefits of and expertise in waterborne freight by both the public and freight and logistics sectors. This is due partly to a lack of appropriate data which limits the ability of the public and private sectors to assess the feasibility of waterborne freight.

4.5 There are three locations in the TfSE area where an increase in waterborne freight could be encouraged:

- Isle of Wight & Solent - this region could utilise the existing vessels and operational frameworks currently in place for Red Funnel, Hover Travel and Wight Link to

increase or expand waterborne freight which could serve as a scalable model for similar projects elsewhere.

- Southampton - with its established rail connectivity, Southampton Port is well positioned to expand its rail freight capacity and there may be opportunities to use waterborne freight as part of these additional rail journeys however, more research will be needed to investigate this.
- Port of London Authority – although outside the TfSE area, London Gateway and Port of Tilbury are actively expanding, creating opportunities to increase the demand for waterborne freight at smaller feeder ports such as Chatham Docks and the Port of Sheerness.

4.6 A copy of the report on the viability of waterborne freight study is contained in **Appendix 4**. A copy of the key findings was circulated to the stakeholders and a draft copy of the report was circulated to Transport Strategy Working Group for review and comment. Comments from these groups have been incorporated into the final draft.

Recommendations from the Waterborne Freight study

4.7 The waterborne freight study has not been able to demonstrate that increasing the volume of waterborne freight in the TfSE area is currently financially viable. The report makes a number of recommendations about what would be needed to improve financial viability. However, even if it was found to be viable, it is unlikely to have significant impact on carbon emissions, road traffic congestion and economic growth and would deliver negligible returns for the scale of investment anticipated. Any further work would be reliant on obtaining better data on which to assess its potential in greater detail, and in the current economic climate, the significant financial investment needed for infrastructure improvements at the ports and inland waterways is unlikely to be forthcoming. Therefore, there is little prospect of the stakeholders taking the actions necessary to support an increase in the viability of waterborne freight in the TfSE area in the near future.

5. Financial considerations for both studies

5.1 The cost of the warehousing provision study was £57,715 and for the waterborne freight study was £42,600. Both were funded from the DfT grant allocation for 2023/24 and 2024/25.

6. Conclusions and recommendation

6.1 The warehousing provision and waterborne freight studies were undertaken to address two key actions in TfSE's Freight, Logistics and Gateways Strategy. The members of the Partnership Board are recommended to agree the Reports for the Warehousing Provision and Viability of Waterborne Freight Studies.

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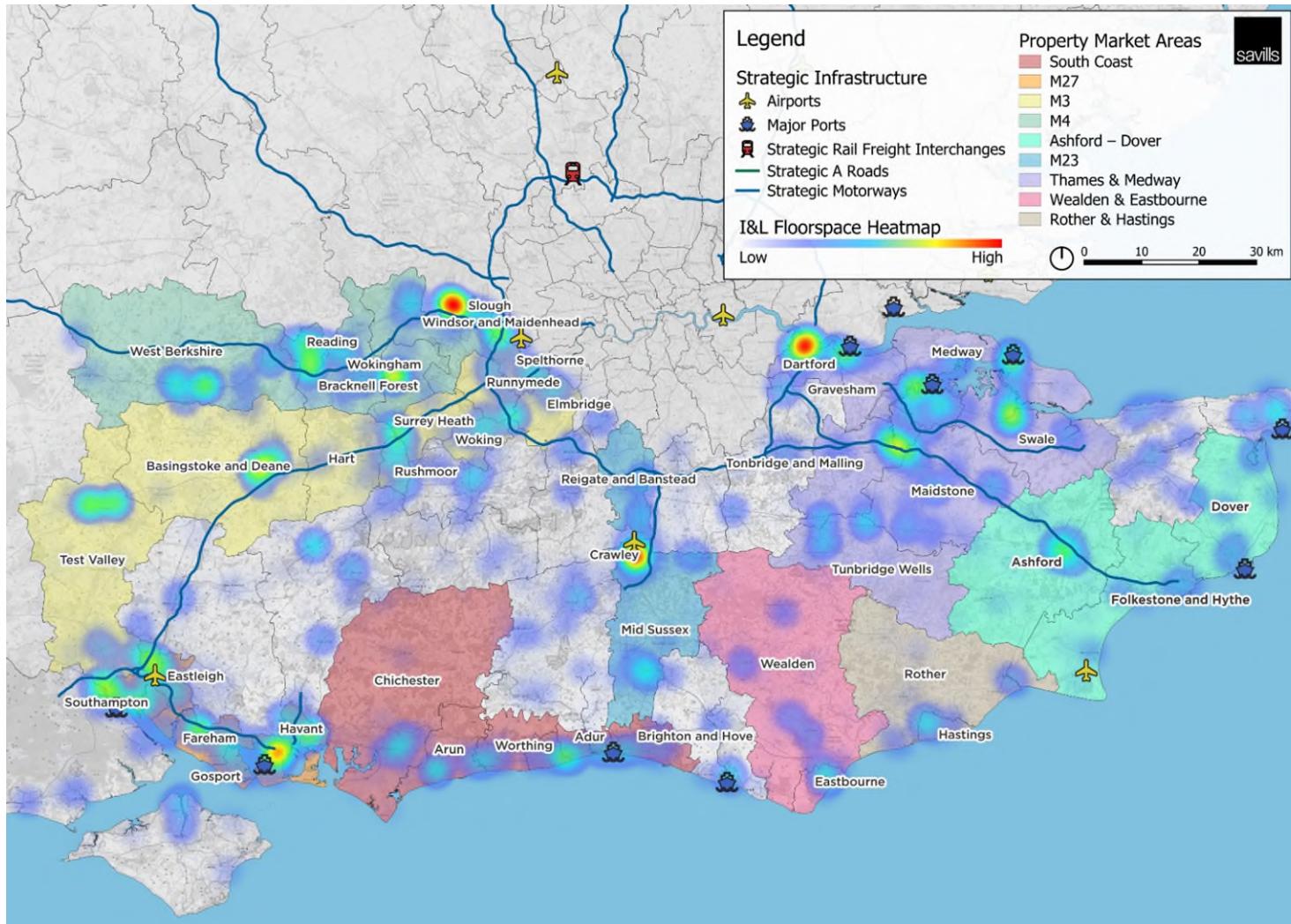
20250317 - PB - Item 9 - Warehousing Provision and Waterborne Freight Viability Studies - Report

Appendix 1 Table showing the local planning authorities included in each PMA and the PMA groupings.¹

<p>M4</p> <ul style="list-style-type: none"> • Bracknell Forest • Reading • Slough • West Berkshire • Windsor & Maidenhead • Wokingham 	<p>M3</p> <ul style="list-style-type: none"> • Elmbridge • Runnymede • Spelthorne • Surrey Heath • Woking • Basingstoke & Deans • Hart • Rushmoor 	<p>M27</p> <ul style="list-style-type: none"> • Fareham • Eastleigh • Gosport • Havant • Portsmouth • Southampton
<p>South Coast</p> <ul style="list-style-type: none"> • Adur • Arun • Brighton and Hove • Chichester • Worthing 	<p>M23</p> <ul style="list-style-type: none"> • Reigate & Banstead • Crawley • Mid Sussex 	<p>Thames & Medway</p> <ul style="list-style-type: none"> • Dartford • Gravesham • Maidstone • Medway • Swale • Tonbridge and Malling • Tunbridge Wells • Ashford and Dover • Ashford • Dover • Folkstone and Hythe
<p>Wealden & Eastbourne</p> <ul style="list-style-type: none"> • Wealden • Eastbourne 	<p>Rother & Hastings</p> <ul style="list-style-type: none"> • Rother • Hastings 	

¹ Source: Savills (2025)

20250317 - PB - Item 9 - Warehousing Provision and Waterborne Freight Viability Studies - Report
 Appendix 2 Map showing the distribution of warehousing in the TfSE area.¹



¹ Source: Savills (2025)

Warehousing Provision Study

Report

18 February 2025: Version 5.0

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Executive summary

Context

The Warehousing Provision Freight Study was commissioned by Transport for the South East (TfSE) and prepared by Steer. Recognising the critical role of freight and logistics in the region's economic success, TfSE published its Freight Logistics and Gateways Strategy in 2022. This comprehensive strategy outlines how strategic planning and policy development, including investment decisions, can enable the sector to support sustainable growth. A key component of this strategy is ensuring an adequate supply of logistics land and property. To address this need, the Strategy includes a measure to undertake a detailed logistics land and property market review. This Warehousing Provision Study assesses current and anticipated demand for logistics land and property within the TfSE region.

Study objectives

Within this context, the objectives of the Warehousing Provision Study are to:

- Understand the quantum, type and suitability of the warehousing stock in the TfSE area;
- Provide robust analysis as to whether the current stock is sufficient for the efficient function of the freight and logistics sector;
- Provide forecasts for likely future demand; and
- Identify where it would be recommended to increase the supply of warehousing stock to support the more efficient function of the freight and logistics sector.

Study approach

The study comprised three main phases of work:

- An initial phase of work principally involving desktop research to understand the role of warehousing in efficient supply chains overall, and to identify how warehousing is planned for by local planning authorities in the TfSE area, including a review of Local Plans;
- A stakeholder engagement phase, involving discussions with representatives from Dartford Council and Portsmouth City Council, Logistics UK, Network Rail, the Port of Southampton and the UK Warehousing Association (UKWA); and
- Analysis of the supply of and demand for warehousing in the TfSE area; focussing on nine sub-regional Property Market Areas (PMAs) that account for 84% of the total warehousing inventory.

Property Market Areas (PMAs)

To accurately reflect the functioning of the warehousing property market within the TfSE area and to facilitate comparisons of supply and demand levels at the regional level, the TfSE area has been divided into nine sub-regional Property Market Areas (PMAs). These PMAs consist of small groupings of local planning authority areas.

The PMAs were created through a methodology that involved mapping all warehousing facilities in the TfSE area and overlaying key transport infrastructure to identify key concentrations of warehousing stock in the area. A shortlist of PMA geographies was further refined at a collaborative workshop to ensure TfSE's institutional knowledge of the area was incorporated.

Each PMA comprises two to nine local planning authorities. Together, the PMAs cover about 84% of all warehousing stock in the TfSE area. The PMAs are:

- Thames Medway
- M4
- M3
- M27
- South Coast
- M23
- Ashford /Dover
- Wealden / Eastbourne
- Rother / Hastings

Study findings

The role of warehousing in efficient supply chains

Warehousing plays a critical role in supply chains by facilitating storage and distribution across key stages, from the procurement of raw materials to the distribution of finished products. Different types of warehousing facilities support various stages of the supply chain, and can be categorised by their function, ownership, and goods type.

Warehousing facilities benefit from co-location to multi-modal transport links, thereby being able to handle and distribute goods quickly.

Selecting a site for warehousing is a commercial function that is undertaken by commercial actors; typically, property developers in association with pension/investment funds. Developers identify and acquire sites, design and build the properties and then let them to occupiers. The market determines the rental value of the space. However, planning authorities play an important role in determining the need for warehousing, and authorities are encouraged to consider warehousing provision within their Local Plans. Though there is some precedent for cross-border co-operation and planning for warehousing between local authorities, it is limited and increasingly dated. There is a significant role for the Sub-national Transport Bodies such as Transport for the South East to play in raising awareness of the need to plan at the appropriate spatial scale for warehousing and supporting efforts by local planning authorities to do so.

Supply of warehousing in the South East

The TfSE area comprises approximately 308 million sq.ft of warehouse inventory, with 84% located within nine sub-regional Property Market Areas (PMAs). The largest PMA is Thames Medway, accounting for 21% of the total inventory. The study finds that the TfSE area as a whole is supply-constrained, with an availability rate below the 8% equilibrium level: 8% is the industry-recognised level below which available supply becomes constrained, and rents increase as strong occupier demand compete for limited available stock. Table 0.1 on the following page shows the availability rate for each of the TfSE PMAs. This is reflected in national trends seen across the last 15 years, indicating a need for more warehousing stock.

The quality of existing stock is predominantly average or poor, with only 9% considered above average quality. There is, therefore, a need for more high-quality warehousing stock to meet modern occupier requirements.

Current and future demand for warehousing

The study reveals that between 2012 and 2024 demand for warehousing in the TfSE area has consistently outpaced supply, with an average annual net absorption (demand) of 2.3 million sq.ft compared to net deliveries (supply) of 1.9 million sq.ft. This has resulted in strong rental growth, with rents increasing by 78%. At present, logistics and manufacturing are the primary drivers of demand, accounting for 70% of total floorspace leasing.

Key drivers of future demand include growth in e-commerce, housing growth, and increased freight flows. In addition, the study identifies 511 hectares of industrial land in the development pipeline that is under construction, in planning, or proposed. Despite this pipeline, a shortfall is forecast for the TfSE area, with a forecast demand for 936 hectares of industrial land over the next 10 years, with the largest requirement in the Thames Medway PMA accounting for 51% of the total demand, as shown in Table 0.1.

Table 0.1: Availability rate and 10-year demand by PMA

PMA	Availability rate (%)	10-year land demand (Ha)
TfSE area	6.1%	936
Thames Medway	6.3%	481
M4	7.3%	103
M3	9.4%	85
M27	5.6%	42
South Coast	6.5%	63
M23	10.7%	65
Ashford / Dover	4.5%	20
Wealden / Eastbourne	5.4%	12
Rother / Hastings	0.7%	63

Source: Availability rate: CoStar, Savills (2025), 10-year land demand: Savills (2025)

Recommendations and next steps

Effective planning is crucial to ensure an adequate and appropriately located supply of warehousing that meets current and future demand. While national planning frameworks increasingly recognise the importance of warehousing, more proactive measures are needed to address the shortage in the TfSE area. These measures could include improved coordination across local planning authorities to address the regional need for warehousing; working with government to strengthen planning policy and guidance to recognise warehousing as 'infrastructure'; and exploring alternative methods for calculating warehousing needs.

TfSE will engage through the Wider South East Freight Forum (WSEFF) with local authorities and operators/developers of warehousing on the subject of how the identified shortage of warehousing space in the TfSE area can be addressed.

Table of contents

Executive summary	3
Table of contents	7
1 Introduction	10
1.1 Introduction to the study	10
1.2 Study context	10
1.3 Objectives of the study	11
1.4 Study approach	11
1.5 Structure of this report	11
2 The role of warehousing in efficient supply chains	12
2.1 The need for warehousing	12
2.2 Types of warehousing	12
2.3 Factors influencing warehousing location and inventory	15
2.4 National warehousing trends	20
3 How warehousing is planned for	23
3.1 Assessing the need for warehousing	23
3.2 The challenges with the current system of planning warehousing	33
4 Supply of warehousing in the South East	35
4.1 Defining the geographies of the analysis	35
4.2 Existing warehousing inventory in the TfSE area	39
4.3 Evaluating current stock	52
4.4 Conclusions	60
5 Current demand for warehousing in the South East	62
5.1 Current demand profile	62
5.2 Conclusions	70
6 Future trends and forecasts	71
6.1 Factors influencing future demand	71
6.2 Future demand for warehousing provision	74
6.3 Future supply	76
6.4 Conclusions	80
7 Balance of supply and demand	81
7.1 Assessment of supply-demand balance in the PMAs	81
8 Summary of findings	83
9 Conclusion	84

9.1 Recommendations	84
9.2 Next steps	84
Appendix A: 8% equilibrium availability – an explanation	85
Appendix B: CoStar Quality Rating	88
Appendix C: Suppressed Demand methodology	90
Appendix D: Summary of findings for PMAs	93

List of Figures

Figure 2-1: Changes in numbers and types of workers employed at warehouse facilities (2006 - 2022).	18
Figure 2-2: Change in warehousing space in regions across England and Wales (2015 – 2024)	21
Figure 2-3: Amount of warehouse space associated with warehouse size-bands (2015 – 2024)	22
Figure 2-4: Amount of warehouse space associated with warehouse occupier (2015-2024)	22
Figure 4-1 TfSE area comprising nine key PMAs	37
Figure 4-2 Thames Medway PMA, comprising the local planning authorities of Dartford, Gravesham, Maidstone, Medway, Swale, Tonbridge and Malling and Tunbridge Wells	43
Figure 4-3 M4 PMA, comprising the local planning authorities of Bracknell Forest, Reading, Slough, West Berkshire, Windsor and Maidenhead and Wokingham	44
Figure 4-4 M3 PMA, comprising the local planning authorities of Elmbridge, Runnymede, Spelthorne, Surrey Heath and Woking	45
Figure 4-5 M27 PMA, comprising the local planning authorities of Fareham, Eastleigh, Gosport, Havant, Portsmouth and Southampton	46
Figure 4-6 South Coast PMA, comprising the local planning authorities of Adur, Arun, Brighton and Hove, Chichester and Worthing	47
Figure 4-7 M23 PMA, comprising the local planning authorities of Reigate and Banstead, Crawley and Mid Sussex	48
Figure 4-8 Ashford / Dover PMA, comprising the local planning authorities of Ashford, Dover, Folkestone and Hythe	49
Figure 4-9 Wealden / Eastbourne PMA, comprising the local planning authorities of Wealden and Eastbourne	50
Figure 4-10 Rother / Hastings PMA, comprising the local planning authorities of Rother and Hastings	51
Figure 4-11: Availability rate (2014-2024) in the TfSE area	52
Figure 5-1: TfSE area net absorption and net deliveries per annum (2012-2024) (sq.ft)	62
Figure 5-2: Rental growth vs. inflation (2014-2024) (2014=100)	66
Figure 5-3: TfSE area share of floorspace leased by sector (2019-2024)	69
Figure 5-4 Demand for floorspace by sector (2019-2024)	70
Figure 6-1: UK internet sales retail sales (2015-2029)	72
Figure 6-2: Dwelling completions and internet sales as a % of retail sales	73

Figure 6-3: Projected compound annual growth of freight by transport mode	74
Figure 6-4: Development pipeline in PMAs across the TfSE area by project status	78
Figure 6-5: Development pipeline in PMAs across the TfSE area by project status and size band	79

List of Tables

Table 2.1: Warehouse types	13
Table 3.1: Summary of key findings from Local Plans	27
Table 3.2: Summary of key findings from Local Transport Plans	31
Table 4.1: PMAs and constituent local planning authorities	38
Table 4.2: Existing inventory across the TfSE area, PMAs and local planning authorities	40
Table 4.3: Availability of warehousing stock across the TfSE area, PMAs and local planning authorities (2025)	53
Table 4.4: Quality of stock within the TfSE area, PMAs and local planning authorities (2025)	56
Table 4.5: Inventory by size band in the TfSE area, PMAs and local planning authorities (2025)	59
Table 5.1: Net absorption and net deliveries sq.ft p.a. (2012-2024)	63
Table 5.2: Rental growth in the TfSE area, PMAs and local planning authorities (2014-2024)	66
Table 6.1: Total projected industrial demand over a 10-year forecasting period in the PMAs	75
Table 6.2: Future supply pipeline in the PMAs	77
Table 7.1: Projected shortfall / surplus in industrial land across the TfSE area	81

1 Introduction

1.1 Introduction to the study

Steer has been commissioned by Transport for the South East (TfSE), the sub-national transport body for the South East of England, to undertake the Warehousing Provision Study to provide insight into the impact of current trends in logistics land and property provision (warehousing) and forecasting of likely future demand for this land use.

Steer has been supported in this work by Savills Economics who have provided data, market intelligence and associated analysis to identify, principally, the distribution, type and quality of warehousing stock within the TfSE area; areas of higher demand for warehousing; and forecasting of levels of future demand for warehousing.

1.2 Study context

1.2.1 Transport for the South East's Transport Strategy

TfSE's 2020 Transport Strategy envisions the region's growth and transformation until 2050, aiming for the South East of England to become a leading global hub for net zero carbon with sustainable economic growth. The vision hinges on:

- the successful integration of transport, digital, and energy networks, resulting in enhanced connectivity and environmental quality; and
- a high-quality, reliable, safe and accessible transport network that offers seamless door-to-door journeys, enabling businesses to compete and trade more effectively in the global marketplace and giving residents and visitors the highest quality of life.

1.2.2 Transport for the South East's Freight Logistics and Gateways Strategy

Recognising the importance of the freight and logistics sector's activities, success and wider impacts to the realisation of the vision, TfSE published its Freight Logistics and Gateways Strategy in 2022. The Freight Logistics and Gateways Strategy is an in-depth exploration of how the freight and logistics sector can be enabled, through strategic planning and policy development, including investment decisions, to support sustainable economic growth and play a full and active role in delivering on the vision.

The Freight and Logistics Gateways Strategy identifies the importance of the provision of a suitable supply of logistics land and property in enabling efficient, cost-effective and low-carbon supply chains. Logistics operators require land for warehousing close to key customer bases and the strategic transport network. Where there is inadequate supply of suitable stock, operators must seek premises further from the optimal location and transport goods over a longer distance, wasting a larger proportion of the journey, with associated impacts for emissions, congestion and operational efficiency.

Planning authorities can facilitate the provision of warehousing in suitable locations by recognising areas in which there is greater (and/or growing) demand for warehousing and designating enough land for development for this purpose. They can also protect land which is designated for logistics and warehousing from development for other purposes such as housing or retail, where there is a need to do so.

The Freight and Logistics Gateways Strategy includes a strategic action to increase the provision of logistics land and property in the TfSE area, and an associated measure to undertake a detailed logistics land and property market review to assess the current and anticipated demand for logistics land and property. This study, the Warehousing Provision Study, is the implementation of this measure.

1.3 Objectives of the study

- Within this context, the objectives of the Warehousing Provision Study are to:
- Understand the quantum, type and suitability of the warehousing stock in the TfSE area.
- Provide robust analysis as to whether the current stock is sufficient for the efficient function of the freight and logistics sector.
- Provide forecasts for likely future demand. Identify where it would be recommended to increase the supply of warehousing stock to support the more efficient function of the freight and logistics sector.
- The study will assist local planning authorities in planning for additional warehousing stock, where required.

1.4 Study approach

The study comprised three main phases of work:

- an initial phase of work principally involving desktop research to understand the role of warehousing in efficient supply chains overall, and identify how warehousing is planned for by local planning authorities in the TfSE area, including a review of Local Plans;
- a stakeholder engagement phase, which involved speaking with representatives from Dartford Council and Portsmouth City Council, Logistics UK, Network Rail, the Port of Southampton and the UK Warehousing Association (UKWA) to get their insight into their warehousing needs, gaps in provision, opportunities and constraints around land use and potential new sites which have been reflected throughout the study; and
- analysis of the supply of and demand for warehousing in the TfSE area.

1.5 Structure of this report

The remainder of the report is structured as follows:

- Chapter 2: the role of warehousing in efficient supply chains
- Chapter 3: how warehousing is planned for
- Chapter 4: supply of warehousing in the South East
- Chapter 5: current demand for warehousing in the South East
- Chapter 6: future trends and forecasts
- Chapter 7: balance of supply and demand
- Chapter 8: summary of findings
- Chapter 9: conclusion

2 The role of warehousing in efficient supply chains

2.1 The need for warehousing

Warehousing facilitates storage and distribution across key stages of the supply chain, from the procurement of raw materials to the distribution of finished products. Key supply chain efficiencies that are enabled by warehousing include¹:

- Mitigating demand variability: uncertain or fluctuating demand patterns for goods require storing inventory to meet customer needs.
- Optimising transport: the physical distance between manufacturers and end consumers often requires intermediate storage to optimise transport and meet planned delivery times. In addition, strategic inventory management helps to justify larger, more cost-effective shipments.
- Enabling production efficiencies: holding inventory can enable production efficiencies, for instance, through economies of scale, or bulk purchasing, helping to ensure a continuous supply of products to customers.

The role of warehousing is fundamental to the 'classic' supply chain within the UK, which involves transferring goods from their place of production or import, and consolidating these in a large warehouse, often located centrally within the country. Goods are then transported to regional distribution centres, and then to retailers or local distribution centres. At the regional scale, the appropriate provision and location of warehousing sites is critical to ensure the efficient movement of goods into a region's urban areas, including:

- the ability to transfer goods onto more sustainable and zero emission forms of transport, and;
- the ability to consolidate goods to optimise the loads carried by larger vehicles and timings of these deliveries.

2.2 Types of warehousing

Different types of warehousing facilities are used to support different stages of the supply chain. Primarily, warehouse types are categorised by facility function, ownership, and goods type². Table 2.1 outlines key terms that are commonly used to describe facilities according to this typology. Warehousing facilities can fulfil one or more of these purposes.

¹ Ivanov, D., Tsipoulanidis, A., & Schönberger, J. (2019), Global Supply Chain and Operations Management

² Piecyk, M. and Allen, J. (2023), [Warehousing in the UK: Operations, Planning and Decarbonisation \(Summary Report\)](#)

Table 2.1: Warehouse types

Warehouse type	Description										
Function											
Distribution	A place where finished goods are transferred from one vehicle to another in their journey to an end user. This type includes warehouses for parcel and mail sorting, as well as online retail.										
	Distribution warehouses can be further categorised as follows ³ :										
	<table border="1"> <thead> <tr> <th>Type of warehouse</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>National Distribution Centres</td> <td> <p>500,000 – 1 million+ sq.ft on up to 100 acres.</p> <p>This amount of warehousing space represents approximately 7 – 14 football pitches.</p> <p>100 acres represents the equivalent space of approximately 57 football pitches.</p> </td> </tr> <tr> <td>Regional Distribution Centres</td> <td> <p>200, 000 – 500,000 sq.ft over five acres</p> <p>This amount of warehousing space represents approximately 5 – 13 large supermarkets.</p> <p>Five acres is approximately the size of five and half large supermarkets.</p> <p>To note, some occupiers such as Amazon operate larger units.</p> </td> </tr> <tr> <td>Last mile fulfilment</td> <td> <p>Urban/peri-urban site, close to the final delivery destination.</p> <p>These can use spaces of up to 100,000 sq.ft on a minimum of five acres (though can be significantly less on constrained urban sites).</p> <p>This is the equivalent space used by approximately 650 car parking spaces.</p> </td> </tr> <tr> <td>Pick-up points</td> <td> <p>A location to which the consumer travels to collect a parcel, such as:</p> <ul style="list-style-type: none"> Click and Collect space within an existing retail store. Parcel locker facility such as Amazon Locker in central urban locations (such as hotel, store, or train station) Specific pick-up store in a town centre or train station, such as Doodle. <p>Hosting a pick-up point can drive additional in-store spend.</p> </td> </tr> </tbody> </table>	Type of warehouse	Description	National Distribution Centres	<p>500,000 – 1 million+ sq.ft on up to 100 acres.</p> <p>This amount of warehousing space represents approximately 7 – 14 football pitches.</p> <p>100 acres represents the equivalent space of approximately 57 football pitches.</p>	Regional Distribution Centres	<p>200, 000 – 500,000 sq.ft over five acres</p> <p>This amount of warehousing space represents approximately 5 – 13 large supermarkets.</p> <p>Five acres is approximately the size of five and half large supermarkets.</p> <p>To note, some occupiers such as Amazon operate larger units.</p>	Last mile fulfilment	<p>Urban/peri-urban site, close to the final delivery destination.</p> <p>These can use spaces of up to 100,000 sq.ft on a minimum of five acres (though can be significantly less on constrained urban sites).</p> <p>This is the equivalent space used by approximately 650 car parking spaces.</p>	Pick-up points	<p>A location to which the consumer travels to collect a parcel, such as:</p> <ul style="list-style-type: none"> Click and Collect space within an existing retail store. Parcel locker facility such as Amazon Locker in central urban locations (such as hotel, store, or train station) Specific pick-up store in a town centre or train station, such as Doodle. <p>Hosting a pick-up point can drive additional in-store spend.</p>
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Last mile fulfilment	<p>Urban/peri-urban site, close to the final delivery destination.</p> <p>These can use spaces of up to 100,000 sq.ft on a minimum of five acres (though can be significantly less on constrained urban sites).</p> <p>This is the equivalent space used by approximately 650 car parking spaces.</p>										
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³ Turley for the British Property Federation (2018), [What Warehousing Where?: Understanding the Relationship between Homes and Warehouses to Enable Positive Planning](#)

Storage	Physical spaces designed to securely store and manage goods/inventory.
Production	Facilities that produce unfinished or finished products that are likely to require use of a warehouse for temporary storage before onwards distribution.
Retail	Consumer-facing warehouses that hold goods for direct purchasing by end users.
Smart warehousing	Companies may run automated warehousing functions using robotics and cloud technologies to save labour costs, improve accuracy and generate higher productivities ⁴ . Structural upgrades such as higher ceilings and stronger air conditioning may be required to support smart functions.
Common ownership models⁵	
Shared user/'Public'	A shared-user warehouse is typically operated by a specialist third party for more than one user. Shared-user warehouses are mostly used by manufacturers, retailers or wholesalers with insufficient goods throughput to warrant their own dedicated warehouse.
Private	A dedicated warehouse is operated for a single user, such as a manufacturer, wholesaler, or retailer. It may be operated by the user themselves or by a specialist third party on their behalf.
On-demand	On-demand warehousing models involve leasing warehouses to a group of customers with fluctuating storing/handling capacity. This may be arranged via an online platform, which manages the interactions and the matching between the lenders and customers.
Goods type^{6,7}	
Fulfilment or e-commerce	Fulfilment of (ambient) retail orders generated from an online store, usually for household consumers but may also include business-to-business goods (i.e. goods that are sold from one business to another). For fulfilment of consumer orders, the client's systems need to be integrated with an e-commerce platform such as eBay, Shopify, WooCommerce, Amazon and Magento.
Temperature-controlled	Products requiring specific temperature conditions, such as chilled or frozen items, require specialised storage facilities. Ambient goods may also require controlled temperature ranges to preserve their quality.
Hazardous goods	Substances with inherent risks, subject to stringent regulations regarding handling, storage, and transport. Safety and quality control are fundamental to operations, supported by emergency response processes, and highly efficient IT systems.

⁴ Kamali, A. (2019), [Smart Warehouse vs. Traditional Warehouse - Review](#)

⁵ Tornese, F. et al. (2020) [On-demand warehousing: main features and business models](#)

⁶ Piecyk, M. and Allen, J. (2023), [Warehousing in the UK: Operations, Planning and Decarbonisation \(Summary Report\)](#)

⁷ UKWA Limited and Enterprise Ireland, (2022) [Guide to Warehousing in the UK](#)

Licensed products	Items like pharmaceuticals, which require specific licenses, controlled storage conditions, and highly accurate operations to remove the risks of decontamination.
Bulk goods	Commodities stored in large quantities, such as liquids, powders, gases, and agricultural products.
Outdoor storage goods	Durable items suitable for open-air storage, often in large quantities.
Bonded goods.	A bonded warehouse is a secure space in which goods liable to import duty and VAT are stored. Customs duty and VAT payments on these items are deferred until the goods are sold or removed from the bonded warehouse.

2.3 Factors influencing warehousing location and inventory

2.3.1 Overview

Selecting a site for warehousing is a critical, strategic decision made by organisations to optimise their logistics operations. Decision-making tools to determine optimal warehouse locations involve assessing interrelated variables (and sub-variables). During decision-making, these variables might be weighted and/or modelled, depending on the sensitivity of commercial operations to each⁸.

Primary variables include:

- Transport connectivity
- Labour market access and skills
- Proximity to markets and customers

Secondary variables include:

- Availability of supporting infrastructure (e.g. utilities such as electricity, water, and cloud technology)
- Land availability and costs (e.g. investment, storage, rental)
- Regulatory and political mechanisms (e.g. processes, incentives and investment, political landscape)
- Potential for market growth

The following sections will explore the primary variables in more detail.

2.3.2 Transport connectivity

The co-location of warehousing with efficient, reliable, resilient, and high-quality transport links are a significant factor that influences warehousing location.

2.3.2.1 Access to the Strategic Road Network/Major Road Network

The UK's Strategic Road Network (SRN) and Major Road Network (MRN) provide vital connections to and from major ports, airports, and industrial hubs, thereby facilitating the movement of goods across the country and internationally. Warehouses located

⁸ Ivanov, D., Tsipoulanidis, A., & Schönberger, J. (2019), Global Supply Chain and Operations Management

near these networks benefit from improved access to both domestic and international markets, resulting in reduced transit times and transport costs, plus allowing for faster goods turnover and better supply chain integration. This is particularly important for time-sensitive goods and just-in-time inventory management strategies.

Additional drivers, including the competitive cost of using HGVs in comparison to more expensive modes (such as rail), alongside increased HGV carrying capacity (in weight and volume), and retailer control of supply chain, can also result in increased warehouse provision in proximity to road networks.

2.3.2.2 Rail access and interchange

In contrast to goods moved via the SRN/MRN, rail freight is more frequently used to transport large volumes of goods over long distances, and through densely populated areas. Furthermore, for the export and import of goods via ports, rail freight serves as a critical 'artery' connecting the rest of the UK, through facilitating intermodal transport⁹. Intermodal transport involves the use of multiple modes of transport to complete a journey. Rail can be used to undertake the primary long-haul stage of the journey, with other modes (usually road) providing the secondary/final delivery leg of the journey. Therefore, warehousing situated near rail access can facilitate intermodal transport, which provides several benefits, most notably, the potential to alleviate vehicle congestion on the road network.

The established model for Rail Freight Interchange development is dependent on a critical mass of demand for, and supply of, distribution floorspace, which acts as the catalyst for generating rail freight traffic, and also for generating sufficient income from the floorspace to fund the significant costs of the rail and road connections to the transport network¹⁰. However, there are currently no Strategic Rail Freight Interchanges (SRFI) involving a critical mass of warehousing in the South East.

2.3.2.3 Seaports and access to navigable waterways

The UK shipping sector is responsible for 95% of UK trade by volume (75% by value)¹¹. Warehouses are an integral part of port operations, as they facilitate the storage and transfer of goods destined for maritime or inland transport. Waterborne freight requires warehouse space at both international ports along the coast, and domestic ports along domestic waterways. The type of warehousing depends on the type of goods typically brought into each port, but could include open storage, consolidation hubs, cold storage or quayside storage for direct access to ships and marine vessels.

Common configurations of port-based warehousing include¹²:

- Container-oriented logistics parks: the dominant type, with a number of large warehouses in proximity to or co-located with the container terminal locations and intermodal terminal facilities.

⁹ Deloitte for Rail Delivery Group (2021) [Assessing the Value of Rail Freight](#)

¹⁰ Intermodality for TfSE (2024). *TfSE Freight Strategy Implementation: Intermodal Freight Study: Technical Note 1: update of GBRTT content*. Unpublished.

¹¹ WSP for TfSE (2019) [TfSE Freight, Logistics and Gateway Review](#)

¹² Theo Notteboom, T. and Rodrigue, J. (2022) [Ports and Distribution Networks](#)

- Traditional seaport-based logistics parks: mainly associated with manufacturing and heavy industry, which has a high material input carried by maritime transport.
- Specialised seaport-based logistics parks: these cover a variety of functions, often closely related to the characteristics of the seaport.

2.3.2.4 Access to airports

Warehouses located near airports, particularly those with strong international air freight operations, benefit from the ability to handle and distribute goods quickly across global markets. Major airports are central to air cargo movements and therefore attract warehouses and distributors that can access air freight services. Proximity to airports enables quicker transit of goods, especially for time-sensitive items like perishable goods, high-value products, and e-commerce shipments. Goods can be processed at the airport's cargo terminals and then quickly transferred to warehouses for distribution. Therefore, warehouses in proximity to airports connect goods between air, road, and rail, providing critical multimodal connectivity required by businesses to optimise long-distance supply chains.

2.3.3 Labour market access and skills

Warehouses often require many people to operate them and therefore require a large pool of employees with varying skillsets. Employment created by logistics sites includes a variety of job roles, from entry-level (e.g. warehouse operatives and warehouse associates) to administrative (e.g. logistics coordinators) and managerial roles (e.g. warehouse manager)¹³. In 2022, Prologis UK calculated that, on average, its logistics customers employed one person for every 97m² of floor space across their sites¹⁴.

In reviewing location options, warehouse occupiers may consider the following labour force characteristics¹⁵:

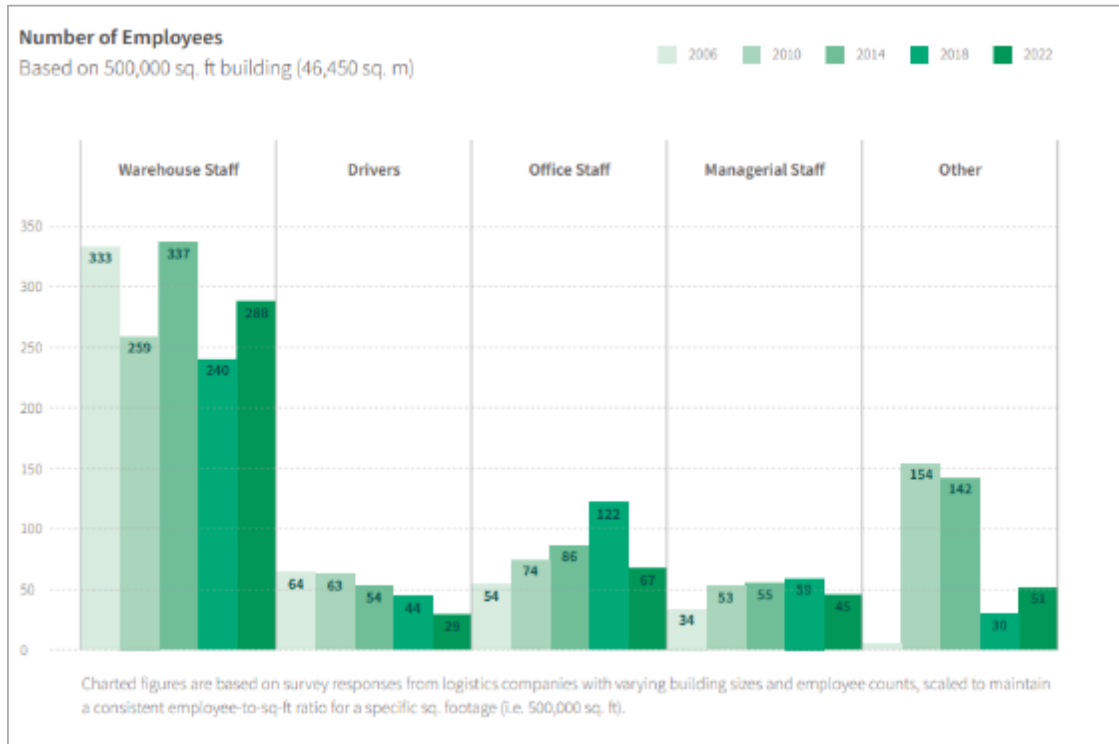
- Latent capacity in the labour force (i.e. unemployment)
- Skills levels
- Occupation types
- Planned housing growth, including affordable housing.

¹³ Frontier Economics (2022) [The Impact of Logistics Sites in the UK](#)

¹⁴ Prologis (2023) [Driving Employment Growth Within The UK's Logistics Sector](#)

¹⁵ Turley (2019), [What Warehousing, Where?](#)

Figure 2-1: Changes in numbers and types of workers employed at warehouse facilities (2006 - 2022).



Source: Prologis (2023) [Driving Employment Growth Within The UK's Logistics Sector](#)

2.3.4 Proximity to markets and suppliers

By establishing warehouses near customer and supplier bases, occupiers can gain a significant competitive edge by enhancing efficiency and attracting and retaining customers who value speed and convenience. Minimising transport distances often translates to lower transport costs, resulting in potential cost savings for the business and potentially lower prices for consumers. Reduced transport distances also translate to faster delivery times, enhancing customer satisfaction and enabling businesses to offer services such as same-day or next-day delivery, which can be a significant competitive advantage.

Additionally, strategically placed warehouses enable occupiers to be more responsive to fluctuations in demand. By having inventory readily available in locations closer to customers, occupiers can quickly adjust to changes in demand patterns, ensuring that products are available when and where they are needed.

2.3.4.1 Proximity to household consumers

Households generate demand for goods of all types. Demand for goods and materials is greatest in areas with concentrated populations. Freight and logistics firms can minimise time and transport costs by locating their facilities (particularly distribution centres and cold storage) in close proximity of the final destination of the goods. The UKWA undertook a survey of warehousing space in 2016, where they identified over 1,500 individual warehousing units used for storage and distribution. In the South East,

27% (market share) was “Retail, Food” with “Retail, High Street” being a close second, which is likely due to the concentrated population density that needs to be served¹⁶.

In 2024, Government set a target to deliver 1.5 million new homes over the next five years¹⁷. Research conducted by Turley calculated that, in 2019, there was an existing ratio of 69 sq.ft of warehouse floorspace to every dwelling in England. Therefore, to maintain the existing warehousing to housing ratio, 20.7 million additional sq.ft of additional warehouse floorspace will be required to ensure adequate logistics provision supports targets for housing growth¹⁸. This is approximately the equivalent of 280 football pitches of warehousing required each year.

Online shopping as a percentage of all retail sales peaked during the COVID-19 pandemic, reaching a peak of nearly 38% in January 2021, in comparison to 8% at the start of 2011 and 19% in February 2020. Online shopping remains above pre-pandemic levels (26.2% in November 2024¹⁹). This has contributed to a sharp rise in new warehouse construction projects. New orders for the building of warehouses were worth £5.6 billion in 2021; this is more than in any year since 1985²⁰.

E-commerce requires large warehouses close to motorways and associated smaller fulfilment centres/delivery depots close to residential delivery catchment areas in urban areas (especially when same-day delivery is provided²¹). Online spend can also be broadly linked to average weekly income: the highest online expenditure is from residents in London and the South East, followed by the North West and East of England. Of note, areas such as the West and East Midlands which play a national fulfilment role have lower online expenditure¹⁸. This suggests a potential disconnect between regional economic activity and online consumer behaviour, as regions with a strong focus on national fulfilment may exhibit lower levels of online spending at the local level, thereby requiring different proportions of warehousing types.

2.3.4.2 Proximity to suppliers

Warehouses located closer to suppliers can reduce transport costs and lead times. This is especially crucial for perishable goods or those with high transport costs. Proximity further facilitates just-in-time strategies where raw materials are delivered to the warehouse as needed, minimising storage costs and reducing the risk of inventory obsolescence. Furthermore, having suppliers located closer can improve supply chain resilience by reducing the impact of supply chain disruptions.

¹⁶ WSP for TfSE (2019) [TfSE Freight, Logistics and Gateway Review](#)

¹⁷ Ministry of Housing, Communities and Local Government (2024) [Housing targets increased to get Britain building again](#)

¹⁸ Turley report for the British Property Federation (2018), [What Warehousing Where?: Understanding the Relationship between Homes and Warehouses to Enable Positive Planning](#)

¹⁹ Office for National Statistics (2024) [Retail sales, Great Britain: November 2024](#)

²⁰ Office for National Statistics (2022) [The rise of the UK warehouse and the “golden logistics triangle”](#)

²¹ Piecyk, M. and Allen, J. (2023), [Warehousing in the UK: Operations, Planning and Decarbonisation \(Summary Report\)](#)

Warehouse proximity to suppliers can also enhance supply chain efficiency by offering value-added services such as raw material processing and quality control. Some warehouses may perform basic processing of raw materials before they are used in production. Additionally, they can act as checkpoints for incoming raw materials, ensuring they meet quality standards before being used in production.

2.4 National warehousing trends

2.4.1 Overview

To demonstrate how the key variables discussed above influence warehousing location, the following outlines warehousing trends at a national scale. This also provides the broader context for operations in the TfSE area.

2.4.2 Spatial distribution of warehousing

Across the UK, the West Midlands, North West, and East Midlands have the greatest quantity of warehouse floorspace²². The West Midlands and East Midlands form the 'Golden Triangle'. The 'Golden Triangle' is defined by the Office for National Statistics as "any one square kilometre of the country which lies within four hours' drive of 90% of the British population"²³, evidencing the key role of road-access in determining logistics activities. However, the dominance of these regions is also attributable to multi-connectivity, as these areas have direct access to rail freight and airports (and seaports in the North West region). In addition, these regions have a relatively central location in the country, providing an ideal location for national and regional distribution to customers, and access to suppliers²⁴. In recent years, the Golden Triangle has spread eastward, with the amount of warehouse space developed in the East of England increasing by 104% over the last 10 years.

Figure 2-2 illustrates how warehousing space in regions across England and Wales has changed between 2015 and 2024. This graph shows that warehousing in the South East has increased since 2015, and in 2024, was the region with the third highest amount of warehousing space across the UK. Figure 2-2 also indicates that the increase in warehousing space since 2015 in the South East is similar to the increase observed in the West Midlands and North West regions, which had comparable amounts of warehousing space in 2015. This suggests that the increase in warehousing space in the South East is aligned with increases in regions across the country over this time. The factors influencing current warehouse demand within the South East will be explored further in Chapter 5.

2.4.3 Size and occupancy

Warehouses are also increasing in size (see Figure 2-3). Whilst warehouses under 500,000 sq.ft still account for the majority of units (65% of stock units), warehouses over

²² UKWA (2024) [The Size and Make-up of the UK Warehousing Sector](#)

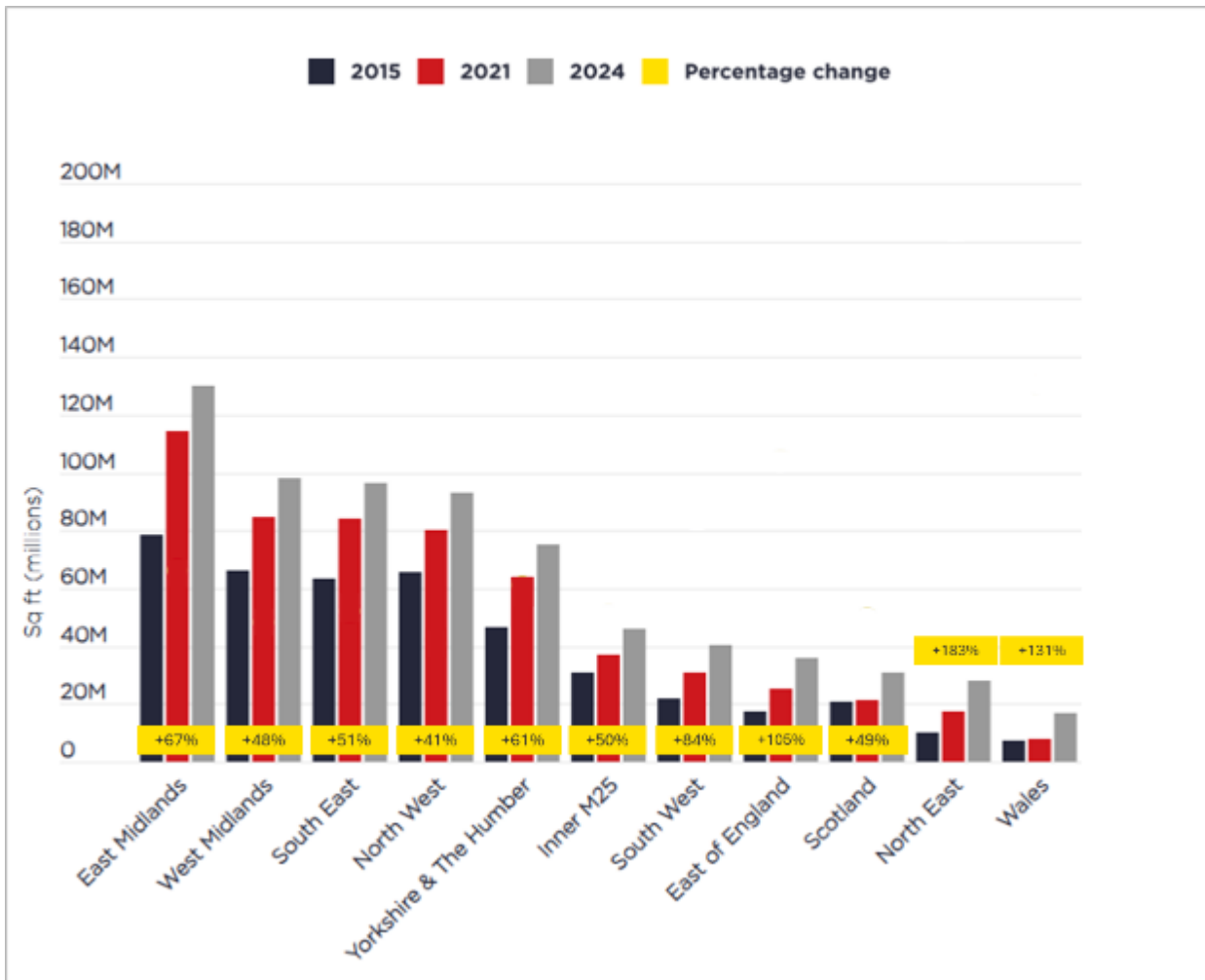
²³ Office for National Statistics (2022) [The rise of the UK warehouse and the "golden logistics triangle"](#)

²⁴ Turley report for the British Property Federation (2018), [What Warehousing Where?: Understanding the Relationship between Homes and Warehouses to Enable Positive Planning](#)

1,000,000 sq.ft now make up 10% of the stock, increasing from just 3% in 2015. This is attributable to an increase in units over 1,000,000 sq.ft. In addition, a trend for larger warehouse units has seen the average sized, build-to-suit unit increase from 297,000 sq.ft in 2015 to 333,000 sq.ft in 2023.

Occupier mix influences the size and type of warehousing space that is occupied (see Figure 2-4). In 2024, third-party logistics (3PL)/transport occupiers were the dominant occupier of warehousing space (128m sq.ft of stock)²⁵. Warehousing is crucial to the freight and logistics sector as they make the offloading, storage and distribution of goods more efficient by providing a central location for these activities. They can also provide varying configurations of stock storage, fulfilment, consolidation, and distribution services. These facilities may also include cross-docking facilities where incoming goods are rapidly unloaded from inbound transport vehicles and sorted for immediate loading onto outbound vehicles to minimise storage time and handling costs.

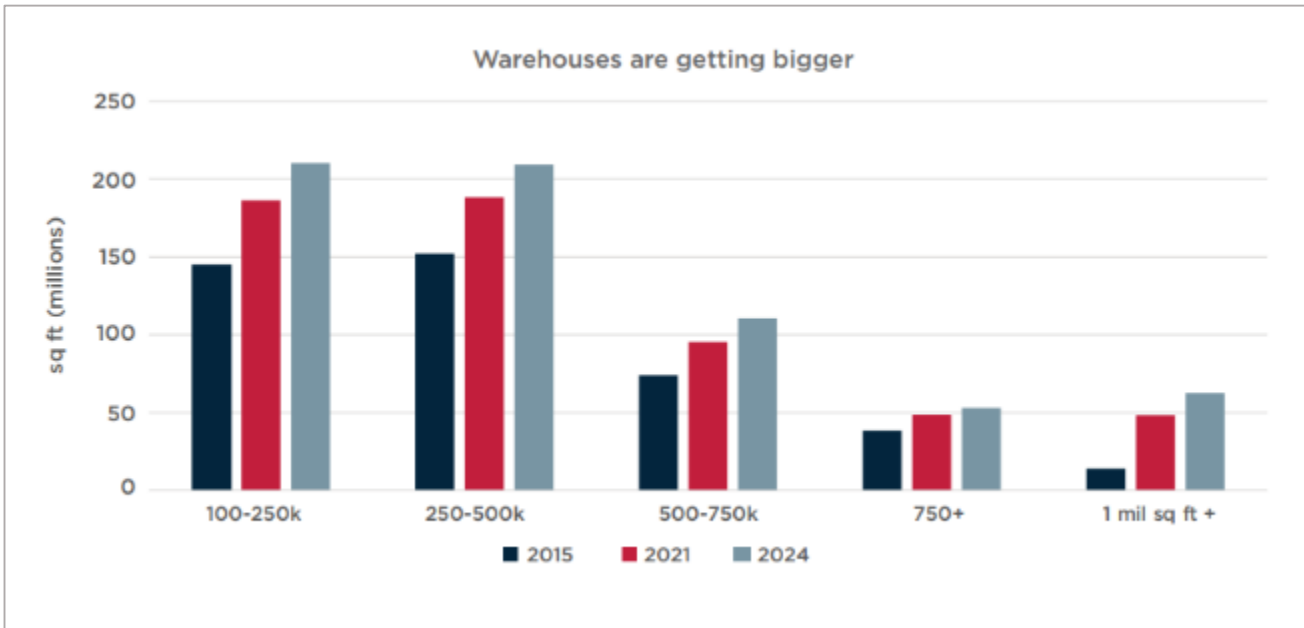
Figure 2-2: Change in warehousing space in regions across England and Wales (2015 – 2024)



Source: UKWA (2024) [The Size and Make-up of the UK Warehousing Sector](#)

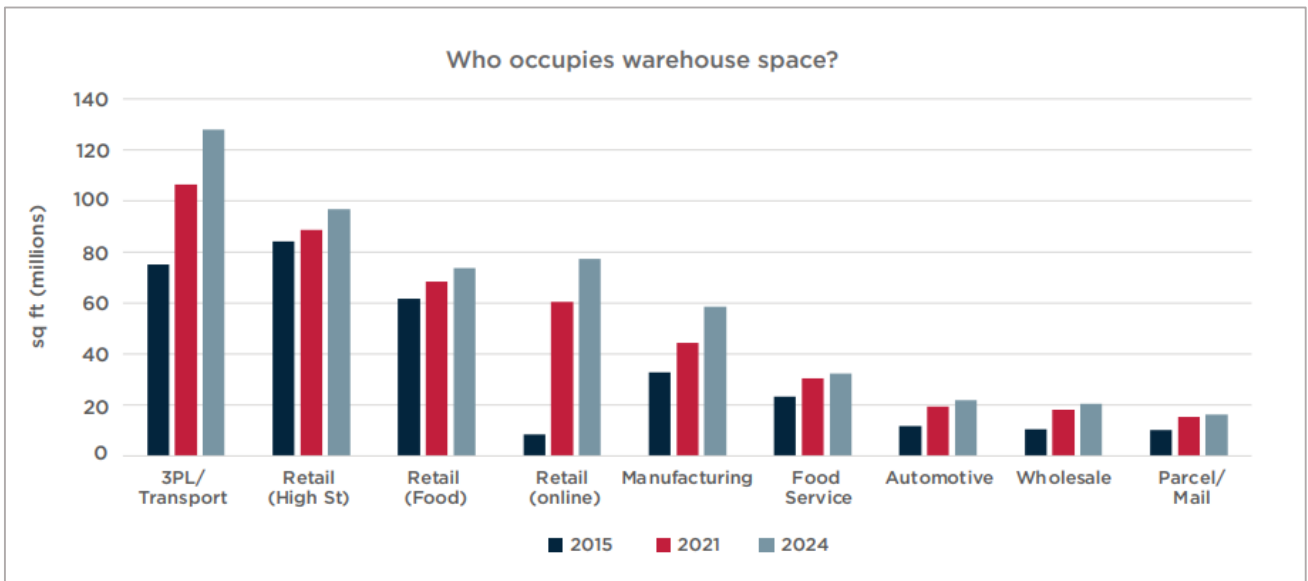
²⁵ UKWA (2024) [The Size and Make-up of the UK Warehousing Sector](#)

Figure 2-3: Amount of warehouse space associated with warehouse size-bands (2015 – 2024)



Source: UKWA (2024) [The Size and Make-up of the UK Warehousing Sector](#)

Figure 2-4: Amount of warehouse space associated with warehouse occupier (2015-2024)



Source: UKWA (2024) [The Size and Make-up of the UK Warehousing Sector](#);

3 How warehousing is planned for

3.1 Assessing the need for warehousing

The provision of warehousing is a commercial function that is undertaken by commercial actors; typically, property developers in association with pension/investment funds. Developers identify and acquire sites, design and build the properties and then let them to occupiers. The market determines the rental value of the space. However, planning authorities play an important role in determining the need for warehousing.²⁶ Through the process of developing Local Plans, authorities are encouraged to consider warehousing needs. Furthermore, national planning laws and guidance, as well as sub-national plans and policies, influence the decision-making process by authorities regarding warehouse supply. This chapter will outline guidance and policies from national and sub-national scales and outline existing warehousing policies and plans for local areas within the TfSE area.

3.1.1 National policy context

3.1.1.1 National Planning Policy Framework, December 2024

The National Planning Policy Framework (NPPF) sets out the Government's planning policies for England and states how these should be applied to the planning process. The NPPF provides a framework within which locally prepared plans can provide for housing and other development in a sustainable manner. Sustainable development planning must simultaneously address three interconnected objectives:

1. Economic: fostering a strong economy through land use that supports business, innovation, and productivity.
2. Social: creating vibrant communities with adequate housing, accessible services, and quality open spaces that enhance the health and well-being of residents.
3. Environmental: protecting and enhancing the natural environment by promoting sustainable land use, minimising waste and pollution, and mitigating the impacts of climate change.

Overall, there is limited direct reference made to warehousing within the document. References to the role of warehousing facilities are provided within the objective of establishing a robust and competitive economy, which outlines the following:

- planning policies should “pay particular regard to facilitating development to meet the needs of a modern economy, including by identifying suitable locations for uses such as laboratories, gigafactories, data centres, digital infrastructure, freight and logistics;” (NPPF, paragraph 86c) and;
- planning policies and decisions should recognise and address the specific locational requirements of different sectors, including “provision for storage and distribution operations at a variety of scales and in suitably accessible locations that allow for the

²⁶ Piecyk, M. and Allen, J. (2023), [Warehousing in the UK: Operations, Planning and Decarbonisation \(Summary Report\)](#)

efficient and reliable handling of goods, especially where this is needed to support the supply chain, transport innovation and decarbonisation.” (NPPF, paragraph 87b).

3.1.2 Regional policy context

In England, there is some precedent, though dated, for research, planning, and strategy for warehousing at a sub-national level, including:

- Leicester and Leicestershire: in 2014, the Leicester and Leicestershire Housing Planning and Infrastructure Group (HPIG) published a strategy that is designed to maintain and enhance the county’s established competitive advantages in the strategic distribution sector in Leicestershire. This strategy outlines several recommendations, including collaborative site identification processes.
- West Midlands: in 2009, The West Midlands Employment Land Advisory Group published a study that considered current logistics market trends and conditions, an updated supply of land for logistics services and reviewed progress on key logistics sites.
- East Midlands: in 2006, the East Midlands Development Agency published research to assess future warehousing supply and demand, and corresponding impacts on employment across the region.
- South East England: in 2010, the South East England Development Agency commissioned a scoping report to provide an initial high-level overview of logistics activity and clusters within the region.

These examples evidence that land-use development authorities at the intersection of housing, employment, and business have historically had most interest in planning for warehousing and logistics. Some examples of where groups of local authorities have collaborated across planning boundaries to consider warehousing (among other issues and opportunities) include:

- Greater Manchester Combined Authority (2024): the Greater Manchester Combined Authority adopted ‘Places for Everyone’, a Joint Development Plan for nine Local Authorities in Greater Manchester, which plans sustainable growth up to 2037. This Plan sets out specific requirements to be taken forward in Local Plans in terms of housing, offices, and industry and warehousing²⁷. The Plan recognises the role of industrial and warehousing development to support businesses, and the wider economy. The Development Plan Document also identifies the amount and the location of new warehousing development that will come forward during the plan. The approach of this policy is to allow each authority to take local circumstances into account when drafting the District Local Plans.
- Employment and Economic Study Eastbourne and Wealden (2022): Eastbourne Borough Council and Wealden District Council jointly commissioned an Economic Study considering the 2019-2039 period to provide information to inform a prospective Economic Development Strategy for each local authority. The study also determined the minimum amount of economic floorspace/land required for each local authority over their respective Local Plan periods, taking into account the

²⁷ Greater Manchester Combined Authority (2024) [“Places for Everyone” Joint Development Plan Document](#)

associated national planning policy guidance on determining economic development needs²⁸.

These recent examples evidence that whilst warehousing is sometimes considered amongst joint planning processes, it is most often considered as part of wider economic development, business, and land-use considerations.

3.1.2.1 TfSE Freight and Logistics Gateways Strategy

The TfSE Freight and Logistics Gateways Strategy (FLAGS) aims to provide a comprehensive framework for the strategic planning and policy development of freight, logistics, and gateways in the South East of England. The report highlights the region's significant role in the UK's economy, emphasising the importance of efficient freight and logistics operations to support economic growth, connectivity, and sustainability. It identifies key challenges such as high land values, constrained housing supply, and the need for holistic investment in transport and logistics networks. The strategy outlines a vision for 2040, focusing on improving operational efficiency, reducing environmental impacts, and integrating logistics into place-making processes.

The strategy identifies the need for increased provision of logistics land and property, including warehousing and consolidation centres, to meet growing demand and improve operational efficiency. It also highlights the importance of integrating logistics into place-making processes through planning policy and better data collection to support the development of warehousing and distribution infrastructure.

3.1.3 Local policy context

3.1.3.1 Local Plans

The National Planning Policy Framework (NPPF) requires that each local planning authority should prepare a Local Plan for its area (NPPF, Section 3). This may involve a single local authority preparing a Local Plan for its own area or a group of local authorities working together to prepare a Local Plan for their combined areas. When prepared, Local Plans comprise part of the development plan for the area²⁹, and set out how land should be used and developed within a specific local authority area. Once adopted, Local Plans provide a framework for managing land use and development, therefore playing a crucial role in shaping the physical, social and economic development of local regions across England. Of note, the [English Devolution White Paper](#)³⁰ contains proposals for a statutory requirement for Mayoral Strategic Authorities to produce a Local Growth Plan. Local Growth Plans would cover a larger area than Local Plans, which could enable better strategic planning for warehousing.

The NPPF is clear that strategic policies should be prepared over a minimum 15 year period and a local planning authority should be planning for the full plan period, however, policies in local plans and spatial development strategies should be reviewed

²⁸ Icení (2022) [Employment and Economic Study Eastbourne and Wealden](#)

²⁹ Ministry of Housing, Communities & Local Government and Department for Levelling Up, Housing and Communities (2024) [Guidance on plan-making](#)

³⁰ Ministry of Housing, Communities & Local Government (2024) [English Devolution White Paper](#)

every five years to determine if updates are required and should be updated accordingly. The Town and Country Planning (Local Planning) (England) Regulations (2012) also require local planning authorities to review Local Plans and Statements of Community Involvement every five years from adoption to ensure policies stay relevant and meet community needs.

As discussed in Chapter 2, appropriate warehouse planning requires high quality accessibility and connectivity to transport networks, labour, and customer markets. Therefore, Local Plans can support the provision of an adequate supply of warehousing stock. However, planning for warehousing land often competes with other critical land uses, such as housing. Key Local Plans for the local planning authorities in the TfSE area are reviewed in Table 3.1, outlining their relevance to plans related to warehousing, and the wider freight and logistics sector that warehousing supports.

Table 3.1: Summary of key findings from Local Plans

Document Name	Recognises the role of warehousing?	Additional need for warehousing described quantitatively?	Quantitative need	Further context
Basingstoke and Deane Local Plan (2016)	✓	✓	Up to 122,000 m ² of additional storage and distribution floorspace	
Chichester Emerging Local Plan (2023)	✓	✓	20 hectares of additional industrial warehousing space by 2029	
Draft Crawley Borough Local Plan 2024 – 2040 (2023)	✓	✓	An outstanding need for a minimum of 17.93 hectares of new industrial-led employment land in Crawley, principally within the logistics and warehouse sectors	Warehousing need associated with economic activities due to 'Gatwick Diamond' area
The Dartford Plan to 2037 (2024)	✓	X	Average rate of 25,000m ² per annum of new industrial/distribution premises	
Dover District Local Plan 2040 (2022)	✓	X		Warehousing need associated with goods movement due to Roll-On Roll-off port activities
Maidstone Borough Council Local Plan Review 2021-2038 (2024)	✓	X	48,940m ² floorspace required for warehousing use between 2021 and 2038	
Medway Local Plan 2041 (2023)	✓	X		The Medway Employment Land Assessment (2020) indicated a

Document Name	Recognises the role of warehousing?	Additional need for warehousing described quantitatively?	Quantitative need	Further context
				need for c.62.3 hectares of employment land up to 2037. The majority of the land would be needed for warehousing and distribution activities
Southampton Local Plan (2015)	✓	✓	Approximately <u>97,000</u> m ² of new and expanded industrial and warehousing uses will be directed to established employment areas and sites	
Emerging Portsmouth Local Plan 2040 (2024)	✓	✓	<u>64,514</u> m ² manufacturing/warehousing floorspace, of which 58,000m ² from the development of a strategic site	Warehousing need associated with the marine and maritime industry and various port activities
The Swale Local Plan (2017)	✓	✓	Need for 81,835 m ² of warehousing space identified from 2014 to 2031.	Warehousing need associated with port activities (Port of Sheerness)
Wealden Draft Local Plan (2024)	✓	✓	The plan identifies a clear need for new warehousing sites, outlining a need for an increase of 210,000 m ² between 2019 and 2039.	The area along the A22/A26/A27 Eastbourne-Polegate-Uckfield-Crowborough corridor is identified as key for future economic growth

3.1.4 Housing and Economic Land Availability Assessment

A Housing and Economic Land Availability Assessment (HELAA) is a method that generates an important evidence base to help identify the future supply of land which is suitable, available and achievable for housing and economic development uses over the Local Plan period. Plan-making authorities may carry out land availability assessments for housing and economic development as part of the same exercise, in order that sites may be identified for the use(s) which is most appropriate³¹. Economic land assessments are informed by evidence bases that seek to understand existing business needs, local context, and market conditions.

The HELAA Planning Practice Guidance advises that authorities can assess the need for, and allocate space for, logistics through collaboration with other authorities, infrastructure providers and other interests to identify the scale of need across the relevant market areas. This work may include³²:

- Engagement with logistics developers and occupiers: to understand the changing nature of logistics requirements, and impact of new and emerging technologies.
- Analysis of market signals: including trends in take up and the availability of logistics land and floorspace across the relevant market geographies.
- Analysis of economic forecasts: to identify potential changes in demand and anticipated growth in sectors likely to occupy logistics facilities, or which require support from the sector.

The guidance, last updated in 2019, also advises that 'engagement with Local Enterprise Partnerships' (LEPs) be undertaken to understand their plans and strategies, including economic priorities within Local Industrial Strategies (Paragraph 031). However, LEPs integrated their functions into local and combined authority functions from 2024³³. Therefore, local authorities may now provide oversight on these issues.

A range of up-to-date supporting evidence may have to be considered in establishing the appropriate amount, type and location of provision, including market signals, anticipated changes in the local population and the housing stock as well as the local business base and infrastructure availability. Strategic policy-making authorities will then need to consider the most appropriate locations for meeting these identified needs (whether through the expansion of existing sites or development of new ones).

While the assessment identifies potential housing and economic land sites, the development plan ultimately determines which sites are allocated for development based on their suitability to meet local needs and objectives.

³¹ Ministry of Housing, Communities & Local Government and Department for Levelling Up, Housing and Communities (2019) [Housing and economic land availability assessment](#)

³³ Department for Levelling Up, Housing and Communities and Department for Business and Trade (2023) [Transfer of Local Enterprise Partnership \(LEP\) Core Functions to Combined and Local Authorities](#)

3.1.4.1 Local Transport Plan

Local Transport Plans (LTP) seek to address local transport challenges, whilst identifying opportunities to promote economic growth, social inclusion and environmental sustainability. Key priorities, investment strategies and policies are identified to improve connectivity and enhance mobility options. Aligning with national transport policies and priorities, Local Transport Plans should seek to ensure coherence when planning investment in transport infrastructure and facilities to maximise the benefit of investment.

Key observations from relevant LTPs across the TfSE area are summarised in Table 3.2.

Table 3.2: Summary of key findings from Local Transport Plans

LTP	Includes freight-related policies (e.g. to relieve congestion)	Recognises the role of warehousing in relation to the transport network?	Additional need for warehousing described quantitatively?	Includes warehousing-related policies/actions?	Summary of policies
Hampshire LTP4 (2024)	✓	✓	✗	✓	Investigating the potential for mini and macro consolidation centres, including identifying suitable land for these facilities.
Kent LTP5: Striking the Balance (2024)	✓	✗	✗	✗	Focus on increasing resilience on the M2/A2 and M20/A20 road corridors to the Port of Dover.
Medway Council LTP 2011 – 2026 (2011)	✓	✓	✗	✓	Investigate the provision of faster and more reliable highway linkages from business, storage and distribution sites to the strategic highway network supporting wider connectivity.
Draft East Sussex LTP 2024 – 2050 (2023)	✓	✓	✗	✓	Promoting sustainable urban freight distribution for first mile/last mile freight journeys to and from key town centres and industrial estates

LTP	Includes freight-related policies (e.g. to relieve congestion)	Recognises the role of warehousing in relation to the transport network?	Additional need for warehousing described quantitatively?	Includes warehousing-related policies/actions?	Summary of policies
West Sussex Transport Plan 2022 - 2036 (2022)	✓	✓	Only for Worthing	✓	Work in partnership to support the introduction of freight consolidation centres where these are market-led
Connected Southampton 2040 – LTP (2019)	✓	✓	X	✓	Freight, Servicing and Logistics policy measures include; Consolidating Freight Deliveries, Delivery and Servicing Plans (DSPs), Dynamic Freight Traffic Control, Last Mile Logistics, and Clean Air Networks
Portsmouth Transport Strategy 2021-2038 (2021)	✓	✓	X	✓	Policy O: Deliver micro and macro freight consolidation measures, supporting businesses and other organisations to consolidate their operational journeys, including use of zero emission vehicles for last mile delivery
Isle of Wight Island Transport Plan 2011-2038 (2011)	✓	X	X	X	
West Berkshire Draft LTP 4 2024-2039 (2023)	✓	X	X	X	

3.2 The challenges with the current system of planning warehousing

The current approach to planning warehousing is for local planning authorities, potentially working in partnership with neighbouring authorities, to understand the need for warehousing within their area and to allocate a sufficient supply in suitable locations.

However, feedback from the freight and logistics sector suggests that the current system does not always result in a sufficient supply of suitable warehousing stock³⁴, with the specific challenges including:

- Land in optimal locations for warehousing is being prioritised for housing development (competition for land between warehousing and other, potentially higher value land uses was cited as an issue in planning for a sufficient supply of warehousing by the representative from Portsmouth City Council).
- Similarly, industrial land which is suitable for warehousing development is being lost to other, higher value land uses. Logistics UK raised the fact that the supply of industrial land in London is at such a critically low level in certain areas that a total quantity of industrial land has been safeguarded³⁵.
- A limited understanding by planners of the role of warehousing in enabling efficient supply chains.
- A limited understanding by planners of the need for co-operation on warehousing beyond local planning geographies.

Recent updates to the National Planning Policy Framework (NPPF) and associated guidance are an important step forward in supporting local authorities to plan effectively for warehousing, yet some difficulties remain.

This approach to planning for warehousing recognises the role of warehousing as an employment land use, and the need for warehousing land is calculated on this basis i.e. the space required to accommodate the number of jobs in the sector. This approach does not allow for the consideration of the need for warehousing as part of efficient supply chains and its role supporting distribution to and servicing of population centres, particularly new ones. Some industry experts have called for a revised approach to calculate warehousing need, whereby warehousing would be recognised as an infrastructure requirement (such as utilities) instead of an economic land use requirement³⁶. This would tie the requirement for warehousing floorspace to individual households, meaning that developers planning new housing developments would need to identify the associated warehousing space requirement.

Though there is some precedent for cross-border co-operation and planning for warehousing between local authorities, it is limited and increasingly dated. There is a significant role for the Sub-national Transport Bodies such as Transport for the South

³⁴ National Infrastructure Commission (2018), [Freight Study Call for Evidence](#)

³⁵ Greater London Authority (2021), The London Plan

³⁶ Turley report for the British Property Federation (2018), [What Warehousing Where?: Understanding the Relationship between Homes and Warehouses to Enable Positive Planning](#)

East to play in raising awareness of the need to plan at the appropriate spatial scale for warehousing and supporting efforts by local planning authorities to do so.

4 Supply of warehousing in the South East

This chapter provides information about the supply of warehousing in the TfSE area, namely the quantum, availability, location and quality of stock.

This chapter and Chapters 5, 6 and 7 can be read in conjunction with an Excel Databook which sets out in detail the historic, current, and future demand/supply dynamics within the area, the constituent property market areas and local planning authorities.

4.1 Defining the geographies of the analysis

This section explains how the property market dynamics for the warehousing sector in the TfSE area have been analysed³⁷. The TfSE area comprises a diverse collection of different functional economic market areas (FEMAs). FEMAs are geographic areas that are defined by the flow of goods, services, labour, and other economic interactions. Each of them has a unique set of attributes and growth drivers. Property markets, and warehousing³⁸ markets in particular, tend to follow FEMA patterns, which are in turn influenced (to an extent) by local planning authority geographies.

Over time, warehousing premises have become concentrated in ways that roughly mirror FEMAs' economic dynamics, reflecting their growth drivers as well as land availability and transport infrastructure.

To ensure the property market analysis in this report reflects the way in which the warehousing property market functions across the TfSE area, the TfSE area has been arranged into nine sub-regional Property Market Areas (PMAs) comprising small groupings of local planning authority areas that are similar to FEMAs. Most warehousing inventory is situated in these PMAs. Local planning authorities are typically part of wider FEMA/PMAs and their property markets are best assessed within this wider spatial context. The Excel Databook which accompanies this report provides PMA-level and local planning authority-level analysis.

Another benefit of using an analytic framework based around PMAs is that it allows their supply and demand levels to be compared to the regional level. This enables the identification of areas within the area that diverge significantly from the regional average.

Figure 4-1 is a map setting out the geography of the TfSE area, the nine PMAs and their constituent local planning authorities. The map is overlaid with a layer of the existing warehousing stock and strategic transport infrastructure, namely the strategic road

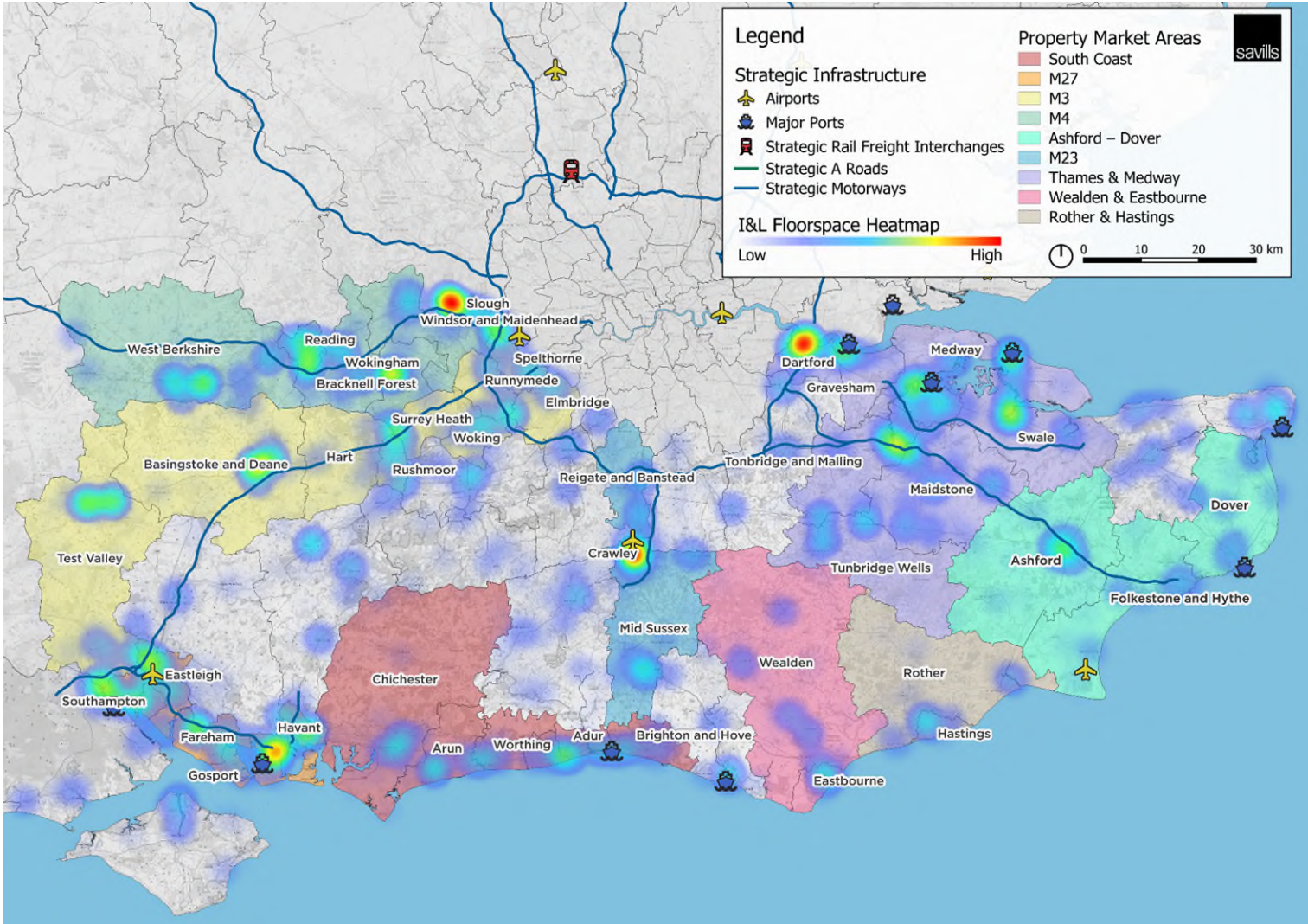
³⁷ The TfSE administrative area does not align with the wider South East region. While there is a high degree of alignment, the TfSE area does not include the local authorities north of the M4, for example Buckinghamshire, Oxfordshire and Milton Keynes.

³⁸ Please note, for the purposes of this analysis the definition of the warehousing sector encompasses the wider industrial and logistics (I&L) sector and its associated use classes: Light Industrial (formerly B1c use class now part of Class E), General Industry (B2 use class) and Storage and Distribution (B8 use class). Effectively the primary use classes that require warehouses and associated yard spaces. These use classes typically cover the diverse range of industrial, manufacturing and logistics companies that operate within England and which require warehouse space.

network (SRN), major ports, airports, and strategic rail freight interchanges (SFRI). It shows areas in which warehousing stock is concentrated, with the red colour indicating higher concentrations of warehousing floorspace and the blue colour indicating lower concentrations of warehousing floorspace. Areas with no colour do not contain warehousing floorspace.

The map shows that the nine PMAs do not cover the entirety of the TfSE area because there are areas in the TfSE area that have no warehousing inventory (no colour); there are areas in the TfSE area in which warehousing inventory is limited (those areas shown in blue colour); and, in areas where warehousing inventory is limited, not significantly integrated as to be part of a wider property market area. In other words, this warehousing is more likely to be smaller in scale to meet the requirements of local operators.

Figure 4-1 TfSE area comprising nine key PMAs



Source: Savills (2025)

The PMAs were created using the following method:

- All existing warehouses in the area were mapped as in Figure 4-1. This enabled key concentrations of warehousing stock in the area to be identified.
- Key transport infrastructure, including motorways and A-roads, airports, major ports, and Strategic Rail Freight Interchanges (SRFI) were overlaid. Data from the Department for Transport on HGV movements was used to highlight roads that are most relevant to warehousing operations, namely those that support at least 10,000 HGV/LGV movements per day³⁹. This demonstrates that there is a strong correlation between the warehousing inventory and the location of key transport infrastructure.
- Based on the mapping exercise, a shortlist of PMA geographies was generated⁴⁰.
- Finally, a workshop that included TfSE, Steer and Savills Economics refined the list of PMAs. The workshop ensured TfSE's institutional knowledge of the area was incorporated.

Table 4.1 sets out the nine PMAs and their constituent local planning authorities. Each PMA comprises two to nine local planning authorities. Together, the PMAs cover about 84% of all warehousing stock in the TfSE area. All data that is presented on the TfSE area level in this report reflect all warehousing stock, not just the 84% in the PMAs.

The local planning authorities that were not assigned to a PMA are:

- Canterbury
- East Hampshire
- Epsom and Ewell
- Guildford
- Horsham
- Lewes
- Mole Valley
- New Forest
- Sevenoaks
- Tandridge
- Test Valley
- Thanet
- Waverley
- Winchester

Table 4.1: PMAs and constituent local planning authorities

PMA	Local planning authorities	PMA	Local planning authorities
M4	Bracknell Forest	M23	Reigate and Banstead
	Reading		Crawley
	Slough		Mid Sussex
	West Berkshire	Thames Medway	Dartford
	Windsor and Maidenhead		Gravesham
	Wokingham		Maidstone
M3	Elmbridge		Medway
	Runnymede		Swale
	Spelthorne		

³⁹ Department for Transport, Domestic Road Freight Statistics July 2021 to June 2022

⁴⁰ This initial list was developed by Savills Economics in conjunction with Savills industrial agents and the Savills Industrial Research team.

PMA	Local planning authorities	PMA	Local planning authorities
	Surrey Heath	Ashford and Dover	Tonbridge and Malling
	Woking		Tunbridge Wells
	Basingstoke and Deans		Ashford
	Hart		Dover
	Rushmoor		Folkstone and Hythe
M27	Fareham	Wealden & Eastbourne	Wealden
	Eastleigh		Eastbourne
	Gosport	Rother & Hastings	Rother
	Havant		Hastings
	Portsmouth		
	Southampton		
South Coast	Adur		
	Arun		
	Brighton and Hove		
	Chichester		
	Worthing		

Source: CoStar; Savills (2025)

4.2 Existing warehousing inventory in the TfSE area

There is approximately 308 million sq.ft of warehouse inventory in the TfSE area. About 84% of the stock is within the PMAs, equivalent to 259 million sq.ft.

Table 4.2 shows the breakdown of warehouse stock in each of the PMAs and their constituent local planning authorities in the TfSE area, in descending order by size of inventory.

The PMA within the TfSE area with the greatest amount of warehousing inventory is Thames Medway (Figure 4-2), with 63.5 million sq.ft of warehousing floorspace. The PMA's strategic location near London and its transport infrastructure, which includes direct access to the M2 and M20, have been instrumental in attracting operators to the area. The expansion of port facilities, including at Sheerness and Chatham on the east coast, have been further notable drivers of warehouse development in recent years. Indeed, the two ports of Sheerness and Chatham together form the London Medway Cluster⁴¹, a strategic cluster of warehousing facilities and terminal operators designed to meet the needs of customers across the South East of England and beyond. This has helped to reinforce the Thames Medway area as a key industrial hub in the South East.

⁴¹ <https://www.peelports.com/port-locations/london-medway>

The next largest markets are the M4 (Figure 4-3-), M3 (Figure 4-4) and M27 (Figure 4-5) PMAs. Together these PMAs and Thames Medway account for just over 65% of inventory within the TfSE area. This is unsurprising given that each of the PMAs have a major motorway traversing them, and/or key strategic infrastructure. For example, the M27 PMA not only contains part of the M27, but it also supports the two ports of Southampton and Portsmouth. As discussed earlier in this report, transport connectivity is a primary factor that influences the location of warehousing stock.

Elsewhere the M23 PMA (Figure 4-7), while supporting just 6% of the TfSE area's stock (equivalent to 18.1 million sq.ft) is home to a key warehousing and industrial hub in Crawley by Gatwick airport.

In contrast to the large PMAs, the smallest are Wealden / Eastbourne (6.7 million sq.ft, see (Figure 4-9) and Rother / Hastings (4.5 million sq.ft, see Figure 4-10). These account for just 2% and 1% of stock across the TfSE area respectively.

Table 4.2: Existing inventory across the TfSE area, PMAs and local planning authorities

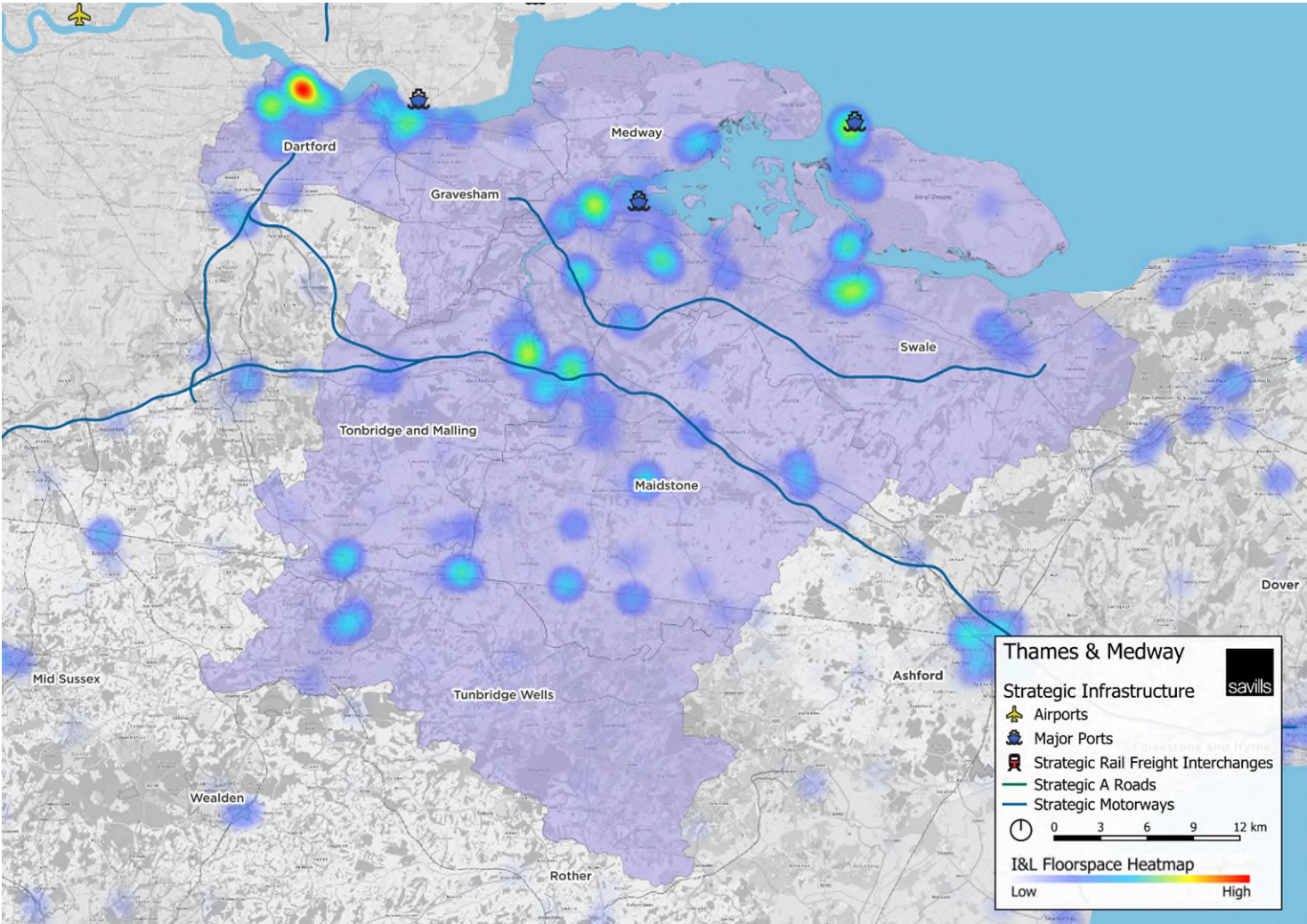
PMA	Local planning authority	Inventory (2024) (sq.ft)	% of TfSE area
TfSE area		307,844,955	100%
Thames Medway		63,489,351	21%
	Dartford	12,329,815	19%
	Gravesham	4,260,439	7%
	Maidstone	8,369,826	13%
	Medway	11,694,592	18%
	Swale	13,030,944	21%
	Tonbridge and Malling	9,999,827	16%
	Tunbridge Wells	3,803,908	6%
M4		49,644,214	16%
	Bracknell Forest	6,026,814	12%
	Reading	9,261,976	19%
	Slough	16,236,837	33%
	West Berkshire	10,550,360	21%
	Windsor and Maidenhead	3,264,069	7%
	Wokingham	4,304,158	9%
M3		43,449,990	14%
	Basingstoke and Deans	10,008,090	23%
	Elmbridge	3,388,097	8%
	Hart	1,466,819	3%

PMA	Local planning authority	Inventory (2024) (sq.ft)	% of TfSE area
	Runnymede	1,899,620	4%
	Rushmoor	3,986,528	9%
	Spelthorne	3,067,847	7%
	Surrey Heath	3,538,108	8%
	Woking	3,703,768	9%
M27		40,003,147	13%
	Eastleigh	9,300,269	23%
	Fareham	5,289,663	13%
	Gosport	2,257,511	6%
	Havant	5,831,941	15%
	Portsmouth	9,227,403	23%
	Southampton	8,096,360	20%
South Coast		20,138,826	7%
	Adur	3,893,678	19%
	Arun	5,483,986	27%
	Brighton and Hove	3,175,849	16%
	Chichester	4,670,979	23%
	Worthing	2,914,334	15%
M23		18,076,620	6%
	Crawley	9,518,558	53%
	Mid Sussex	5,427,362	30%
	Reigate and Barnstead	3,130,700	17%
Ashford / Dover		12,670,089	4%
	Ashford	6,427,032	51%
	Dover	3,677,874	29%
	Folkestone and Hythe	2,565,183	20%
Wealden / Eastbourne		6,715,793	2%
	Eastbourne	2,593,591	39%
	Wealden	4,122,202	61%
Rother / Hastings		4,536,270	1%
	Hastings	2,627,910	58%
	Rother	1,908,360	42%

PMA	Local planning authority	Inventory (2024) (sq.ft)	% of TfSE area
	Other (e.g. East Hampshire, Guildford, Horsham, Sevenoaks, Winchester)	49,120,655	16%

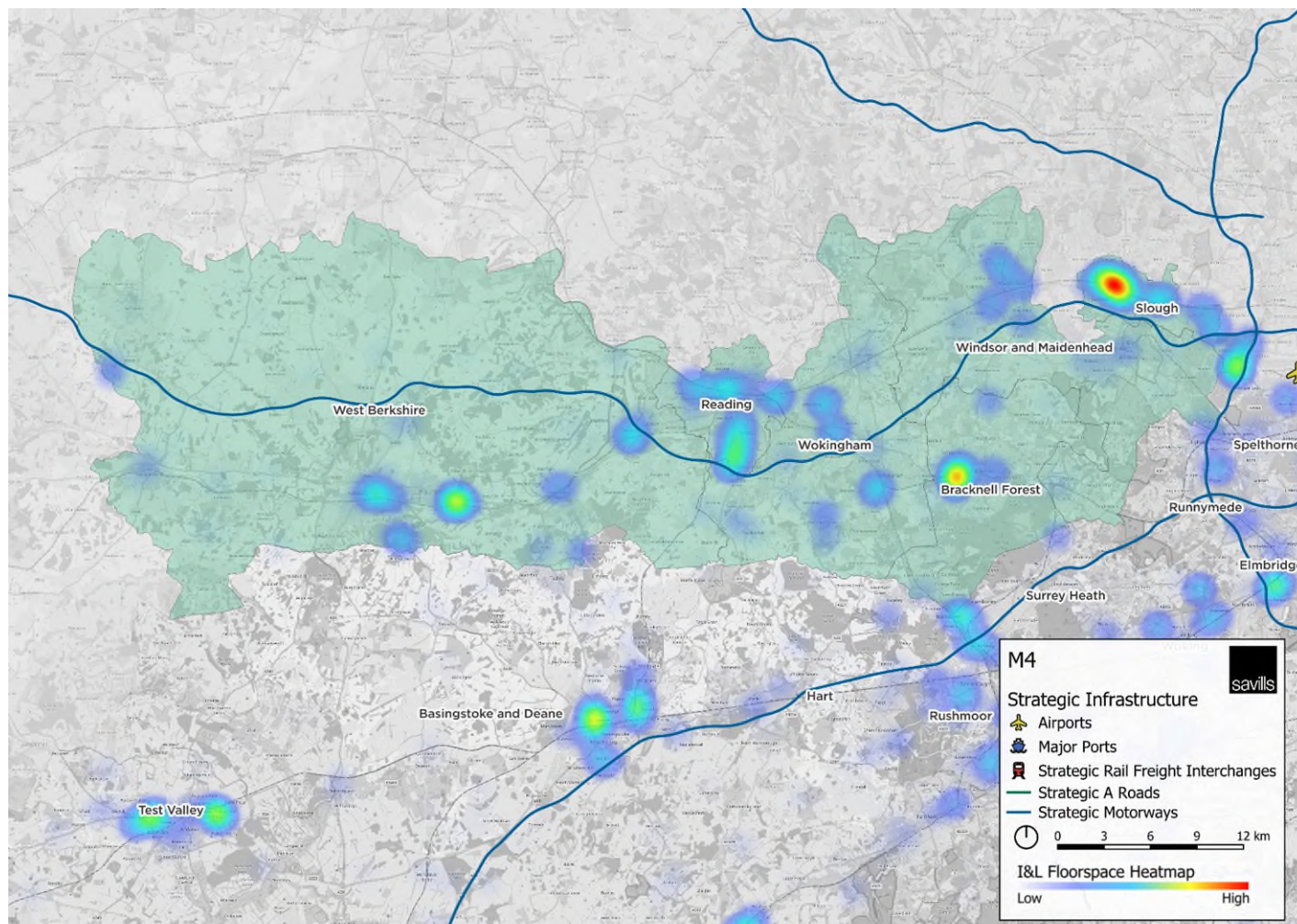
Source: CoStar; Savills (2025)

Figure 4-2 Thames Medway PMA, comprising the local planning authorities of Dartford, Gravesham, Maidstone, Medway, Swale, Tonbridge and Malling and Tunbridge Wells



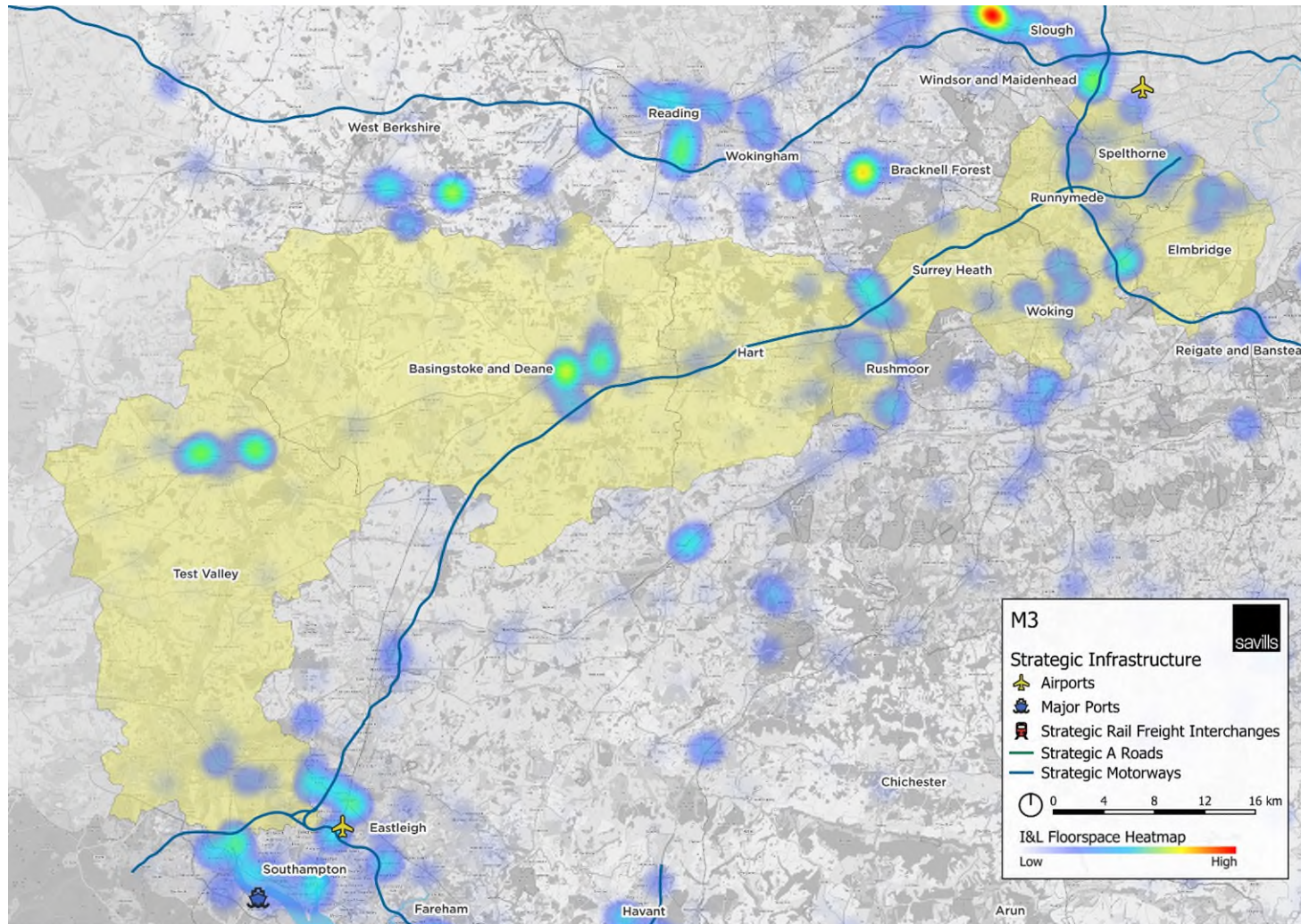
Source: Savills (2025)

Figure 4-3 M4 PMA, comprising the local planning authorities of Bracknell Forest, Reading, Slough, West Berkshire, Windsor and Maidenhead and Wokingham



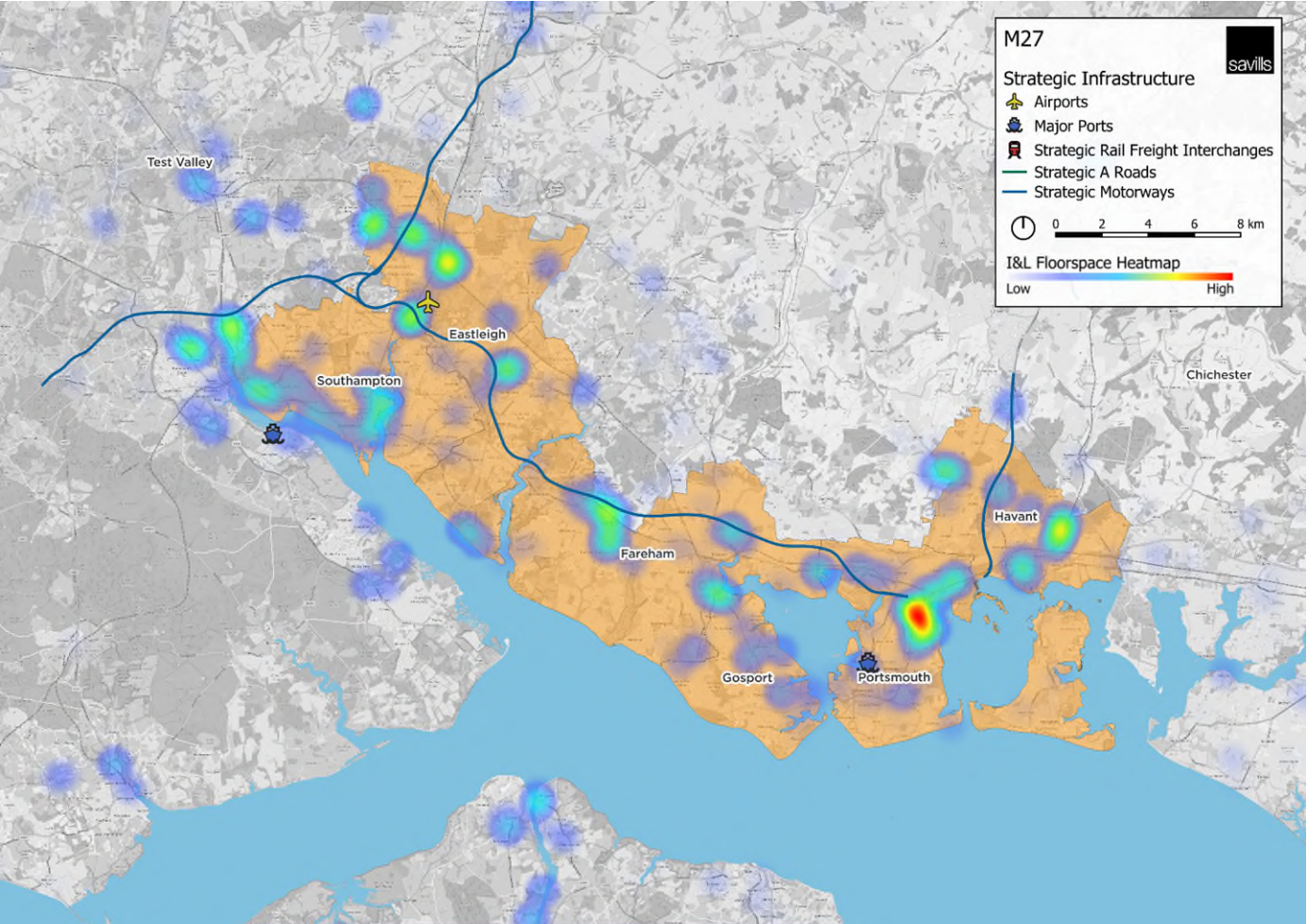
Source: Savills (2025)

Figure 4-4 M3 PMA, comprising the local planning authorities of Elmbridge, Runnymede, Spelthorne, Surrey Heath and Woking



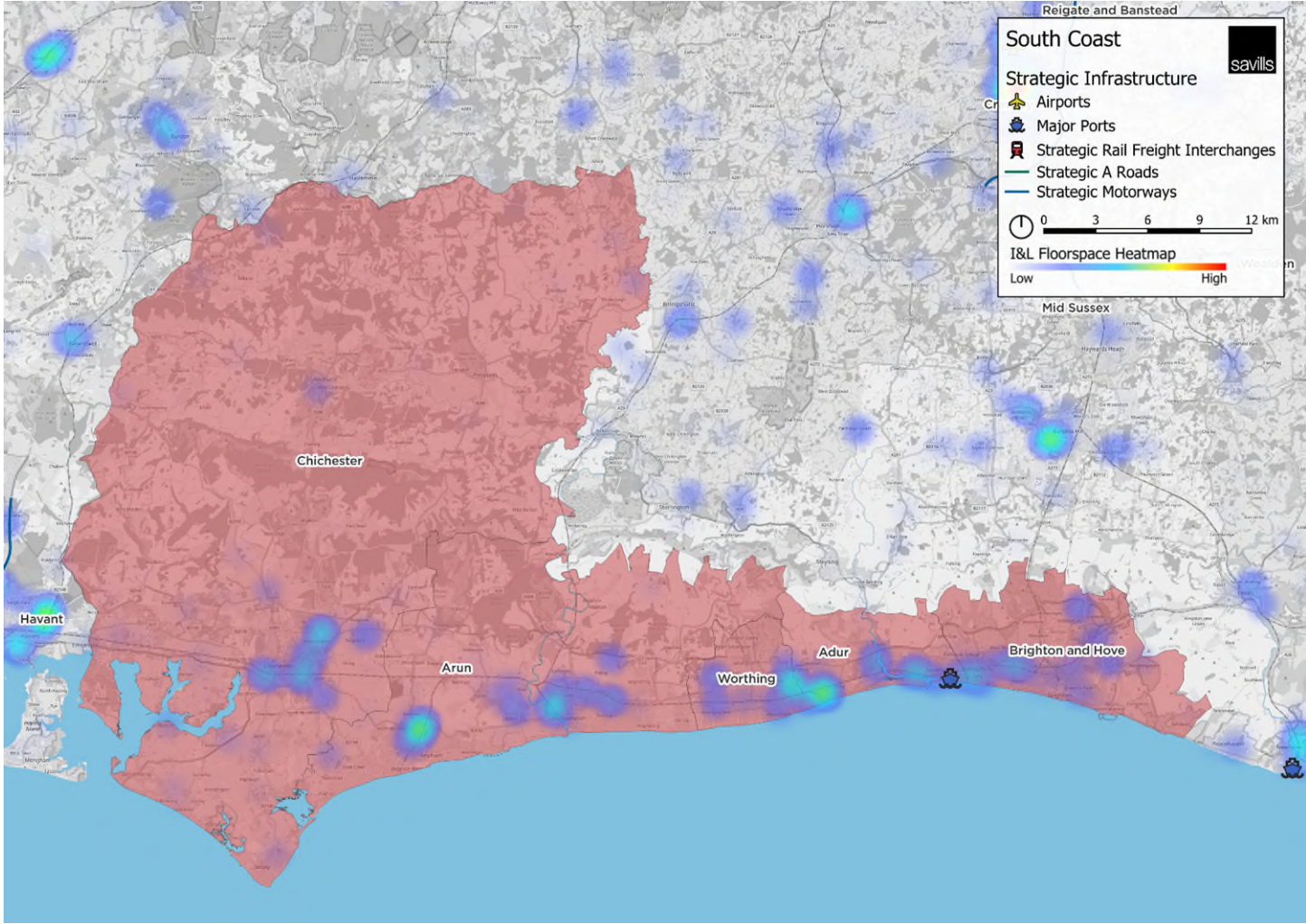
Source: Savills (2025)

Figure 4-5 M27 PMA, comprising the local planning authorities of Fareham, Eastleigh, Gosport, Havant, Portsmouth and Southampton



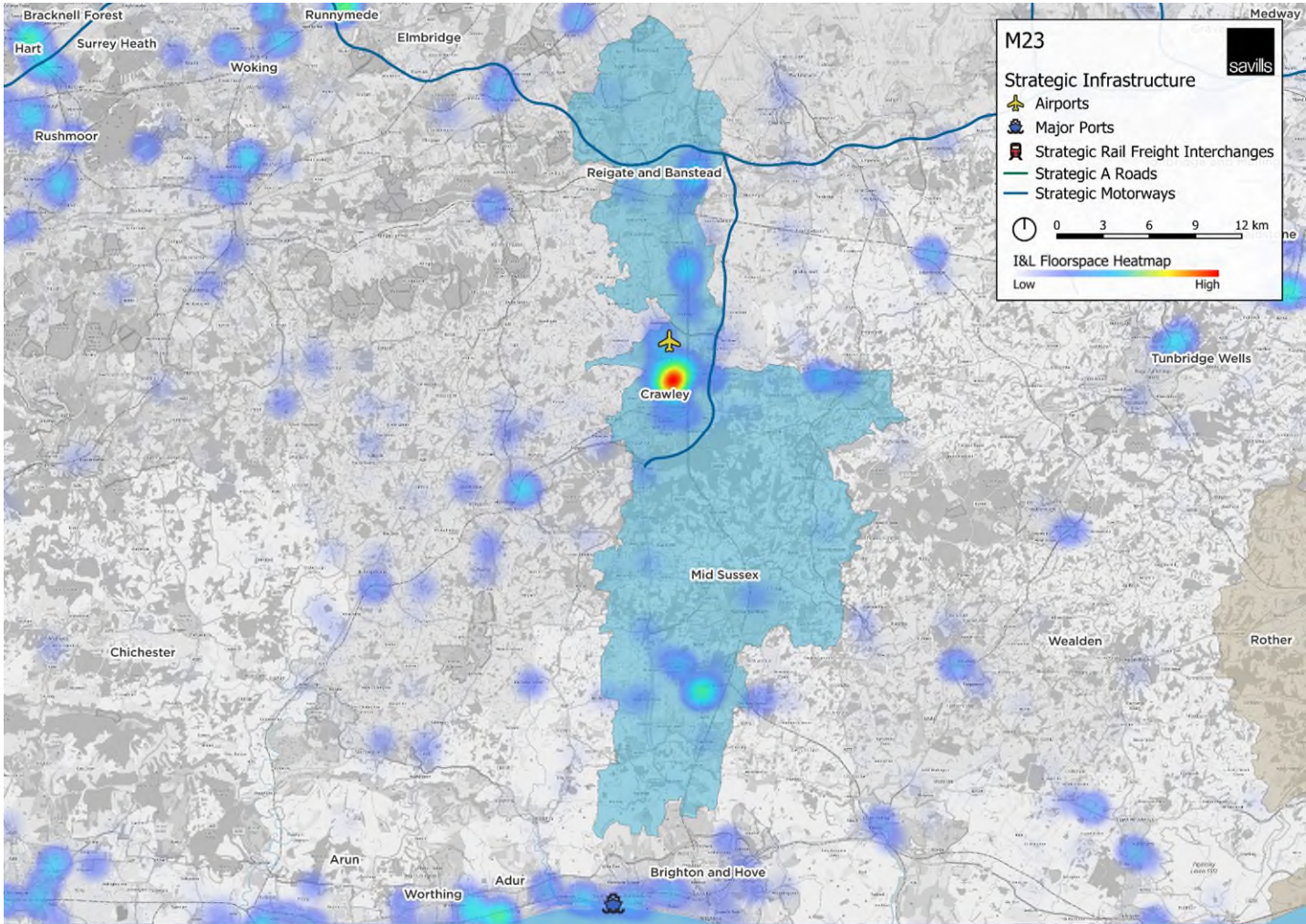
Source: Savills (2025)

Figure 4-6 South Coast PMA, comprising the local planning authorities of Adur, Arun, Brighton and Hove, Chichester and Worthing



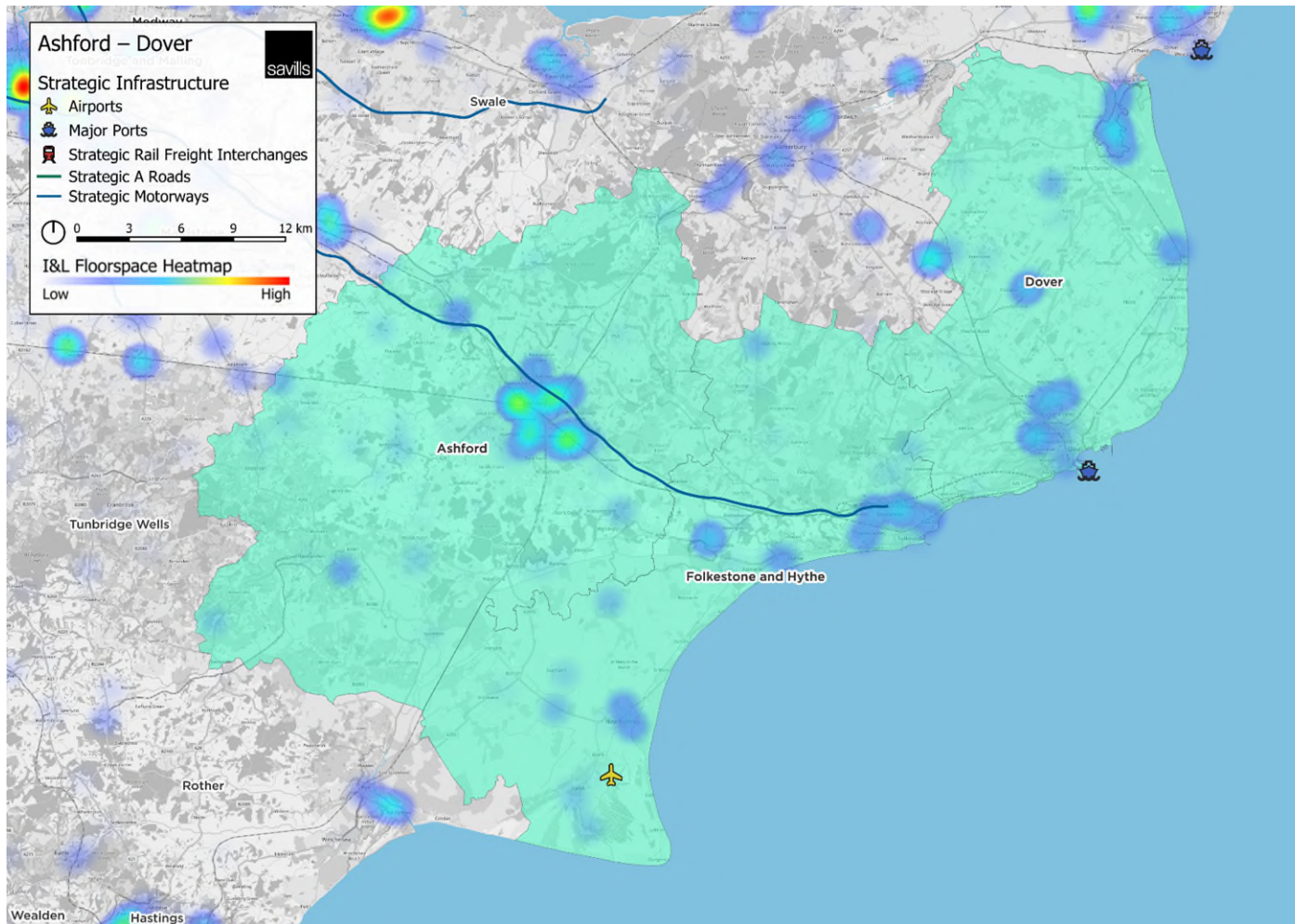
Source: Savills (2025)

Figure 4-7 M23 PMA, comprising the local planning authorities of Reigate and Banstead, Crawley and Mid Sussex



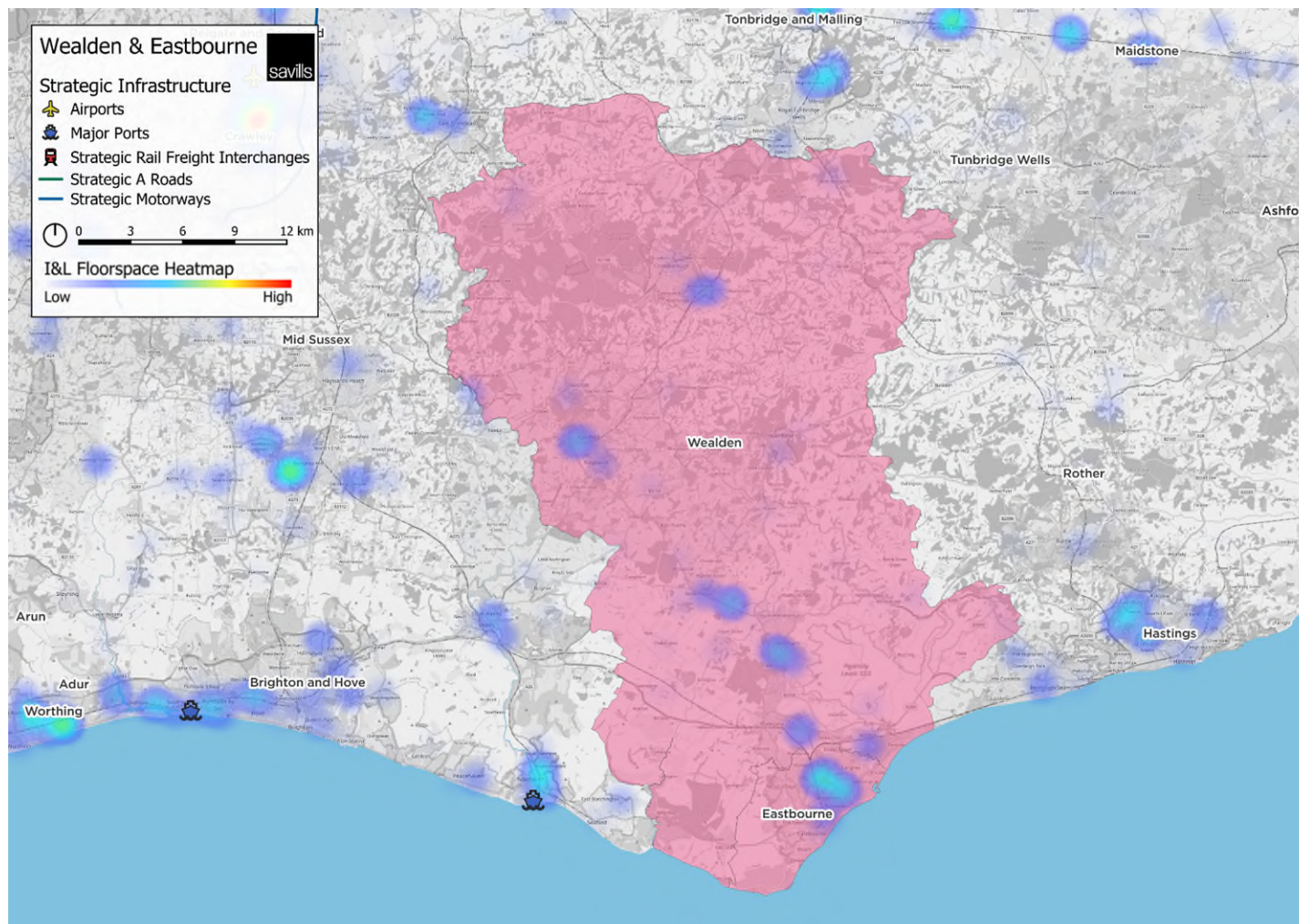
Source: Savills (2025)

Figure 4-8 Ashford / Dover PMA, comprising the local planning authorities of Ashford, Dover, Folkestone and Hythe



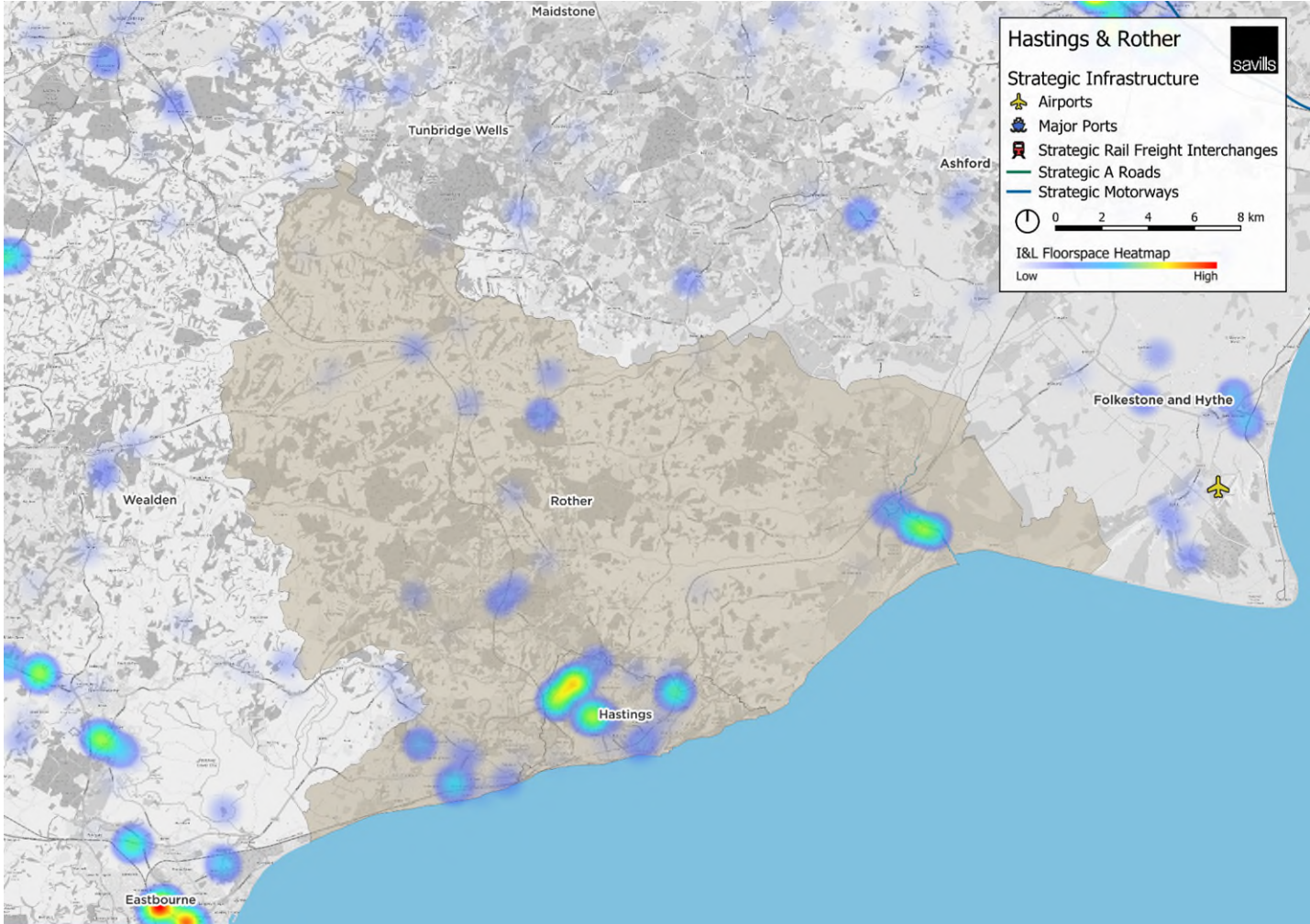
Source: Savills (2025)

Figure 4-9 Wealden / Eastbourne PMA, comprising the local planning authorities of Wealden and Eastbourne



Source: Savills (2025)

Figure 4-10 Rother / Hastings PMA, comprising the local planning authorities of Rother and Hastings



Source: Savills (2025)

4.3 Evaluating current stock

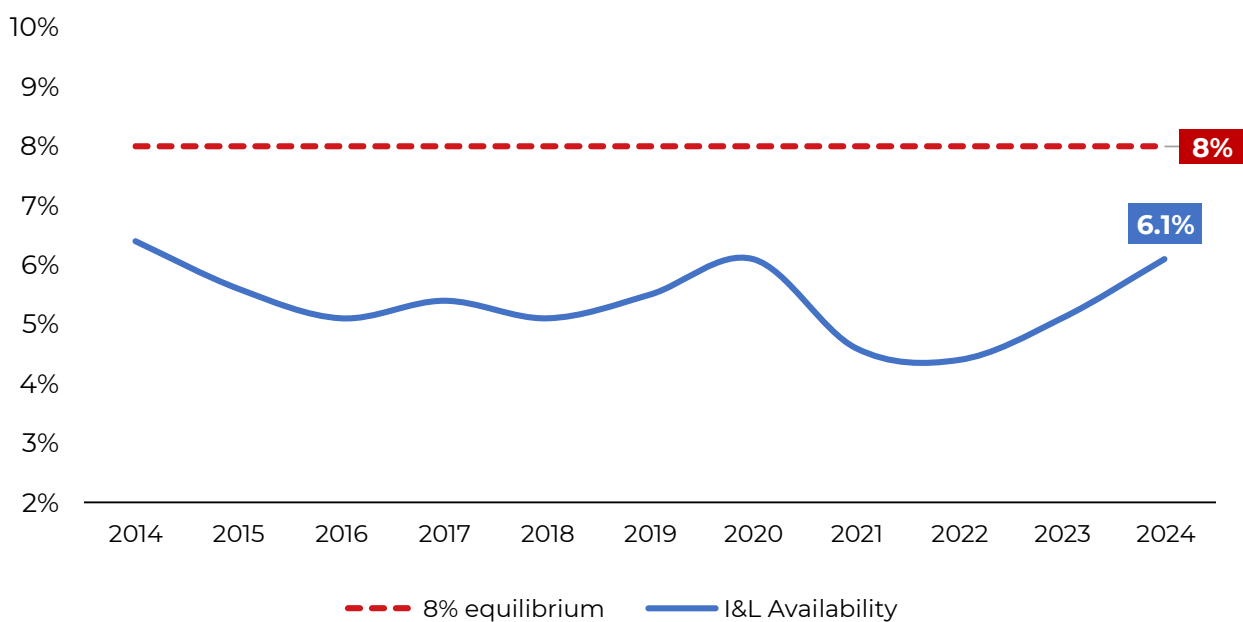
This section assesses the supply of the current stock in the TfSE area in terms of availability, the quality of the stock, and the size of the units and buildings.

4.3.1 Availability

At the national level, an availability rate of 8% is considered the market's equilibrium where supply and demand are broadly in balance. If the rate is above 8% the market is considered to be in surplus. If it is below 8%, it is considered to be supply-constrained. Further explanation about the 8% equilibrium rate is provided in Appendix A.

Within the TfSE area, the availability rate has been below the 8% equilibrium for every year since 2014 (Figure 4-11). In 2022 it was as low as 4.4%. It currently stands at 6.1%. This means that it can be considered that the TfSE area as a whole is supply-constrained (the M3 and M23 PMAs are the only PMAs in the TfSE area that are not supply-constrained, with availability rates of 9.4% and 10.7% respectively).

Figure 4-11: Availability rate (2014-2024) in the TfSE area



Source: CoStar; Savills (2025)

Table 4.3 presents availability in the nine PMAs and in their constituent local planning authorities.

Seven of the nine PMAs have an availability rate below the 8% equilibrium level. A review of the historic data shows that availability has been below the 8% equilibrium for all of the last decade across these PMAs. This indicates that the majority of warehousing markets in the TfSE area have been supply-constrained for a considerable period. The limited supply suppresses demand because not all occupiers have been able to find space to meet their needs. As a result, they are either forced to remain in their existing premises, even if not ideally suited to their operational requirements, or leave the area to

find suitable premises elsewhere, taking jobs and investment to another PMA or outside of the TfSE area altogether.

Of the four largest PMAs (Thames Medway, M4, M3 and M27), three (Thames Medway, M4 and M27) have an availability rate below 8%. This suggests that when new supply has come forward in these markets, it has been taken up quickly (which is known to be the case in Southampton, where the Port of Southampton has planned for and delivered significant additional warehousing in recent years, including a new consolidation centre to manage deliveries to the passenger port). It also indicates that there is a need for more warehousing stock.

It should be noted however that there is variation in the availability rate between the local planning authorities within each PMA. For example, Dartford has an availability rate of 9.1% and the Thames Medway PMA overall has an availability rate of 6.3%. This aligns with Dartford Council's own understanding of the supply of warehousing stock in the area, in that there is not currently a significant supply issue.

As noted above, only two PMAs (the M3 and M23) in the TfSE area have availability rates above the 8% equilibrium level. The rise in availability in the M3 market has been relatively recent as it was just 5.1% in 2022. In the M23 market, availability has been steadily rising for the past seven years. It increased from 2% in 2018 to 10.7% in 2024. This largely reflects the significant quantum of development which came forward around Gatwick airport.

Table 4.3: Availability of warehousing stock across the TfSE area, PMAs and local planning authorities (2025)

PMA	Local planning authority	Availability rate (%)	Available floorspace (sq.ft)
TfSE area		6.1%	18,778,542
Thames Medway		6.3%	3,999,829
	Dartford	9.1%	1,122,013
	Gravesham	0.6%	25,563
	Maidstone	4.8%	401,752
	Medway	3.4%	397,616
	Swale	7.9%	1,029,445
	Tonbridge and Malling	6.8%	679,988
	Tunbridge Wells	9.6%	365,175
M4		7.3%	3,624,028
	Bracknell Forest	5.7%	343,528
	Reading	9.1%	842,840
	Slough	5.6%	909,263
	West Berkshire	5.1%	538,068

PMA	Local planning authority	Availability rate (%)	Available floorspace (sq.ft)
	Windsor and Maidenhead	5.3%	172,996
	Wokingham	18.0%	774,748
M3		9.4%	4,084,299
	Basingstoke and Deans	12.4%	1,241,003
	Elmbridge	11.7%	396,407
	Hart	22.3%	327,101
	Runnymede	13.3%	252,649
	Rushmoor	5.2%	207,299
	Spelthorne	6.8%	208,614
	Surrey Heath	7.0%	247,668
	Woking	1.7%	62,964
M27		5.6%	2,240,176
	Eastleigh	6.4%	595,217
	Fareham	6.2%	327,959
	Gosport	4.8%	108,361
	Havant	6.6%	384,908
	Portsmouth	3.5%	322,959
	Southampton	6.2%	501,974
South Coast		6.5%	1,309,024
	Adur	10.1%	393,261
	Arun	5.2%	285,167
	Brighton and Hove	2.6%	82,572
	Chichester	4.3%	200,852
	Worthing	11.7%	340,977
M23		10.7%	1,934,198
	Crawley	11.6%	1,104,153
	Mid Sussex	11.0%	597,010
	Reigate and Barnstead	4.2%	131,489
Ashford / Dover		4.5%	570,154
	Ashford	4.2%	131,489
	Dover	1.0%	36,779
	Folkestone and Hythe	4.8%	123,129

PMA	Local planning authority	Availability rate (%)	Available floorspace (sq.ft)
Wealden / Eastbourne		5.4%	362,653
	Eastbourne	5.9%	153,022
	Wealden	5.2%	214,355
Rother / Hastings		0.7%	31,754
	Hastings	0.5%	13,140
	Rother	0.9%	17,175
Other (e.g. East Hampshire, Guildford, Horsham, Sevenoaks, Winchester)		1.3%	622,427

Source: CoStar; Savills (2025)

4.3.2 Quality of stock

This section covers the quality of the stock. The data is presented using a star rating. High quality (above average) properties that meet the requirements of modern warehousing operators are given a rating of four or five stars. Properties of an average standard are given three stars. Properties that are of a poor or below average standard are given one or two stars. The details of the characteristics of the different categories of quality are set out in Appendix B.

Occupiers are gravitating towards better quality buildings, with better Environmental, Social and Governance (ESG) features. Contrary to some perceptions, new warehouse developments are quality employment hubs with a wide range of worker amenities and green initiatives that are improving environmental performance and operational efficiency.

Modern warehouse developments are reducing embodied carbon and other construction related emissions via the use of recycled materials, cement alternatives in concrete, and reliance on local labour force. During their operational phase, energy efficiency at warehouses is being improved by addressing both the demand and supply of energy. The former is about reducing the inherent energy demand a building requires through specific design measures (for instance through providing LED motion sensing lighting or installing smart sensors and sub-meters). This is reflected in the high BREEAM (Building Research Establishment Environmental Assessment Method) and EPC (Energy Performance Certificate) ratings of new warehouse buildings. The latter is about decarbonising the development's energy supply via the use of renewable sources on site (PV, wind, etc).

Table 4.4 compares the quality of warehouse stock across the TfSE area and within each of the nine PMAs. It shows that 91% of the TfSE area's warehouse inventory is of either average quality or poor. Only 9% of existing stock is considered to be of above average quality. The lack of good quality stock reflects a lack of capital investment by existing and proposed occupiers, who can be unwilling or unable to tolerate a period of

disruption while works are undertaken to upgrade or refurbish buildings⁴². Warehouses that were built decades ago – and which have not been regularly refurbished – have become outdated and in some cases obsolete. Often, they have not been upgraded to meet current efficiency, sustainability, and automation standards, as well as modern specifications (e.g. minimum eaves heights). While new high-quality development is coming forward in the region, this forms only a small portion of overall stock.

Across the nine PMAs in the TfSE area, a similar trend is evident. Existing stock is skewed towards low or average quality units. Some of the smaller PMAs (in terms of warehouse inventory) such as Rother / Hastings, Wealden / Eastbourne and Ashford / Dover have very little stock of above average quality.

The exception to this trend is the Thames Medway PMA where almost a fifth (17%) of its stock is of above average quality. This reflects the new development which came forward in recent years.

Overall, across the TfSE area and within the nine PMAs there is a lack of good quality warehousing stock to meet modern occupier requirements. This indicates that existing, reasonably functional premises need to be refurbished or redeveloped (by investors or occupiers), and that new, high-quality premises are needed.

Ultimately the delivery of new high-quality stock will be driven by the decisions of investors. However, public sector intervention can support this process. For example, the implementation of an agile, pro-development planning system that is responsive to the sector's needs, will be critical in ensuring enough land for warehousing is allocated in appropriate locations to meet demand.

Also, if local authorities allocate more warehousing land where it is most needed, the demand and supply imbalance is more likely to be addressed by the private sector, whether that be private investors, developers, or land owners.

Table 4.4: Quality of stock within the TfSE area, PMAs and local planning authorities (2025)

PMA	Local planning authority	Below average (1 and 2 stars)	Average (3 stars)	Above average (4 and 5 stars)
TfSE area		31.6%	59.1%	9.2%
Thames Medway		33.1%	50.3%	16.6%
	Dartford	42.3%	34.0%	23.7%
	Gravesham	34.7%	61.4%	3.9%
	Maidstone	45.6%	49.5%	4.9%
	Medway	27.6%	61.8%	10.6%
	Swale	42.6%	39.8%	17.6%
	Tonbridge & Malling	24.9%	62.8%	12.3%

⁴² 'Stay or go: Should industrial and logistics occupiers stay put, or find new warehouse space?' Savills, 2024

PMA	Local planning authority	Below average (1 and 2 stars)	Average (3 stars)	Above average (4 and 5 stars)
	Tunbridge Wells	39.8%	59.5%	0.0%
M4		24.3%	65.3%	10.4%
	Bracknell Forest	14.6%	78.4%	7.0%
	Reading	34.9%	50.3%	14.8%
	Slough	19.6%	65.8%	14.7%
	West Berkshire	22.9%	69.0%	8.1%
	Windsor & Maidenhead	40.3%	58.7%	1.0%
	Wokingham	24.0%	73.1%	2.5%
M3		23.0%	66.0%	10.9%
	Basingstoke & Deans	19.7%	64.9%	15.4%
	Elmbridge	30.4%	64.2%	5.4%
	Hart	29.1%	60.0%	10.9%
	Runnymede	26.4%	68.7%	4.8%
	Rushmoor	31.6%	54.5%	13.7%
	Spelthorne	31.6%	68.4%	0.0%
	Surrey Heath	16.3%	74.3%	9.4%
	Woking	16.2%	61.1%	22.7%
M27		24.9%	67.9%	7.1%
	Eastleigh	24.2%	72.0%	3.4%
	Fareham	25.7%	68.5%	5.7%
	Gosport	26.8%	73.2%	0.0%
	Havant	20.2%	68.4%	11.4%
	Portsmouth	20.5%	76.5%	2.9%
	Southampton	33.0%	51.1%	15.9%
South Coast		36.6%	54.3%	8.9%
	Adur	51.5%	41.6%	6.9%
	Arun	30.7%	60.5%	8.3%
	Brighton & Hove	48.8%	50.6%	0.5%
	Chichester	24.6%	53.2%	22.0%
	Worthing	33.6%	65.4%	1.0%
M23		27.6%	61.6%	10.8%

PMA	Local planning authority	Below average (1 and 2 stars)	Average (3 stars)	Above average (4 and 5 stars)
	Crawley	18.9%	73.1%	8.0%
	Mid Sussex	38.3%	43.5%	18.2%
	Reigate & Barnstead	35.3%	58.3%	6.4%
Ashford / Dover		41.2%	56.0%	2.6%
	Ashford	30.8%	67.7%	1.4%
	Dover	57.2%	36.3%	6.6%
	Folkestone & Hythe	44.3%	54.9%	0.0%
Wealden / Eastbourne		47.2%	51.7%	0.6%
	Eastbourne	46.7%	53.3%	0.0%
	Wealden	47.5%	50.8%	0.9%
Rother / Hastings		61.0%	39.0%	0.0%
	Hastings	61.6%	38.4%	0.0%
	Rother	59.2%	39.2%	0.0%

Source: CoStar; Savills (2025). Numbers may not sum to 100% due to rounding

4.3.3 Size band analysis

Table 4.5 compares the inventory share by size band across the buildings in the TfSE area and the nine PMAs based on sq.ft. The following size bands are used:

- Small-scale - warehouses within the 0-30k sq.ft size band, approximately the size of a large supermarket;
- Mid-box - warehouses within the 30-100k sq.ft size band, approximately the size of 0.5 – 1.5 football pitches; and
- Large - warehouses of 100k+ sq.ft or greater size band.

The TfSE area's inventory has a higher proportion of sq.ft in small buildings, followed by mid-box buildings and then large units.

There are variations across the PMAs. The M4, M27 and Thames Medway PMAs have a higher proportion of large buildings, with most of these large buildings having been delivered in recent years. Larger buildings typically require locations with direct access to the Strategic Road Network (SRN) to optimise operational efficiency. This also enables quicker access to end customers, whether they are consumers or businesses. It also helps to reduce transportation time, costs and carbon emissions.

As illustrated in Figure 4-1, these three PMAs have significant inventory concentrated around the respective movement corridors that bisect them. In the case of the M27, large units are also required to facilitate the storage and distribution of goods entering the country at the Southampton and Portsmouth ports. Large warehouses are essential components of freight port operations, often with specialised storage (e.g. refrigerated warehouses) and cross docking facilities.

Table 4.5: Inventory by size band in the TfSE area, PMAs and local planning authorities (2025)

PMA	Local authority	Small scale (0-30k sq.ft)	Mid-box (30-100k sq.ft)	Large (100k+ sq.ft)
TfSE area		38.3%	32.7%	29.1%
Thames Medway		28.4%	30.9%	40.7%
	Dartford	18.1%	24.7%	57.3%
	Gravesham	25.5%	15.3%	59.2%
	Maidstone	36.1%	34.3%	29.6%
	Medway	33.6%	34.6%	31.8%
	Swale	26.7%	30.8%	42.5%
	Tonbridge and Malling	26.9%	39.3%	33.8%
	Tunbridge Wells	41.2%	28.6%	30.3%
M4		34.0%	32.9%	33.1%
	Bracknell Forest	18.2%	24.9%	56.9%
	Reading	39.3%	35.5%	25.2%
	Slough	30.2%	36.0%	33.8%
	West Berkshire	31.2%	35.1%	33.7%
	Windsor and Maidenhead	56.8%	25.9%	17.3%
	Wokingham	49.2%	26.2%	24.7%
M3		35.5%	37.4%	27.1%
	Basingstoke and Deans	28.8%	35.0%	36.2%
	Elmbridge	43.3%	37.2%	19.4%
	Hart	54.8%	36.1%	9.1%
	Runnymede	51.1%	48.9%	0.0%
	Rushmoor	49.8%	33.6%	16.5%
	Spelthorne	38.0%	44.9%	17.1%
	Surrey Heath	32.6%	39.8%	27.6%
	Woking	27.9%	28.1%	44.0%
M27		31.9%	35.3%	32.7%
	Eastleigh	23.3%	41.8%	34.9%
	Fareham	42.3%	36.4%	21.2%
	Gosport	40.4%	13.8%	45.8%
	Havant	29.0%	26.6%	44.4%

PMA	Local authority	Small scale (0-30k sq.ft)	Mid-box (30-100k sq.ft)	Large (100k+ sq.ft)
	Portsmouth	30.6%	38.1%	31.2%
	Southampton	36.3%	36.2%	27.4%
South Coast		50.2%	28.9%	20.9%
	Adur	43.5%	41.9%	14.6%
	Arun	43.8%	28.2%	28.0%
	Brighton and Hove	63.5%	33.0%	3.6%
	Chichester	54.0%	17.2%	28.7%
	Worthing	50.5%	27.2%	22.3%
M23		40.0%	40.6%	19.4%
	Crawley	27.2%	45.7%	27.1%
	Mid Sussex	55.6%	29.5%	14.9%
	Reigate and Barnstead	52.1%	44.4%	3.5%
Ashford / Dover		50.0%	33.0%	17.0%
	Ashford	48.6%	31.8%	19.5%
	Dover	43.7%	34.9%	21.4%
	Folkestone and Hythe	62.4%	33.4%	4.2%
Wealden / Eastbourne		56.7%	27.0%	16.3%
	Eastbourne	47.8%	30.8%	21.4%
	Wealden	62.3%	24.6%	13.1%
Rother / Hastings		54.2%	24.7%	21.2%
	Hastings	50.2%	32.7%	17.1%
	Rother	59.7%	13.6%	26.7%

Source: CoStar; Savills (2025). Numbers may not sum to 100% due to rounding

PMAs which are not as strategically located for warehouse development, given their low level of inventory (e.g., Wealden/Eastbourne and Hastings / Rother) or lack of a major movement corridor such as the South Coast, are skewed towards smaller units. Smaller units, while representing a critical segment of the wider industrial and warehousing market, tend to be oriented towards meeting local demand and are less reliant on access to the SRN.

4.4 Conclusions

The key findings for the TfSE area are:

- The TfSE area has approximately 308 million sq.ft of warehouse inventory. About 85% is within the nine PMAs which form the basis for this study.

- Thames Medway is the PMA with the most warehousing inventory (21% of warehousing in the TfSE area), whilst Rother / Hastings is the PMA with the least warehousing inventory (1%).
- The TfSE area's warehouse market is highly supply constrained. Its availability rate is below the 8% equilibrium mark which is the level in which supply and demand are broadly in balance. It has been supply-constrained for all of the past decade. The lack of sufficient supply has suppressed demand because not all occupiers have been able to find suitable space to meet their operational requirements. Seven of the nine PMAs (Thames Medway, M4, M27, South Coast, Ashford / Dover, Wealden / Eastbourne and Rother / Hastings) are also supply constrained.
- There is a lack of high-quality warehousing stock to meet modern occupier requirements in the TfSE area. Only 9% of existing stock is of high or above average quality. Thames Medway is the PMA with the highest amount of above average warehousing inventory (16.6%), and Rother / Hastings has no warehousing that is of above average quality. Across the PMAs, existing, reasonably functional premises need to be refurbished or redeveloped (by investors or occupiers) and new, high-quality premises need to be delivered.
- The TfSE area's warehouse inventory has a higher proportion of sq.ft in small buildings, followed by mid-box buildings and then large units. There are notable variations across the PMAs. The markets that are located along the major movement corridors and which accommodate strategic infrastructure are more likely to have a higher proportion of large units.

5 Current demand for warehousing in the South East

5.1 Current demand profile

This chapter reviews key demand metrics. The aim is to gauge the current and historic demand performance across the TfSE area and in the PMAs.

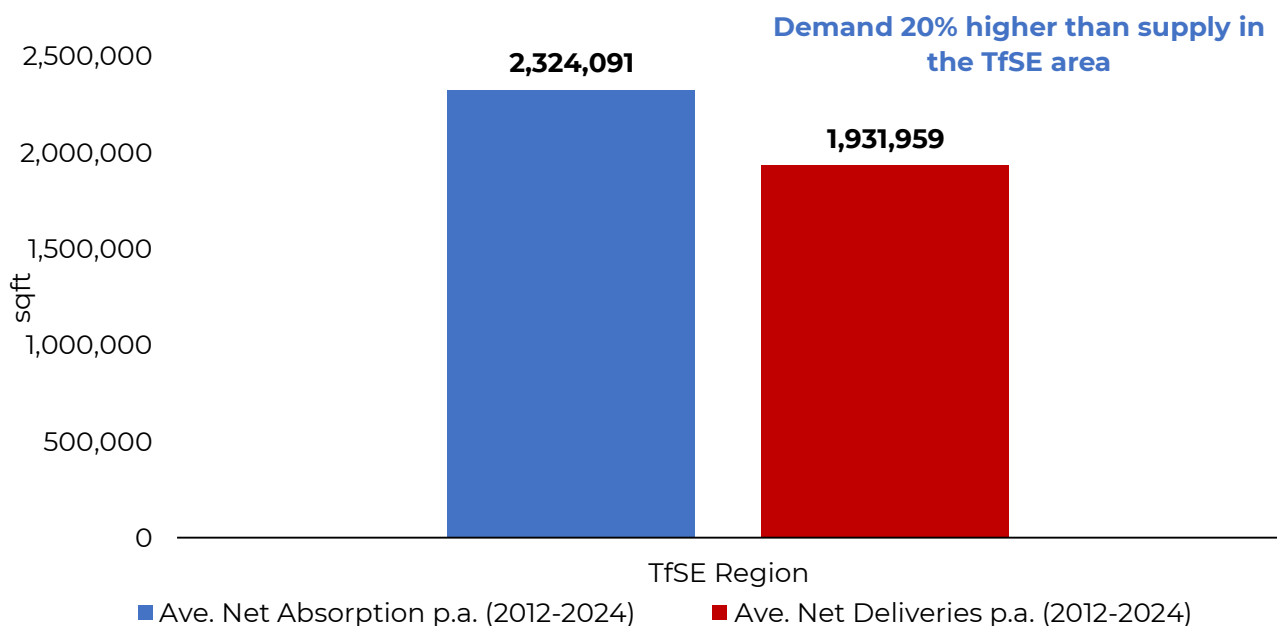
The warehouse sector continues to undergo unprecedented change which has influenced the profile of demand for premises. Over the past 15 years operating models and occupier requirements have fundamentally shifted. While the sector was already growing strongly in the pre-pandemic period, the Covid-19 Pandemic accelerated and intensified the underlying growth trends and dynamics (see Section 6.1 for more details). This has caused a ratcheting up of demand for warehouse floorspace, particularly those that can best accommodate logistic activities.

5.1.1 Demand vs supply

'Net absorption' is a leading measure of demand. Over a given period, it reflects the total amount of space that has been leased (move-ins), minus the amount of space that has been vacated during the same periods (move-outs).

Figure 5-1 compares net absorption with net deliveries which is a measure of the change in inventory (floorspace) and which comprises new developments and demolitions. Figure 5.1 shows that that between 2012 and 2024, average annual levels of net absorption (demand) far exceeded average levels of net deliveries (supply) across the TfSE area. On average the TfSE area has delivered 1.9 million sq.ft of warehouse space per annum while net absorption (demand) has been significantly higher at 2.3 million sq.ft per annum. This equates to demand outstripping supply by 20% on an annual basis.

Figure 5-1: TfSE area net absorption and net deliveries per annum (2012-2024) (sq.ft)



Source: CoStar; Savills (2025).

This is consistent with analysis in Chapter Four (Figure 4.2) which showed availability being below the 8% equilibrium over the last decade.

Table 5.1 below shows the demand-supply balance across the TfSE area, in the PMAs and for the local planning authorities. It sets out the average net absorption and average net deliveries (both by sq.ft and sq.ft as a % of existing inventory). Across the TfSE area and six of the PMAs, average net absorption (sq.ft) has historically exceeded average net deliveries (sq.ft), contributing to their supply-demand imbalance. The markets in which demand has exceeded supply for the past 13 years are highlighted in blue.

Table 5.1: Net absorption and net deliveries sq.ft p.a. (2012-2024)⁴³

PMA	Local planning authority	Average net absorption	Average net absorption as % of inventory	Average net deliveries	Average net deliveries as % of inventory	Ratio of demand and supply
TfSE area		2,324,091	0.8%	1,931,959	0.6%	120%
Thames Medway		866,868	1.4%	740,199	1.2%	117%
	Dartford	356,000	2.9%	275,795	2.2%	
	Gravesham	82,490	1.9%	71,254	1.7%	
	Maidstone	90,758	1.1%	81,911	1.0%	
	Medway	162,175	1.4%	143,214	1.2%	
	Swale	51,777	0.4%	49,163	0.4%	
	Tonbridge and Malling	115,438	1.2%	113,335	1.1%	
	Tunbridge Wells	8,993	0.2%	5,527	0.1%	
M4		420,143	0.8%	267,748	0.5%	157%
	Bracknell Forest	84,021	1.4%	42,864	0.7%	
	Reading	145,400	1.6%	138,186	1.5%	
	Slough	101,858	0.6%	23,322	0.1%	
	West Berkshire	90,905	0.9%	59,052	0.6%	
	Windsor and Maidenhead	-6,575	-0.2%	-7,313	-0.2%	
	Wokingham	4,535	0.1%	11,637	0.3%	
M3		216,893	0.5%	254,502	0.6%	85%
	Basingstoke and Deans	4,535	0.1%	11,637	0.3%	
	Elmbridge	-3,129	-0.1%	-10,277	-0.3%	

⁴³ Negative net absorption occurs when more space is vacant than leased during a given period.

PMA	Local planning authority	Average net absorption	Average net absorption as % of inventory	Average net deliveries	Average net deliveries as % of inventory	Ratio of demand and supply
	Hart	12,231	0.8%	15,512	1.1%	
	Runnymede	3,552	0.2%	-469	0.0%	
	Rushmoor	26,369	0.7%	38,531	1.0%	
	Spelthorne	7,665	0.2%	-1,571	-0.1%	
	Surrey Heath	11,268	0.3%	1,435	0.0%	
	Woking	26,957	0.7%	9,908	0.3%	
M27		174,075	0.4%	116,348	0.3%	150%
	Eastleigh	28,214	0.3%	-2,924	0.0%	
	Fareham	35,626	0.7%	25,948	0.5%	
	Gosport	18,057	0.8%	11,491	0.5%	
	Havant	11,064	0.2%	3,587	0.1%	
	Portsmouth	46,596	0.5%	24,492	0.3%	
	Southampton	34,518	0.4%	53,755	0.7%	
South Coast		111,721	0.6%	146,303	0.7%	76%
	Adur	22,532	0.6%	30,864	0.8%	
	Arun	83,866	1.5%	84,549	1.5%	
	Brighton and Hove	-21,284	-0.7%	-24,666	-0.8%	
	Chichester	34,919	0.7%	44,548	1.0%	
	Worthing	-5,776	-0.2%	11,008	0.4%	
M23		148,188	0.8%	204,237	1.1%	73%
	Crawley	57,374	0.6%	88,294	0.9%	
	Mid Sussex	72,870	1.3%	97,420	1.8%	
	Reigate and Barnstead	28,677	0.9%	25,418	0.8%	
Ashford / Dover		104,163	0.8%	52,501	0.4%	198%
	Ashford	44,619	0.7%	45,111	0.7%	
	Dover	52,526	1.4%	23,301	0.6%	
	Folkestone and Hythe	7,506	0.3%	-15,910	-0.6%	
Wealden / Eastbourne		38,595	0.6%	33,005	0.5%	117%
	Eastbourne	-308	0.0%	-8,318	-0.3%	

PMA	Local planning authority	Average net absorption	Average net absorption as % of inventory	Average net deliveries	Average net deliveries as % of inventory	Ratio of demand and supply
	Wealden	38,903	0.9%	41,323	1.0%	
Rother / Hastings		45,940	1.0%	16,711	0.4%	275%
	Hastings	20,659	0.8%	5,316	0.2%	
	Rother	25,281	1.3%	11,395	0.6%	

Source: CoStar; Savills (2025).

Three of the PMAs (M3, M23 and South Coast) have historically recorded more deliveries (new supply) than demand over the period 2012-2024. For the M3 and M23 PMAs, both markets have seen a significant quantum of new supply in recent years resulting in each of their availability rates rising above the 8% equilibrium (Table 4.3). Concurrently, the South Coast's availability, while still below the 8% equilibrium, is on an upward trajectory. Across all three PMAs, the uptick in availability is a consequence of the delivery of new supply.

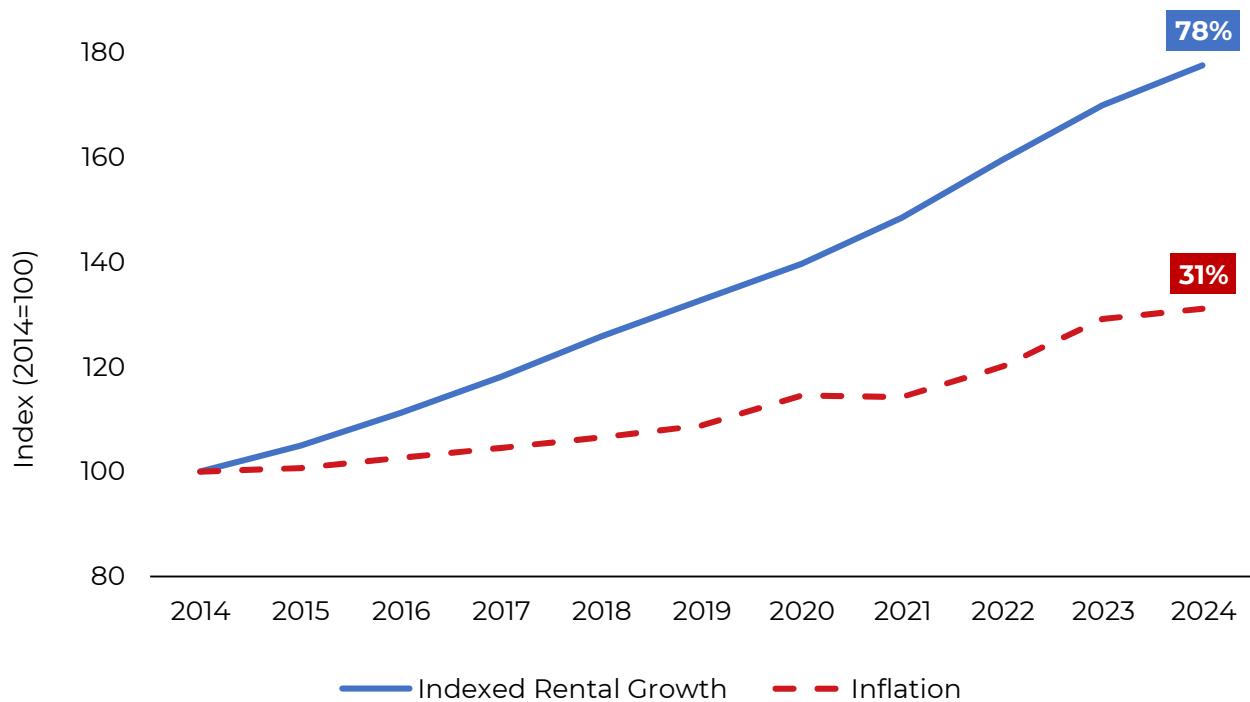
The overall sustained imbalance between demand and supply in the TfSE area as a whole underpins the need to address supply constraints. Insufficient supply relative to demand risks escalating rental values, which have risen well above the rate of inflation for the past decade (see following sub-section).

5.1.2 Rental growth

Rental growth is a key market indicator for investigating the relationship between supply and demand. When demand outstrips supply, rental levels typically increase as occupiers bid for limited available stock. This is a sign of a supply constrained market. Conversely, when demand is weaker in the face of available supply, rental growth is lower, typically tracking inflation more closely. This is characteristic of a demand constrained market.

In the TfSE area, the lack of available floorspace and limited new supply has contributed to rapid rental growth. Figure 5-2 shows how warehouse rents in the TfSE area have grown by 78% between 2014 and 2024. This is equivalent to about 4.9% per annum. Over the same period, general prices grew by 31% which is equivalent to about 2.3% per annum.

Figure 5-2: Rental growth vs. inflation (2014-2024) (2014=100)



Source: CoStar; Savills (2025).

Across all nine PMAs, rents grew at a faster rate than inflation illustrating the underlying supply constrained dynamics in the market (Table 5.2). Rental growth has been strongest in the Thames Medway PMA, a result of persistent lack of stock in one of the region's established industrial hubs. The stronger rental growth is also likely being driven by the higher-than-average proportion of good quality units in the Thames Medway area, as illustrated in Table 4.4.

The PMAs of Wealden / Eastbourne and Rother / Hastings have recorded weaker (yet still robust) rental growth. These locations have less stock that is of above average quality. This also contributes towards restraining relative rental growth.

Table 5.2: Rental growth in the TfSE area, PMAs and local planning authorities (2014-2024)

PMA	Local planning authority	Total rental growth	Rental growth per annum
TfSE area		78%	5.9%
Thames Medway		94%	6.9%
	Dartford	104%	7.4%
	Gravesham	82%	6.2%
	Maidstone	89%	6.6%
	Medway	90%	6.6%

PMA	Local planning authority	Total rental growth	Rental growth per annum
	Swale	95%	6.9%
	Tonbridge & Malling	96%	6.9%
	Tunbridge Wells	85%	6.3%
M4		83%	6.2%
	Bracknell Forest	89%	6.6%
	Reading	86%	6.4%
	Slough	82%	6.2%
	West Berkshire	85%	6.3%
	Windsor & Maidenhead	78%	5.9%
	Wokingham	72%	5.6%
M3		76%	5.8%
	Basingstoke & Deans	77%	5.9%
	Elmbridge	94%	6.9%
	Hart	65%	5.2%
	Runnymede	74%	5.7%
	Rushmoor	78%	5.9%
	Spelthorne	84%	6.3%
	Surrey Heath	76%	5.8%
	Woking	75%	5.7%
M27		67%	5.3%
	Eastleigh	70%	5.4%
	Fareham	67%	5.3%
	Gosport	66%	5.2%
	Havant	69%	5.4%
	Portsmouth	66%	5.2%
	Southampton	66%	5.2%
South Coast		66%	5.2%
	Adur	68%	5.3%
	Arun	77%	5.9%
	Brighton & Hove	63%	5.0%
	Chichester	59%	4.7%
	Worthing	59%	4.8%

PMA	Local planning authority	Total rental growth	Rental growth per annum
M23		79%	6.0%
	Crawley	81%	6.1%
	Mid Sussex	76%	5.8%
	Reigate & Barnstead	80%	6.1%
Ashford / Dover		78%	4.9%
	Ashford	77%	5.9%
	Dover	77%	5.9%
	Folkestone & Hythe	75%	5.8%
Wealden / Eastbourne		52%	4.3%
	Eastbourne	54%	4.4%
	Wealden	50%	4.2%
Rother / Hastings		59%	3.9%
	Hastings	59%	4.7%
	Rother	60%	4.8%

Source: CoStar; Savills (2025)

5.1.3 Demand by sector

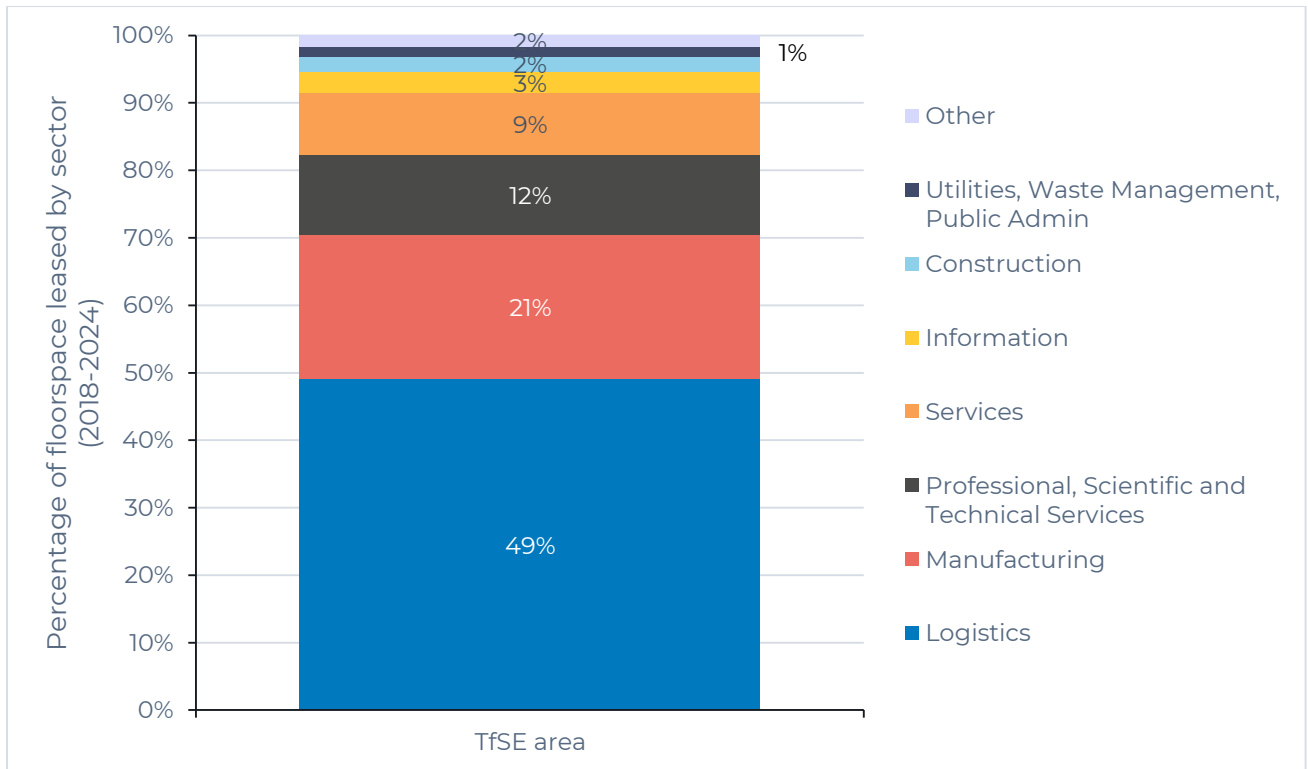
This section analyses lease transactions by sector over the past five years (2019 to 2024) to understand which sectors are driving demand.

Industrial premises are generally flexible, enabling different occupiers to fit out their spaces to meet their specific operational requirements. Industrial and warehouse premises serve a wide range of industries from traditional manufacturers, logistics firms, innovative R&D companies, laboratories and service sector businesses.

Since 2019 almost every business sector of the economy has leased industrial floorspace within the TfSE area. The sector provides premises that accommodate companies of all sizes and at all stages of the supply chain. Whilst the majority of demand has come from the traditional manufacturing and logistic sectors (70%), almost a third of the industrial floorspace (30%) has been from other sectors. Around 20% is from the services sector including professional, scientific and technical activities.

The result is a highly diverse sectoral base which supports economic resilience, job creation, and growth, whilst reducing risks associated with sector-specific dependencies. Figure 5-3 illustrates the share of floorspace leased by sector in the TfSE area.

Figure 5-3: TfSE area share of floorspace leased by sector (2019-2024)



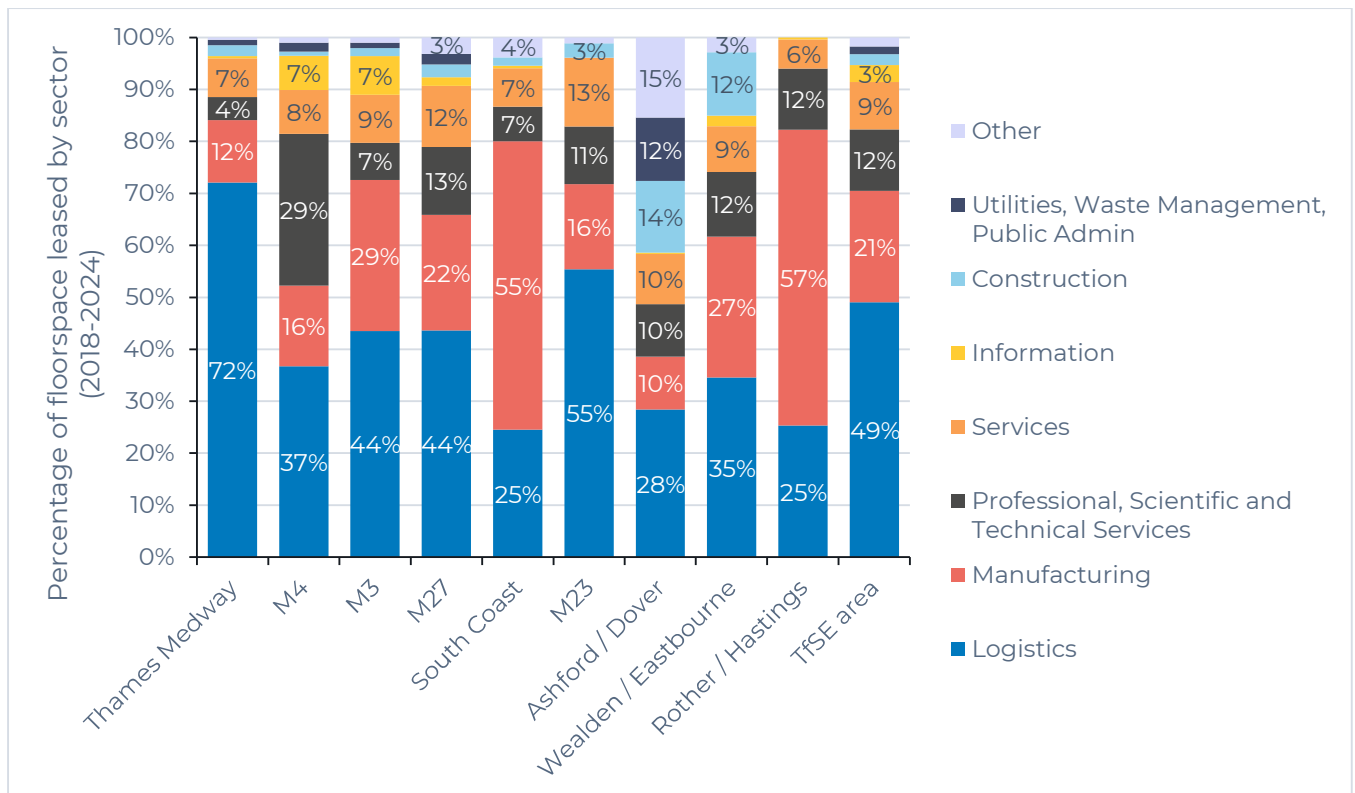
Source: CoStar; Savills (2025).

Figure 5-4 shows the share of floorspace leased by sector across the nine PMAs and the TfSE area. Across almost all PMAs, the highest proportion of floorspace is for logistics.

Within the Thames Medway PMA, over 70% of floorspace leased has come from the logistics sector, significantly higher than any other PMA. This emphasises the recent ongoing investment in the port facilities and logistics infrastructure bolstering the cluster's capacity to handle high cargo volumes.

The PMAs with less developed warehouse markets such as Ashford / Dover and Wealden / Eastbourne have a tenant base that is more diverse and less oriented towards logistics.

Figure 5-4 Demand for floorspace by sector (2019-2024)



Source: CoStar; Savills (2025)

5.2 Conclusions

The key findings for the TfSE area are:

- Average levels of demand (net absorption) have exceeded average levels of new supply (net deliveries) in the TfSE area which explains the supply constrained state of the TfSE area's warehousing market identified in Chapter Four.
- Between 2012 and 2024, demand for warehouse floorspace exceeded supply by 20%. This is a sustained demand/supply imbalance. There is a similar trend in six of the nine PMAs.
- Rents grew about 5% per annum between 2014 and 2024. This is more than twice the rate of inflation over the same period. Similar levels of rental growth have been seen across the PMAs. The PMAs with the highest rental growth rates per annum are Thames Medway (6.9%) and M23 (6.0%). The PMAs with the smallest rental growth rates per annum are Rother / Hastings (3.9%) and Wealden / Eastbourne (4.3%).
- Since 2019 almost every business sector of the economy has leased industrial floorspace within the TfSE area. The majority of demand is from either logistics (49%) or manufacturing (21%). Almost a third of demand (30%) has been from other sectors. Around 20% is from the services sector including professional, scientific and technical activities.

6 Future trends and forecasts

This chapter considers the warehousing sector's future trajectory. It first reviews the key trends and drivers of demand and then considers future performance. Bespoke modelling techniques have been used to forecast future supply and demand in the TfSE area and the nine PMAs. This has included the use of Savills Suppressed Demand model (see Appendix C for further information) to estimate future floorspace requirements.

6.1 Factors influencing future demand

The warehousing sector enables the economy to function smoothly by connecting suppliers, manufacturers, and consumers. Without it, supply chains would be disrupted, costs would rise, and access to goods and services would be compromised—impacting economic activity. Companies such as Savills would view the sector and its workers, stock of facilities and distribution networks as critical national infrastructure and should be planned for on the same basis as is done for other infrastructure such as roads, rail, ports and airports.

The warehousing sector is continually growing, driven by a number of structural growth drivers.

6.1.1 Growth in online retailing

As the country's population grows, so will the need for warehouse floorspace to support household consumption and other sectors of the economy. Statistics show that the share of internet sales as a proportion of total retail sales has consistently increased over the last 20 years, rising from 3% in 2006 to 19% before the onset of the Covid-19 Pandemic. During the Pandemic, the figure increased to around 40%. While it has fallen back from its peak, it was around 30% in November 2024⁴⁴.

Most forecasters assume that online retailing will continue to grow due to changes in buying habits and delivery expectations. The National Infrastructure Commission predicts e-commerce will comprise up to 65% of total retail expenditure by 2050 for non-food items⁴⁵.

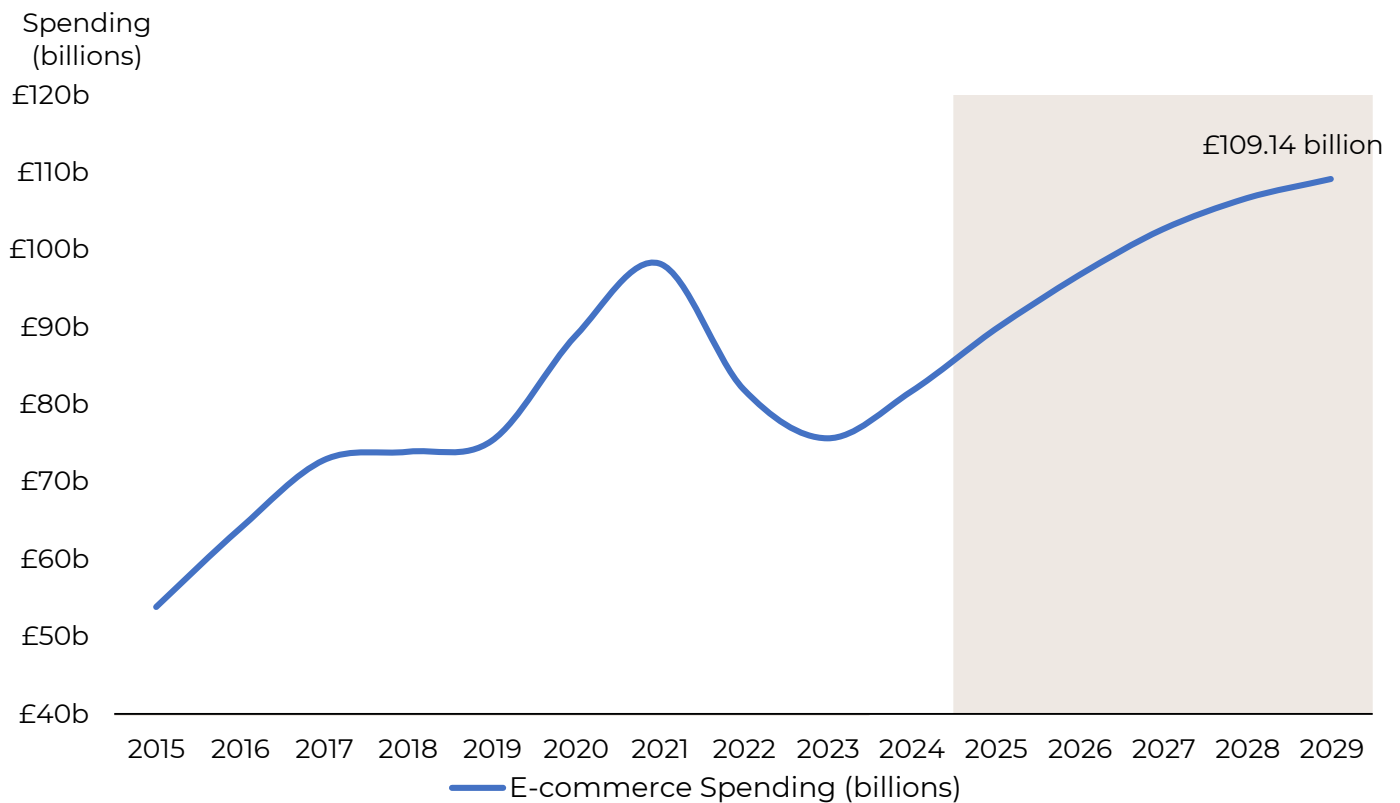
Arguably a more relevant statistic than the percentage of online sales is the total amount of online spending in monetary terms. This is because the percentage of online sales does not pick up the fact that online spending can increase even if the online percentage sales remain static. This is because total online spend will continue to increase as more homes are built and the number of households increase. This relationship is shown in Figure 6-1 below based on Statista data⁴⁶. Real prices have been used to remove the effect of inflation by rebasing all data back to 2015 prices. Figure 6-1 shows that following a brief dip in total online spending from the 2021 Covid-19 lockdown-induced peak, the growth trend is continuing.

⁴⁴ ONS (2024), Internet sales as a percentage of total retail sales (ratio) (%)

⁴⁵ National Infrastructure Commission (2019), Future of Freight Demand

⁴⁶ Statista is a data portal: <https://www.statista.com/>

Figure 6-1: UK internet sales retail sales (2015-2029)



Source: Statista; Savills 2025

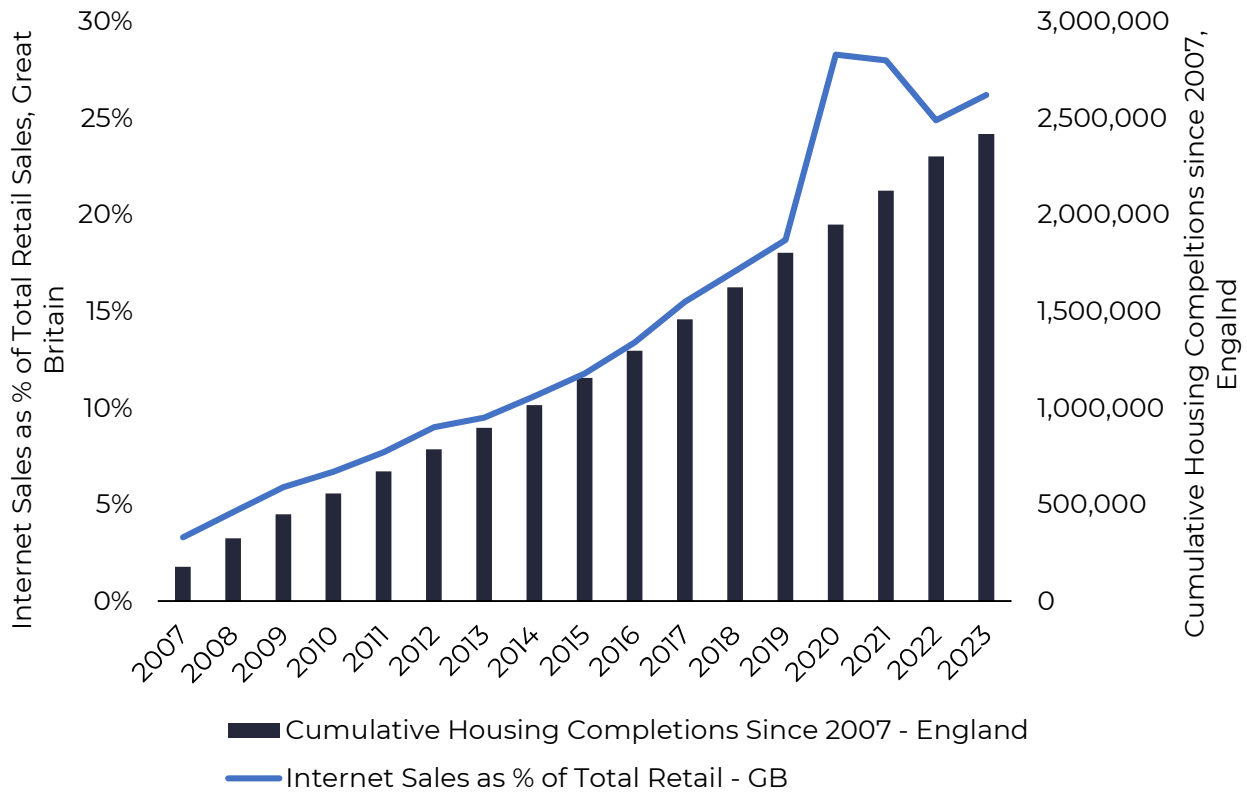
The growth in online shopping has significant implications on future warehouse demand given that e-commerce requires around three times the logistics space of traditional bricks-and-mortar retailers⁴⁷. Internet shopping relies on increased choice for the consumer and also increased delivery speeds to a location of people's choosing. This means that more inventory is required to be located nearer to the general population. This in turn has meant that more warehouse space is required.

6.1.2 Housing growth

This exponential growth in online retailing is both a function of the UK's increasing housing supply and that on average, each individual house is spending more online. Figure 6-2 shows how housing growth at the national level has broadly tracked the growth in online retailing before the onset of the Covid-19 Pandemic, during which time online retailing has spiked even higher.

⁴⁷ Prologis (2016), Global E-Commerce Impact on Logistics Real Estate. Available at: <https://www.prologis.com/about/logistics-industry-research/global-e-commerce-imoact-logistics-real-estate>.

Figure 6-2: Dwelling completions and internet sales as a % of retail sales



Source: ONS, MHCLG, Savills

Between 2001 and 2023, the number of homes across the South East increased by 21%⁴⁸. This trend is expected to continue with the ONS projecting that the number of households across the entire South East region will grow a further 6% between 2025 and 2035, equivalent to over 230,000 new homes⁴⁹.

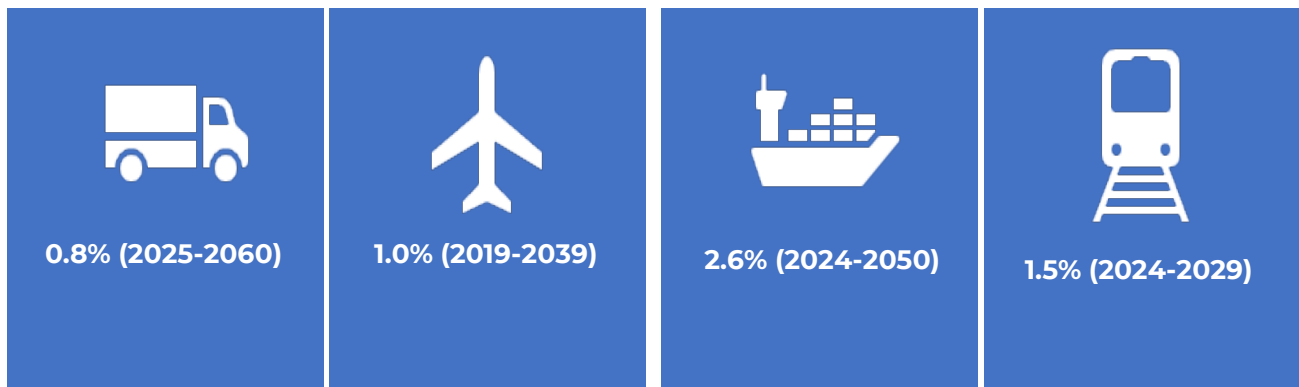
6.1.3 Growth in freight flows

Freight flows are another key driver of warehouse floorspace demand. Significant growth is forecast across all freight modes (Figure 6-3). Freight arriving and leaving the UK needs to be sorted, packaged and distributed via a network of freight handling infrastructure (i.e. ports, airports, rail freight interchanges and motorways) and conveniently located warehouse premises to reach end customers. This is particularly important for the South East region, given it is home to some of the largest freight handling ports in the country (e.g. Southampton, Dover).

⁴⁸ MHCLG (2024): Table 125: Dwelling stock estimates by local authority district, 2001-2023

⁴⁹ ONS (2024) 2018-based household projections for local authorities and higher administrative areas within England (principal projection)

Figure 6-3: Projected compound annual growth of freight by transport mode



Source: In order of appearance from left to right: DfT (2022)⁵⁰, Boeing (2019)⁵¹, DfT (2024)⁵², MDS Transmodal (2023)⁵³

6.2 Future demand for warehousing provision

This section uses the Savills Suppressed Demand Model to estimate future warehousing land demand. Details of the methodology are in Appendix C.

6.2.1 Future PMA demand estimates

Table 6.1 summarises the estimated warehousing floorspace needed across the nine PMAs which form the TfSE area. The annualised floorspace figures are translated into a land requirement using a 35% site coverage ratio⁵⁴.

Across the nine PMAs there is an estimated demand for 936 ha of industrial land. The Thames Medway has the largest requirement, equating to 51% of total demand. The lowest future demand requirement arises in the Wealden / Eastbourne PMA, with demand for just 12 ha of land.

⁵⁰ Department for Transport (2022), National Road Traffic Projections

⁵¹ Boeing (2019), Air Cargo Forecast

⁵² Department for Transport (2024), Maritime and Shipping Statistics

⁵³ MDS Transmodal, Network Rail's Freight Growth Forecasts 2024-2029

⁵⁴ In Savills' experience, and based on recent developments across the country, a site coverage ratio of around 35% is reflective of modern I&L occupier requirements.

Table 6.1: Total projected industrial demand over a 10-year forecasting period in the PMAs

PMA	Historic demand (annualised) (sq.ft)	Suppressed demand (annualised) (sq.ft)	E-commerce uplift (annualised) (sq.ft)	Total annualised demand (sq.ft)	Total annualised land demand (Ha)	10-year land demand (Ha)
All PMAs	1,898,935	1,365,367	262,800	3,527,101	94	936
Thames Medway	933,151	706,949	172,928	1,813,028	48.1	481
M4	289,035	72,517	26,573	388,125	10.3	103
M3	228,199	68,688	24,424	321,310	8.5	85
M27	104,255	43,882	11,815	159,953	4.2	42
South Coast	120,878	110,904	7,237	239,019	6.3	63
M23	123,750	104,618	17,263	245,630	6.5	65
Ashford / Dover	46,318	26,527	2,560	75,404	2.0	20
Wealden / Eastbourne	20,113	26,473	0	46,585	1.2	12
Rother / Hastings	33,236	204,809	0	238,045	6.3	63

Source: Savills 2025

6.3 Future supply

This section shows the estimates of the development pipeline of warehousing supply for the PMAs.

This process entails reviewing Savills proprietary data as well as data from CoStar and Glenigans. The development pipeline projects have been categorised as either i) under construction; ii) in planning; or iii) proposed.

To account for the uncertainty regarding the delivery of new development that is 'proposed' at the time of writing, a likelihood adjustment factor has been applied. It is assumed that only 50% of the 'proposed' floorspace will come forward. This assumption has been informed by Savills industrial agents and research team. As was the case with the demand estimates, the floorspace figures have been converted to land estimates based on a 35% site coverage ratio.

Table 6.2 sets out the planning pipeline for each PMA by category. The planning pipeline supply is also mapped in Figure 6-4 and Figure 6-5.

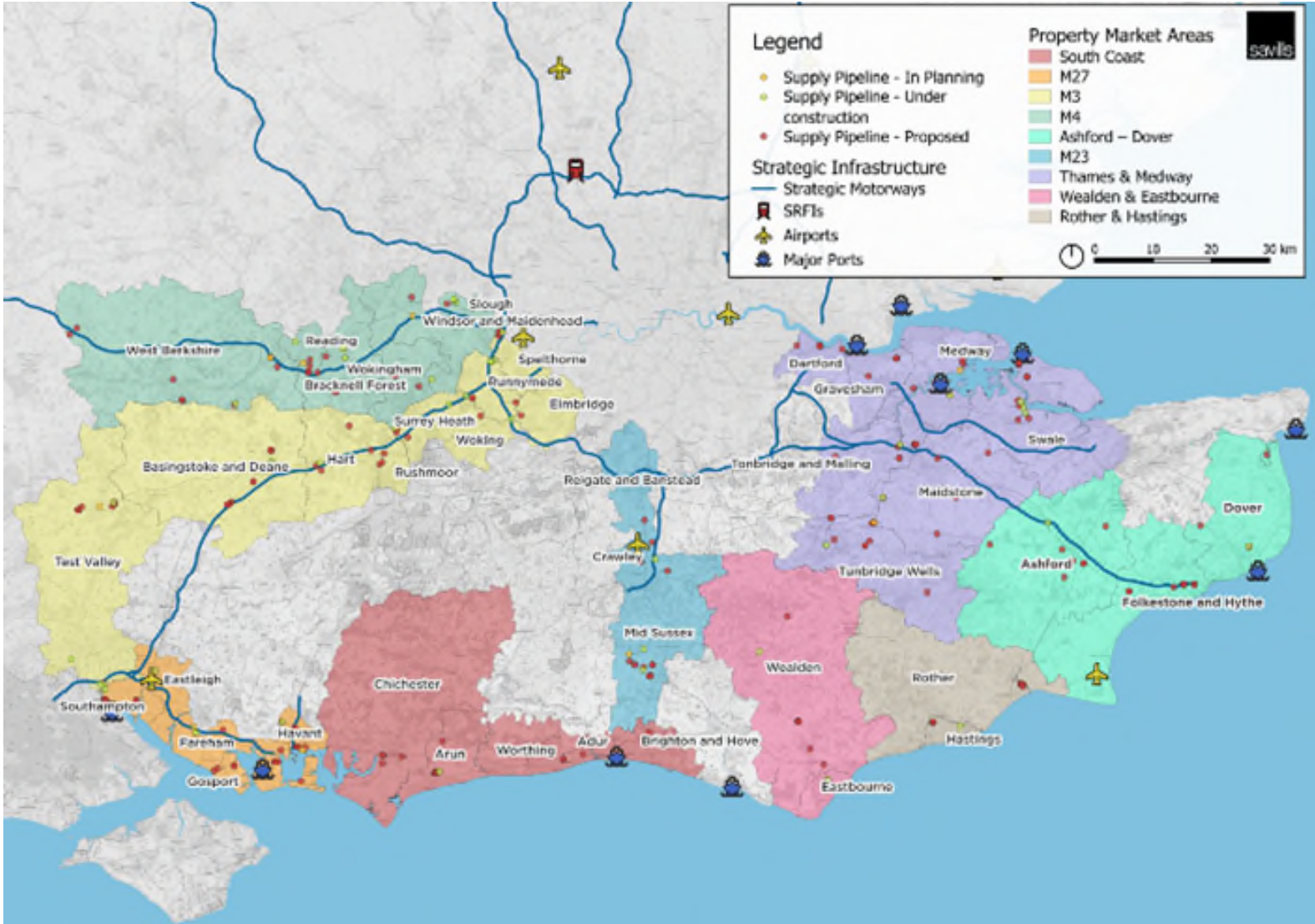
Across the nine PMAs which form the TfSE area, there is currently about 511 ha of industrial land in the pipeline – either under construction, in planning or proposed. This is a snapshot in time and the pipeline will continually change. The greatest quantum of pipeline supply is projected to come within the larger, more established markets, such as in the Thames Medway, the M4, M3 and M27 PMAs. These four PMAs make up 80% of the development pipeline.

Table 6.2: Future supply pipeline in the PMAs

PMA	Under construction (sq.ft)	In planning (sq.ft)	Proposed (sq.ft)	Future supply pipeline (Ha)
All PMAs	8,091,025	2,189,674	12,983,098	511
Thames Medway	2,219,560	187,170	1,653,289	108
M4	1,244,646	1,391,000	1,740,364	116
M3	1,768,542	172,500	2,083,911	107
M27	225,639	214,004	2,438,445	76
South Coast	145,458	0	568,096	19
M23	431,084	52,500	1,424,133	51
Ashford / Dover	44,368	0	770,957	22
Wealden / Eastbourne	228,590	0	108,732	9
Rother / Hastings	14,596	0	111,263	3

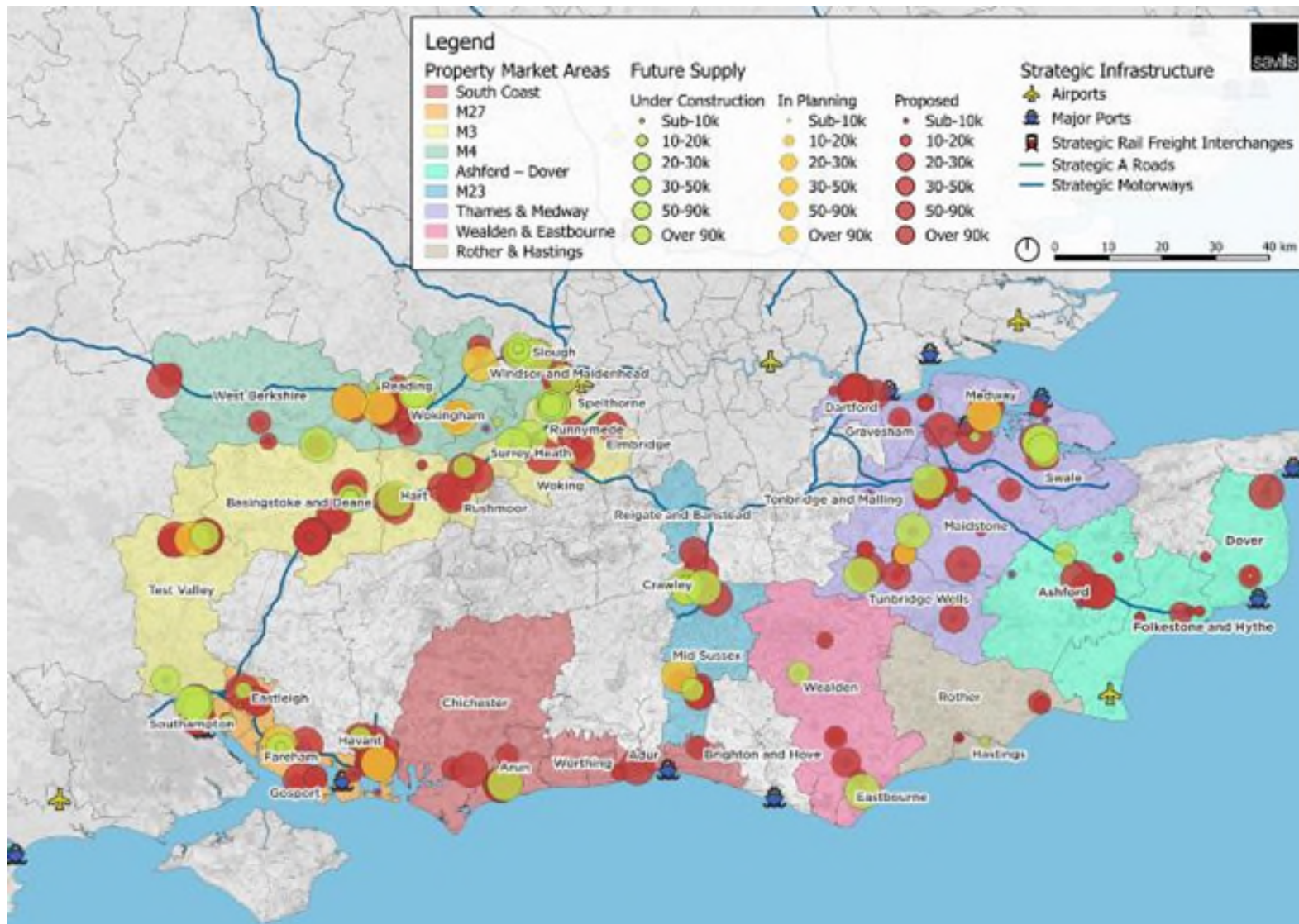
Source: Savills; CoStar 2025

Figure 6-4: Development pipeline in PMAs across the TfSE area by project status



Source: Savills; CoStar, Glenigans 2025

Figure 6-5: Development pipeline in PMAs across the TfSE area by project status and size band



Source: Savills; CoStar, Glenigans 2025

6.4 Conclusions

The key findings are:

- The warehouse sector is a major facilitator of other sectors of the UK economy.
- The sector's performance is being driven by a number of structural growth drivers, including growth in online sales which now accounts for 30% of all retail. Online retail is projected to account for up to 65% of total retail expenditure by 2050 for non-food items. Other structural growth drivers include population/household formation from new housing.
- It is estimated that across the nine PMAs there is demand for 936 ha of industrial land over a 10-year forecasting period. The Thames Medway PMA has the largest requirement at 481 ha, equating to 51% of total demand.
- There is current about 511 ha of industrial land in the development pipeline – either under construction, in planning or proposed. The greatest quantum of pipeline supply is projected to come within the larger, more established PMAs such as Thames Medway, M4, M3 and M27. These four PMAs accommodate 80% of the current development pipeline.

7 Balance of supply and demand

7.1 Assessment of supply-demand balance in the PMAs

This section consolidates the analysis of the future trajectory of supply and demand from Chapter Six by assessing the balance between them to see where the greatest need for new floorspace is located. It compares the future demand generated by Savills' Suppressed Demand model⁵⁵ - an industry-endorsed method for calculating total demand - with the estimated development pipeline.

Table 7.1 shows which PMAs have a projected shortfall or surplus in industrial land. The PMAs shaded blue are those which currently have a shortfall in which demand over the next 10 years is expected to exceed projected supply. This can, of course, change as new land is allocated or permissions are granted. However, there is currently insufficient land in the planning pipeline to meet anticipated demand. The majority of the shortfall is in the Thames Medway PMA which comprises nearly 88% of total need. Other PMAs with notable shortfalls are Rother / Hastings and South Coast.

Conversely, the M4, M3, M27 and Ashford/Dover are projected to have surpluses in warehousing land to meet demand over the next 10 years. However, it is emphasised that there is a need for continuous monitoring of this dynamic given the uncertainty around delivering future supply which is subject to delays and unforeseen complications with the planning process. This is especially pertinent given the projected surplus is not significant across any market.

Table 7.1: Projected shortfall / surplus in industrial land across the TfSE area

PMA	Future demand (Ha) (10-year period)	Development pipeline (Ha)	Land shortfall
All PMAs	936	511	-426
Thames Medway	481	108	-373
M4	103	116	13
M3	85	107	22
M27	42	76	34
South Coast	63	19	-45
M23	65	51	-15
Ashford / Dover	20	22	2
Wealden / Eastbourne	12	9	-3

⁵⁵ Further information is provided in Appendix C.

PMA	Future demand (Ha) (10-year period)	Development pipeline (Ha)	Land shortfall
Rother / Hastings	63	3	-60

Source: Savills 2025

8 Summary of findings

The main findings from the Warehousing Provision Study are as follows. A summary of findings for each of the PMAs is included in Appendix D.

- There are difficulties associated with planning for a sufficient supply of warehousing. Though planning guidance is increasingly clear about the need for local authorities to plan for warehousing need, stakeholders engaged for the purposes of this study identified that warehousing need is in competition with other, higher value/priority land uses such as housing.
- There is a current excess of demand over supply for warehousing across the region which is resulting in the rental cost increasing above the rate of inflation. The main drivers for demand are housing (with its related e-commerce demand) and freight growth.
- The largest share of floorspace across the region is leased for warehousing is made by the logistics sector, followed by manufacturing and professional, technical and scientific services.
- The TfSE area's inventory has a higher proportion of small buildings, followed by mid-sized buildings and larger units. The M4, M27 and Thames Medway PMAs have a higher proportion of large buildings which is not surprising given need for locations with direct access to the Strategic Road Network (SRN) to optimise operational efficiency for those larger buildings.
- The largest stock inventory for warehousing can be found near to the major SRN freight routes in the PMAs of Thames Medway, M4, M3, M27, South Coast, M23 and Ashford/Dover.
- 91% of the TfSE area's warehouse inventory is of either average or poor quality, with only 9% of existing stock considered to be of above average quality. Some of the smaller PMAs (in terms of warehouse inventory) such as Rother / Hastings, Wealden / Eastbourne and Ashford / Dover have very little stock of above average quality. indicating that existing, reasonably functional premises need to be refurbished or redeveloped, and that new, high-quality premises are needed.
- There will be a future shortage of warehousing of suitable quality across the TfSE area. In particular, future shortages of warehousing floorspace are forecast for the property market areas of Thames Medway, South Coast, M23 and Rother and Hastings. There is less of a concern for the M4, M3 and M27. Wealden and Eastbourne require some further floorspace while for the time being Ashford and Dover area is near balance.

9 Conclusion

Warehousing is a critical component of infrastructure at local, regional, and national scales. Good-quality warehousing can underpin economic growth, drive employment and skills development, and, crucially, enable a seamless flow of goods via intermodal transport networks, resulting in a more efficient movement of goods into regional and local areas. A diverse range of warehousing facilities are necessary to accommodate the varied needs and operating models of different occupiers.

The Warehousing Provision Study has shown that despite having extensive warehouse inventory, the TfSE area is supply constrained with low levels of availability; demand consistently being outpaced by supply; and strong rental growth for which costs have exceeded inflation. In addition, the area's existing warehousing stock does not meet the evolving needs of modern occupiers because it is considered to be predominantly of average or poor quality. In the future, it is estimated that there will be a significant shortfall in the availability of warehousing land of around 426 ha over the next 10-year period due to the continuing rise in online spending, population and household growth. For reference, 426 ha is approximately the equivalent size of 950 large supermarkets.

9.1 Recommendations

While the market plays a significant role in driving warehousing development, effective planning is essential to ensure an adequate and appropriately located supply that meets current and future demand. While current and recent updates to national planning frameworks recognise the important role of warehousing more proactive measures to address the shortage of warehousing space in the TfSE area could be taken including:

- improved co-ordination across local planning authorities to help address regional warehousing needs by optimising land use.
- working with government to support the strengthening of planning policy and guidance to ensure that warehousing is considered as a critical component of regional infrastructure and as an enabler of housing delivery.
- exploring alternative methods for calculating warehousing need in order to better account for warehousing's role in enabling efficient supply chains and its role supporting distribution to and servicing of population centres, particularly new ones; and
- enhancing the availability and utilisation of data on warehousing trends, demand, supply, and performance to facilitate more informed planning decisions.

9.2 Next steps

TfSE will engage through the Wider South East Freight Forum (WSEFF) with local authorities and operators/developers of warehousing on the subject of how the recommendations outlined above can be implemented in order to address the identified shortage of warehousing space in the TfSE area.

Appendix A: 8% equilibrium availability – an explanation

Why is the 8% equilibrium level applied?

This 8% equilibrium level is found in a number of prominent publications such as the:

- GLA's Land for Industry and Transport Supplementary Planning Guidance (SPG);
- The London Plan (2021); and
- The British Property Federation's 'Levelling Up – Logic of Logistics' report.

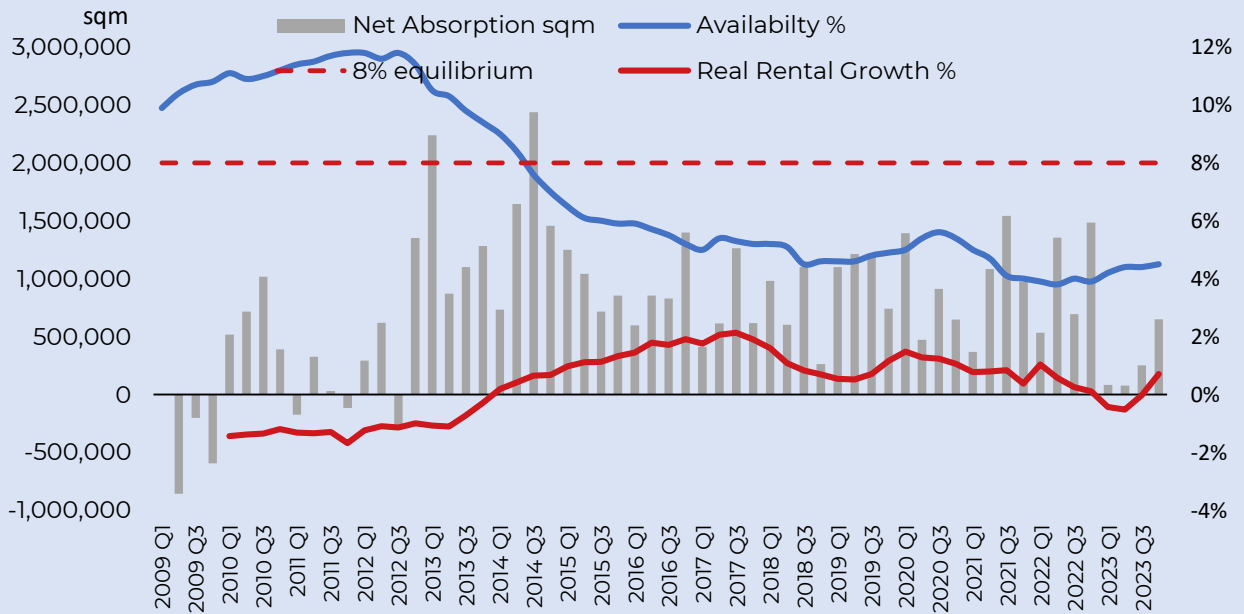
Below this level available supply becomes tight and rents increase as strong occupier demand compete for limited available stock. This is reflected in national trends seen across the last 15 years.

Indeed, if the real rental growth (i.e. rental growth adjusted for inflation) and its relationship to availability over the past 15 years is analysed at the national level, it becomes clear that industrial & logistics (I&L) rents begin to grow strongly when availability is below 8%. This relationship is clearly illustrated in A 1 below. When availability was above 8% between 2009 and 2014, real rental growth (net of inflation) was either negative or only slightly positive. This enabled demand to be accommodated as sufficient supply was available.

However, since 2014, availability dipped has below 8% and stayed below this level ever since at the national level, real rents have grown strongly year-on-year. During this period, net supply has been lower than the 2009-2014 period despite the I&L sector going from strength to strength. This clearly shows the suppressing nature that tight availability (below 8%) has had on I&L demand nationally.

Why is the 8% equilibrium level applied?

A 7: Historic Net Absorption (sqm), Availability (%) and Real Rental Growth (%) in England

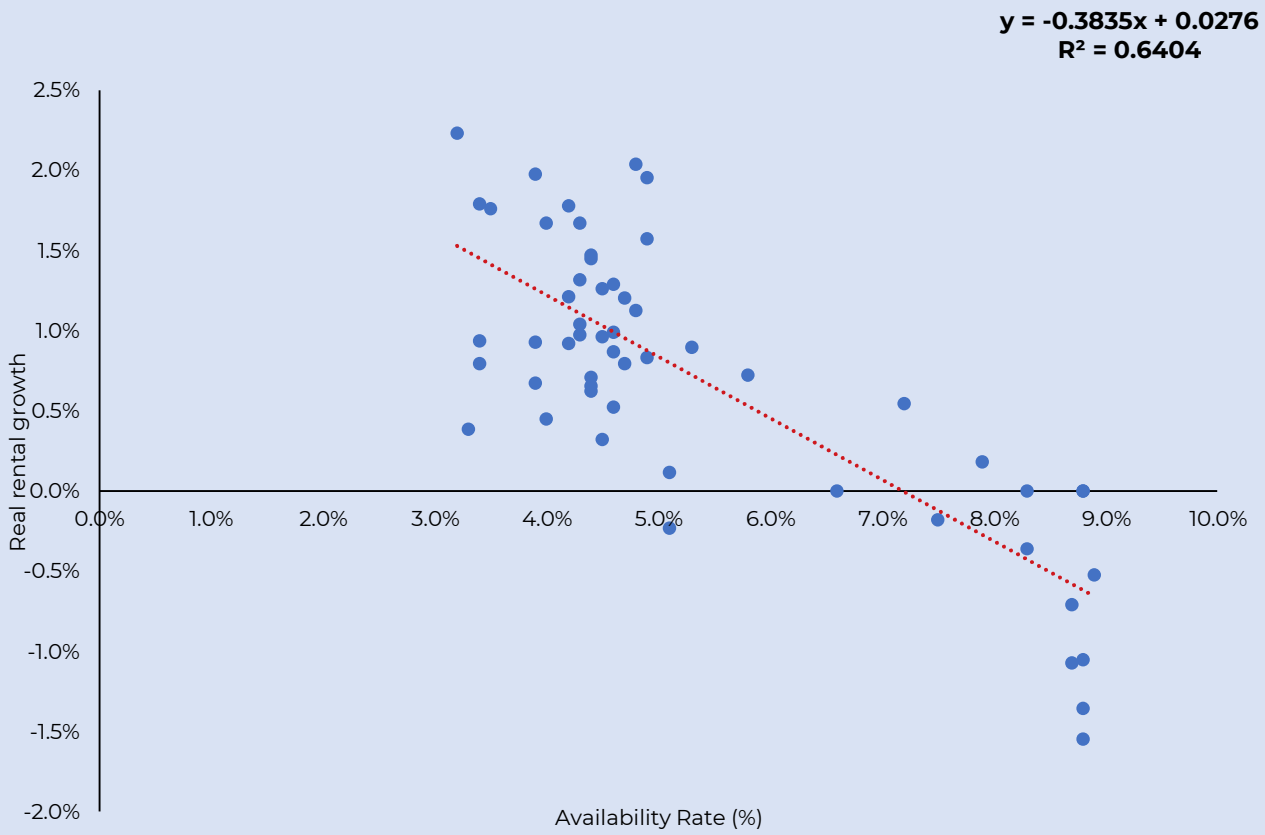


In addition to the above market trends, further empirical analysis has been undertaken to evidence the application of the 8% equilibrium rate. Figure A 2 plots, for every quarter since 2011, I&L availability for large I&L units (100,000 sq.ft+) and real rental growth (quarter-on-quarter). As illustrated in the scatter plot, and specifically where the red “line of best fit” intercepts the x-axis, real rental growth is close to zero (i.e. demand = supply) when availability is around 7.5% - 8%. This gives further credence to the use of the 8% equilibrium level.

The 8% equilibrium level is also widely used in employment land studies, including in recent strategic studies including the Warehousing and Logistics in the South East Midlands Study (2022) and the West Midlands Strategic Employment Sites Study (2024). Therefore, it has become a recognised assumption.

Why is the 8% equilibrium level applied?

A 2: Real Rental Growth v Availability (%) – I&L units over 100,000 sq.ft



Appendix B: CoStar Quality Rating

RATING	GROUP	DEFINITION	
★★★ ★★★★	Architectural Design	Exterior Materials	Concrete tilt-up or concrete block, surface detailing to break up long facades, different and higher quality materials used on office parts of building. Insulated walls and roof.
		Fenestration/Glazing	Large windows at office areas, skylights for reduced lighting expense.
		Overall Aesthetics	Positively differentiated from building in immediate vicinity. Representing current trends and standards in design.
		Visibility/Access	Visibility from major access routes, clear delineation between employee/visitor route and service. Convenient access for trucks with very clear and visible signage from a distance.
	Structure/Systems	RBA (typically)	> 150,000 sq. ft.
		Clear Height (typically)	Distribution: > 32 ft. Warehouse: > 24 ft. Manufacturing: > 28 ft.
		Dock Ratio (typically)	Distribution: < 5,000 sq. ft./dock Warehouse: < 5,000 sq. ft./dock Manufacturing: < 10,000 sq. ft./dock
		Sprinkler Type	ESFR system
	Site/Landscaping/Exterior Spaces	Coverage Ratio (typically)	< 30%
		Truck Court (typically)	> 125 ft.
	Certifications	Possibly a certified/labeled green and energy efficient building.	
★★★★★	Architectural Design	Exterior Materials/Façade	Concrete tilt-up or concrete block, surface detailing to break up long facades, different and higher quality materials used on office parts of building, possibly exhibiting signs of weathering and wear.
		Fenestration/Glazing/Views	Large windows at office areas, possibly skylights.
		Overall Aesthetics	Representing recent trends and standards in design.
		Visibility/Access	Visibility from major access routes, clear delineation between employee/visitor route and service. Convenient access for trucks with very clear and visible signage from a distance.
	Structure/Systems	RBA (typically)	Typically > 100,000 sq. ft.
		Clear Height (typically)	Distribution: > 30 ft. Warehouse: > 24 ft. Manufacturing: > 28 ft.
		Dock Ratio (typically)	Distribution: < 7,500 sq. ft./dock Warehouse: < 7,500 sq. ft./dock Manufacturing: < 15,000 sq. ft./dock
		Sprinkler Type	Yes
	Site/Landscaping/Exterior Spaces	Coverage Ratio (typically)	< 50%
		Truck Court (typically)	> 100 ft.
	Certifications	Possibly a certified/labeled green and energy efficient building.	

☆☆☆	Architectural Design	Exterior Materials	Concrete tilt-up or concrete block with a basic level of finish, undifferentiated materials at office.
		Fenestration/Glazing/Views	Small windows at office areas, possibly skylights.
		Overall Aesthetics	Average with respect to surrounding buildings, contextually appropriate.
		Visibility/Access	Delineation between access for employee/visitors and service vehicles. Convenient access for large trucks. Decent signage.
	Structure/Systems	RBA (typically)	Typically > 50,000 sq. ft.
		Clear Height (typically)	Distribution: > 28 ft. Warehouse: > 20 ft. Manufacturing: > 24 ft.
		Dock Ratio (typically)	Distribution: < 10,000 sq. ft./dock Warehouse: < 10,000 sq. ft./dock Manufacturing: < 20,000 sq. ft./dock
		Sprinkler Type	Yes
	Site/Landscaping/ Exterior Spaces	Coverage Ratio (typically)	< 70%
		Truck Court (typically)	> 80 ft.
Certifications	Possibly a certified/labeled green and energy efficient building.		
☆☆	Architectural Design	Exterior Materials/Façade	Metal or brick.
		Fenestration/Glazing/Views	No glazing, no skylights.
		Overall Aesthetics	Average, functional.
		Visibility/Access	No apparent access strategy, difficult access and sub-optimal signage.
	Structure/Systems	Purely Functional.	
	Site/Landscaping/ Exterior Spaces	Minimal or no landscaping, no exterior spaces.	
Certifications	Unlikely a certified/labeled green and energy efficient building.		
☆	Practically uncompetitive with respects to the need of a typical industrial tenants, may require significant renovation, possibly functionally obsolete.		

Source: CoStar 2025. Available at: https://www.costar.com/sites/costar.com.na/files/2023-09/costar_buildingratingsystem-definition.pdf

Appendix C: Suppressed Demand methodology

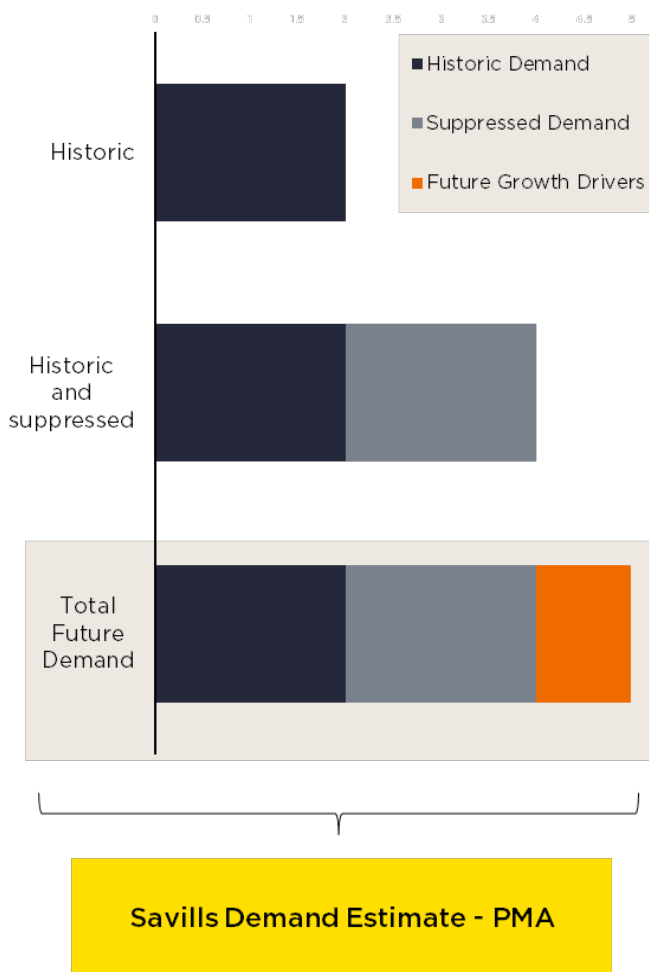
The Savills Suppressed Demand methodology takes a layered approach to estimating future warehousing land demand, comprising of the following three elements:

- Calculate the PMA historic demand: as discussed in Chapter 5, net absorption is the leading measure of leasing demand in a market. The first step therefore entails projecting forward the historic 10-year net absorption trend within a given PMA.
- Calculate the PMA 'suppressed demand': To quantify the impact of supply / demand imbalances within the warehousing sector, the Savills methodology then takes into account the principle of 'suppressed demand'. This accounts for demand that has been lost due to historic supply shortages. The calculation of suppressed demand can then be added to historic demand projections to give a more accurate picture of likely demand into the future. Suppressed Demand is calculated via the following steps:
 - Find a market's equilibrium availability: a market's equilibrium availability rate is either when rents are broadly stable or when rental growth transitions from being negative or stable, to growing strongly year on year. This is around 8% in England, as evidenced in Appendix A.
 - Calculate the availability to equilibrium floorspace: estimate how much floorspace should have been available in years when a market was below the equilibrium rate or the surplus of available floorspace when the market was above equilibrium. For instance, if the equilibrium rate is 8% but the market had 5% availability in a given year, the 3% difference is translated into a quantum of floorspace (sq.ft).
 - Calculate suppressed demand: the next step entails calculating how much demand the market lost in those years when availability was below the equilibrium rate. To do this, the average of the ratio between net absorption and available floorspace for every year over the historic period is calculated. This ratio is then applied specifically to the availability uplift that was needed in those years of tight supply to reach the equilibrium rate. This provides a suppressed demand calculation for each year when actual availability was lower than the equilibrium rate. These are then added together to give a total suppressed demand over the lookback period.
 - The annualised suppressed demand figure is then added to historic annualised demand to provide a more accurate estimate of future demand.
- Estimate additional demand associated with e-commerce growth: finally, the Savills methodology considers increases in demand associated with future e-commerce growth, which is the major growth driver for the sector, driving both demand for the supply-chain, and also the manufacturing of goods. In order to estimate future increases in warehouse demand linked to e-commerce growth, the share of demand that has historically been linked to e-commerce in a market

is calculated and it is then estimated how much higher this is likely going to be in the future, based on online retail forecasts provided by Statista. Statista is a leading provider of market and consumer data with over two million registered users.

Together these three components form an annual demand for warehouse floorspace in a given PMA which can then be multiplied by the number of years in a forecast period (e.g. 10 years). Figure C 1 provides a graphical illustration of the Savills Suppressed Demand methodology.

C 1: Savills Suppressed Demand Methodology



Methodology

Our future demand estimate is made up of three components:

- 1) Historic Demand** - We use net absorption as a measure of the net demand for I&L floorspace. We project forward the historic 10-year net absorption trend within a PMA.
- 2) Suppressed Demand** - When availability is below the equilibrium rate (typically 8%), potential occupiers can't find the required floorspace, so less space is taken up than is demanded in the market. Our suppressed demand methodology uses market intelligence to account for the demand that was not realised due to a lack of supply. We add this level of 'suppressed demand' to the historic net absorption trend as a 'top-up'.
- 3) Future Growth Drivers** - Our estimates account for growth drivers which will impact the need for future I&L floorspace. Specifically, we factor in future e-commerce growth which is the major growth driver for the I&L sector, driving both demand for the supply-chain, and also the manufacturing of goods.

Source: Savills (2025).

Compliance with National Policy

The Savills approach to estimating future industrial and warehouse demand is considered to be industry best practice. It has been endorsed by the British Property Federation ('BPF') in the 'Levelling Up – The Logic of Logistics' report and was shortlisted

for an RTPI Award for Research Excellence 2022. The report has also been referenced as part of the Government's recently published 'Future of Freight Plan' and has been the focus of several discussions with senior officers at the then Department for Levelling Up, Housing and Communities and the Department of Transport. The approach has also been recently considered in the Warehousing and Logistics in the South East Midlands Study (2022) and is being used as one of the estimation methods as part of the West Midlands Strategic Employment Sites Study (2024).

The Savills methodology is also compliant with the requirements of the Housing and economic needs assessment Planning Practice Guidance (MHCLG, 2019) as it:

- Analyses 'market signals, including trends in take up and the availability of logistics land and floorspace across the relevant market geographies'. If a market is identified as being supply constrained (i.e. demand exceeds supply), the Savills model supplements the historic demand profile accounting for suppressed demand (i.e. demand lost due to historic supply constraints).
- Applies 'economic forecasts to identify potential changes in demand and anticipated growth in sectors likely to occupy logistics facilities, or which require support from the sector'. The Savills method quantifies how much industrial floorspace growth is linked to current and future e-commerce growth, which is the major growth driver for the sector, driving both demand for the supply-chain, and also the manufacturing of goods.

Based on the above, the Savills approach to estimating future industrial and warehouse demand is considered to be NPPF/NPPG compliant.

Appendix D: Summary of findings for PMAs

PMA	Summary of findings
Thames Medway	This is the largest PMA in the TfSE area, comprising 21% of warehousing inventory. A shortfall of 373 ha of land (equivalent of approximately 1,300 large supermarkets) over the next 10 years is forecast, representing the largest forecasted shortfall.
M4	Despite historically being supply constrained, a significant development pipeline means the PMA is forecast to have a marginal surplus of 13 ha of land over the 10-year forecast period, reflective of its commercially attractive location.
M3	Supply has exceeded demand, on average, by 15%. The PMA is forecast to have a moderate surplus of 22 ha of land over the 10-year forecast period.
M27	Despite historically being supply constrained, its attractive location to occupiers means the PMA has a healthy development pipeline, with an expected surplus of 34 ha of warehouse land over the 10-year forecast period, the highest of any PMA.
South Coast	The PMA is currently supply constrained with a 6.5% availability rate. It is expected that the PMA will have a shortfall of 45 ha of land over the 10-year forecast period, the third highest shortfall across the PMAs.
M23	With an availability rate of 10.7%, the highest of any PMA, it is not currently supply constrained, however, the PMA is forecast to have a shortfall of 15 ha of land over the 10-year forecast period.
Ashford /Dover	Over the past 13 years, demand has exceeded supply by about 98% per annum, the second highest demand/supply imbalance of any PMA in the TfSE area. It is forecast that the PMA will have a very marginal surplus of two ha of land over the 10-year forecast period.
Wealden / Eastbourne	This PMA's current stock is skewed towards smaller units, with 57% of inventory in the 0-30k sq.ft size band. It is expected that the PMA will have a marginal shortfall of three ha of land over the 10-year forecast period.
Rother / Hastings	This PMA is a less established warehousing market that equates to 1% of the TfSE area's total. It also has the lowest quality warehousing of all PMAs assessed. It is forecast that the PMA will have a significant shortfall of 60 ha of land over the 10-year forecast period.

Waterborne Freight Study

Final Report

12th December 2024



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Abbreviations & Definitions

Abbreviations	
BRES	Business Register and Employment Survey
DfT	Department for Transport
FLAGs	TfSE Freight, Logistics & Gateway Strategy
HGV	Heavy Goods Vehicles
ITL	International Territorial Levels
IWW	Inland Waterway
LDC	Large Distribution Centres
Lo-Lo	Lift-on/Lift-off Cargo
LSOA	Lower Super Output Area
MRN	Major Road Network
ONS	Office for National Statistics
RFI	Rail Freight Interchange
Ro-Ro	Roll-on/Roll off Cargo
SRN	Strategic Road Network
SSS	Short Sea Shipping
STB	Sub-national transport body
TE	Transport East
TfSE	Transport for the South East
VOA	Value Office Agency

Definitions

- **Short Sea Shipping:** Maritime traffic that moves cargo along a coast without having to cross an ocean (DfT, 2022e).
- **Dry Bulk:** Is carried in the main cargo hold of bulk carrier vessels, typically in large quantities without packaging. Example goods include coal, ores and scrap metal.
- **Inland Waterway Traffic:** Freight traffic carried by both barges and seagoing vessels along inland waters, both non-seagoing traffic and seagoing traffic, which crosses into inland waters from the sea (DfT, 2017).
- **Lift-on/Lift-off:** Consists of container traffic. TEU (twenty-foot equivalent units) is a standardised measure to allow for the different sizes of container boxes.
- **Liquid Bulk:** Consists of any liquid or liquid gas that is transported in a tank, typically in large quantities and in specialised tankers. Example goods include crude oil, petroleum products, chemicals, or liquefied natural gas.
- **Major Ports:** Ports moving cargo volumes of at least 1 million tonnes annually (DfT, 2023h).
- **Roll-on/Roll off:** Cargo that can be moved on to, or off, a vessel either by their own propulsion (e.g. passenger car) or with assistance (e.g. unaccompanied trailer).

Table of Contents

Definitions	3
Key Study Findings	8
Key Opportunities	10
Study Conclusions	10
Key Recommendation	11
1 Chapter One - Introduction	12
1.1 Project Background	12
1.2 Report Purpose	12
1.3 Aims & Objectives	13
1.4 Scope	14
1.5 Context: The Role of Waterborne Freight	14
1.6 Waterborne Freight Background	16
1.7 Current Situation: TfSE Waterborne Infrastructure & Activity	18
1.8 Report Structure	19
2 Chapter Two – Local Context & Infrastructure Assessment	20
2.1 Overview	20
2.2 Socio-Economic	21
2.3 Transport Network	28
2.4 Warehouses	34
2.5 Waterborne Infrastructure Assessment	40
2.6 Conclusion & Key Chapter Findings	51
3 Chapter Three - Freight Movements	53
3.1 Overview	53
3.2 Methodology	53
3.3 HGV Freight Loaded & Unloaded	54
3.4 HGV Freight Flows	63
3.5 Waterborne Vehicle Freight Loading & Unloading	68
3.6 IWW Freight Quantities	72
3.7 Conclusion & Key Chapter Findings	75
4 Chapter Four – Current & Forecast HGV Use	77
4.1 Overview	77
4.2 Methodology	77
4.3 Results	77
4.4 Segmented Trajectory Predictions	81
4.5 Conclusion & Key Chapter Findings	84
5 Chapter Five – Data Gap Analysis	86
5.1 Overview	86
5.2 Data Limitations	87
5.3 Waterborne Freight Feasibility Themes	88
5.4 Gap Analysis & Recommendations	88
5.5 Conclusion & Key Chapter Findings	92
6 Chapter Six – Stakeholder Insights	93
6.1 Overview	93

6.2	Approach	94
6.3	Key Insights	94
6.4	Place-based Opportunities	99
6.5	Conclusion & Key Chapter Findings	100
7	Chapter Seven – Key Challenges & Opportunities	102
7.1	Overview	102
7.2	Approach	102
7.3	Key Challenges	102
7.4	Key Opportunities	105
7.5	Conclusion & Key Chapter Findings	116
8	Chapter Eight – Key Findings, Conclusions & Next Steps	117
8.1	Overview	117
8.2	Key Findings	117
8.3	Priority Locations for Expanding Waterborne Freight	119
8.4	Study Conclusion	119
8.5	Recommendations	120
9	Appendix	123
9.1	Appendix A - Stakeholder Insights	123

Cadence-Enabled Report

We have provided access to our visualisation tool Cadence to support access and interaction with the maps included in this report. Please use this link: [TfSE Waterborne Freight Study](#)

List of Figures

Figure 1-1: Map of Study Area	15
Figure 1-2: National Freight Lifted by Waterborne & HGV	16
Figure 1-3: Domestic Waterborne Cargo by Type	17
Figure 2-1: Population Density	22
Figure 2-2: Indices of Multiple Deprivation Decile & Ports	24
Figure 2-3: Total Relevant Workforce per LSOA within TfSE Area	26
Figure 2-4: All HGV flows in SRN & MRN	30
Figure 2-5: Railway, RFIs & International Rail Freight Gateways	33
Figure 2-6: Local Planning Authority-Level LDC Count	36
Figure 2-7: Warehouse Land Area Density	39
Figure 2-8: Major & Minor Port Locations in the TfSE Area	43
Figure 2-9: Key Strategic Ports in the TfSE Area & Other Port Locations (TfSE & Wider Area)	46
Figure 2-10: Map of IWW within the TfSE Area	48
Figure 2-11: Map of IWW in the TfSE Area Undergoing Restoration	49
Figure 2-12: Map of IWW within the TfSE Area and Neighbouring Areas	50
Figure 3-1: TfSE ITL3 Areas & Waterborne Freight Infrastructure	56
Figure 3-2: Volume of Goods Loaded & Unloaded in the ITL3 Areas within the TfSE Area.	58
Figure 3-3: Goods Types Loaded & Unloaded in the ITL3 Areas within the TfSE Area	59
Figure 3-4: Origin-Destination Goods Flow (Either Direction)	64
Figure 3-5: Demand between ITL2 Areas within the TfSE Area and Neighbouring Area	65
Figure 3-6: Goods Lifted Between ITL2 Areas in the TfSE Area	67
Figure 3-7: Freight in Both Direction for Ports within the TfSE Area	68
Figure 3-8: Percentage Change in Tonnage Freight Traffic in Major Ports in the TfSE Area	71
Figure 3-9: Goods Lifted by Major IWW in the TfSE Area	74
Figure 4-1: Forecast Growth in HGV Vehicle Kilometres	78
Figure 4-2: HGV Billion Vehicle Kilometres Within Local Authorities in the TfSE Area	80
Figure 6-1: Key Discussion Themes	94

List of Tables

Table 2-1: Ports (TfSE and Wider Area) & Total Workforce within 5 km Radius	27
Table 2-2: Waterborne Efficiency & Mitigating HGV Impacts Case Study	28
Table 3-1: TfSE Area Freight Movement Analysis Methodologies	53
Table 3-2: TfSE Local Transport Authorities & ITL3 areas	55
Table 3-3: Analysis of Commodities Suitable for Waterborne Freight	61
Table 3-4: ITL2 Areas s & Associated Local Transport Authorities (those denoted with a * are not within the TfSE area). Source: (ONS, 2024c)	64
Table 3-5: Summary of Goods Lifted by Internal IWW Traffic. Source: (DfT, 2023e)	72
Table 4-1: Emerging Trends of Freight Moved by Cargo Type	81
Table 5-1: Relevant Study Questions & their Data Limitations	86
Table 5-2: Data Gap Analysis & Recommendations	89
Table 6-1: Overview of Stakeholder Engagement Process	93
Table 7-1: Key Challenges and Mitigating Actions	103
Table 7-2: Enabling Opportunities Impact & Viability Assessment	106
Table 7-3: Site Specific Opportunity Assessment	113
Table 8-1: Recommendations	120

Executive Summary

Introduction & Project Background

The freight and logistics sector plays a vital role supporting the movement of goods, providing economic benefits to the South East. The sector is currently facing several challenges including road congestion and transitioning to a net zero future to support the UK government's 2050 net zero commitment.

Waterborne transportation presents an opportunity to alleviate road congestion and minimise the sector's carbon impact. Transport for the South East (TfSE) is the sub-national transport body (STB) for the South East of England and has commissioned City Science to explore the viability of transferring some freight movements from the road to waterborne freight. This study will inform delivery of the Freight, Logistics & Gateway Strategy and the Transport Strategy vision, alongside supporting the economic growth of the area. Waterborne freight includes coastal shipping, such as short sea shipping (SSS), and inland water ways (IWW).

Aims, Objectives & Scope

The primary aim of this study is to evaluate the viability of integrating SSS and IWW into the TfSE freight transportation system. The study's anticipated key outcomes are to ascertain whether increasing waterborne freight in the TfSE area is a viable way to:

1. Reduce Greenhouse Gas Emissions

2. Mitigate Road Network Congestion

3. Stimulate Economic Growth in Coastal Towns

To achieve these aims this study has conducted analysis to:

- Identify the freight market segmentation(s) most suitable for transfer to waterborne methods.
- Assess whether there is a substantial volume of freight, currently reliant on road networks, that could be efficiently and viably shifted to waterborne freight.
- Project the future trajectories of relevant market segments.
- Evaluate the viability and competitiveness of establishing a SSS service connecting ports along the coast.
- Identify any infrastructure enhancements and modifications that are required to facilitate a seamless transition to waterborne freight.
- Investigate the economic viability of the transition to waterborne freight.

Key Study Findings

We have categorised the key study findings into the categories shown below.

Market Factors &
Commercial
Viability

Operational &
Infrastructure

Policy &
Collaboration

Social &
Environment

Data for Decision
Making

Market Factors & Commercial Viability

- **Competitiveness:** While a large volume of freight in the TfSE area, such as aggregates and metals, is suited for waterborne transport, road freight dominates due to its flexibility and speed. For waterborne transport to grow, it must be more cost-competitive than road and rail options. Hybrid models combining passenger, freight, and rail services could improve viability.

Operational & Infrastructure

- **Cost:** Expanding waterborne freight faces challenges, particularly the high costs of upgrading port facilities and limited rail connectivity.
- **Limited IWW:** The fragmented IWW network also hinders continuous freight movement, requiring substantial investment for viable alternatives to road transport, resulting in SSS having more potential.
- **Port Specialisation:** This limits growth across a wide variety of cargo types.

Policy & Collaboration

- **Government Support:** A lack of targeted government incentives and long-term regulatory frameworks creates uncertainty. Supportive policies, such as growth targets, planning protections, and financial incentives, could help build momentum for waterborne freight.
- **Encouraging Uptake:** The majority of freight market segments which are considered suitable for transfer to waterborne freight, and have reasonable volumes loaded to or unloaded from Heavy Goods Vehicles (HGVs) within the TfSE area, are expected to continue to grow or remain stable. This emphasises that introducing a policy of infrastructure changes to encourage transfer of freight from HGVs to waterborne modes would likely have long term benefits.
- **Knowledge Sharing & Collaboration:** Increased public sector knowledge and cross-sector collaboration will also be crucial to realising its potential.

Social & Environmental

- **Environment:** Shifting freight from road to waterborne modes could reduce congestion, air pollution, and carbon emissions, benefiting urban and coastal communities.
- **HGV Increase:** Overall, annual HGV kilometres in the TfSE area is expected to increase 17% to 28% from 2022 to 2040 and many of the Local Transport Authorities within the TfSE area which currently have high levels of HGV vehicle kilometres inside their boundary also contain waterborne freight infrastructure. This highlights the possibility of securing local support for the changes required to enable waterborne freight. However, increased port activity may cause localised congestion.

Data for Decision Making

- **Data Gaps & Confidentiality:** Data gaps, particularly in freight type and routes, limit the ability to assess the feasibility of shifting freight to waterborne transport. Improved data on current movements and robust freight modelling systems are needed, although data confidentiality concerns remain a barrier to open sharing.

Key Opportunities

This study has identified a number of priority locations for waterborne expansion.

- **Isle of Wight & Solent:** This region could utilise existing vessels and operational frameworks to build on this successful model, minimising the need for extensive new infrastructure. While the impact may be localised, this initiative could serve as a scalable model for similar projects.
- **Southampton:** With established rail connectivity, Southampton Port is positioned to expand its rail freight share. Opportunities exist to use waterborne freight for a portion of the journey, particularly where destinations are accessible via both rail and port connections. However, it's unclear how many journeys are better suited for rail-water transport versus rail alone.
- **Port of London Authority:** Whilst outside of the TfSE area, London Gateway and Port of Tilbury are actively expanding, creating opportunities to increase the demand for waterborne freight at smaller feeder ports. Expansion here could attract a greater volume of bulk and containerised goods for redistribution within the TfSE area. Investment in supporting infrastructure at these ports will be essential for accommodating increased waterborne freight capacity.

We suggest that further discussions are had with key stakeholders to continue to explore waterborne freight expansion at these sites.

Study Conclusions

This study has demonstrated that there is some potential for shifting some road freight to waterborne modes within the TfSE area. However, there are a number of key challenges including:

- **Data:** Improved availability and use of data will enable better identification and optimisation of suitable goods and routes for waterborne freight.
- **Cost Competitiveness:** Waterborne freight must become more cost-competitive compared to road and rail transport.
- **Infrastructure Development:** Ports and intermodal connections require significant investment to accommodate increased freight volumes.
- **Policy & Incentives:** Financial incentives, long-term regulatory frameworks and targeted investments that foster collaboration between public and private stakeholders are needed. to promote a fundamental shift away from

road freight. Without these, waterborne options frequently lack the commercial appeal necessary for broad private sector adoption.

Despite these challenges there are opportunities and potential benefits:

- **Bulk Goods & Port Access** Shifting specific types of goods, such as bulk commodities, and in regions with well-established port access such as Southampton, the Solent and the Port of London Authority.
- **Environmental & Economic Benefits:** Transitioning freight from road to waterborne modes can reduce congestion and air pollution as well as support job creation, particularly in port-related activities and associated supply chains.

Key Recommendation

As a result of the challenges, the study has not been able to demonstrate that increasing the volume of waterborne freight in the TfSE area is currently financially viable. The report makes a number of recommendations about what would be needed to improve financial viability. However, even if it was found to be viable, it is unlikely to have significant impact on carbon emissions, road traffic congestion and economic growth and would deliver negligible returns for the scale of investment anticipated. Any further work would be reliant on obtaining better data on which to assess its potential in greater detail, and in the current economic climate, the significant financial investment needed for infrastructure improvements at the ports and inland waterways is unlikely to be forthcoming. Therefore, there is little prospect of the stakeholders taking the actions necessary to support an increase in the viability of waterborne freight in the TfSE area in the near future

1 Chapter One - Introduction

1.1 Project Background

TfSE is the STB for the South East of England. The TfSE Transport Strategy (TfSE, 2020) presents the region's vision to 2050, aiming to foster sustainable economic growth and reduce carbon emissions. The Strategy acknowledges that to achieve this goal will require the successful integration of transport, digital and energy networks and a high-quality, reliable, safe and accessible transport system. Freight is considered extensively within the strategy which notes the need for key stakeholders and the public to be at the heart of transport planning. To meet environmental sustainability goals, the strategy specifies that there must be attractive alternatives available for road freight. The plan identifies key challenges for freight which focus on "accommodating future growth and reducing the impact of freight transport on the environment"

The TfSE Freight, Logistics & Gateway Strategy (Freight Strategy) emerged as a recommendation from the TfSE Transport Strategy, and has been subsequently developed (TfSE, 2022). It provides a route map to enable the sustainable growth of the industry. Key strategic objectives include improving the operational efficiency and capacity of the sector, the connectivity at international gateways and reducing the environmental impact of freight and logistics operations. The action plan outlined a need to review the potential of inland waterway (IWW) freight and coastal shipping, such as short sea shipping (SSS), for freight movement, and hence informed the commissioning of this study.

One of the key challenges highlighted across these strategies is the decarbonisation of the freight and logistics sector, reducing freight-based congestion on the local road network and supporting wider co-benefits such as improved air quality. To address these challenges, TfSE are actively exploring sustainable alternatives to road-based freight transportation. The TfSE Freight Strategy specifically recognises the potential for waterborne freight to enable this across the region.

TfSE commissioned City Science to explore the viability of transferring some freight movements from the road to water within or to and from the TfSE area. The study forms part of the delivery of the Freight Strategy Action Plan and delivery of the Transport Strategy vision, alongside supporting the sustainable economic growth of in the area.

1.2 Report Purpose

TfSE identified the two core objectives of the study were to provide:

- A more informed position on the potential for coastal shipping, SSS and inland waterways to be used more extensively for the movement of freight.

- Greater insight into possibilities and recommend points for action or further investigation, for example, which types of materials and/or goods would be suitable and the origins and destinations of these.

To meet these objectives, six study questions were developed to inform this study including:

1. Understand the segmentation of the freight market suitable for transferring to waterborne transport methods.
2. Assess whether there is a substantial volume of freight, currently reliant on road networks, that could be efficiently shifted to waterborne transportation.
3. Project the future trajectories of relevant market segments.
4. Evaluate the viability and competitiveness of establishing a coastal shipping service connecting ports along the coast.
5. Identify necessary infrastructure enhancements and modifications essential for facilitating a seamless transition to waterborne freight transportation.
6. Investigate the economic sustainability of this transition, potentially attracting participation from private sector operators

A key challenge for this study has been the availability of data which has restricted our ability to fully answer the first three study questions. Whilst some datasets are available, they are often fragmented and provide an incomplete picture. Specific data limitations have included the lack of:

- **Geospatial granularity:** Makes it difficult to determine values specific to the TfSE area.
- **Commodity granularity:** Reduces the ability to isolate specific goods flows that would be suitable for transition to waterborne freight. This is primarily due to data collection on waterborne freight largely being based on ship type (e.g. container cargo). As such there is insufficient granularity to determine specific goods or materials being transported by water.

Where data has been a constraint, we have liaised closely with TfSE to discuss and agree alternative approaches to inform this Final Report.

1.3 Aims & Objectives

The primary aim of this study is to evaluate the viability of integrating SSS and IWW into the TfSE freight transportation system. The study's anticipated key outcomes are to ascertain how increasing the use of waterborne freight in the TfSE area can:

1. Reduce
Greenhouse Gas
Emissions

2. Mitigate Road
Network Congestion

3. Stimulate
Economic Growth in
Coastal Towns

1.4 Scope

The viability of using the following modes of waterborne freight to replace HGV freight movements are in scope of this study:

- **SSS:** Maritime traffic that moves cargo along a coast without having to cross an ocean (DfT, 2022e).
- **IWW:** Freight traffic carried by both barges and seagoing vessels along inland waters, both non-seagoing traffic and seagoing traffic, which crosses into inland waters from the sea (DfT, 2017).

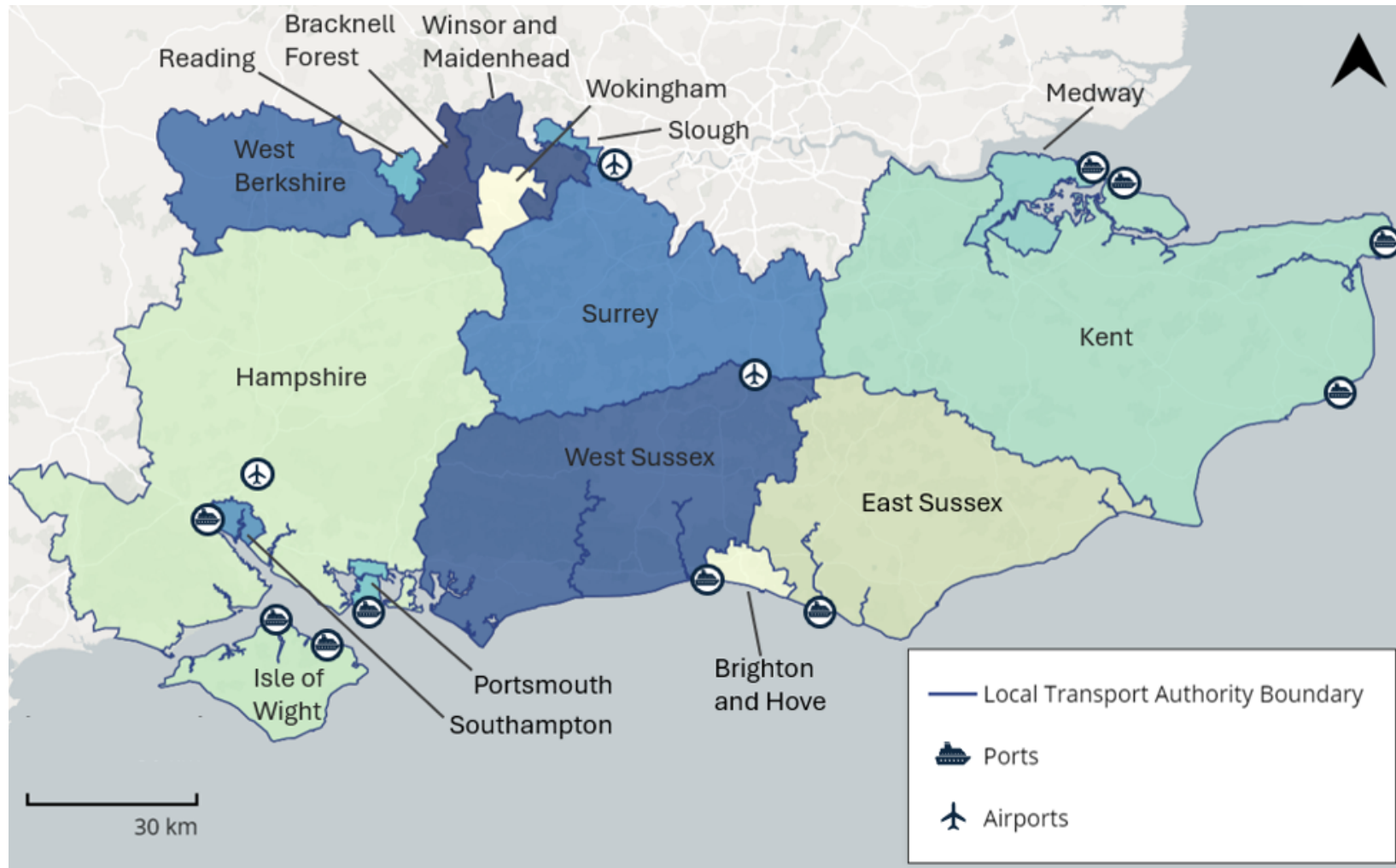
Opportunities may also exist to support substituting rail freight (e.g. Southampton – Port of London Authority) by using waterborne services to transport cargo between smaller, regional and major hub ports. However, a detailed analysis of this opportunity is outside of the study's scope. The geographical scope of this study is the TfSE area, illustrated below in Figure 1-1.

1.5 Context: The Role of Waterborne Freight

The use of waterborne freight presents opportunities to reduce transport emissions, because the movement of freight by coastal domestic shipping (often referred to as SSS) and IWW uses considerably less energy than that used in the transport of goods by road, rail or air (European Community Shipowners' Associations, 2020). This was demonstrated by previous Cross River Partnership trials, see Table 2-2 for more detail, that highlighted how bringing goods into central London via the River Thames produced less than half of the carbon emissions of road transport due to reduced journey mileage (Cross River Partnership, 2022). The Cross River Partnership trials also found that transferring goods to waterborne methods reduced congestion through an overall reduction in vehicles on the road.

However, transitioning towards a greater reliance on waterborne freight presents several challenges, including the need for additional infrastructure such as roads, rail networks, and interchange facilities to increase capacity at existing ports and support onward journeys. These infrastructure requirements also pose financial challenges due to their associated costs. The expansion of existing sites or the development of new sites, will require sufficient land to enable development, as well as the supporting infrastructure previously outlined.

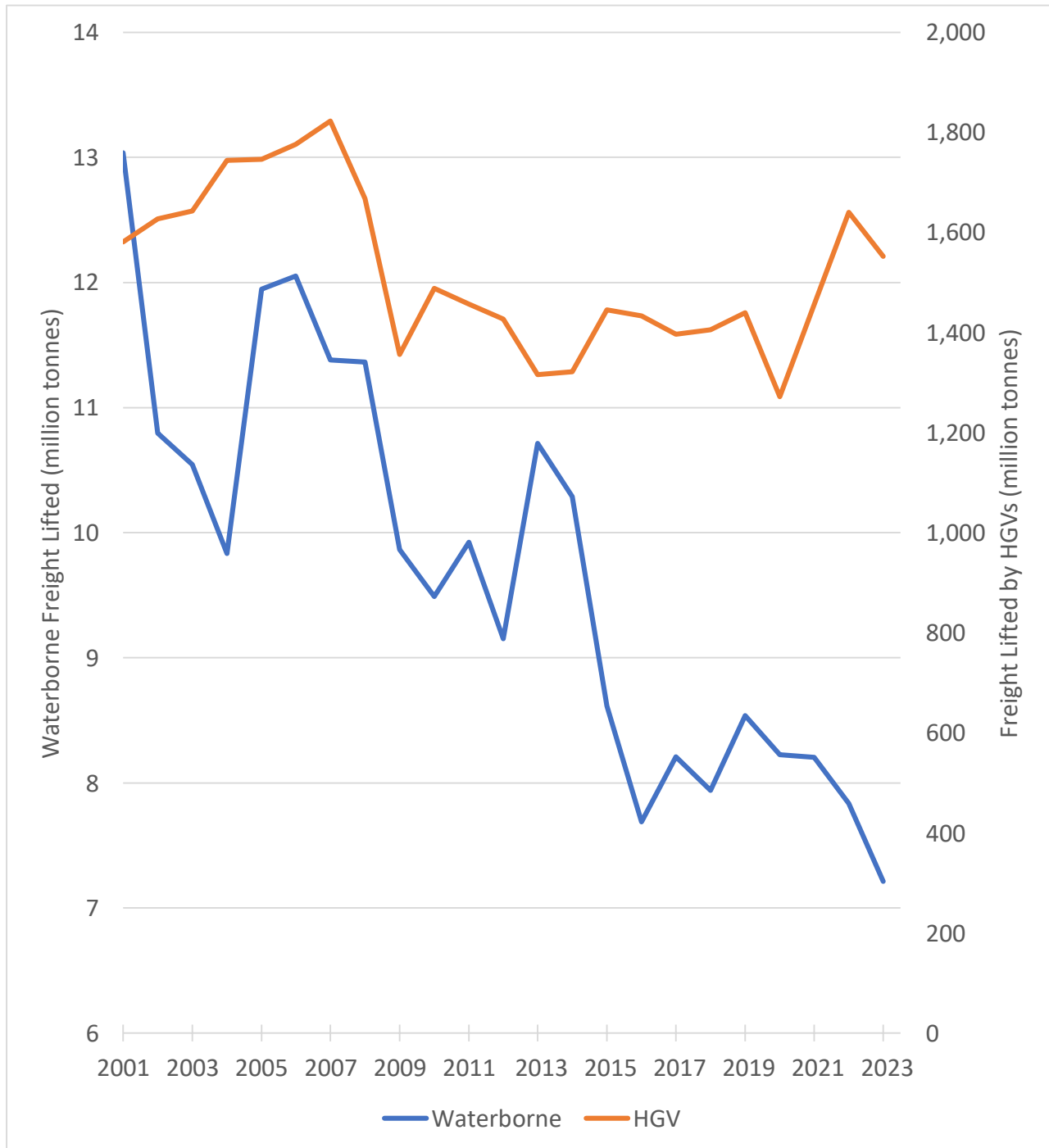
Figure 1-1: Map of Study Area. Source: (ONS, 2021) Contains OS Data © Crown Copyright. To view an online interactive version of this map, click [\[here\]](#).



1.6 Waterborne Freight Background

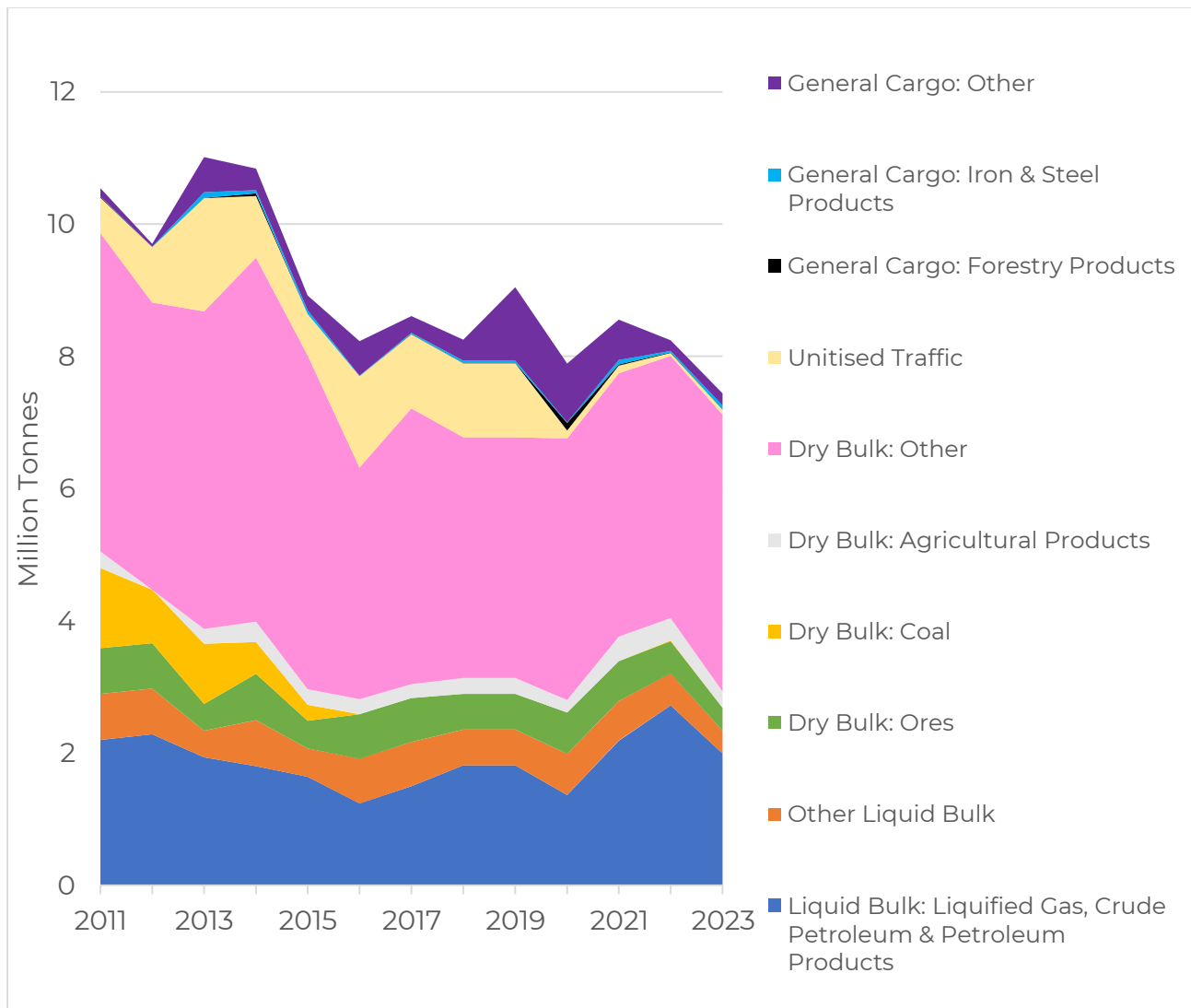
Nationally, waterborne freight accounts for a comparatively small amount of freight lifted compared to that moved by HGVs. Figure 1-2 shows waterborne freight volumes measured by total tonnes, HGV volumes is shown on a separate axis. On average, 157 times more domestic cargo is lifted by HGV than by water. Additionally, there is evidence of an overall decline in waterborne freight over the last decade.

Figure 1-2: National Freight Lifted by Waterborne & HGV. Source: (DfT, 2023h; DfT, 2023f)



Commodities which are already carried in large quantities by waterborne freight may be most suitable for shifting from HGVs. Figure 1-3 shows the annual amount carried by domestic waterborne freight in the UK, from 2011 to 2023, split by cargo type (DfT, 2023h). Because the DfT largely assess the cargo type based on information about the type of ship (e.g. container ship), the cargo categories are insufficiently granular to identify many specific commodities. This data limitation is discussed further in Section 5.4. Nonetheless, insight about the suitability of broad commodity groups can be gained. Figure 1-3 shows waterborne freight is dominated by just two types of cargo categories: dry bulk goods (metal ores, grain or construction raw materials) and liquid bulk goods (crude oil, petroleum products and chemicals). In 2023 dry and liquid bulk cargoes accounted for 63% and 32% of the freight carried.

Figure 1-3: Domestic Waterborne Cargo by Type. Source: (DfT, 2023h)



1.7 Current Situation: TfSE Waterborne Infrastructure & Activity

The TfSE area hosts a range of waterborne resources, as outlined in the supporting technical documents for the TfSE Freight Strategy (TfSE, 2022), see WP3 Freight Specific Infrastructure (WSP, 2021).

- **Major Ports:** There are six major ports in the TfSE area that handle more than 1 million tonnes of cargo a year, such as Southampton and Portsmouth,.
- **Minor Ports:** Minor ports that provide localised waterborne freight activity, as well as recreational and leisure facilities, such as the Isle of Wight.
- **The Solent Freeport:** Freeports have been created by the government to boost investment with imported goods exempt from taxes. The Solent Freeport was approved in 2022 and could lead to shifts in supply chain activity and maritime freight paths. Additionally, it could create over 30,000 jobs and thereby enable the levelling up of coastal communities.
- **IWW System:** Navigable routes within the TfSE area include the River Medway, River Arun and River Rother. The area also benefits from its proximity to the River Thames, the busiest IWW in the UK. The River Medway is identified as a significant natural watercourse outside of the River Thames that supports waterborne freight movements, with no other inland freight routes designated across the rest of the South East.

WP3 recognises that waterborne freight has the potential to grow across the UK and the South East, competing with road and rail transport (WSP, 2021).

However, challenges are identified including:

- Development pressures along the River Thames and River Medway may conflict with retaining waterway and wharf infrastructure.
- The uptake of coastal shipping as a cost-effective transport method will likely be impacted by regulations and legislation related with planning consent for associated infrastructure.
- Narrow IWWs across the TfSE area may constrain freight movement.
- Significant resources and investment are needed for new handling equipment at ports and wharves.
- Collaboration is required among stakeholders, including freight and logistics companies, ports, and IWW service providers.

TfSE recognises there is a need to better understand the key considerations which impact the viability of the expansion of waterborne freight, and the types and scale of associated benefits. This study and report provide insight to address this need.

1.8 Report Structure

This Final Report is structured to align with the study purpose and scope:

- **Local Context & Waterborne Infrastructure Assessment:** Provides a general insight into the TfSE area's demographic factors, such as population and deprivation, and evaluates the availability of waterborne infrastructure within the TfSE area and its surrounding areas.
- **Freight Movements:** Detailed information on the TfSE area's current freight movements, including both road-based and waterborne freight. It highlights the proportion and types of goods transported within and outside of the area.
- **Future Trends & Forecasting Impacts:** Presents key data trends related to waterborne freight, and forecasts future trends and their anticipated impact on the area's freight movements.
- **Data Gap Analysis:** Discusses the data required to assess the feasibility of achieving substantial mode shift of freight from HGVs to waterborne vehicles, highlights the gaps and outlines recommendations.
- **Stakeholder Insights:** Presents the outcomes from the stakeholder engagement process, focusing on challenges, wider opportunities and place-based opportunities
- **Challenges & Opportunities:** Collates and analyses the challenges and opportunities identified throughout this study.
- **Key Findings, Conclusions & Next Steps:** Outlines the study's key findings, conclusions, recommendations and next steps.

2 Chapter Two – Local Context & Infrastructure Assessment

2.1 Overview

This Chapter provides an understanding of the TfSE area's socio-economic context, current infrastructure provision, geographical characteristics and connectivity with surrounding areas that may impact the area's ability to expand waterborne freight. This Chapter will inform this study by ensuring that recommendations are tailored to address locally specific challenges and lever local strengths. The factors explored include:

- **Socio-economic Factors:** The availability of suitable labour is essential for the operation and management of freight services. Understanding these factors is crucial for determining if the local workforce could support an expansion in waterborne freight provision. Additionally, identifying place-based opportunities for economic stimulation can help support equitable growth through identifying a correlation between opportunities for waterborne freight expansion and areas of deprivation. This was explored through analysing total population distribution across the area, deprivation levels and a high-level market sector analysis.
- **Current Infrastructure Provision:** Existing transport networks, such as roads and rail, port locations and supporting infrastructure, such as warehousing, enable the transfer and movement of goods across the area. The data has been mapped to show where infrastructure is currently located to identify preliminary challenges and opportunities for expanding existing waterborne freight services.
- **Geographical Characteristics:** The presence and availability of navigable waterways determine the feasibility and efficiency of waterborne freight routes and are therefore fundamental for expanding waterborne freight. IWW routes are mapped across the TfSE area to identify preliminary challenges and opportunities for expanding waterborne freight through IWW.
- **Connectivity with Surrounding Areas:** Due to the cross-boundary relationship of freight provision, it is critical to explore the infrastructure available in TfSE's neighbouring areas to understand how well waterborne freight systems and networks are linked across different regions. Exploring this connectivity helps identify untapped collaboration opportunities and ensures seamless integration with regional freight networks outside of the TfSE area. The same approach has been applied to understanding the TfSE area's infrastructure provision.

By thoroughly examining these factors, this Chapter seeks to ensure that study conclusions are tailored and grounded in a detailed understanding of local and regional contexts, providing a solid foundation into waterborne freights viability within the TfSE area.

2.2 Socio-Economic

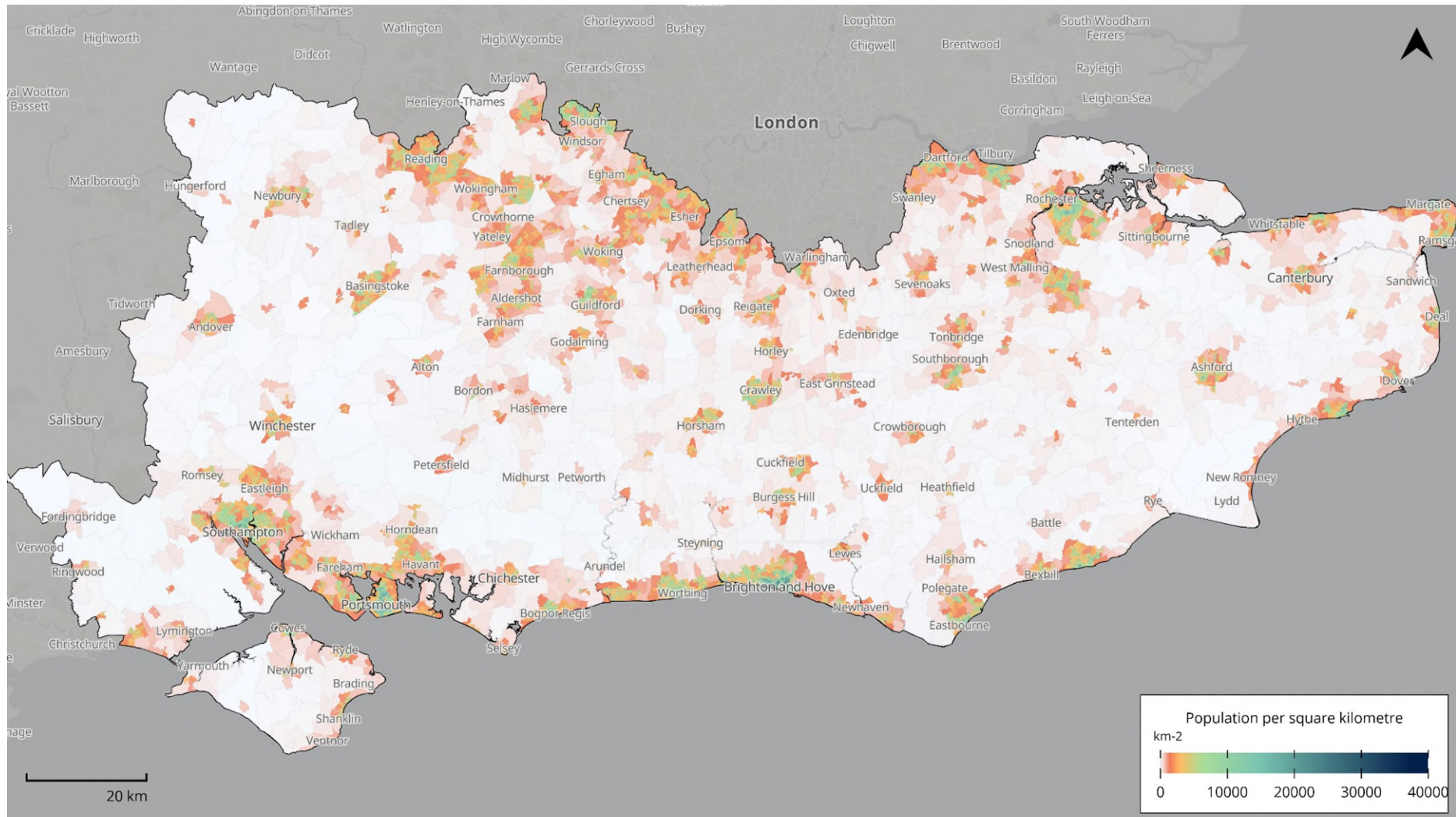
2.2.1 Population

Home to over 8 million people, the TfSE area is one of the UK's most populated areas. This significant population contributes to the high demand for goods movement into the region. Figure 2-1 indicates the spatial distribution of this population across the TfSE area, showing the density of the population in each Lower Layer Super Output Area (LSOA) (ONS, 2022a). LSOAs are standardised geographic areas that provide a consistent framework for collecting and presenting local area statistics. They are designed to have population sizes containing between 1,000 to 3,000 residents and are the smallest super output area available. This supports a granular analysis of census data, such as population density.

The results reveal that while large areas of TfSE are sparsely populated, there are notable coastal towns and cities with significant population densities. These include Southampton, Portsmouth, Brighton, Eastbourne and Dover, which align with key strategic waterborne infrastructure, such as ports, and activity. This presents a number of promising opportunities including that any expansion of port activity can be supported by a local workforce.

Whilst there are smaller pockets of higher levels of population through the centre of the TfSE area, typically correlating with towns or cities, there is a clear pattern of higher population density around the periphery of London, including areas, such as Medway, Dartford, Reading, Spelthorne and Slough. Higher population densities in these areas indicate a strong demand for goods. Integrating waterborne freight into the existing transportation network in these areas through IWW could support carbon reductions, and associated benefits such as improving air quality, and alleviate congestion both within the TfSE area and London.

Figure 2-1: Population Density. Source: (ONS, 2020) Contains OS Data © Crown Copyright. To view an online interactive version of this map, click [\[here\]](#).



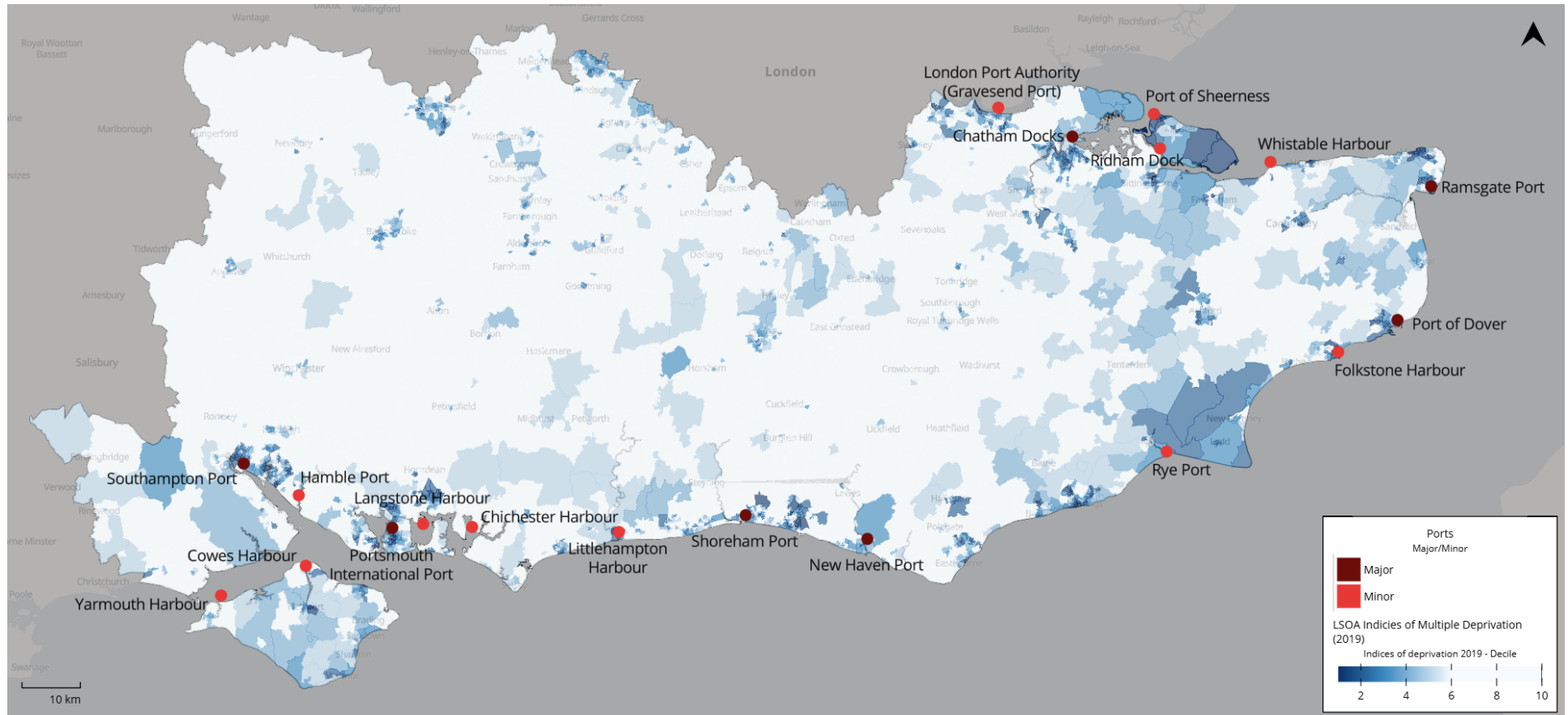
2.2.2 Deprivation

Deprivation is a key socio-economic characteristic that captures the multi-dimensional aspects of poverty and inequality within a population. Understanding local deprivation levels can support the identification of areas that could economically benefit from waterborne freight expansion, such as through stimulating the local coastal economy and providing additional job opportunities.

Figure 2-2 displays LSOA-level deprivation rankings (MHCLG, 2019) within the TfSE area alongside the locations of key port infrastructure (see Section 2.5.1 for further detail). The deprivation rankings are a nationally published dataset which rank LSOAs according to deprivation based on a range of metrics, such as income, employment, health, deprivation and disability, education, skills and training, crime, barriers to housing services and living environment. LSOAs are ranked within 10 equal groups (or deciles) according to their deprivation rank. Low values indicate greater levels of deprivation and are shown in dark blue, whereas high values indicate lower levels of deprivation and are shown in pale blue.

Large areas of TfSE contain LSOAs which are amongst the least deprived in the country, however there are some LSOAs which have high levels of deprivation, and these tend to be concentrated on the coast with many port locations coinciding with these pockets of greater deprivation. Introducing increased waterborne freight movements and the associated regeneration, such as port infrastructure and job creation, could help alleviate deprivation in these communities. This economic uplift could contribute to improved living standards, reduced poverty, and enhanced social outcomes for residents.

Figure 2-2: Indices of Multiple Deprivation (2019) Decile & Ports. Sources: (MHCLG, 2019), (UK-Ports, 2023) Contains OS Data © Crown Copyright. To view an online interactive version of this map, click [\[here\]](#).



2.2.3 Employment & Business

Expanding waterborne freight necessitates a skilled workforce with expertise and knowledge in elements, such as logistics, cargo handling, and port management. While population density offers an indication of the volume and distribution of the potential labour pool and deprivation levels highlight where economic stimulation could benefit communities, examining specific workforce categories provides a more nuanced understanding of the available expertise needed for expansion.

To explore the availability of relevant sectors and skills, the Business Register and Employment Survey (BRES) (ONS, 2022b) was sampled. The BRES provides data on the employment with geographical areas, segmented by industry classification. The following classifications were selected:

- Sea and Coastal Freight Water Transport.
- Inland Freight Water Transport.
- Operation of Warehousing and Storage Facilities for Water Transport Activities.
- Service Activities Incidental to Water Transportation.
- Cargo Handling for Water Transport Activities.

Across all these categories, the total workforce within the TfSE area is 6,785 employees – this is approximately 0.2% of all employees in the area. Figure 2-3 displays this information spatially, outlining the total relevant workforce (as defined by the five relevant work categories above) per LSOA and their proximity to major or minor port infrastructure. Major ports are defined as those with cargo volumes of at least 1 million tonnes annually (DfT, 2023h). There are clear concentrations of activity surrounding port infrastructure in the Solent (Southampton and Portsmouth) and the Isle of Wight, as well as around the Thames Gateway and Medway. Some major port infrastructure, such as Shoreham and Newhaven Port are supported by smaller workforce populations.

In addition, there are pockets of skills inland, including north of Ashford, which could potentially coincide with supporting freight services, such as warehousing and logistics. These inland areas may play a crucial role in the broader supply chain, offering strategic locations for distribution centres that alleviate pressure on port-side operations.

Figure 2-3: Total Relevant Workforce per LSOA within TfSE Area. Source: (ONS, 2022b) Contains OS Data © Crown Copyright. To view an online interactive version of this map, click [\[here\]](#).

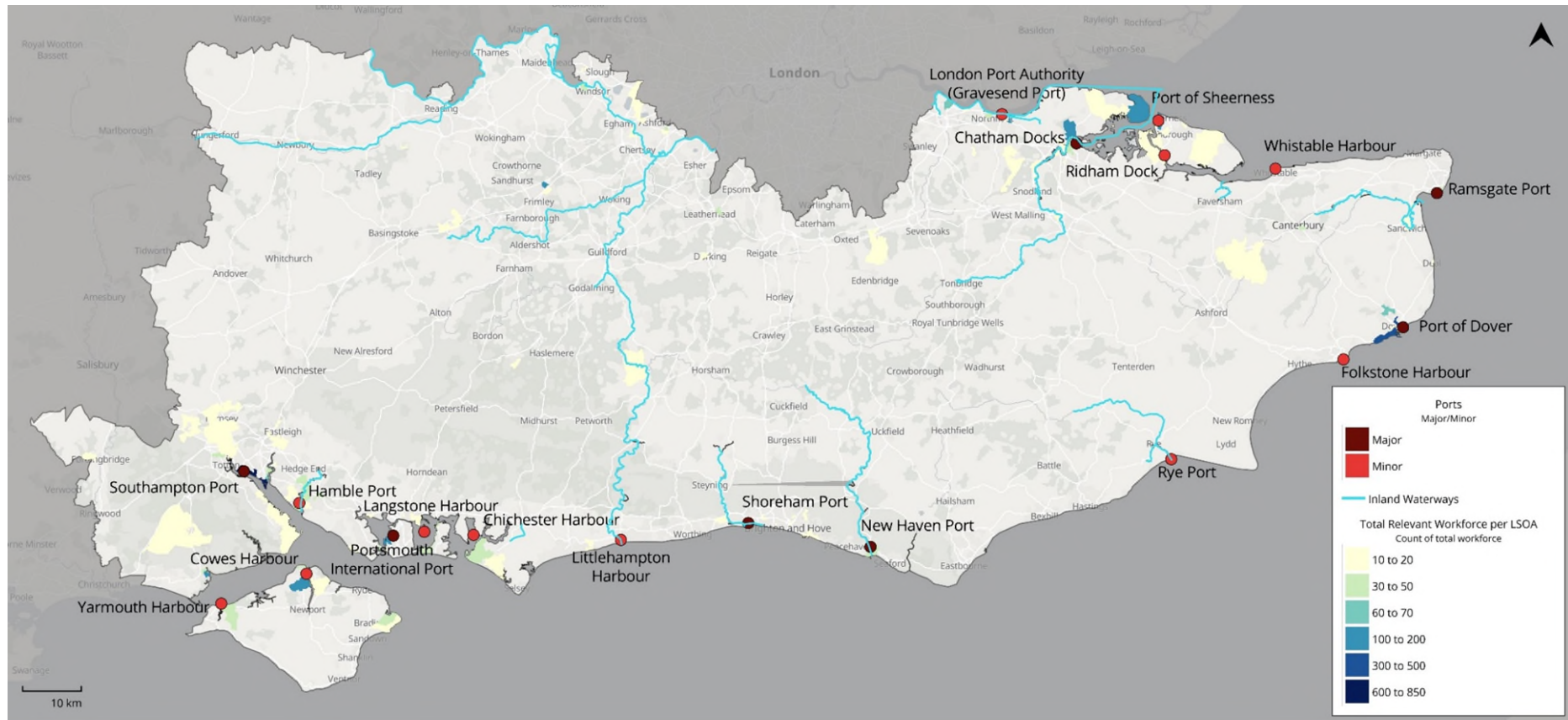


Table 2-1 outlines the total workforce within the TfSE area that is within a 5 km radius of port infrastructure. This proximity suggests a significant portion of the workforce is conveniently located to support port operations, potentially enhancing the efficiency and responsiveness of waterborne logistics and freight activities, such as reducing commuting distance. The high concentration of employees near the ports, such as Southampton, Dover, Cowes and Portsmouth, also underscores the strategic advantage of building on local skills for expanding waterborne freight capabilities within the area.

However, the dataset also highlights areas that may require additional support to promote and expand skills, ensuring the labour force is sufficiently prepared for any potential increase in waterborne activities. This could include locations, such as Ramsgate, Yarmouth, Chichester, Whitstable and Littlehampton, which all observe less than 100 employees within a 5 km radius.

Table 2-1: Ports (TfSE and Wider Area) & Total Workforce within 5 km Radius

Port Name	Waterborne Related Workforce within 5 km radius
Southampton Port	2,400
Port of Dover	920
London Port Authority	510
Port of Portsmouth	440
Port of Sheerness	340
Cowes Harbour	250
Ridham Docks	240
Langstone Harbour	230
Chatham Docks	220
Hamble Port	205
Shoreham Port	130
Newhaven Port	100
Ramsgate Port	70
Yarmouth Harbour	50
Chichester Harbour	40
Whitstable Harbour	20
Littlehampton Harbour	10


2.3 Transport Network

Waterborne freight does not operate in isolation; it requires efficient connections to other modes of transport to complete the logistics chain. Exploring existing transport infrastructure provision, such as the highways, rail, airports and warehouses, provides essential insights into where waterborne freight can complement existing transportation modes and alleviate pressure on road networks. More broadly, it can also provide insights into overall market accessibility and economic development opportunities.

2.3.1 Road Network

The Strategic Road Network (SRN) and the Major Road Network (MRN) are crucial for the movement of goods, providing accessibility to and from ports from inland destinations. The TfSE area is served extensively by the SRN (managed by National Highways), and the MRN (managed by the Local Transport Authorities). Collectively these form the backbone of the area’s transport network. However, the transportation of goods often also involves numerous trucks and delivery vehicles, such as HGVs, which are major contributors to traffic congestion and pollution, as well as overall traffic volumes. By transporting goods via IWW or coastal routes, waterborne freight can significantly decrease the number of HGVs on the road, therefore alleviating congestion and reducing emissions. This is demonstrated well by the Cross River Partnership's work on their London Light Freight River Trial started in 2023(see Table 2-2).

Table 2-2: Waterborne Efficiency & Mitigating HGV Impacts Case Study

Case Study – Waterborne Efficiency & Mitigating HGV Impacts	
Key Stakeholders	
Dates	2023 – ongoing
Location	Dartford & London
Background	<p>The Cross River Partnership has recently launched the London Light Freight River Trial, a significant initiative under the Defra-funded Clean Air Logistics for London project. Collaborating with key partners, such as the Port of London Authority, Lyreco UK & Ireland, Speedy Services, Thames Clippers Logistics, Grid Smarter Cities, and Pedal Me, the trial aims to showcase the River Thames’s potential to facilitate rapid, efficient, and environmentally sustainable deliveries for the next-day delivery market, including return deliveries. Sustainable and low carbon transport modes have also been integrated into the trial, with goods being transported by cargo bikes and electric vehicles to the final destination.</p>

Case Study – Waterborne Efficiency & Mitigating HGV Impacts

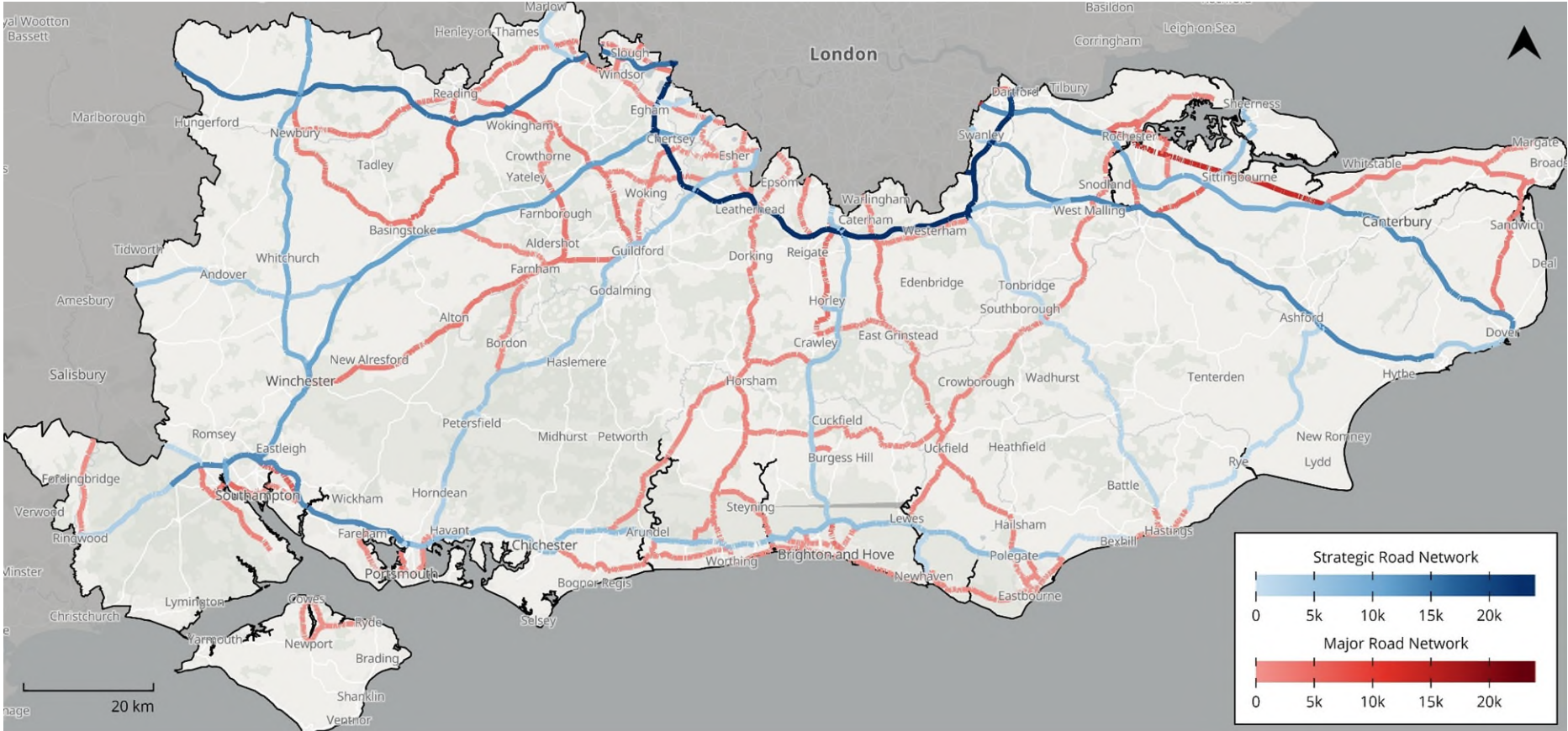
Outcome

The study highlights the significant environmental benefits of utilising the River Thames and waterborne freight transport, noting that it emits less than half the carbon compared to road transport. Previous trials revealed staggering reductions of 78% in NO_x and 88% in CO₂ emissions compared to conventional road-based delivery methods. These reductions are primarily due to shorter journey mileage along the river and the displacement of diesel vehicles. For example, Lyreco UK & Ireland has successfully reduced its delivery vehicles on the roads, contributing to lower congestion and air pollution. However, the study highlights that if all road vehicles were fully electric, the environmental benefits regarding NO_x and CO₂ diminish. Despite this, particulate emissions would still be reduced. Additionally, fully electric HGVs are not currently mainstream due to their high cost.

Figure 2-4 illustrates 2022 HGV average annual traffic volumes on the MRN and SRN (DfT, 2022b). It identifies the busiest routes, based on traffic flows, as the M4 and M5 near Greater London. Significant traffic volumes are also observed on the M27 around Southampton and the A34 near Winchester, which provides a vital link that connects Hampshire to the Midlands and beyond. Other key routes are also identified that serve Dover, such as M20, M2 and A2. Dover is one of the UK's busiest ports, serving over 6 million passenger movements and 18 million tonnes of cargo in 2022 and is also one of Europe's busiest ferry ports, providing a vital international gateway for the movement of people and goods.

There is an opportunity for waterborne freight to reduce HGV movements on the road network within the TfSE area through offering an alternative route and transport mode for transporting freight. This could include rerouting goods by sea along the coast to support port-to-port journeys and through nearby IWWs, such as the River Medway. However, implementing this opportunity could potentially exacerbate congestion on the road networks surrounding port areas through creating, displacing and diverting road vehicle movements to these locations, such as from additional employees commuting and unloading, reloading and transferring increased levels of goods.

Figure 2-4: All HGV flows on SRN & MRN. Source: (DfT, 2022b) Contains OS Data © Crown Copyright. To view an online interactive version of this map, click [\[here\]](#).



2.3.2 Rail Network

Rail freight plays a vital role in transporting goods, accounting for 7% of domestic freight moved and 22% of inter-modal road freight journeys in 2022 (DfT, 2023i). The rail network provides critical transfer points, such as interchanges, for goods moving between ports and inland destinations as well as connecting directly to ports to support the loading and uploading of cargo from ships to trains.

2.3.2.1 Rail Freight Interchanges

Rail Freight Interchanges (RFIs) are facilities where cargo is transferred between different modes of transport, particularly between rail or road or rail and waterborne freight. RFIs are particularly suitable for bulky items that are less suitable for transportation by road due to weight and/or size, such as construction materials, industrial waste and bulk liquids, such as oil. As shown in Section 1.6, these goods are also often highly suitable for carrying by waterborne vehicles. This highlights the opportunity for connecting rail and waterborne freight transport. RFIs can also be used to transfer containerised goods between rail and waterborne, such as at the port of Southampton as part of DP World's modal shift programme (DP World, 2023). There is the potential to reduce HGV freight by simultaneously increasing the use of rail and waterborne freight – facilitated by increased connection between the two. Despite having good rail network coverage, the TfSE area only hosts three RFIs that are concentrated in and around the Solent, Southampton and Portsmouth, and the Medway Ports. There are three more RFI's north of the Thames Estuary however, these are outside of the TfSE area. Beyond these RFIs, rail connectivity between and at ports is largely limited, focusing on routes in and out of London. Exploring new avenues or routes to promote rail connectivity, could enhance the efficiency and competitiveness of waterborne freight provision. Considerations for developing capacity at existing RFIs include the cost of new infrastructure (rail tracks or terminals) and navigational constraints along IWW (ensuring sufficient depth and width for vessels to navigate effectively).

2.3.2.2 High Speed One

The TfSE area is home to the only high-speed rail link in the UK, High Speed 1 (HS1), which connects London with the Channel Tunnel, acting as a vital link for the movement of goods and people from the UK to mainland Europe. Of the 360 million tonnes of freight traded with the UK in 2021, over 14 million tonnes (4%) were transported through this link (DfT, 2022g). Along HS1, there are three international RFIs providing access to Europe via the Channel Tunnel Rail Link, which includes stations at Ebbsfleet International, Ashford International and Folkestone International. Since its opening in 1994, the Channel Tunnel has remained the quickest route for passengers and freight to mainland Europe. However, rail freight from Europe faces limited opportunities for onward travel as most of the rail network between Folkstone and London has not been updated since the early 1990s. It is therefore unable to accommodate standard European freight containers and wagons (Logistics UK, 2023). Potential solutions include track lowering, minor alterations to various structures and light track

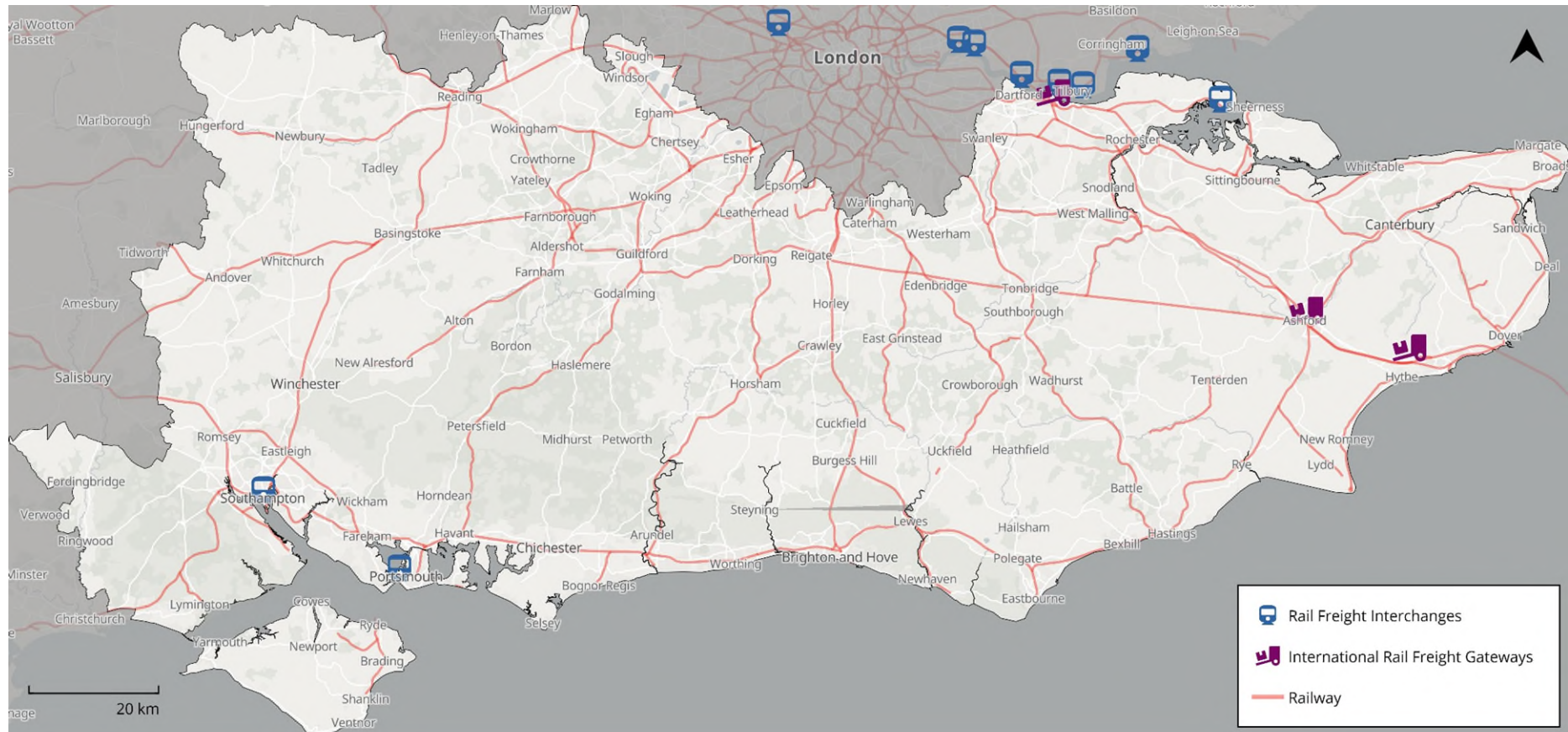
works to achieve the correct track gauge clearance to enable exchangeable freight containers to pass through (Logistics UK, 2023).

2.3.2.3 Future Growth

Figure 2-5 highlights that there is good rail network coverage in the TfSE area. Major lines used for freight include the South Eastern Line connecting London with Dover, Canterbury, Ashford and Folkstone; Brighton Main Line and South Western Main Line connecting London with towns, such as Guildford, Woking and Basingstoke. At a national level, there is growing momentum to boost the modal share of rail freight, with the DfT announcing ambitious targets to expand rail freight by at least 75% by 2050 (DfT, 2023g). The Rail Freight Forecasts published by Network Rail forecasts a 32% increase in tonnage moved annually in 2033, compared to 2016 levels, with intermodal freight at ports doubling (National Rail, 2020). It is worth noting that these figures do not take account of capacity constraints and assume the levels of service provided by the network in terms of end-to-end transit times remain constant, relative to the base year (2016/17). Similarly, the gauge clearance capability of the network is assumed to remain constant relative to the base year.

The rail network in the TfSE area offers the potential to contribute to an increase in the freight carried by waterborne vehicles and a decrease in the freight carried by HGVs. By connecting waterborne with rail, freight can be transferred to and from waterborne infrastructure in large quantities without the use of HGVs – extending the reach of HGV-less freight journeys away from waterborne infrastructure. However, there are challenges to realising this opportunity. The existing TfSE rail network provides essential connections between ports and inland destinations, but limitations remain such as the insufficient number and accessibility of RFIs. To maximise the potential of waterborne freight, strategic investments in rail connectivity and modernisation of facilities, such as enhancements in gauge clearance, are crucial. As national freight strategies increasingly prioritise sustainable transport options, utilising the rail network in the TfSE area could become essential for achieving these goals. Therefore, addressing existing challenges through proactive measures and infrastructural upgrades can significantly enhance the rail network's capacity to support and expand waterborne freight capabilities.

Figure 2-5: Railway, RFIs & International Rail Freight Gateways. Source: (Network Rail, 2021) Contains OS Data © Crown Copyright. To view an online interactive version of this map, click [\[here\]](#).



2.4 Warehouses

Transporting goods via waterborne freight often involves a mode or vehicle change and the storage of goods to enable them to be transported onwards to reach their destination inland. Therefore, there needs to be supporting infrastructure in place, such as warehousing, to facilitate potential expansions in waterborne freight. Warehousing provides essential infrastructure, services and logistical support, enhancing efficiency and reliability throughout the supply chain because it facilitates goods storage (dry and cold), consolidation (grouping shipments together to bring down transportation costs), and offers services, such as optimising inventory management and value-added packaging and labelling processes. Several types of warehousing land use types exist, such as:

- **Distribution Centres:** A place where finished goods are transferred from one vehicle to another in their journey to an end user.
- **Traditional Warehouses, Storage Depots & Cold Storage Warehouses:** Physical spaces designed to securely store and manage items, goods, or materials for a specified time period and specialised facilities that are equipped with refrigeration or freezing systems to store perishable goods, such as food and pharmaceuticals.
- **Liquid Bulk Storage Facilities:** Specialised facilities designed to safely store quantities of liquids, such as petroleum, chemicals, or food products, in tanks or containers.
- **Retail Warehouses:** Consumer-facing warehouses that hold significant inventories for direct purchasing by end users.
- **Place-Production Facilities:** Facilitates that produce unfinished or finished products that are likely to require use of a warehouse for temporary storage for onwards distribution.

Distribution and logistics warehouses, such as distribution centres, can play a crucial role in supporting waterborne freight expansion. They can increase competitiveness by being strategically located, lever economies of scale and increase efficiencies through improved cargo handling processes. By exploring the current provision of distribution and logistics warehousing within the TfSE area, the study will identify if warehousing provision could be a possible constraint to waterborne freight expansion.

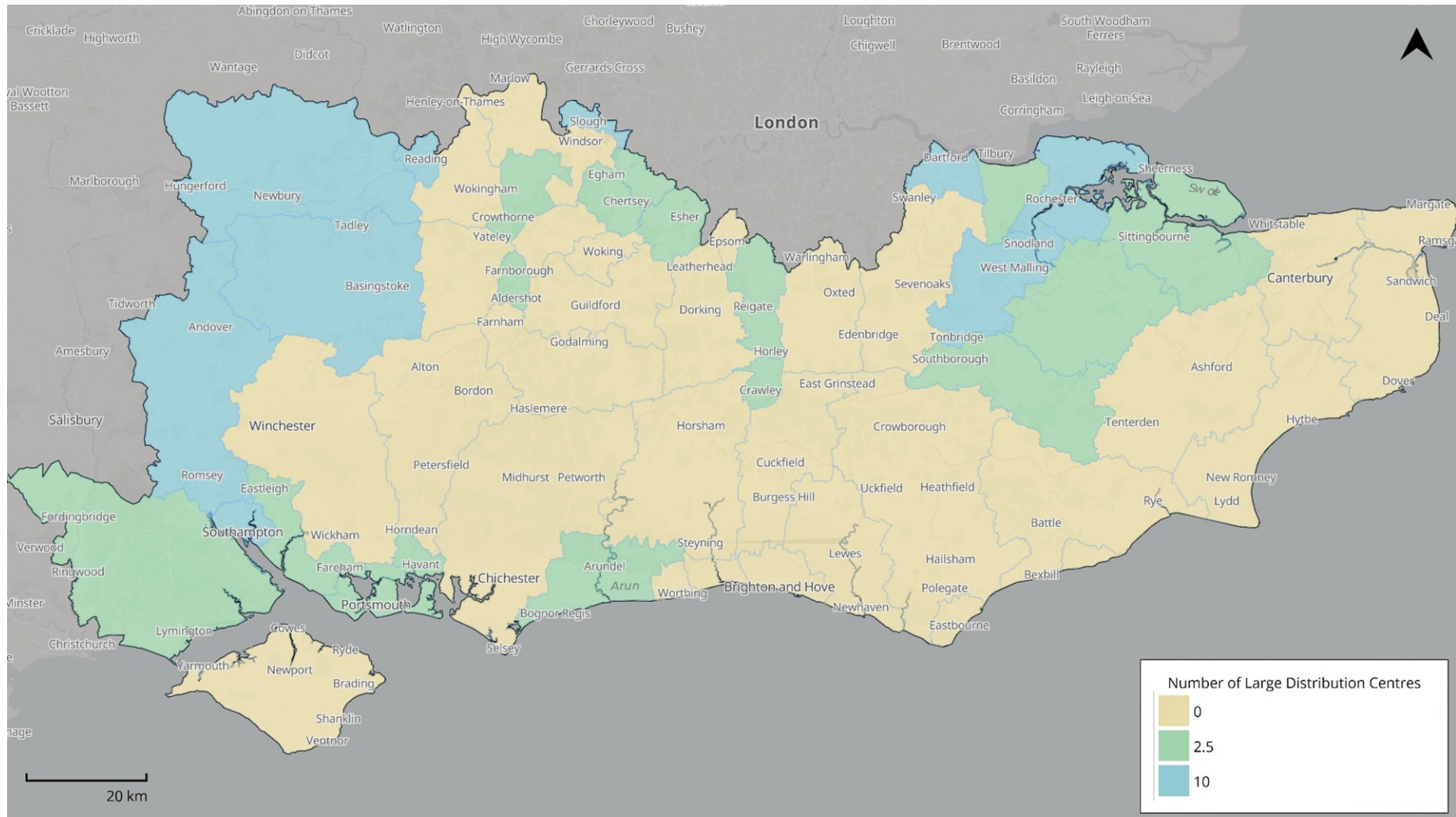
2.4.1 Distribution Centres

Figure 2-6 illustrates the number of Large Distribution Centres (LDCs) within each local authority district across the TfSE area as of 2023 (VOA, 2023). While a considerable number of local authorities have few LDCs, notable clusters emerge around the area's periphery, particularly in coastal cities and towns, such as Southampton and Portsmouth and near the River Thames.

The presence of warehouses near these locations presents an opportunity to support the storage and consolidation of goods arriving through SSS and IWW. Incoming cargo could be unloaded and stored at nearby warehouse facilities for consolidation with other shipments and to allow transfer/interchange between different transport modes. The strategic location of distribution centres near ports also fosters economic growth in the area through supporting businesses

by enabling the provision and transportation of goods alongside wider employment opportunities for local communities.

Figure 2-6: Local Planning Authority-Level 2023 LDC Count. Source: (VOA, 2023) Contains OS Data © Crown Copyright. To view an online interactive version of this map, click [\[here\]](#).



However, due to the high volume of goods already passing through these locations, infrastructure availability may be limited, such as a lack of capacity at distribution centres, so more warehousing may be required to meet any future increases in demand, as waterborne freight is expanded.

Alongside specific challenges relating to waterborne expansion, as outlined in the Chapter 1, WP3 Freight Specific Infrastructure (WSP, 2021) additionally highlights key challenges that could restrict expanding warehousing provision if required, including:

- **Competing Land Uses:** Conflicts between the need for housing, commercial property, and transport infrastructure.
- **Regional Shifts:** Potential of warehousing and distribution space moving to other parts of the UK.
- **Online Retailing:** The rise of online retailing and the resulting pressure to meet increased demand for space.
- **Market Dominance:** The disproportionate influence of larger organisations that monopolise space and assets, driving up warehousing costs and creating difficulties for smaller organisations with warehousing needs.

Investment in additional warehousing infrastructure is typically driven by the private sector. However, as outlined in WP5 Operational and Planning Considerations (WSP, 2022), public authorities, such as Local Planning Authorities, play a crucial role in shaping land use policy and designating land for warehousing provision. Therefore, it is essential for industry stakeholders and local authorities to collaborate, ensuring efficient identification and allocation of warehousing land and creating optimal conditions for the freight sector to operate effectively.

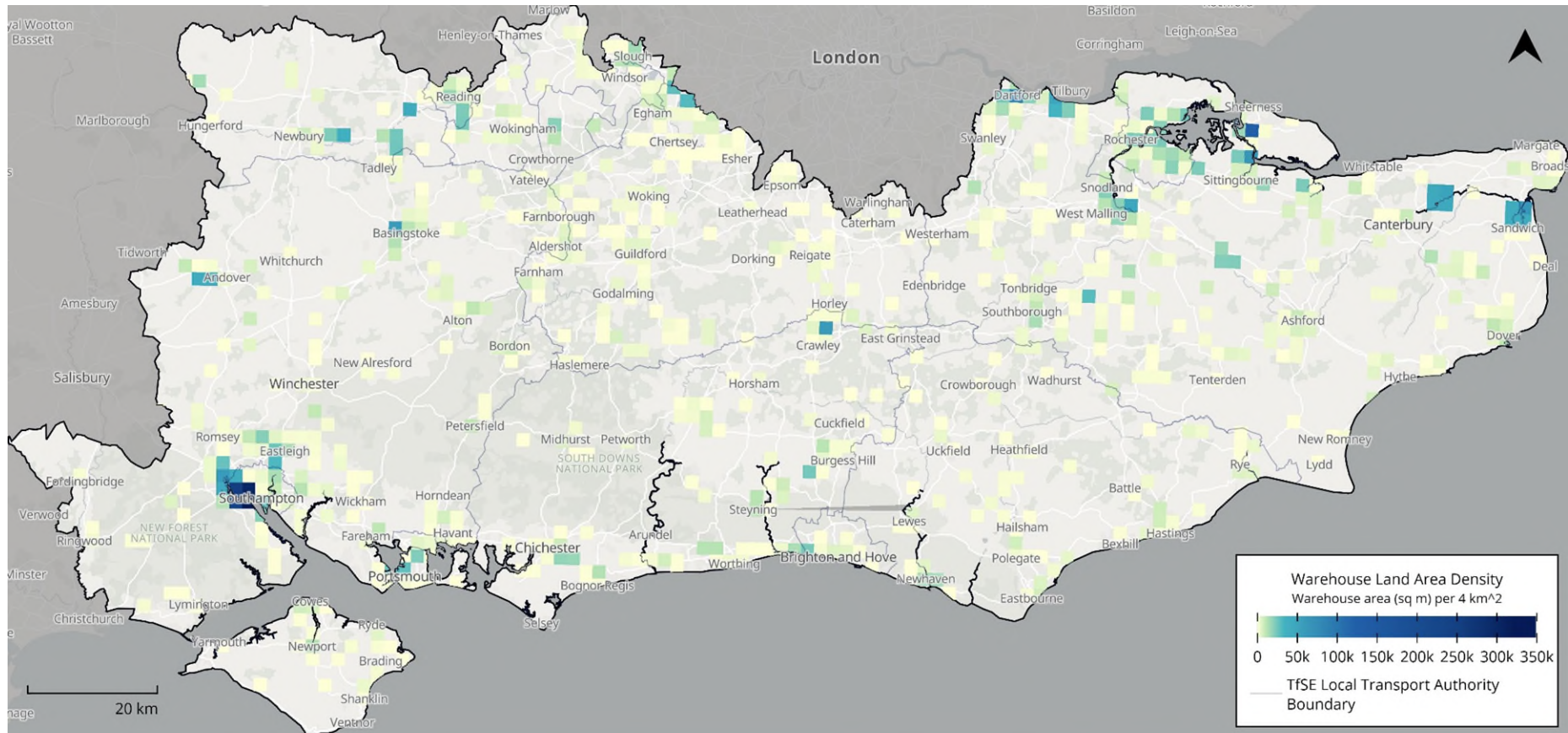
2.4.2 Warehousing Distribution

Figure 2-7 shows the TfSE area with a grid overlaid, providing insights into the spatial distribution of warehousing (ONS, 2023). The colour of each grid square represents the total floorspace of all the warehouses within that square. There are some areas without any warehouse provision, including more rural areas such as parts of the South Downs but a moderate distribution of warehouses in urban areas around the TfSE area's periphery, such as Sheerness and Spelthorne. Generally, grid squares that contain ports, such as Southampton, Portsmouth, Dover and Medway, can be seen to have a large amount of warehousing floorspace. Adoption of waterborne freight is likely to require warehousing in the areas surrounding ports, to accommodate the processing and sorting of goods either before or after they have been transferred by waterborne freight. This map indicates that there would likely be sufficient warehouse availability to support increased goods handling through these ports.

Although this study does not quantify land availability, Figure 2-6 and Figure 2-7 indicate that there is existing warehousing in many of the ports. These locations could provide essential infrastructure and services to enhance the efficiency and competitiveness of waterborne freight. As noted throughout this study, careful planning and investment will be necessary to address possible limitations, such

as infrastructure upgrades and space constraints. For further insights into warehousing availability, please refer to the TfSE Warehousing Provision Freight Study due to be completed in Spring 2025.

Figure 2-7: Warehouse Land Area Density. Source: (ONS, 2023) Contains OS Data © Crown Copyright. To view an online interactive version of this map, click [\[here\]](#).



2.5 Waterborne Infrastructure Assessment

This section will comprehensively examine the geospatial distribution of existing waterborne infrastructure within TfSE and neighbouring areas, focusing on ports and IWWs. The goal is to determine whether there is a robust and sufficient network to support current and future waterborne freight activities. By analysing current operations, including the volume and type of sea cargo being transported, as well as infrastructure distribution and connectivity, the study will identify potential opportunities for expanding waterborne freight, building on existing activities and identifying potential expansion challenges.

2.5.1 Ports

The proximity of the area's coastline to major international shipping lanes and mainland Europe means that the TfSE area hosts numerous international gateways. Figure 2-8 illustrates the spatial distribution of port infrastructure across the TfSE area (UK-Ports, 2023), revealing a notable concentration around the Solent and Thames Estuary as well as along the south coast. Collectively the ports within the TfSE area, handle a significant proportion of the UK's cargo for both international and domestic distribution, totalling almost 69 million tonnes in 2020 (DfT, 2022c). Sea cargo is broadly segmented in the following categories as defined by the DfT (DfT, 2023d):

- **Liquid Bulk:** Liquid or liquid gas transported in a tank. Refers to the transportation of liquids, typically in large quantities, such as crude oil, petroleum products, chemicals, or liquefied natural gas. These goods are usually transported in specialised tankers.
- **Dry Bulk:** Is carried in the main cargo hold of bulk carrier vessels, for example coal, ores and scrap metal. These goods are typically transported in large quantities without packaging and are loaded directly onto vessels without the need for containers.
- **Lift-on/Lift-off (Lo-Lo):** The method of cargo handling where goods are lifted onto and off the vessel using cranes or other lifting equipment. This method is commonly used for cargo that cannot be easily rolled on or off the vessel, such as heavy machinery or containerised cargo.
- **Roll-on/Roll-off (Ro-Ro):** Cargo that can be moved on to, or off, a vessel either by their own propulsion, such as a passenger car, or with assistance, such as an unaccompanied trailer. Ro-Ro vessels are usually equipped with specialised ramps and decks to facilitate the smooth loading and unloading of wheeled cargo.
- **General Cargo:** Refers to goods that are not categorised as liquid bulk, dry bulk, or containerised cargo and can be transported using various methods.

Using Maritime Data Statistics (DfT, 2022a), we have provided an overview of the TfSE area's main major ports below, defined as those with cargo volumes of at least 1 million tonnes annually (DfT, 2023a). This dataset does not provide a

breakdown of the names and locations of ports within the UK that goods are distributed to.

- **Southampton:** The UK's second busiest container port in the UK trade (Highway Logistics , 2023) with over 31 million tonnes of cargo shipped to key destinations across Europe, North America, Asia and to other ports across the UK (DfT, 2022a). Over 60% of goods handled by the port are liquid bulk (DfT, 2022a), as well as handling over 900,000 vehicles annually making it the UK's largest automotive handling port (Associated British Ports, u.d). It is also a predominant passenger port, accommodating over 1.8 million passengers in 2022, primarily through cruise ship journeys (DfT, 2022a).
- **Portsmouth:** Handled over 2.9 million tonnes of cargo in 2022, in which nearly 70% is solely Ro-Ro vehicular based cargo (DfT, 2022a). The majority of this port's cargo transits to the EU with a smaller proportion being distributed to other UK ports (DfT, 2022a). The designation of the Solent Freeport in 2022, consisting of both the ports of Southampton and Portsmouth, as well as other inland locations, could lever in additional investment and associated port and freight-based activities (Solent Freeport, 2023). Portsmouth also accommodates large volumes of passengers, transporting over 1.2 million people in 2022, predominantly through short sea ferry trips (DfT, 2022a).
- **Medway Ports:** A number of port facilities located on the River Medway close to the Thames Estuary including Sheerness, Isle of Grain (including Thamesport), Chatham Docks, Ridham Dock, Otterham, Rochester, Queenborough, Oakham Ness and Kingsnorth Power Station. Collectively they form a major cargo hub on the eastern coast of the TfSE area which handled nearly 13.5 million tonnes of cargo in 2022 (DfT, 2022a). The majority of the goods handled are liquid and dry bulk, which are transported to North America, the EU and to other ports across the UK (DfT, 2022a).
- **Shoreham:** Solely a cargo port, handling nearly 1.6 million tonnes of cargo in 2022 of which 75% is dry bulk (DfT, 2022a). The majority of its cargo is distributed to other ports across the UK and the remainder is transported to the EU (DfT, 2022a).
- **Newhaven:** This port handled 1.1 million tonnes of cargo in 2022, broadly split between dry bulk and Ro-Ro (DfT, 2022a). The overwhelming majority of the port's cargo is either distributed to the EU or to other ports across the UK (DfT, 2022a). Nearly 0.4 million passengers' transit through the port annually, predominantly associated with short sea (ferry) movements (DfT, 2022a).
- **Dover:** As the principal cross-channel gateway to mainland Europe, this port handled over 18 million tonnes of cargo in 2022 in which over 95% is Ro-Ro – making it the largest Ro-Ro port globally (DfT, 2022a). The port also accommodated over 6.5 million passengers in the same year, the overwhelming majority being short-sea passengers to mainland Europe (DfT, 2022a).

As well as several major ports, the TfSE area is supported by various minor ports. These include Sheerness and Ridham (Swale), Gravesham (Port of London Authority) and Littlehampton (Arun). With pre-existing infrastructure in place,

these sites could be optimal locations to explore potential expansion opportunities at a more localised level.

Certain minor ports hold historical significance in waterborne freight provision, such as Rye Port (Rother) and Folkestone (Folkestone & Hythe). Despite their historical importance, their relevance in the area has diminished over time due to shifts in trade routes, exemplified by developments like the Dartford Tunnel and the rise of larger port facilities. These locations present an opportunity to reassess freight traffic distribution to alleviate congestion and increase supply chain resilience using these historically significant routes.

On a broader scale, the port infrastructure within the TfSE area serves as a vital catalyst for the coastal economy, offering a diverse array of leisure boating, sailing events and services as well as acting as hubs for commercial, industrial and employment activity. Ports of this broader nature include Hamble (Fareham), Cowes (Isle of Wight), Whitstable (Canterbury), Langstone Harbour (Portsmouth), and Chichester (Chichester).

Figure 2-8: Major & Minor Port Locations in the TfSE Area. Source: (UK-Ports, 2023) Contains OS Data © Crown Copyright. To view an online interactive version of this map, click [\[here\]](#).



2.5.2 Neighbouring Port Infrastructure & Connectivity

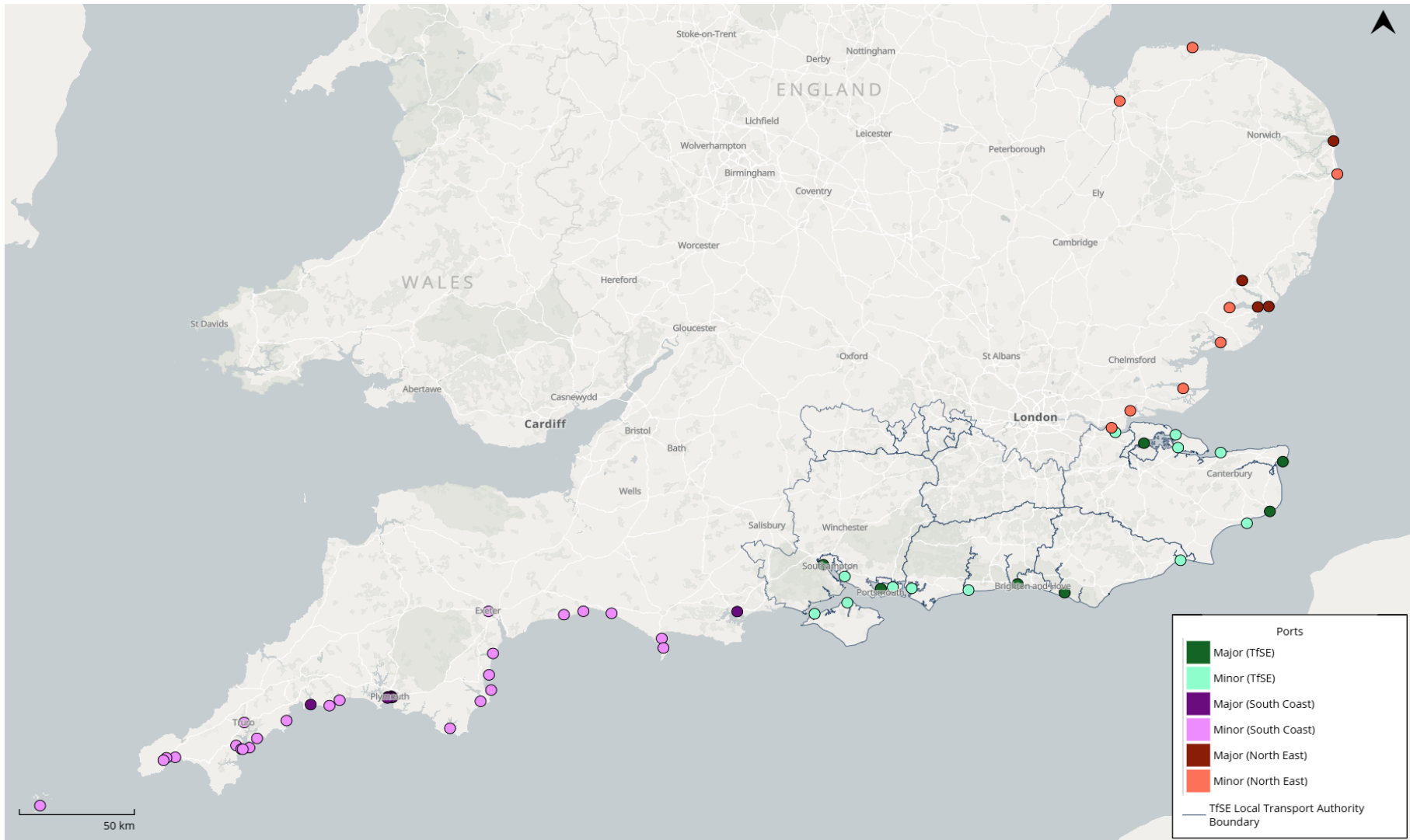
Waterborne freight inherently involves movement across various geographic and administrative boundaries. For example, a shipment might originate from a port in one region and be offloaded at a port in another, such as the Dover to Thames Gateway, which is a vital corridor for goods entering the UK due to Dover's proximity to mainland Europe, making it the closest UK port for European imports. Due to the dynamic and cross-boundary nature of waterborne freight, it is important to explore the port infrastructure located within neighbouring areas to the TfSE area to fully capitalise on regional capabilities and ensure that there is the necessary port infrastructure to receive any increases in cargo volumes generated by ports in the TfSE area.

Figure 2-9 identifies ports within the surrounding areas to TfSE, outlining high levels of major and minor port infrastructure and extensive coverage and capacity for waterborne freight operations. This includes 11 major ports with notable clusters, particularly around Plymouth and Felixstowe, which align with recently designated Freeport status (e.g. Freeport East and Plymouth and South Devon Freeport). Concentrated port activity in these areas signifies strategic hubs for cargo movement due to operational synergies, network efficiency due to higher density of transport links and fostering an environment of economic growth and innovation. This highlights several potential synergies and collaboration opportunities between ports in other neighbouring areas including:

- **Port of London Authority (including London Gateway & Port of Tilbury) & Sheerness:** The Port of London Authority manages several ports along the River Thames, including London Gateway and Port of Tilbury, which is in the Transport East (TE) area, while Sheerness in the TfSE area is also located in the Thames Estuary. Collaboration between these ports can enhance connectivity within the Thames Estuary, optimise navigation channels, and facilitate trade between TfSE and TE areas. To maximise success, joint efforts to develop navigational and transport infrastructure and dredging projects to accommodate larger vessels may be necessary, as well as successfully coordinating logistics solutions for efficient cargo movement along the Thames corridor.
- **Plymouth & Southampton:** Plymouth handled 2 million tonnes of freight in 2022, with almost half of this route to other locations in the UK. Liquid and dry bulk goods dominate the cargo mix, reflecting 1.1 million tonnes at 0.9 million tonnes respectively. Plymouth (located on the South Coast) and Southampton (one of the UK's busiest ports) could collaborate to strengthen maritime connectivity along the English Channel. Collaboration between Plymouth and Southampton can facilitate the exchange of best practices, optimise shipping routes, and enhance trade links with international markets.
- **Felixstowe & Thames Estuary:** The Port of Felixstowe on the east coast is the UK's largest container port, transporting approximately 22 million tonnes of cargo to Asia and Europe (DfT, 2022c). This is predominantly Lo-Lo cargo (18.3 million tonnes). By forging partnerships with ports located in and around the Thames Estuary (Sheerness and Medway), Felixstowe can play a pivotal role in streamlining the transportation of goods from London to international markets,

unlocking immense potential. In parallel, this could alleviate congestion in and around London as well as leverage the existing capacity of the River Thames.

Figure 2-9: Key Strategic Ports in the TfSE Area & Other Port Locations (TfSE & Wider Area). Source: (UK-Ports, 2023) Contains OS Data © Crown Copyright. To view an online interactive version of this map, click [[here](#)].



2.5.3 Inland Waterways

Figure 2-10 outlines the IWW routes within the TfSE area, highlighting limited and fragmented provision. However, three maritime waterways are currently used for IWW traffic including the River Medway, the River Ramsgate to the North East and Southampton Water in the South. These maritime waterways allow the transportation of freight over a relatively short-distance and do not connect to wider regions. There are currently very low levels of internal freight moved through IWW channels in the South East, however the River Medway stands out as a significant watercourse (outside of the River Thames) that currently supports waterborne freight movements (DfT, 2022f).

Figure 2-11 outlines that, although some waterways appear to provide routes across the TfSE area, they are currently undergoing restoration (Wey & Arun Canal in West Sussex and parts of the River Ouse). Waterway restoration initiatives (alterations to a canal or river to improve navigability) could be prioritised to improve connectivity to inland areas, such as Reading, Slough, Redhill, Sevenoaks and Maidstone. However, this may be costly and will require detailed surveys to understand if the network can accommodate appropriate vessel sizes.

Similar to port infrastructure, it is imperative to assess the availability of IWW outside of the immediate TfSE area to gain a holistic and comprehensive perspective on potential routes for waterborne freight expansion. Figure 2-12 illustrates the IWW network across the TfSE area and the neighbouring area, revealing current levels of fragmented infrastructure with a significant trunk route flowing from west to east. Moreover, several routes connect the TfSE area with neighbouring areas, such as the Grand Union Canal and the River Thames linking to Greater London, and the Kennet and Avon Canal connecting to the South West. Notably, the River Thames handled the majority (52%) of the UK's IWW freight in 2022 (DfT, 2023b), indicating the potential to coordinate activities and alleviate congestion within Greater London by optimising or increasing services along the River Thames in collaboration with the Port of London Authority (see work conducted by the Cross River Partnership in Table 2-2 for further detail).

Figure 2-10: Map of IWW within the TfSE Area. Source: (IWA, 2023) Contains OS Data © Crown Copyright. To view an online interactive version of this map, click [\[here\]](#).

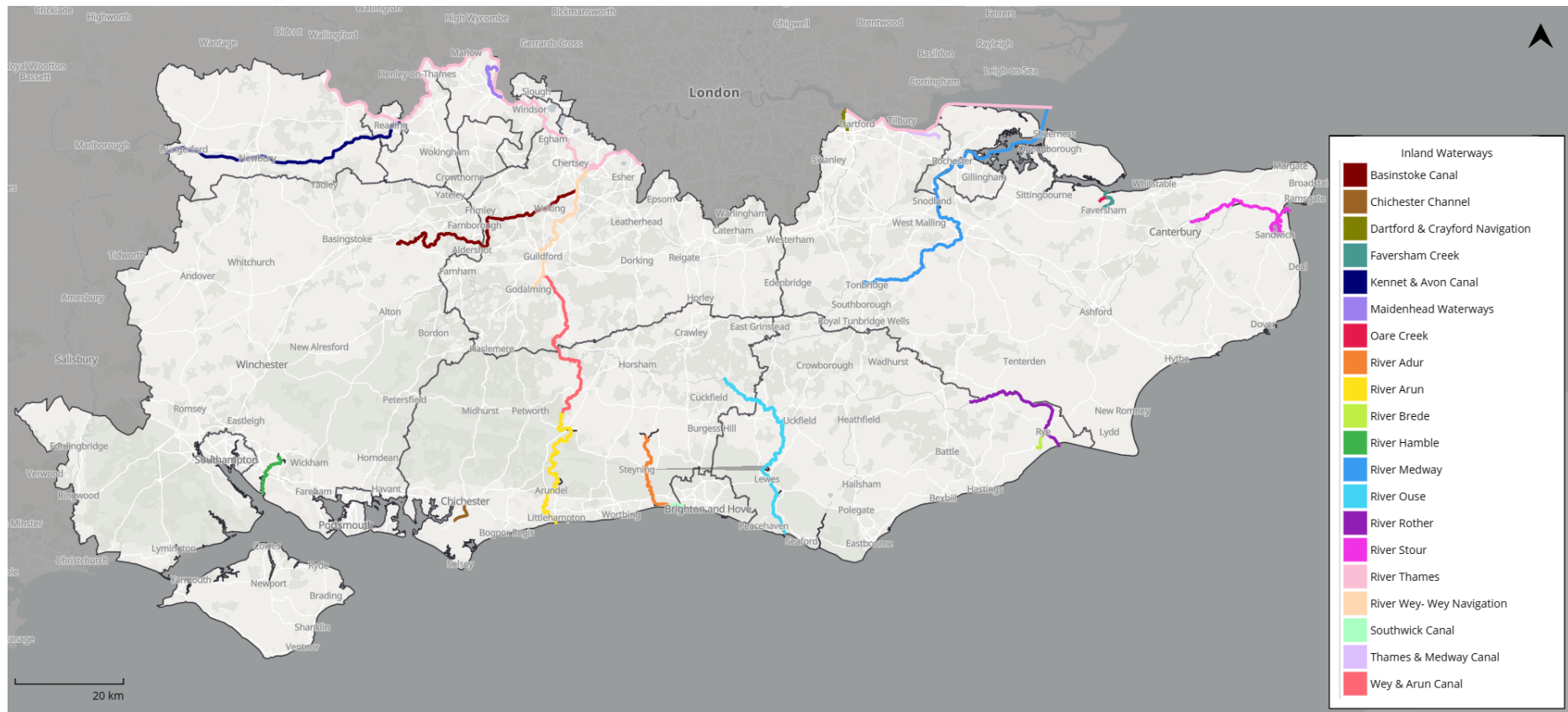
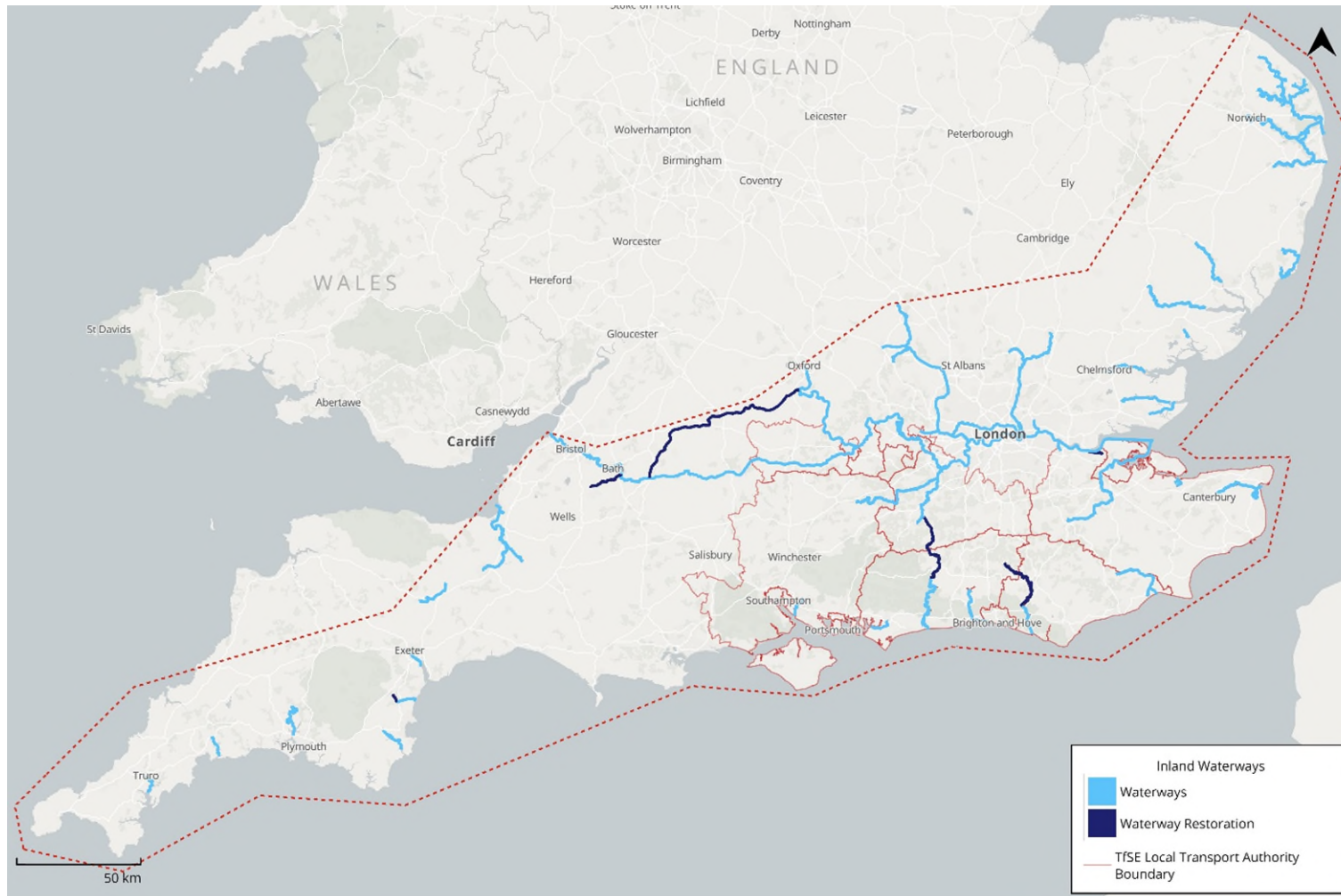


Figure 2-11: Map of IWW in the TfSE Area Undergoing Restoration. Source: (IWA, 2023) Contains OS Data © Crown Copyright. To view an online interactive version of this map, click [\[here\]](#).



Figure 2-12: Map of IWW within the TfSE Area (Solid Red Line) and Neighbouring Areas (Dotted Red Line). Source: (IWA, 2023) Contains OS Data © Crown Copyright. To view an online interactive version of this map, click [\[here\]](#).



2.6 Conclusion & Key Chapter Findings

This chapter has offered a comprehensive overview of the TfSE region's socio-economic landscape, infrastructure, geographical features, and connectivity with neighbouring areas, all of which influence the region's potential for expanding waterborne freight. While it does not directly address the study's core questions, it has 'set the scene' for the remainder of the study, ensuring that recommendations are grounded in the local context. Key chapter findings include:

- **Congestion Relief:** The TfSE area is served extensively by the SRN and MRN which experience high levels of HGV traffic flows on roads, such as the M4, M5, A27, A34 and M20. Given the heavy utilisation of highways by HGV traffic, particularly along coastal routes and radial routes around London, exploring the redistribution of some road freight to waterways could significantly relieve congestion on these critical corridors. However, such measures may concurrently heighten congestion around port and IWW locations.
- **Vibrant Port Activity:** The extensive presence of both major and minor ports within the TfSE area already supports a vibrant maritime economy equipped with the required workforce skills and infrastructure (cargo handling equipment, berths and quays, storage facilities and terminals) to facilitate the expansion of waterborne freight activities on both local and regional scales. Building-on current activity could stimulate economic growth, new jobs and investment in the local economy.
- **Reassessing Freight Distribution:** Several minor ports hold a historical significance in waterborne freight provision, such as Rye Port (Rother) and Folkestone (Folkestone & Hythe). These locations present an opportunity to reassess freight traffic distribution to alleviate congestion and enhance supply chain resilience by utilising previously established routes and infrastructure.
- **Warehousing Capacity:** The ports within the TfSE area have good access to warehousing facilities. However, due to the high volume of goods already passing through these locations, infrastructure availability may be limited. A lack of existing warehousing capacity may mean that more warehouses are required.
- **SSS Expansion:** Coastal hubs like Southampton, Portsmouth, Newhaven, and Dover, boast access to major ports, warehousing infrastructure, and dense populations, providing well suited locations to explore intercoastal SSS initiatives within the UK and England.

- **Enhancing Existing IWW Capacity:** Despite the limited and fragmented overall nature of IWW infrastructure across the TfSE and wider areas, strategic opportunities could be seized along heavily utilised routes such as the River Medway. These opportunities could include upgrading navigation channels and building additional terminals. Building capacity in these key areas could unlock potential for IWW traffic expansion. However, additional work may be required, such as dredging to increase navigability. In contrast, opportunities for IWW expansion from South to North are likely to be constrained due to the extent of waterway restoration efforts required.
- **Logistics Chain & Waterborne Freight:** Whilst the TfSE area boasts a significant amount of waterborne freight infrastructure, it is important to note that there are still large areas, particularly inland regions, that lack access to these waterborne routes and facilities. This means that for many logistics chains, completing the entire journey via waterborne freight is not feasible. However, waterborne freight can still be used to replace certain parts of the overall logistics chain. For a logistics chain with waterborne modes to be a viable option, it must be cost-effective, meaning it should be cheaper than any existing land-based chain. This is typically the case in two scenarios: firstly, when the logistics chain already includes routes that connect places with waterborne infrastructure and, secondly, when the land-based route is long. In the latter case, the cost of transporting the freight to the waterborne infrastructure could be offset by the savings gained from transporting goods over long distances in bulk.

Many populated areas in the TfSE region are near the coast and substantial ports. Many of these locations are well supported by the infrastructure required for waterborne freight, raising the potential for transferring freight between these places from road to waterborne modes. However, there are also substantial populations within the TfSE area, and beyond, which are inland and not near to any waterborne freight infrastructure (e.g. canals). Based on current infrastructure, waterborne would not be a suitable replacement for many of these inland freight journeys within the TfSE area.

While this analysis provides a strong foundational understanding of the region's characteristics, it does not yet offer detailed insights into the specific volumes and types of goods being transported. To address this, the next chapter builds on these findings by identifying which goods, and in what quantities, could be feasibly shifted from road to waterborne freight.

3 Chapter Three - Freight Movements

3.1 Overview

Section 1.6 has shown that, nationally, the majority of freight is carried by HGVs and so there is potential opportunity to shift freight to waterborne modes. As highlighted in Chapter 2, the TfSE area already boasts the necessary transport networks, major international gateways and necessary infrastructure to facilitate a potential expansion in SSS. However, opportunities for IWW opportunities may be constrained by the navigability of waterways for modern vessels. In this Chapter, we outline historical and current goods movements across HGVs, ports and along IWWs to understand current freight flows across the TfSE area and how an increase in waterborne freight may be able to support these patterns. This analysis includes identifying the types of goods being transported, the methods of transportation, and the origins and destination of these goods. This will enable us to determine which types of goods, and in what volumes, could potentially be shifted from HGVs to waterborne freight.

3.2 Methodology

To investigate the potential for modal shift of freight from HGVs to waterborne it is important to quantify:

- The amount of freight carried by HGVs which might be suitable for modal shift. To assess this requires an understanding of the type and volume of goods being carried by HGVs as well as its origin and destination.
- The amount of freight already handled by SSS and IWW infrastructure. To assess this requires an understanding of the amount of goods handled by port infrastructure and carried along IWW.

There is no single dataset available to inform this study. Consequently, four separate datasets have been analysed to investigate each of the aspects. These datasets are outlined in Table 3-1 along with the methodology applied for each analysis. The following subsections will outline the findings.

Table 3-1: TfSE Area Freight Movement Analysis Methodologies

Dataset	About	Methodology
HGV Freight Loaded & Unloaded	Tonnage of goods loaded and unloaded on to HGVs	We have analysed data on the quantities of goods picked up and dropped off by HGVs (EU, 2023), segmented by the good type. We selected and aggregated the data, whose reporting area aligned with the TfSE boundary. This provided the quantity of goods loaded and unloaded on to HGVs within the TfSE area.
HGV Freight Flows	Tonnage of goods transported	We have analysed the origin-destination pairings of goods carried by HGVs,

Dataset	About	Methodology
	between origin-destination pairs	aggregated for specific 'goods lifted' values (DfT, 2023f) to specific areas of relevance.
Waterborne Vehicle Freight Loading & Unloading	Tonnage of goods handled at each of ports within the TfSE area.	We have analysed the quantities of different cargo types loaded and unloaded at each of the ports within the TfSE area (DfT, 2023e). Loaded and unloaded quantities have been combined.
IWW Freight Quantities	Goods moved along IWW within the TfSE's area.	The reported tonnage of goods carried by IWW is presented for IWWs within the TfSE area (DfT, 2023e).

Throughout this analysis, datasets have been utilised that provide values for geographical areas, which are a disaggregation of the TfSE area. Key boundaries used for the disaggregation are those defined by the International Territorial Levels (ITLs) – ITL1, ITL2 and ITL3. The ITLs are a hierarchical classification of administrative areas implemented by the UK since leaving the European Union to support statistical analysis. The ITL3 areas are generally county sized or larger, whereas ITL2 group several counties together, with four ITL2 areas covering all the TfSE area. The ITL1 areas are region sized.

3.3 HGV Freight Loaded & Unloaded

This analysis investigates the quantity of goods loaded to or unloaded from HGVs within the TfSE area's constituent ITL3 areas and includes segmentation by different goods types. Some ITL3 areas incorporate multiple Local Transport Authorities, and vice versa. The HGV freight data, which is provided by the European Commission's Eurostat service (EU, 2023), only relates to the amount of freight loaded or unloaded. No information about the origin or destination of the associated HGV journey is included in the data, or the situation the freight is transferred from or to (e.g. another mode or a warehouse). Nonetheless, the dataset allows insight into the amount of freight being transported by HGV into or out of areas hosting waterborne freight infrastructure, and the breakdown of different goods types. Goods types are important because not all goods types are suitable for shifting to waterborne, such as food, which might require short transport times to ensure freshness.

To allow cross referencing between the ITL3 areas and Local Transport Authority boundaries, Table 3-2 lists the ITL3 areas whilst Figure 3-1 illustrates and names them.

Table 3-2: TfSE Local Transport Authorities & ITL3 areas

ITL3 Areas	Local Transport Authorities
Berkshire	Windsor & Maidenhead, Wokingham, West Berkshire, Bracknell Forest, Reading, Slough
West Sussex (North East), West Sussex (South West)	West Sussex
North, South & Central Hampshire	Hampshire
Medway	Medway
Kent Thames Gateway, East Kent, West Kent, Mid Kent	Kent
Brighton & Hove	Brighton & Hove
East Sussex	East Sussex
East Surrey, West Surrey	Surrey
Portsmouth	Portsmouth
Southampton	Southampton
Isle of Wight	Isle of Wight

Figure 3-1: TfSE ITL3 Areas & Waterborne Freight Infrastructure. Sources: (ONS, 2024b) (IWA, 2023) (UK-Ports, 2023) Contains OS Data © Crown Copyright. To view an online interactive version of this map, click [\[here\]](#).

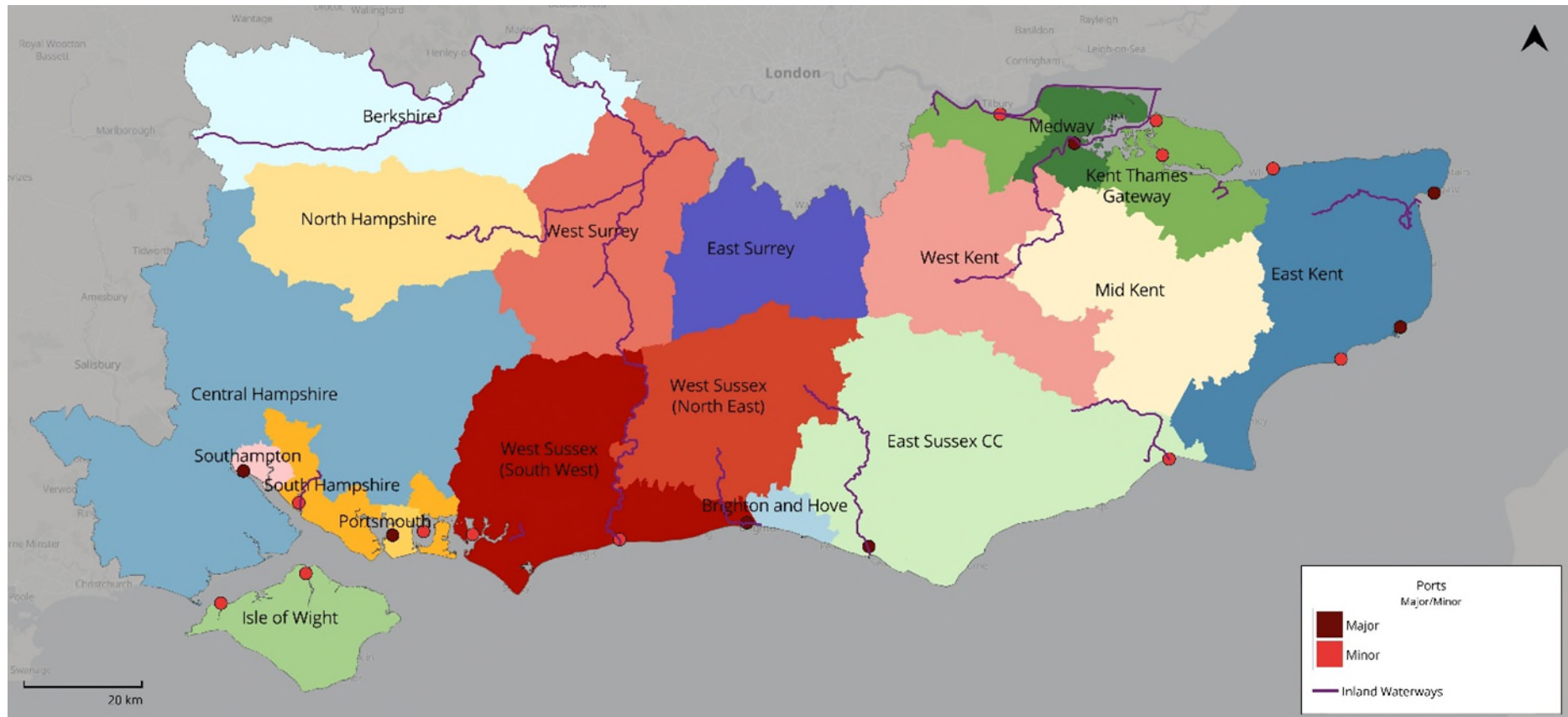


Figure 3-2 illustrates the ITL3 areas within the TfSE area and the amount of goods loaded to and unloaded from HGVs within each of these during 2019 (the latest year for which data are available). Figure 3-3 illustrates the same HGV freight data but provides a breakdown of the freight quantities between the goods types.

Overall, high volumes of goods are being loaded or unloaded within ITL3 areas with port infrastructure, with at least six areas observing the loading and unloading of more than 5 million tonnes.

The Kent Thames Gateway stands as a prominent location, loading and unloading over 25 million tonnes of goods (see Figure 3-3). This site covers broadly the area east of the M25, bounded to the north by the River Thames and to the south by the A2 and the Downs. The concentration of freight activity positions the area as a prime candidate for exploring the conversion of some traffic to waterborne freight, given its proximity to water routes. Similarly, a large volume of goods are loaded and unloaded to HGVs in Berkshire, which has IWW routes through it although this network currently has sections which cannot be traversed (see Section 2.5.3).

Notably, the Isle of Wight stands out as the sole ITL3 area with a port facility that exhibits extremely limited HGV loading and unloading activity. However, this is likely attributed to its limited nature and the scale of freight operations typically associated with island environments

Figure 3-2: 2019 Volume of Goods Loaded & Unloaded in the ITL3 Areas within the TfSE Area. Source: (EU, 2023) Contains OS Data © Crown Copyright. To view an online interactive version of this map, click [\[here\]](#).

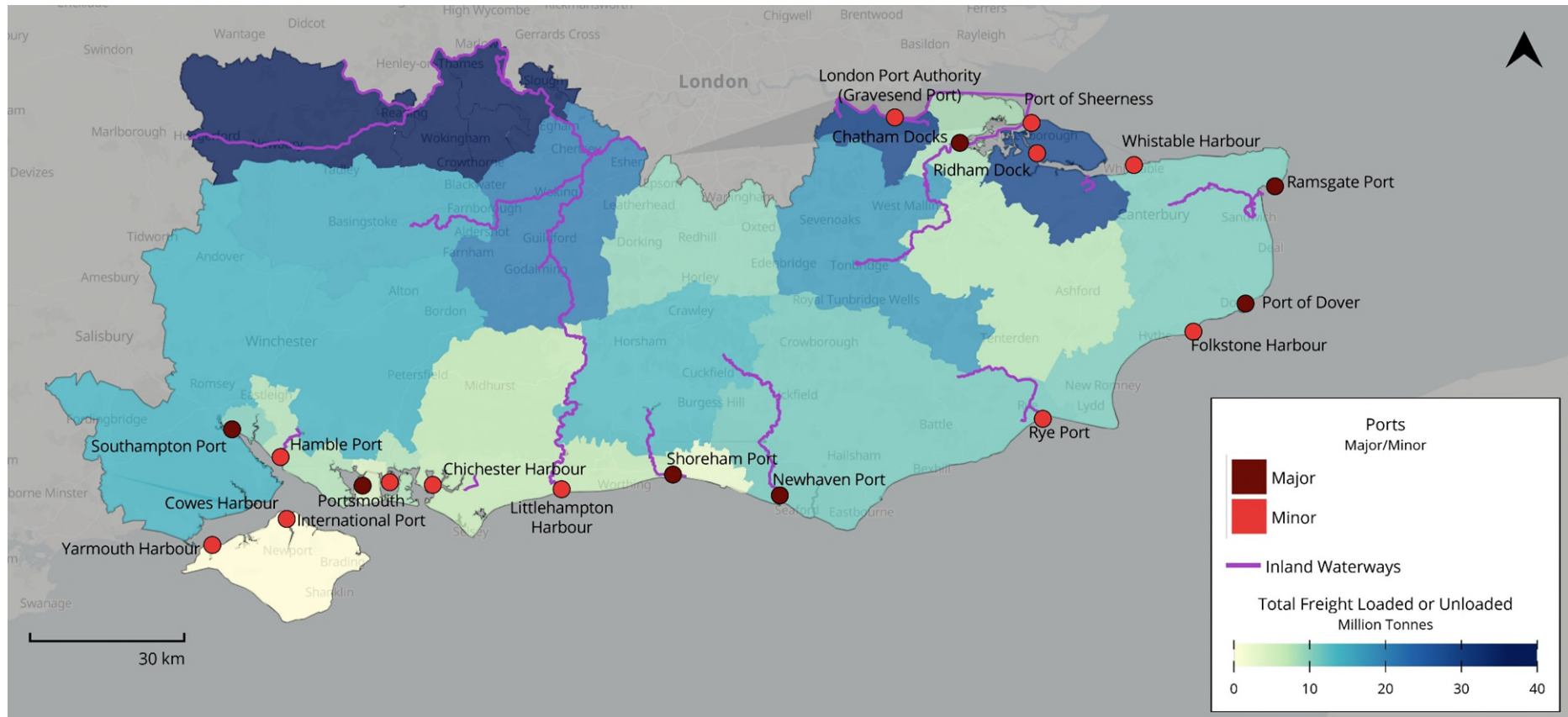


Figure 3-3: Goods Types Loaded & Unloaded in the ITL3 Areas within the TfSE Area. Source: (EU, 2023)

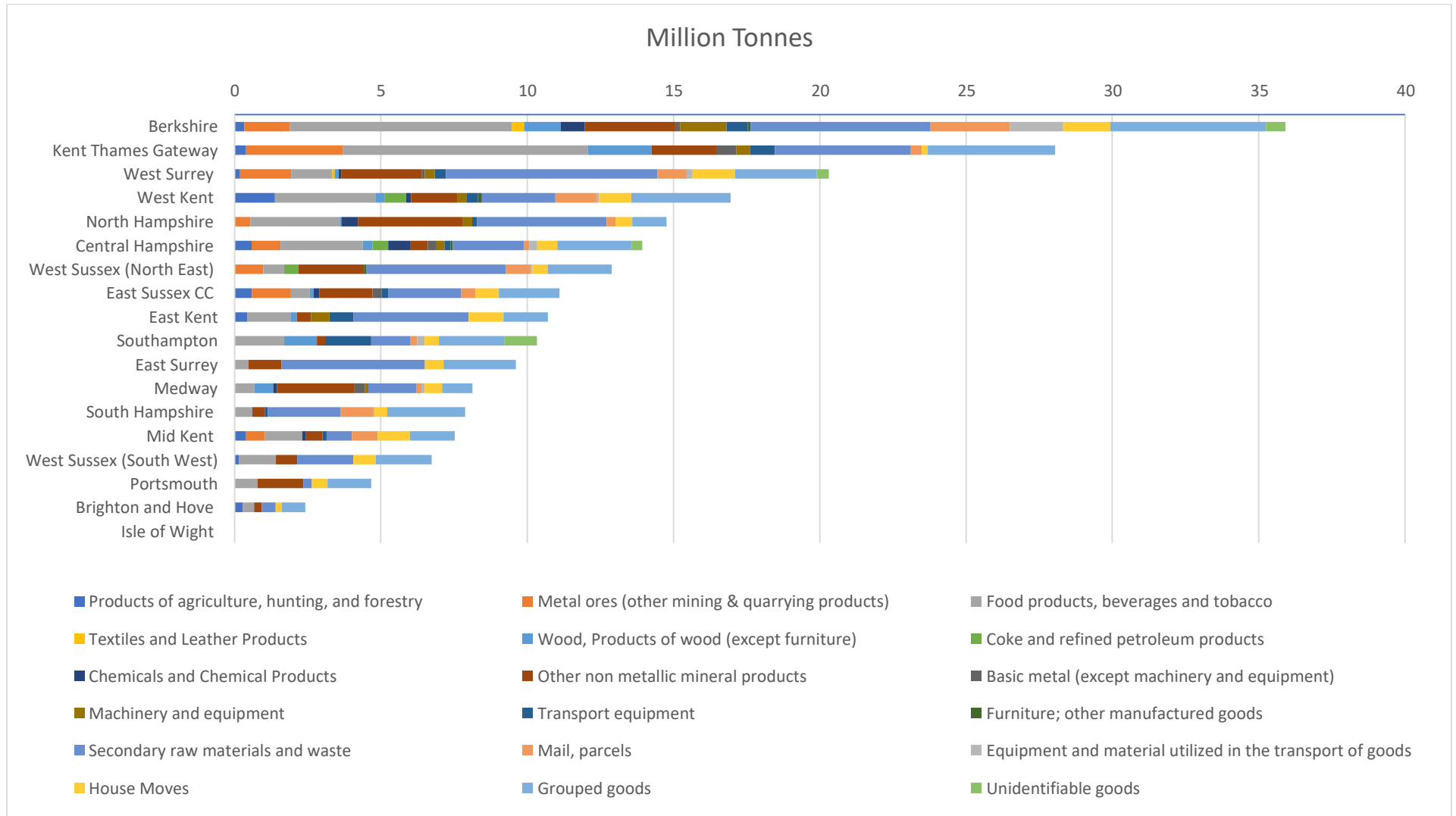


Figure 3-3 also provides an overview of the split between different types of goods by volume being loaded to and unloaded off HGVs within ITL3 areas. This can be cross referenced against Table 3-3, which presents a high-level analysis of which commodities are suitable for transport by waterborne freight. The commodities are ranked from high to low suitability.

- **High:** Commodities which are already carried by waterborne modes.
- **Medium:** Commodities for which there is some evidence suggesting their suitability is comparable to commodities already carried.
- **Low:** Commodities where legislative or practical difficulties (such as requiring new specialist vessels).

Together Table 3-3 and Table 3-2 inform that the key good types which currently have substantial (i.e. greater than 1 million tonnes in at least one ITL3 Area) volume carried by HGV and have evidence of being highly suitable for carrying by waterborne are:

- Metal ores (and other mining & quarrying products)
- Wood, products of wood (except wood furniture)
- Other non-metallic mineral products
- Products of agriculture, hunting and forestry

Commodities which account for substantial volume and have some evidence of being suitable are:

- Machinery and equipment
- Secondary raw materials and waste
- Other non-metallic mineral products
- Transport equipment
- Grouped goods
- Equipment and material utilised in the transportation of goods.

Waterborne freight potentially offers distinct advantages for these commodities, since they are transported in sufficient volumes for waterborne vehicles to present a cost-effective alternative to road transport and an attractive option for optimising freight logistics. However, careful consideration will be needed about whether the operational requirements of the supply chains of these will be compatible with a waterborne-based leg, which might be slower than its HGV-based counterpart.

Table 3-3: Analysis of Commodities Suitable for Waterborne Freight

Suitability for Waterborne	Commodity	Notes
High	Products of agriculture, hunting and forestry	Agricultural and Forestry products are already extensively shipped by waterborne transportation (see Figure 1-3). No additional legislative difficulties were identified.
	Metal ores (and other mining & quarrying products)	Ores are already transported using waterborne transport (see Figure 1-3) No additional future legislative barriers have been identified.
	Wood, products of wood (except wood furniture)	Wood and timber are categorised as dry bulk commodities and already extensively transported using waterborne transport (see Figure 1-3). No additional future legislative hurdles have been identified.
	Other non-metallic mineral products	This commodity is often already transported in dry bulk vessels and could benefit from the cost-efficiency and high capacity of waterborne transportation (Transportation Institute, 2019).
	Coke and refined petroleum products	Liquid bulk (including liquified gas, crude petroleum and petroleum products) is already extensively transported by waterborne transportation (see Figure 1-3). No additional future legislative hurdles have been identified.
	Basic metal (except machinery)	Iron and steel products are already transported by waterborne transportation (see Figure 1-3). No additional future legislative hurdles have been identified.
Medium	Textiles and leather products	These commodities are not currently shipped domestically but extensively shipped from international sources (The Alliance Project, 2015) in a Unitised Cargo fashion. It would benefit from the high capacity of waterborne transportation (Maritime Union, 2022).
	Machinery and equipment	Large machinery and equipment are well-suited for waterborne transportation due to their size and weight, which benefit from the

Suitability for Waterborne	Commodity	Notes
		high capacity and cost efficiency of this transport method (Transportation Institute, 2019).
	Secondary raw materials and waste	These materials are well-suited for waterborne transportation due to their size and weight, which benefit from the high capacity of waterborne transportation (Transportation Institute, 2019). Legislative issues do exist around certain types of waste however International Shipping of waste is already seen suggesting those are surmountable for domestic shipping (Defra, 2021b).
	Transport equipment	Transport equipment well-suited for waterborne transportation due to its size and weight, which benefit from the high capacity and cost efficiency of this transport method (Transportation Institute, 2019).
	Grouped goods	Definitions vary slightly between data sets relating to HGV and waterborne freight, but 'unitised goods' is broadly comparable to 'grouped goods'. This category has been shipped in the past but is no longer suggesting it could be once again.
	Furniture; other manufactured goods	Waterborne transportation would be suitable for transporting these products as they can be transported in bulk, increasing cost efficiency. This commodity is less likely to be damaged during waterborne transportation due to the stable nature of shipping vessels (Maritime Union, 2022).
	Equipment and material utilised in the transportation of goods	Waterborne transportation is well-suited to transporting these commodities, due to the large size and weight of this type of equipment and material (Transportation Institute, 2019).
Low	Chemicals and chemical products	These products are less suitable for waterborne transportation given the high risk and regulations involved with transporting them (Maritime Union, 2022). Regulations

Suitability for Waterborne	Commodity	Notes
		would also require specialist vessels (IMO, 2024).
	House moves	House moves typically require rapid transportation to geographically diverse locations. They are not suitable for waterborne modes which are typically slower and have more restricted destinations.
	Mail, parcels	Due to the delivery of these commodities often being time-sensitive, waterborne transportation is less suitable for these commodities (International Transport Forum, 2022).
	Food products, beverages, and tobacco	Food Products have additional legislative hurdles and the logistics are often done in a just-in-time manner. Waterborne transportation is deemed less suitable for these commodities due to the slower speeds involved (International Transport Forum, 2022).
N/A	Unidentifiable goods	No assessment possible.

3.4 HGV Freight Flows

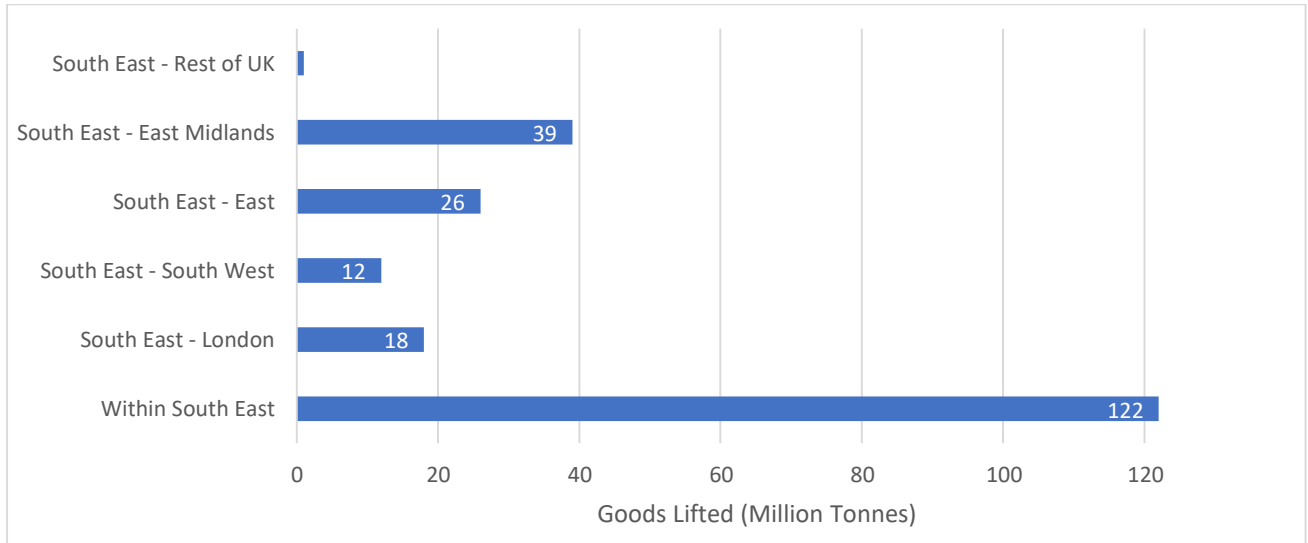
We have analysed the flow of goods transported by HGV between paired areas. Flows with trip ends which are connected by IWWs, or are close to ports, are likely to be more suitable for shifting to waterborne modes. Figure 3-4 illustrates the quantity of goods transported by HGV between paired geographic areas (DfT, 2023f). The areas are based on ITL1 boundaries, or agglomerations of them. The South East area includes the TfSE area, as well as Oxfordshire, Buckinghamshire and Milton Keynes, which are not within the TfSE area. Freight flows in both directions are counted.

The results show that the most significant volume of goods, in both directions, are transported within the South East, with more goods moved by HGV internally than to/from all other UK destinations/origins combined. This internal movement within the South East suggests an opportunity to convert some of these road-transported goods to waterborne freight, particularly through SSS and port-to-port journeys within the TfSE area. For example, from Medway to Southampton.

While the East Midlands emerges as the next largest pairing, reflecting its status as a major distribution hub within the UK, the potential for waterborne freight

expansion in this region is limited due to geographical constraints, such as distance, lack of IWW routes and being landlocked. However, robust pairings with London and the East of England suggests an opportunity to build on these connections to further inter-regional trade and support waterborne freight expansion. Expanding waterborne freight could also strengthen supply chain resilience through providing an alternative route for transporting goods and minimising the impact of supply chain disruptions, such as Dartford Crossing closures, significant road congestion or rail strikes.

Figure 3-4: 2022 Origin-Destination Goods Flow (Either Direction). Source: (DfT, 2023f)



We have investigated the ‘Within South East’ freight flows in more detail by analysing flows HGVs between smaller geographies within the TfSE area. The data was provided by the DfT in 2019 (DfT, 2019) and supported a maximum geospatial granularity of ITL2 areas. The local authorities contained within each ITL2 area are listed in Table 3-4. Zone TLJ1 contains three substantial local authorities, which are not within the TfSE area.

Table 3-4: ITL2 Areas & Associated Local Transport Authorities (those denoted with a * are not within the TfSE area). Source: (ONS, 2024c)

ITL2 Areas	Local Transport Authorities
TLJ1	Windsor & Maidenhead, Wokingham, Bracknell Forest, West Berkshire, Reading, Slough, Oxfordshire*, Buckinghamshire*, Milton Keynes*
TLJ2	Brighton and Hove, East Sussex, Surrey, West Sussex
TLJ3	Portsmouth, Southampton, Isle of Wight, Hampshire
TLJ4	Medway, Kent

Figure 3-5 outlines the flow of goods between these ITL2 areas, reaffirming the prevalence of the movement of goods internally across the TfSE area highlighting the robust economic activity and the interconnectedness of the

area’s internal markets. The substantial volumes of goods moving within the area serve as a clear indicator of economic activity, suggesting active production, distribution and consumption processes. This movement also reflects the engagement of businesses within these zones in trade, manufacturing and various services. Notably, there is a high flow of goods along the East-West axis, indicating the potential for goods to be transferred via coastal shipping between ports along the south coast.

Figure 3-5: Demand between ITL2 Areas within the TfSE Area and Neighbouring Area. Source: (DfT, 2019) Contains OS Data © Crown Copyright. To view an online interactive version of this map, click [\[here\]](#).

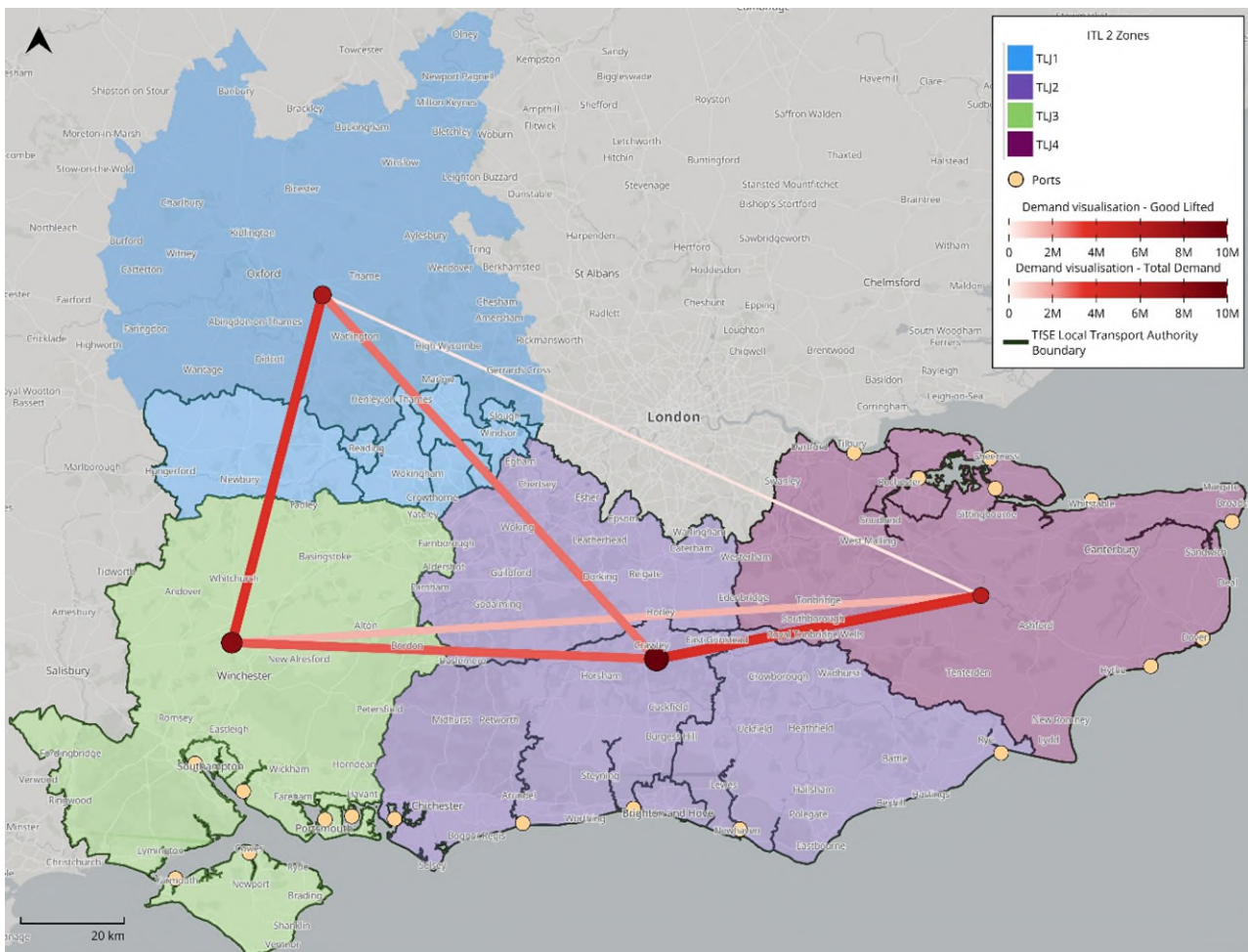


Figure 3-6 outlines a breakdown of the goods types by tonnage that are moved between ITL2 areas, which are typically agglomerations of counties. This reflects that high proportions of goods are moved internally within the same zones, with the most prominent activity seen in TLJ4 and TLJ3.

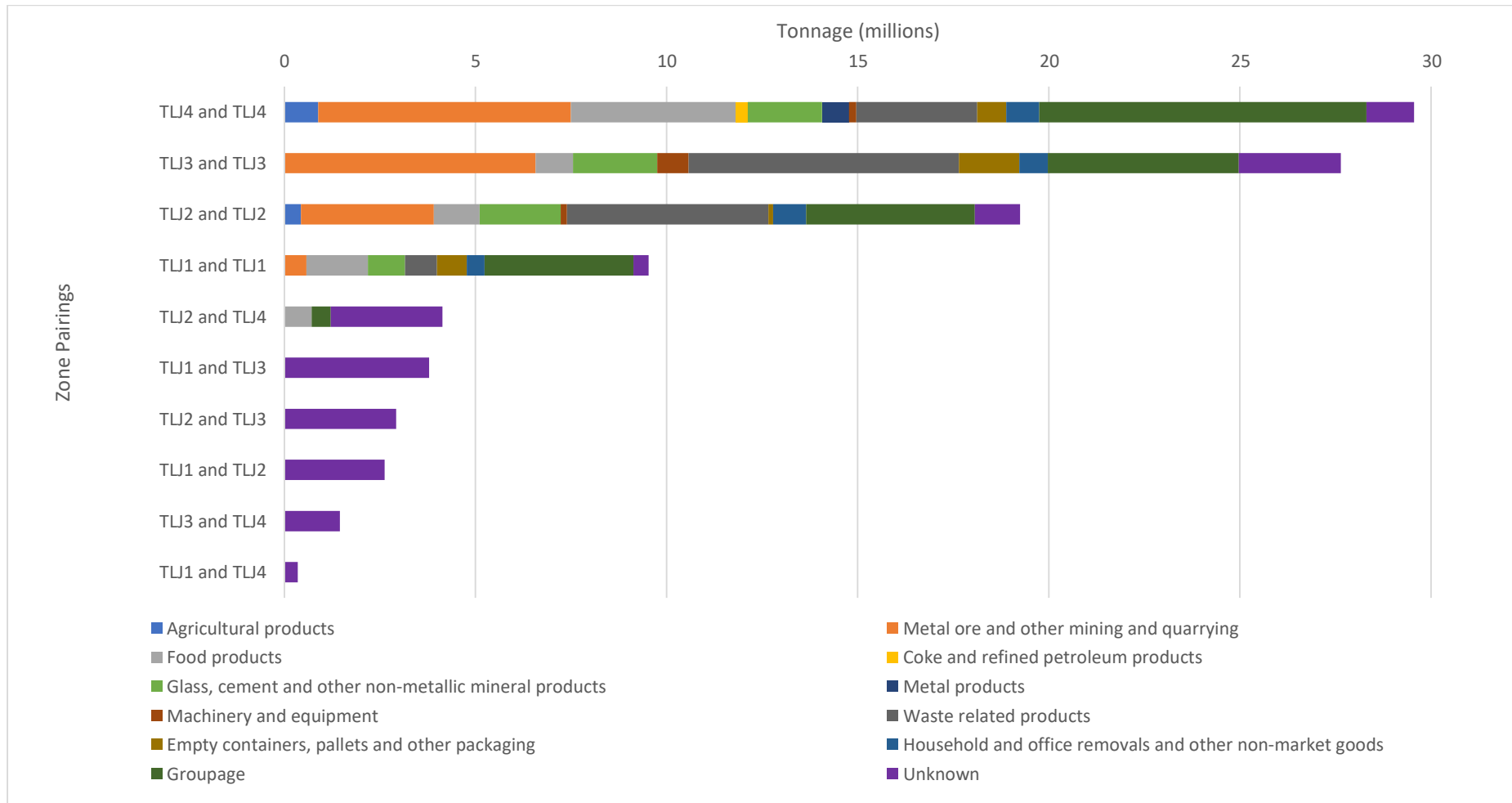
This reflects that high proportions of goods are moved internally within the same zones, with the most prominent activity seen in TLJ4 and TLJ3.

- **TLJ4 - Medway and Kent:** The River Medway offers a crucial opportunity as a potential route for transporting goods within this area due to its location and current levels of pre-existing freight capacity with access to supporting infrastructure.
- **TLJ3 - Portsmouth, Southampton, Isle of Wight and Hampshire:** Contains high levels and good access to significant port infrastructure. It is crucial to determine the proportion of these movements related to supply chain activities that could potentially be facilitated by port-to-port journeys.

'Metal ore and other mining and quarrying' emerges as a key commodity type, which is considered a bulk good. Bulk goods are typically large quantities of raw materials that are not packaged but are transported in loose form. The transport efficiency benefits associated with waterborne freight, such as cost-effectiveness, efficient handling, flexibility, reduced environmental impact, storage facilities and reliability, make it an attractive option for moving heavy and bulky commodities like metal ore, which could be supported by waterborne freight. However, the limited suitability of the specialisation in specific types of goods also highlights one of the constraints of waterborne freight. While it excels in transporting bulk commodities, its applicability to a broader range of goods is limited.

Whilst there is detailed segmentation regarding the goods lifted within the same zones, it is important to note that there is a lack of data regarding the types of goods being lifted between the different zones. These goods are categorised as 'Unknown'. This is a key data gap and indicates a need for improved methods of recording and tracking commodity types at these locations. Enhancing data collection and analysis techniques would provide a more accurate insight into trade patterns and facilitate better-informed decision-making regarding waterborne freight expansion initiatives.

Figure 3-6: Goods Lifted Between ITL2 Areas in the TfSE Area. Source: (DfT, 2019)



3.5 Waterborne Vehicle Freight Loading & Unloading

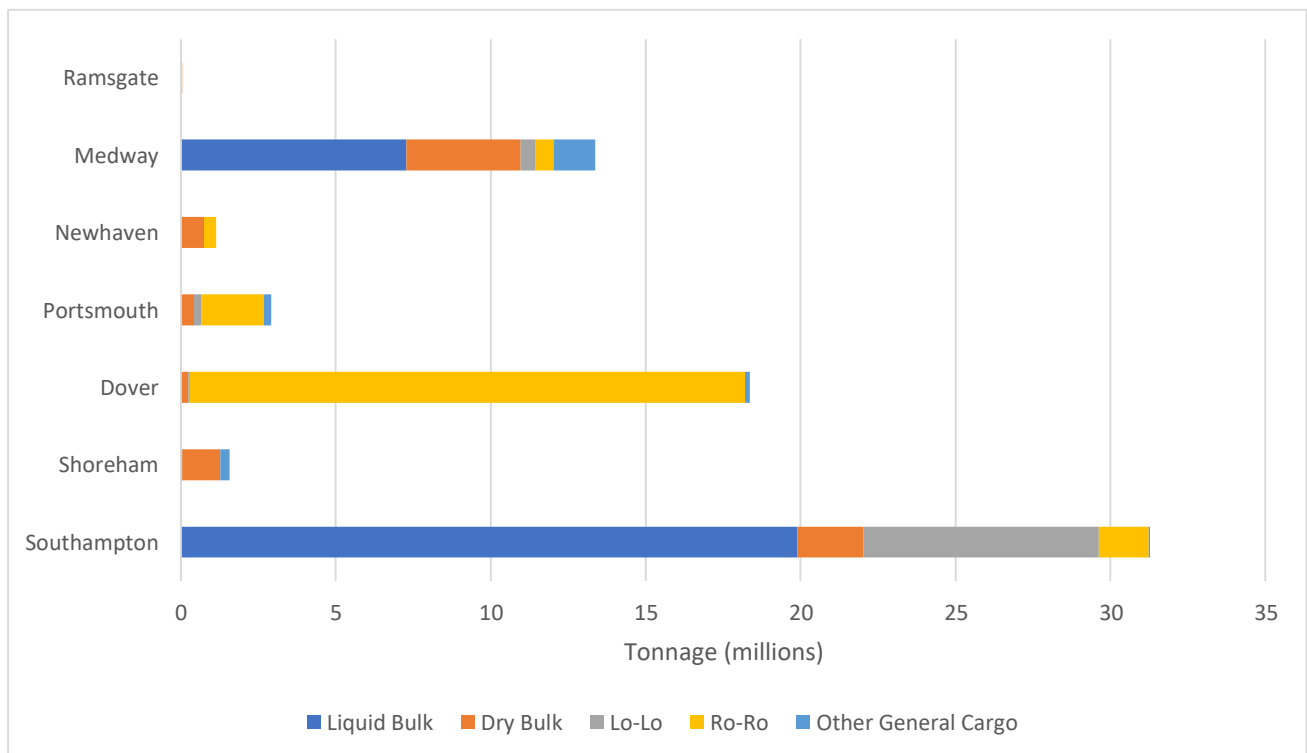
We have analysed the freight throughput at ports within the TfSE area to understand their capacity to accommodate additional freight owing to a shift from HGVs to waterborne modes.

As discussed in Chapter 2, the TfSE area is home to several major ports that support a vibrant maritime economy. Figure 3-7 illustrates the quantity of freight loaded to and unloaded from waterborne freight vehicles at port locations, including segmentation by cargo categorisations including:

- Liquid Bulk
- Dry Bulk
- Lo-Lo
- Ro-Ro
- General Cargo

Figure 3-7 highlights that Southampton has the highest tonnage in both directions at 31 million tonnes, followed by Dover and Medway with 18 and 13 million tonnes respectively.

Figure 3-7: Freight in Both Direction for Ports within the TfSE Area (2022). Source: (DfT, 2023e)



The volume of freight being transported at these ports is substantial, indicating the presence of existing key infrastructure that, depending on condition and availability, may be able to accommodate an increased proportion of the goods moved by HGVs. Additionally, there could be an opportunity for collaboration and knowledge-sharing between larger ports and those currently handling lower levels of cargo, such as Shoreham, Portsmouth, and Newhaven, to bolster intercoastal SSS freight activity within UK ports.

Figure 3-8 illustrates the percentage change in goods handled at major ports since 2016, showing the historical trends and supporting a comprehensive analysis of port activity over recent years. The figure highlights a notable upward trend in freight at Medway and Newhaven (both of which are smaller major ports) with them observing increases of 146% and 142%, respectively from 2016. These increases highlight the opportunity to build upon the usage of these ports for freight transport. Ramsgate is another smaller major port, but it has experienced the greatest decline in freight traffic (61%). This decline is possibly linked to the decommissioning and removal of berths in 2020, which significantly reduced the port's capacity to handle freight. However, recent investments from the Levelling Up Fund in 2021 aim to improve services and potentially revitalise the port's operations (The Isle of Thanet News, 2022).

There is a stable pattern of activity within larger major ports such as Dover, Southampton and Portsmouth until 2019. These ports maintained consistent traffic volumes, suggesting well-established operational capabilities and steady demand for their services. However, from 2019 onwards, a decline in freight traffic is observed, which is likely attributed to the combined impacts of the UK's departure from the European Union and the COVID-19 pandemic, both of which disrupted supply chains. Despite these challenges, Figure 3-7 demonstrates that these ports continue to handle substantial freight tonnage, highlighting resilience and capacity to manage significant cargo volumes even amid broader market disruptions. This ongoing capacity indicates that, historically, these port locations have handled larger volumes of freight than current levels, suggesting they possess the necessary facilities and infrastructure to respond to an increase in waterborne freight to, at a minimum, pre-2019 levels.

Figure 3-7 also outlines the range of cargo types across these ports. This identifies the need for tailored and bespoke solutions to optimise port operations and explore the feasibility of expanding current activities within ports that handle similar goods types. This range is evident even in neighbouring ports like Portsmouth and Southampton, which, despite their geographical proximity, have distinct variations in cargo handling. Each cargo type has unique infrastructure requirements and operational needs, requiring different approaches to ensure efficient handling:

- **Liquid Bulk:** Liquid bulk cargo requires specialised facilities, such as tank farms, pipelines, and storage tanks to ensure safe handling and storage.
- **Ro-Ro:** Ro-ro operations need specific berths, ramps, and terminal facilities to facilitate the smooth loading and unloading of wheeled cargo.
- **Mixed Cargo:** The mix of cargo types at ports like Medway necessitates flexible infrastructure that can accommodate a wide range of commodities, including liquid bulk, dry bulk, and general cargo.

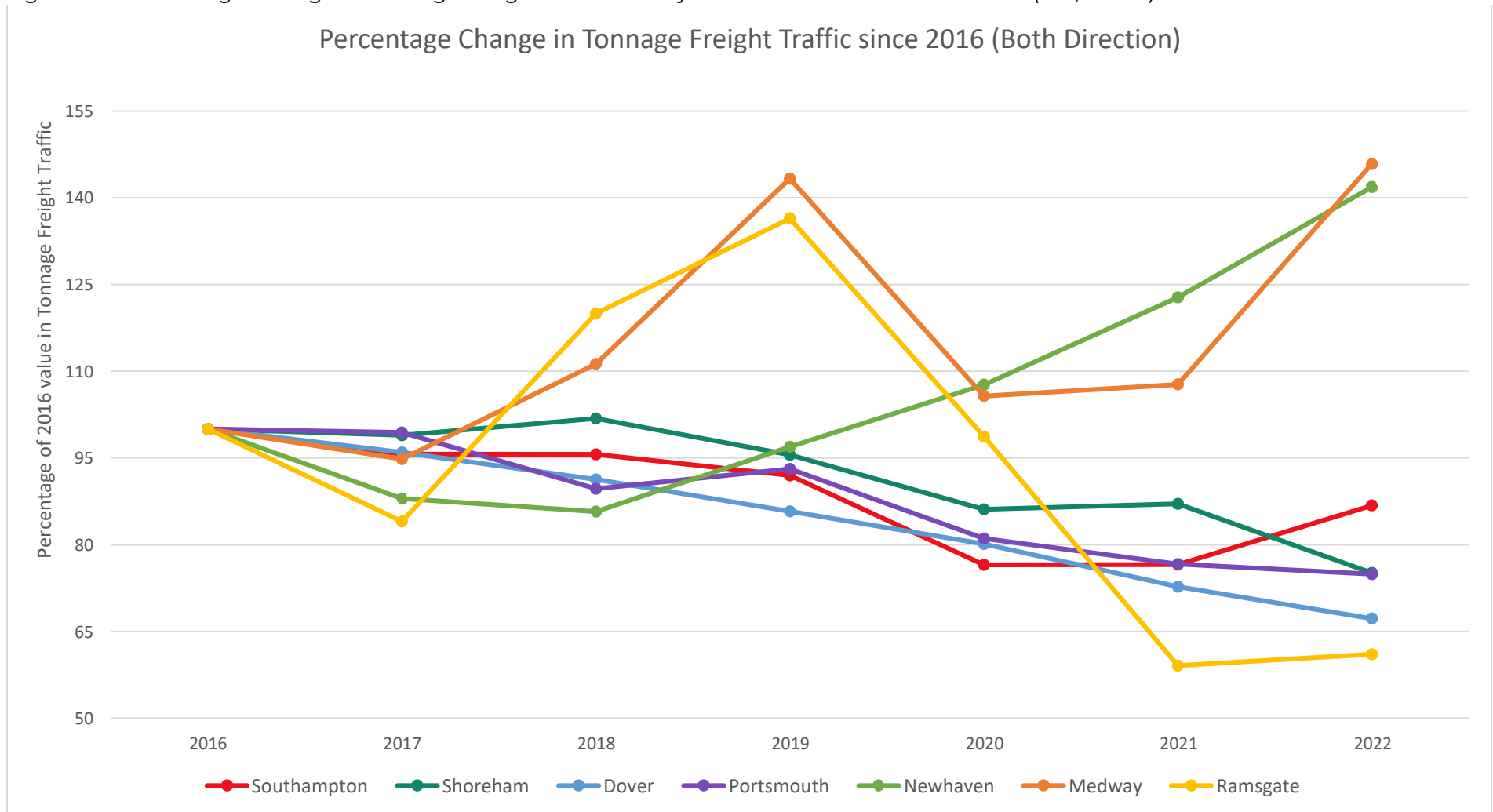
The need for specialised infrastructure and operations tailored to each cargo type is another key constraint of waterborne freight because it could limit the viability of journeys between ports that specialise in different types of cargo.

Currently, national datasets do not capture goods movements at minor port locations. As such, no datasets are available on the freight activities of the area's 11 minor ports, which are:

- Rye Port (Rother)
- Hamble (Fareham)
- Cowes (Isle of Wight)
- Sheerness (Swale)
- Port of London Authority (Gravesham)
- Ridham (Swale)
- Whitstable (Canterbury)
- Folkstone (Folkestone & Hythe)
- Langstone Harbour (Portsmouth)
- Littlehampton (Arun)
- Chichester (Chichester)

Gaining insights into the specific types of freight activities occurring at these ports is essential for strategic planning and resource allocation. Therefore, efforts to capture and analyse data related to freight movements at minor ports is paramount for informed decision-making and the sustainable development of the TfSE area's maritime infrastructure.

Figure 3-8: Percentage Change in Tonnage Freight Traffic in Major Ports in the TfSE Area. Source: (DfT, 2023e)



3.6 IWW Freight Quantities

We have analysed data on existing IWW freight movements, to provide insight on the existing utilisation of this mode. The DfT categorises the UK into port groups containing strategic freight waterways. Two of these port groups overlap with TfSE area boundaries including Thames & Kent and Sussex & Hampshire. The volume and type of goods lifted is provided in Table 3-5. '0' represents an absolute value of zero and LOW means the value is less than half the smallest unit displayed and different from a real zero. Table 3-5. highlights the dominance of IWW traffic within the Thames & Kent Port Group, reflecting the current capacities of the River Thames and River Medway. In contrast, Sussex & Hampshire exhibits comparatively lower levels of movement, attributed to the current limitations in IWW infrastructure capacity, despite the presence of several rivers including the River Hamble, Arun, Adur, Ouse, Rother, Brede and Chichester Channel (IWA, 2023).

Table 3-5: Summary of Goods Lifted by Internal IWW Traffic. Source: (DfT, 2023e)

Region (within / overlapping the TfSE area)	Goods Lifted by Region & Cargo Type (million tonnes) 2022				
	Liquid Bulk	Dry Bulk	Unitised Traffic	General Cargo	Total
Thames & Kent	0.2	1.7	LOW	LOW	1.9
Sussex & Hampshire	0.0	0.0	0.0	LOW	LOW

The DfT data (2023h) further defines IWW traffic into two categories:

- **Non-Seagoing Traffic:** Internal traffic that remains entirely within IWW.
- **Seagoing Traffic:** Referring to traffic that crosses into IWW from the sea.

Figure 3-9 outlines the total volume of goods lifted by major IWWs within the TfSE area over the last 30 years, including the River Thames and River Medway. The River Thames had 24 million tonnes of total traffic in 2022, of which 1.7 million tonnes was non-seagoing traffic. Over the last three decades, the total traffic carried on the River Thames has varied significantly, with current levels comparable to those in 1993. There was a steady increase in activity from 2009 to 2019, but a sharp decline from 2019 to 2020, likely due to the impacts of the COVID-19 pandemic. Notably, the current volume of traffic is similar to the goods being moved through some of the key ports in the area, and in some cases substantially more, demonstrating the importance of exploring the expansion of IWW transportation.

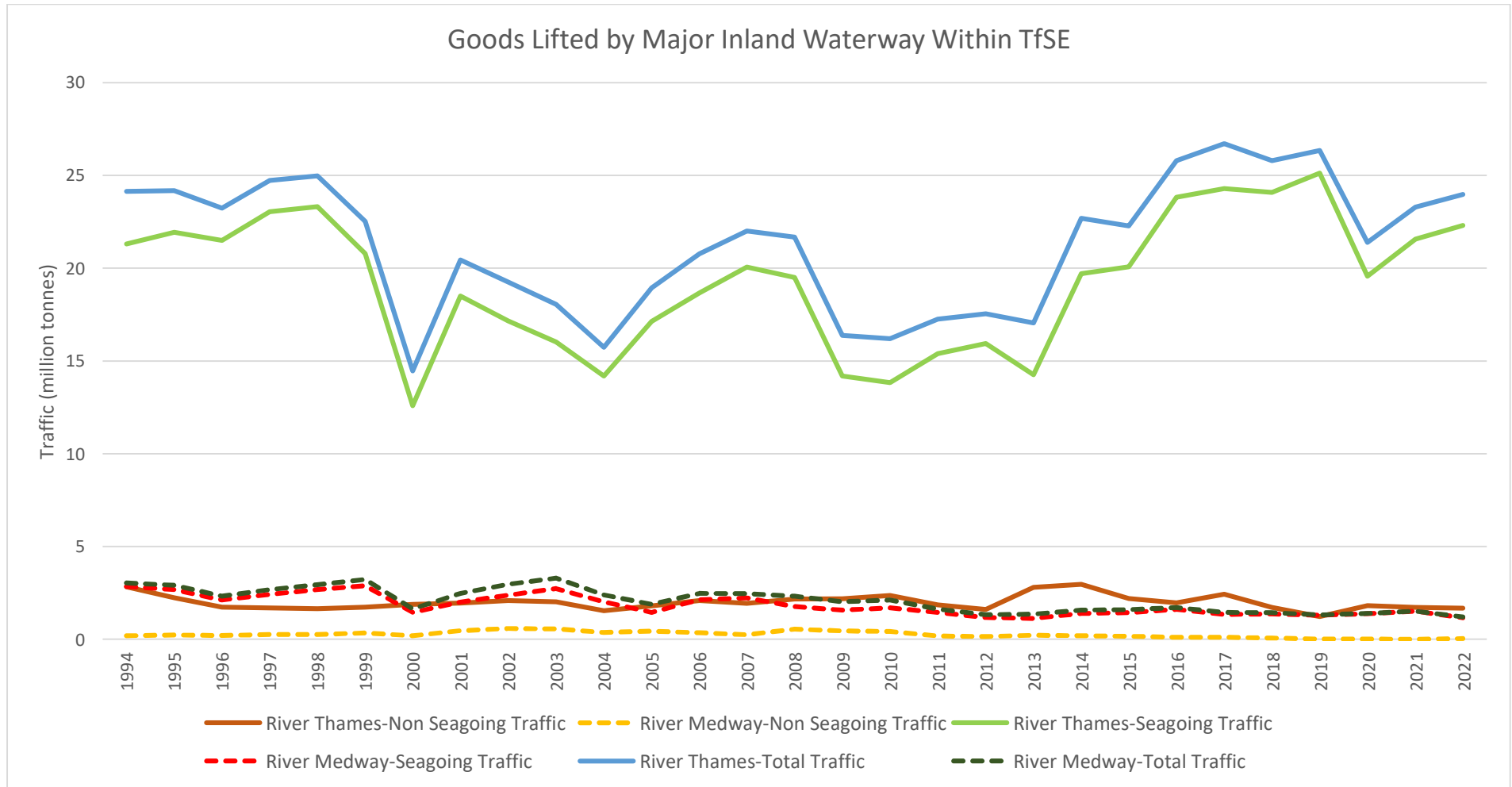
The River Thames carries significantly more freight than the River Medway due to several factors including:

- **Geographic Location & Access:** The River Thames runs from Thames Head in Gloucestershire through London and to the Thames Estuary, where it flows into the North Sea. The River Thames provides direct access to the heart of the UK's economic and commercial centre, London, facilitating the movement of goods to and from major markets.
- **Port Infrastructure:** The Port of London, located on the River Thames, is one of the UK's largest ports. It has extensive facilities for handling various types of cargo, including containers, bulk goods, and specialised freight. The port's infrastructure supports high-capacity operations and efficient logistics.
- **Economic Activity:** The economic activity along the River Thames is higher due to the presence of numerous industries, businesses, and commercial centres in and around London, which generates a greater demand for freight transport.
- **Historical Significance:** The River Thames has been a crucial trade route for centuries, contributing to the development of robust trade and transport networks. Its longstanding significance has led to the establishment of extensive facilities and services.

The River Medway demonstrates lower levels of total traffic at 1.3 million tonnes in 2022 and has remained relatively stable throughout the last 30 years. Despite lower levels of total traffic, the River Medway remains a valuable asset to the TfSE area to support the transportation of goods. Opportunities exist to improve and protect the existing infrastructure along the riverbanks, such as wharves, terminals, and loading facilities, to enhance efficiency and accommodate increased cargo volumes. Additionally, utilising the River Medway as a freight corridor presents an opportunity to strengthen regional connectivity within the TfSE area (particularly for locations along the river and with London).

Although Figure 3-9 highlights the volume of goods being transported, it does not provide segmentation by goods types. This limitation prevents us from gathering detailed insight in the specific categories of goods being transported beyond what is presented in Figure 3-9. Enhancing data collection methods to include goods type segmentation would enable us to identify journeys that are most suitable to transfer to waterborne, which would in turn help us identify opportunities to transfer goods from HGVs to waterborne.

Figure 3-9: Goods Lifted by Major IWW in the TfSE Area. Source: (DfT, 2023e)



3.7 Conclusion & Key Chapter Findings

This chapter explored in detail historic and current freight flows in the TfSE area focusing on the methods of transport, such as HGVs, ports and IWW, good types, origin and destinations of these goods and overall volumes of freight being transported. This analysis identified what goods types and in what volumes could potentially be shifted from HGVs to waterborne freight. Key chapter findings include:

- **Goods Types:** Goods handled within the TfSE area by HGVs that lend themselves to be transported efficiently in bulk are concentrated in key commodity types, such as metal ore and other mining and quarrying. Waterborne freight is an efficient, cost-effective, and reliable mode of transport for bulk goods, highlighting an opportunity for waterborne freight to support more of these movements. However, the specialisation in specific types of goods also highlights the constraints of waterborne freight. While it excels in transporting bulk commodities, its applicability to a broader range of goods is limited. This limitation should be a focal point for further studies, aiming to identify ways to diversify the types of goods that can be effectively transported via waterborne freight.
- **Utilising Existing Infrastructure:** The prevalence of Ro-Ro and bulk cargo freight in current ports demonstrates the operational efficiency and cost savings available at major ports in the area due to existing infrastructure that facilitate quicker loading/unloading procedures and the transportation of larger volumes of goods. However, limitations including cargo diversity, specific infrastructure needs (dredging operations to accommodate larger vessels) and space constraints (needing additional storage or consolidation centres) could impede expansion efforts as well as port-to-port journeys between ports specialising in different cargo types.
- **Short Distance Movements:** Most goods moved by HGV within the TfSE area travel a relatively short distance, staying within a local authority and its nearest neighbours. It will be important to understand what proportion of these goods movements are associated with supply chain movements, which could be supported through port-to-port journeys.
- **East-West Movements:** There are medium sized HGV freight flows (to the order of approximately 1 to 5 million tonnes annually) running East to West within the TfSE area. These present a promising opportunity for shifting to waterborne freight for two reasons. First, if the distances involved between the freight origin and destination are large enough that there is an opportunity for waterborne freight to be cost-effective. Compared to the overall distance of the journey, any extra HGV kilometrage incurred by transporting the freight to a port would be insubstantial. Second, there are regular ports along the coast that are connected. Whilst there are also

reasonable flows in the North to South direction, the IWW network connecting these is fragmented.

- **National Distribution Networks:** Whilst half of goods loaded or unloaded onto HGVs within the TfSE area have a paired trip end within TfSE, the other half have a corresponding trip end outside of the region. Key paired locations include the East Midlands and Greater London, highlighting the national significance of the area. It also emphasises the importance of ensuring a stable and resilient freight supply chain. Waterborne freight could provide an alternate route to transporting goods, such as secondary raw materials and grouped goods, through east to west movements (Southampton to Dover to Medway) strengthening overall supply chains.
- **Data Availability and Reporting:** Enhanced data reporting, both across regions and at a finer granularity within minor ports, would provide invaluable insights into the types of goods being transported within the TfSE area and current trade patterns. This detailed information would not only facilitate a comprehensive understanding of freight movement patterns whilst also providing insight on the capacity of existing infrastructure to support waterborne expansion at a localised level, informing better decision making regarding waterborne freight expansion initiatives.

This chapter has primarily focused on analysing historical and current freight flows, identifying key market segments and goods types currently in use. It has found that there are some HGV goods movements within the TfSE area which are suitable for transferring to waterborne. In particular, longer length journeys of large or bulk materials. With these segments identified, the next step involves addressing a core study question: projecting the future trajectory of these market segments to assess potential impacts from increased HGV use, such as congestion and pollution. This will help determine if these impacts are expected to increase and if waterborne freight could be prioritised in certain areas to mitigate these impacts.

4 Chapter Four – Current & Forecast HGV Use

4.1 Overview

One of the key motivators for converting freight movement from HGVs to waterborne freight is to reduce the volume of HGVs on the road and their associated impacts, such as air pollution and congestion, and to support the decarbonisation of the freight sector. In this Chapter we present insights into current and future forecasts of HGV use to understand:

- If the negative impacts associated with HGVs are likely to increase, decrease or remain stable. If forecasts predict an increase in HGV traffic, the urgency and potential benefits of expanding waterborne freight become more significant.
- What areas have experienced high volumes of HGV traffic to inform a targeted approach to promoting waterborne freight in areas where it will have the greatest impact.

4.2 Methodology

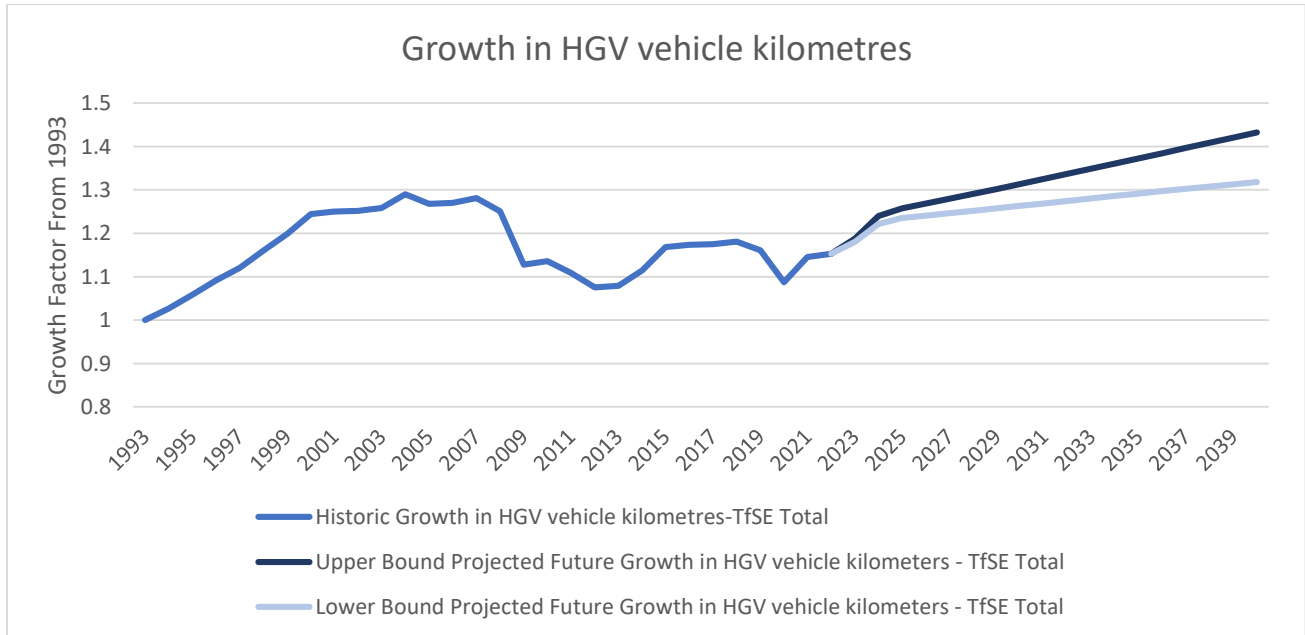
The annual kilometrage of HGVs, and all other vehicle types, for every local authority is provided at year intervals from 1993 to 2022 (DfT, 2023c). The HGV kilometrage for each local authority were then compared. DfT regional-level road traffic forecasts (DfT, 2022d) have been analysed, focusing on the TfSE area. The forecasts are provided in terms of percentage growth for different vehicle types, under different scenarios relating to future technology, behaviours, and economy. Two scenarios have been selected which result in the maximum and minimum future-year HGV traffic. The forecast HGV growth factors were applied to the observed HGV vehicle kilometrage in 2022 (DfT, 2023f) – the latest year for which data was available.

4.3 Results

Figure 4-1 illustrates the yearly growth factors for HGVs since 1993, for historic and forecast years. Historic results show that HGVs follow a steady growth with some fluctuation. The forecasts show this growth continuing until 2040 with the upper and lower bound of forecast HGV kilometrage being respectively 17% and 28% greater than 2022.

Figure 4-2 illustrates the vehicle kilometres travelled annually by HGVs in each of the local authorities within the TfSE area. The total across the TfSE area has consistently ranged between 3 billion and 3.5 billion kilometres per year over the past three decades. This shows the deeply ingrained nature of road-freight movements in the area, posing potential challenges to the movement of freight away from HGVs freight traffic to alternative transport modes, such as waterborne freight. However, it highlights the need for strategic interventions (subsidies, incentives and national and local government policy), fostering collaboration with stakeholders and raising awareness of the environmental benefits of waterborne freight to encourage this modal shift.

Figure 4-1: Forecast Growth in HGV Vehicle Kilometres. Sources: (DfT, 2022 & 2023)

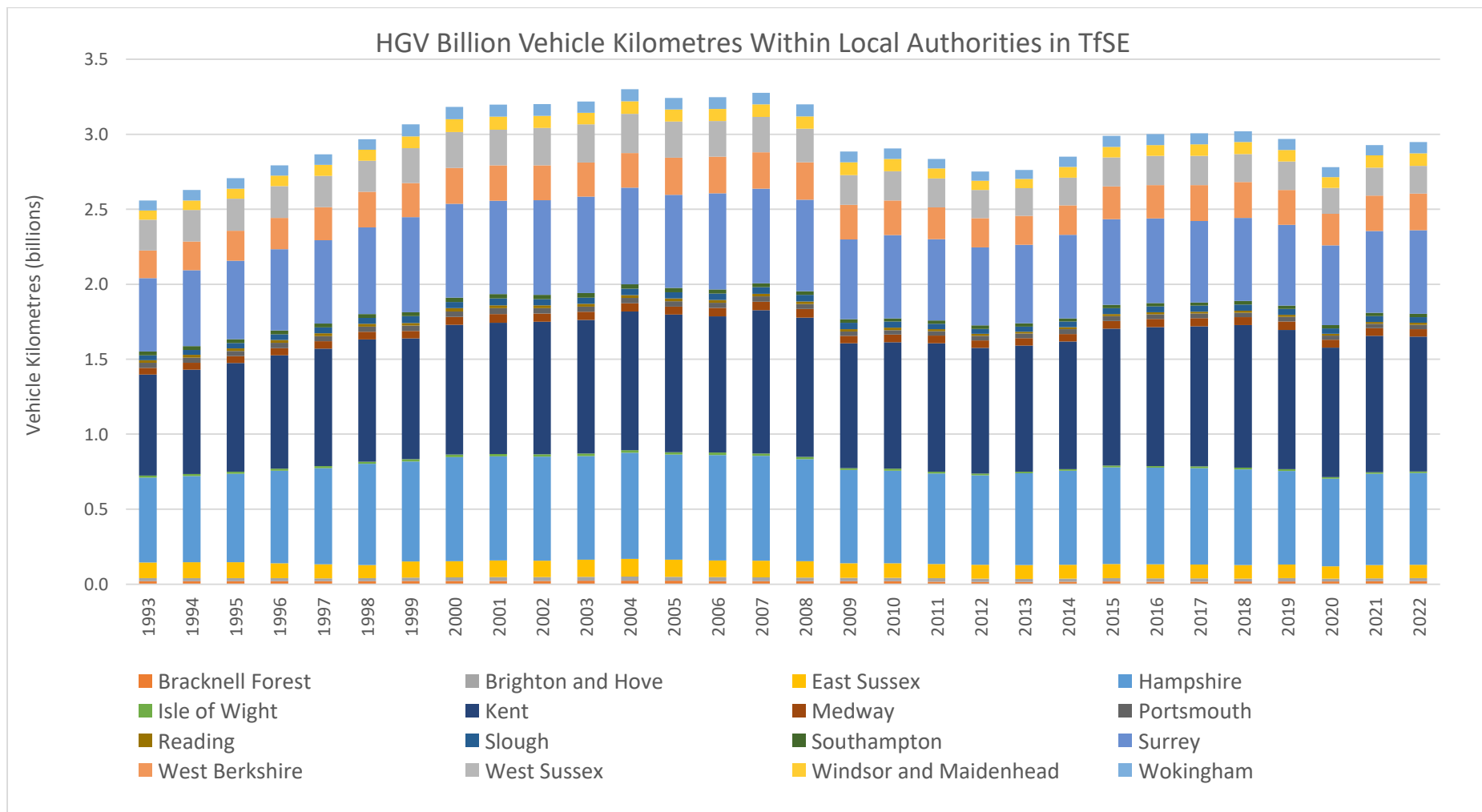


Kent, Hampshire and Surrey emerge as the local authorities with the region's greatest HGV traffic. This could be attributed to their strategic locations, bordering major economic hubs like London, and boasting key transport infrastructure, such as the SRN, and significant port infrastructure, such as Southampton and Dover. Kent, in particular, has also witnessed the joint second-largest increase in traffic since 1993, at 33%, potentially fuelled by the opening of infrastructure like the Channel Tunnel and Dartford Tunnel bridge and its strategic positioning for trade with continental Europe. The presence of robust waterborne infrastructure in these areas presents an opportunity to divert some of these vehicle movements to more sustainable waterborne methods, thereby mitigating concerns related to increased HGV traffic, such as road congestion and air pollution.

Windsor & Maidenhead has seen the largest overall increase in traffic at 40%, followed by West Berkshire also at 33%, which could be attributed to a combination of population growth, economic development and enhancements to the transportation network. Both local authorities are also intersected by the M4, a major route carrying a significant proportion of vehicle movements into and around London. Medway, Slough, Surrey and Wokingham have also experienced relatively sizeable increases (between 12-15%) highlighting that the demand for freight goods have increased steadily across the region. In contrast, several key local authorities along the south coast that have direct access to key port infrastructure have seen a decrease in HGV movement including the Isle of Wight (29%), Portsmouth (15%), East Sussex (15%), Southampton (12%) and West Sussex (11%). In the cases of Portsmouth, West Sussex, and Southampton, this reduction in HGV movement aligns in most cases to the reduction in the quantity of goods loaded to and unloaded from waterborne vehicles (described in Section 3.5). It should also be noted, however, that in Southampton this could also be related to the modal shift project being run by [DP World](#) which has seen

a number of road trips replaced by rail journeys. In the case of East Sussex, there has been a reduction in HGV movements, whilst concurrently also seeing an increase in the quantity of goods loaded to and unloaded from waterborne vehicles the major port contained within it - Newhaven (described in Section 3.5). Factors which could be contributing to this include an increase in waterborne-to-waterborne cargo transfers at the port, and a reduction in HGV movements in East Sussex which are not interacting with Newhaven.

Figure 4-2: HGV Billion Vehicle Kilometres Within Local Authorities in the TfSE Area. Source: (DfT, 2023c)



4.4 Segmented Trajectory Predictions

Table 4-1 lists assessments of demand trajectories for freight transport. This is done on a commodity-by-commodity basis for those identified in Table 3-3 as medium or high suitability for modal shift to waterborne freight. To determine the trajectory, historical HGV goods movement data (DfT, 2023f) has been assessed in combination with likely changes due to new policies or future trends. National level HGV goods movement data has been used owing to the lack of suitable data specific to the TfSE area.

Table 4-1: Emerging Trends of Freight Moved by Cargo Type

Commodity	Trajectory Prediction	Predicted Future Trend
Products of agriculture, hunting and forestry	Remained stable over the last few decades and would be expected to grow. Government strategies to encourage more local and domestic food production and consumption (Defra, 2021a) could drive down demand for transport however environmental instability will likely increase the need for movement of raw food goods to mitigate emerging gaps in productive regions (Defra, 2022; IPCC, 2019). Additionally, population growth is also expected which would increase the demand for transport of food (ONS, 2024a).	Growing
Secondary raw materials and waste	This cargo type has already seen growth in transport demands and that is expected to continue. Legislation is increasingly targeting proper disposal of different types of waste (e.g. electronic waste), which will likely require specialist facilities which would push to increase transport demand (Defra, 2021b). Conversely, policies towards reuse would act to reduce transport volumes of waste whilst likely increasing other categories of transport.	
Grouped goods	Grouped goods refers to all goods that are shipped in sub-container units and can be made up of any of the other types. Methodological changes in government accounting make it very difficult to detect trends. Pursuing efficiencies and sustainability in logistics will likely see a growth of groupage with government policy attempting to make it easier (Cabinet Office, 2023).	

Commodity	Trajectory Prediction	Predicted Future Trend
Machinery and equipment	Machinery represents a steady demand for transport and is expected to grow. The UK is committed to increased building and a decarbonisation transition that will require new machinery and equipment to be manufactured and distributed across the country (DESNZ, 2023).	Slightly Growing
Other non-metallic mineral products	A growing cargo type that is expected to either plateau or continue to grow. A prioritisation for new built environments will likely see an increase in demand for raw building materials, such as sand and quarried materials (Homes England, 2023). Alternatively, more reuse in construction could mitigate this trend.	Stable or Growing
Textiles and leather products	Whilst a small cargo type it has been stable and is expected to remain so in the future. Recent methodological changes in accounting lead to low confidence in assessing the trend. Fast fashion demand has grown significantly in the UK which is linked to increases in transport requirements (Environmental Audit Committee, 2019). Policies against fast fashion with increased reuse would likely hold transport demand steady as reduction in new goods transport compensated by more waste being redirected back into this category for reuse (DfT, 2017).	Stable
Metal ores (and other mining & quarrying products)	Metal ores have shown to generate a steady demand for transport and no change is anticipated. An increasing focus on sustainability and recycling could see a reduction in the transport of raw materials like metal ores but is likely to be matched by overall growth in demand (BEIS, 2022b).	
Transport equipment	Primarily made up of automotive vehicles this cargo type has seen steady demand and that is expected to continue. High uncertainty due to the extent to which an electrification versus modal shift strategy is pursued for decarbonisation of the transport sector. Electrification without high modal shift would result in continued demand for	

Commodity	Trajectory Prediction	Predicted Future Trend
	the transport of new vehicles. Government policy would currently map to this outcome (DfT, 2022d).	
Equipment and material utilised in the transportation of goods	Highly fluctuating type of cargo with future trends hard to discern. Increased focus on sustainability is likely to drive down the raw volume of packaging required which would see demand fall (Defra, 2021b).	Stable or Declining
Wood, products of wood (except wood furniture)	A declining cargo type of transport demand that is expected to fall further. It is made equally between paper goods and non-furniture wood products. A continued digitisation of media will likely influence a continued decline in demand for printed goods.	Declining
Coke and refined petroleum products	Steady demand for transport is observed but is expected to decline in the future. A successful transition to a low-carbon economy should see this category collapse in the medium to long term. In the short to medium term however, petroleum products could simply replace each other (e.g. oil being replaced by LPG), or the transition could falter overall (BEIS, 2022a).	
Basic metal (except machinery)	Basic metal is expected to continue to reduce in significance. Increased sustainability could see lower levels of demand for raw materials which would a reduction in demand however that is highly dependent on the degree of which items are reused as opposed to recycled and the locations of the recycling facilities (BEIS, 2022b).	
Furniture; other manufactured goods	Transport of these goods has significantly declined over the last decade and no major changes to this trend are anticipated. Increasing reuse would likely see a further reduction in demand given goods are likely to be reused in the local area rather than any extensive redistribution occurring (Defra, 2021b).	

4.5 Conclusion & Key Chapter Findings

This chapter has offered valuable insights into both the future trajectory of HGV usage and the current levels of activity across the TfSE area, alongside projections for the key market segments identified in Chapter 3. The key findings are as follows:

- **High HGV Movements:** Total HGV vehicle kilometres across the TfSE area has consistently ranged between 3 and 3.5 billion kilometres per year over the past three decades. This shows the deeply ingrained nature of road-freight movements in the area and highlights the significant impacts of such high-traffic levels including congestion, poor air quality and increased carbon emissions. These factors collectively highlight an opportunity for alternative sustainable transport modes for freight, such as waterborne.
- **Increased Growth in HGV Movements:** There is a forecasted substantial growth in HGVs on the TfSE area's roads, with increases ranging from 17% to 28% depending on the forecast scenario. This increase will potentially compound existing challenges relating to HGV use. This finding also strengthens the case for transferring some freight movements to waterborne modes, since it will contribute to alleviating these issues.
- **Key HGV Freight Growth Segments:** Of the ten types of commodity that are identified as having some evidence of feasibility for modal shift to waterborne as well as contributing a substantial amount to demand for road freight (identified in Section 3.3), nine of them are expected to experience growth or stable demand in the future. Only 'Wood, products of wood (except wood furniture)' is expected to experience a decline in demand for transport. 'Other non-metallic mineral products' and 'Products of agriculture, hunting and forestry' are assessed as highly suitable for transfer to waterborne freight and have substantial HGV demand which is expected to grow into the future – these are priority opportunities for shifting to waterborne modes.
- **Data Challenge:** No commodity-level forecasts of HGV freight demand are available in the public domain. Furthermore, the robustness of dataset for determining historical trends is limited. This is because DfT historical observations of HGV freight, published by the DfT (2023f), for the years 2023 and 2022 are not comparable with the years prior to 2022 – according to DfT recommendations.

This chapter has concluded that, left unchecked, there will be a growth trend in the demand for movement of goods by HGVs – driven in part by increasing population. Many of the freight market segments identified in previous chapters as being suitable for transfer to waterborne freight are included in this. It is likely that acting now to try to reduce reliance on HGVs for freight for these segments would also be beneficial for the future.

Data gaps and availability have consistently posed challenges throughout this study, affecting the ability to fully address key research questions. The following

chapter details our approach to tackling these issues and provides recommendations to mitigate these challenges going forward.

5 Chapter Five – Data Gap Analysis

5.1 Overview

Addressing the key study questions (as set out in Chapter 1) has been impacted by the availability of suitable data. This Chapter sets out the data dependent questions and the data limitations. It then discusses the data required to assess the feasibility of achieving substantial mode shift of freight from HGVs to waterborne vehicles. These requirements are compared against currently available data. Recommendations are made for addressing the identified data gaps.

Table 5-1 sets out the study questions that were largely dependent on analytical data. It also describes our approach to addressing each question, and the key data limitations.

Table 5-1: Relevant Study Questions & their Data Limitations

Relevant Study Questions	Our Approach	Data Limitation
1. Understand the segmentation of the freight market suitable for transferring to waterborne transport methods.	<p>The domestic waterborne that is already carried has been analysed at a national level to identify key commodity types and volumes. This is alongside a literature review.</p> <p>Findings will be supplemented through stakeholder engagement as presented in Chapter 6 of this report.</p>	<p>Publicly available data on waterborne cargo does not provide sufficient cargo type segmentation, or sufficient segmentation on trip length and origins and destination.</p> <p>Understanding the volumes transported within each of these segments will provide a richer understanding of the existing waterborne freight activities.</p> <p>Additionally, there are no publicly available forecasts for the volumes which could be carried by waterborne freight in the future.</p>
2. Assess whether there is a substantial volume of freight, currently reliant on road	<p>Data on the quantity of freight loaded and unloaded from HGVs within the TfSE area has been analysed, segmented by commodity type.</p> <p>This is supplemented with analysis of the quantity of</p>	<p>There is insufficient granularity on the geospatial and commodity segmentation of HGV freight. Whilst reasonable granularity can be achieved for one of these</p>

Relevant Study Questions	Our Approach	Data Limitation
networks, that could be efficiently shifted to waterborne transportation	freight transported by HGVs between different origin and destinations – for all commodities combined.	individually, the granularity of both combined is insufficient.
3. Project the future trajectories of relevant market segments.	We have produced future trajectories for HGV traffic (all commodities combined) within the TfSE area. This is supplemented by qualitative appraisal of the future demand for movement of key commodities.	No commodity-level forecasts of HGV freight demand are available in the public domain. Furthermore, there is no suitable dataset for determining historical trends - which could be extrapolated to give a forecast.

The remaining three study questions (as outlined below) are explored through the stakeholder engagement process (see Chapter 6):

4. Evaluate the viability and competitiveness of establishing a coastal shipping service connecting ports along the coast.
5. Identify necessary infrastructure enhancements and modifications essential for facilitating a seamless transition to waterborne freight transportation.
6. Investigate the economic sustainability of this transition, potentially attracting participation from private sector operators.

5.2 Data Limitations

Close collaboration with TfSE and stakeholders (e.g. Network Rail) ensured that the best available data has been used to assess the feasibility of shifting freight from HGVs to waterborne modes in the TfSE area. Analysis of data from sources including the DfT, Network Rail, Office for National Statistics (ONS), and Ordnance Survey, has been conducted to understand the following insights for the TfSE area:

- Contextual information on the key locations.
- Workforce availability.
- Infrastructure capacity for waterborne freight.
- The amount of freight loaded and unloaded from HGVs.
- Key origins and destinations for HGV journeys.
- The amount of freight already carried by IWW.
- The amount of freight being handled already at port locations.

5.3 Waterborne Freight Feasibility Themes

We have identified the following data-led themes as key for determining the feasibility of waterborne freight:

- **Freight Demand:** The amount of freight that could or would be shifted to waterborne modes (both now and in the future) needs to be determined, including information about the origins and destinations of its supply chain, quantity, and goods type. Owing to the uncertainty about how supply chains might adapt to the introduction of waterborne freight, this assessment should be done under a range of scenarios reflecting different assumptions. For example, whether distribution centre locations are based near to waterborne infrastructure.
- **Waterborne Freight Infrastructure:** The infrastructure required to facilitate the increase in freight demand needs to be determined and compared to existing infrastructure. There is an interplay between freight demand and infrastructure requirements, so a range of scenarios should be assessed.
- **Operational Factors:** Other factors which will be important for the feasibility of waterborne freight include the transport and loading times, capacity and, running costs of the waterborne vehicles, as well as the availability of suitable personnel in areas surrounding loading and unloading infrastructure.

5.4 Gap Analysis & Recommendations

Table 5-2 presents the assessment of the required data under each of the feasibility themes, compares this to what is currently available and outlines recommendations on how any data 'gap' might be filled.

Table 5-2: Data Gap Analysis & Recommendations

Theme	Data Requirement	Data Currently Available	Recommendation
Freight Demand	HGV flows including information on quantity of freight, origin and destination, and goods type.	Data on each of the required aspects is published separately by DfT and has been presented in Chapter 3. Because they are separate, they give a fragmented and incomplete picture of HGV freight movements, additionally data for some flows is not revealed.	DfT holds data that sufficiently fulfils the data requirements, but it is restricted due to commercial sensitivity. Highlighting that this data would be an enabler in achieving freight mode shift from HGVs is recommended. Additionally, development of a multi-modal freight model (see below) would meet this data requirement. This could also be used for forecasting.
	Domestic waterborne freight flows including information on quantity of freight, origin and destination, and goods type.	DfT publish information on the amount of goods unloaded and loaded from waterborne vehicles at ports (as presented in Section 3.5). Insufficient information is available to identify the origin and destination port of domestic waterborne freight, along with cargo type.	Highlight to DfT that publishing domestic level origin-destination paired waterborne freight flows, segmented by cargo type, would be an enabler in achieving freight mode shift from HGVs. Additionally, development of a multi-modal freight model (see below) would meet this data requirement. This could also be used for forecasting.
	The location, size and use class of warehouses.	Fragmented data is currently available from ONS and the	Highlight to the VOA that releasing more granular versions of the data

Theme	Data Requirement	Data Currently Available	Recommendation
		Value Office Agency (VOA) (as presented in Section 2.4), however this does not give the complete picture owing to insufficient granularity on the location or type of warehouse.	they hold would be an enabler in achieving freight mode shift from HGVs. Private suppliers, such as Savills, may be able to provide additional data.
	The quantity of freight flowing between origins and destinations, forecast for the future under a range of scenarios, segmented by mode and goods type.	No publicly available datasets are suitable to investigate this requirement, however there are privately owned models which could be adapted.	Investigate the cost associated with developing a freight model (based on existing models) which can be used for forecasting under a range of different future scenarios.
Waterborne Infrastructure	The quantity and type of goods already handled in each port.	Data is available for major UK ports, as presented in Section 3.5. No data is available for minor ports.	Highlight to DfT that expanding this data release to minor ports is desirable.
Operational Factors	Transport times, loading times, capacity and, running costs of the waterborne vehicles.	No datasets have been found in the public domain.	Engage with vessel operators to obtain high-level estimates for this information.
	Number of available personnel to staff increased freight handling around waterborne freight infrastructure.	Section 2.2.3 discussed the number of people already employed in waterborne freight related activities.	The available data provides a sufficient evidence base for suggesting that there is likely a suitably skilled workforce base in the areas of waterborne freight operations. It could be enhanced through specific employment

Theme	Data Requirement	Data Currently Available	Recommendation
			market modelling to examine what workforce could become available in the area (e.g. through retraining) if waterborne freight increased.

5.5 Conclusion & Key Chapter Findings

A summary of key chapter findings is provided below:

- **Limited Freight Data:** The lack of suitable freight data is a challenge for understanding the feasibility of modal shift to from HGVs to waterborne freight. Existing data is fragmented, making it difficult to identify freight flows suitable for this shift. Government departments hold many of the datasets required, but do not readily share them owing to the risk of sharing commercially sensitive information.
- **HGV Freight Data:** Critical data includes the volume of freight moved between origin and destinations (represented at a local authority level of granularity, or smaller), segmented by goods type and mode of transport. This should be available for a range of future scenarios.
- **Waterborne Data:** Improved data on existing waterborne freight activities would provide better understanding about the types of goods that are suitable for waterborne freight. Greater granularity of good types, particularly cargo currently classified as 'grouped', and origin and destination information would be highly beneficial.
- **Adaptive Logistic Chains:** The introduction of additional SSS and IWW waterborne freight services might cause existing logistics chains to dramatically alter, as they take advantage of any benefits waterborne freight might offer. The introduction of waterborne freight services between an origin and destination might induce additional demand for freight transport between that origin and destination, beyond what is already carried by HGVs. For a given origin and destination, predictions of waterborne freight usage based on existing HGV freight volumes might be an underestimate.
- **A New Model:** Model output data can address both of the challenges described above. Model data can be used to provide the data granularity and segmentation to understand current HGV freight flows and identify those which might be suitable for shifting to waterborne freight. A model can also be used for investigating potential future scenarios, including ones in which logistics chains adapt owing to the availability of waterborne freight options.

The best publicly available data has been used and analysed by this study. However, in most cases, additional data sets would enhance the analysis and conclusions that can be drawn – allowing the study questions to be more fully answered or answered with a greater degree of certainty. Additional data would ideally combine greater granularity and measurements of factors more specific to the study question. In most cases, no known datasets are available to achieve this. Acquiring better data would involve gathering new source data, combining existing disparate data sets, or developing a new model – the latter of these likely being the most achievable. These datasets would be highly beneficial and allow a range of high value insights but would require substantial resources.

6 Chapter Six – Stakeholder Insights

6.1 Overview

In parallel to the data analysis outlined in the previous chapters, a series of engagement activities were conducted. These were used to understand trends, issues and opportunities that might not be apparent in the data, to validate findings and provide local insights. This information was key to addressing study objectives, such as, assessing the viability and competitiveness of establishing a coastal shipping service, identifying required infrastructure enhancements and evaluating the economic sustainability of the transition.

To capture diverse perspectives, a wide range of key stakeholders were engaged, including local authorities, port operators, national government bodies, and other relevant industry players. Each stakeholder group brought unique expertise and viewpoints, from regulatory and infrastructure considerations to operational and economic concerns. Table 6-1 provides an overview of the engagement activities conducted, the purpose and the organisations represented. The interactive platform Miro was used to gather insights (see Appendix A – Stakeholder Insights).

Table 6-1: Overview of Stakeholder Engagement Process

Engagement & Purpose	Organisations Represented
<p>Workshop 1 – Challenges & Opportunities: Identify initial challenges and opportunities for expanding waterborne freight.</p>	<ul style="list-style-type: none"> • Southampton • Portsmouth • DfT • AB Ports • Portsmouth Port • Portsmouth Port • Port of London Authority • Amazon • TfSE
<p>1 x 1-1: Gain a more detailed, case by case insight that explores waterborne expansion including challenges and opportunities experienced by the organisation.</p>	<ul style="list-style-type: none"> • Logistics UK
<p>Workshop 2 – Key Findings & Local Insights: Present and discuss initial study findings and continue to draw out key local opportunities, short-term priorities and to discuss next steps.</p>	<ul style="list-style-type: none"> • Brighton & Hove Council • Solent Transport • AB Ports • Portsmouth City Council • Portico Shipping • Amazon • Logistics UK • DfT • Shoreham Port • Road Haulage Association (RHA) • Southampton City Council • TfSE

6.2 Approach

The findings from the multiple engagement sessions have been categorised under key themes, see Figure 6-1. A brief summary of each theme is outlined below.

Figure 6-1: Key Discussion Themes



- **Market Factors & Financial Viability:** Examines the economic challenges and competitive dynamics that impact the cost-effectiveness and financial sustainability of waterborne freight.
- **Operational & Infrastructure:** Addresses the physical and logistical requirements for waterborne transport, including port infrastructure, vessel availability, and the facilities needed to efficiently move freight.
- **Coordination & Communication:** Focuses on the collaboration and information-sharing needed across stakeholders, including freight operators, ports, and authorities.
- **Social & Environment:** Considers the social impacts and environmental benefits of waterborne freight, such as reduced emissions and traffic congestion.
- **Digital Technology:** Highlights the role of digital tools and systems.
- **Policy & Regulation:** Covers the policies, regulatory frameworks, and government incentives necessary to support and expand waterborne freight.

6.3 Key Insights

6.3.1 Market Factors & Financial Viability

6.3.1.1 Key Challenges

- **Freight Competitiveness:** Highlighted as one of the biggest challenges to waterborne freight expansion. Ports continually review commercial opportunities for coastal shipping, however, it frequently struggles to compete with road freight, due its geographical extensiveness, flexibility and lower operating costs. Stakeholders noted that if waterborne options were more commercially viable, they would already be pursued by the private sector. For example, many viable sea journeys run parallel to faster and more efficient road and rail networks. This, in combination with most freight designations from international ports heading inland, limits port-to-port SSS waterborne opportunities within the TfSE area, with few exceptions, such as the Isle of Wight.
- **Infrastructure Investment & Funding:** Expanding waterborne freight requires significant investment, with high port infrastructure costs leading to

a funding stalemate amongst stakeholders, as none can bear the costs alone. Additional handling expense and high shipment volumes are also required to make waterborne transport competitive.

- **Economic & Market Constraints:** High costs and longer transit times further limit competitiveness. Many end users prioritise cost, and without incentives to test or pilot waterborne freight, industries are hesitant to shift from established land transport modes. Additionally, unless distribution centres are located near waterways, justifying waterborne freight remains difficult, which will require additional investment.
- **Sustainability & Collaboration Goals vs. Cost:** Although interest in sustainable transport is rising, cost remains a key factor. Shared transport, such as integrating passenger and freight services like Hovertravel, could reduce costs, but current infrastructure lacks adequate multi-user support for collaboration.

6.3.1.2 Key Opportunities

- **Shared Transport Solutions:** Multiple operators could work together to utilise existing networks to reduce costs, improve efficiency, and attract broader customer bases. For example, integrating passenger and freight services, where vessel costs can be offset by passenger fares, with smaller contributions from freight operators could support making waterborne freight more competitive. Additionally, it would help make higher frequencies and longer operating hours more viable than if these services operated to serve foot passenger demand alone. Alongside collaboration, it requires careful management of journey times to maintain a positive customer experience.
- **Growth at Smaller Ports:** There is an opportunity for expansion at smaller ports that have redundant quayside space. These facilities can be revitalised to handle increased freight volumes, particularly for niche markets. For example, the Tipner Site in Portsmouth was cited as having some accessible waterfront/quay that could be used for the maritime industry. However this is limited to supporting activities such as boat maintenance and construction, marine infrastructure and research.
- **Value-Added Services:** Vessel operators can enhance their competitiveness by offering third-party freight handling services, such as warehousing or order fulfilment, which would streamline logistics by reducing the complexity of the supply chain and attract more customers seeking integrated solutions.

6.3.2 Operational & Infrastructure

6.3.2.1 Key Challenges

- **Limited Infrastructure & Slow Transit:** The absence of suitable IWW to carry cargo and the slower speeds of waterborne freight compared to other modes pose logistical challenges, particularly for high-frequency, time-sensitive shipments. This issue is compounded by seasonal/weather disruptions and

planned/unplanned outages. For example, one stakeholder mentioned that, within the Solent there is a lack of IWW due to them being deprioritised in the 19th and 20th Century as rail and road transport became more prevalent.

- **Last-Mile & Warehousing Gaps:** Stakeholders expressed that many piers and ports are not located near warehousing facilities, making last-mile delivery complex and costly. The limited availability of vessels suited for last-mile logistics and the need for specialised infrastructure, such as ro-ro capabilities, further hinder operational feasibility.
- **Complexity & Capacity Issues:** Capacity limitations and the high capital cost required for infrastructure upgrades limit scalability and efficiency. Due to sizing limitations, there is also a lack of availability of smaller boats to support expansion at smaller ports.
- **Supply Chain Complexities:** Waterborne freight requires additional supply chain handling 'touchpoints' compared to road freight, such as a party to manage the freight on board the vessel, between the warehouse and last-mile delivery. This further increases transit times and costs.
- **Port Specialisation:** Whilst the geography of ports along the south coast of the TfSE area indicates that SSS could be a viable option, each port tends to specialise in specific cargo which means that growth is limited to the transportation of goods due to the specific infrastructure required. To enable SSS, ports would need to align in handling similar cargo types.

6.3.2.2 Key Opportunities

- **Integration with Last-Mile Solutions:** Whilst ports are reluctant to allow bike and micro-mobility options on-site, there is a significant potential to link waterborne freight with these emerging last-mile solutions, that do not rely on road transport, to unlock end-to-end sustainable parcel deliveries.
- **Investment in Infrastructure:** New infrastructure, such as port recharge facilities for short-distance electric ro-ro shipping, could support the growth of sustainable waterborne freight. Upgrading existing ports to increase capacity and capability, as well as ensuring sufficient berth space, would facilitate enhanced operations.
- **Synergistic Rail-Waterway Movements:** Establishing synergies between rail and waterway movements could optimise logistics and enhance the attractiveness of waterborne transport as a viable option.
- **Multi-Use Infrastructure:** Exploring the multi-use potential of existing infrastructure and landing points can lead to greater efficiencies and reduced costs. Designing piers with space for light freight operations, such as e-cargo bikes, could further facilitate this integration.
- **Coastal Wharfs:** There is potential to revitalise small wharfs on coastal waterways, generating construction and operational employment opportunities outside of larger ports. Although economic viability will be a key concern.

6.3.3 Coordination & Communication

6.3.3.1 Key Challenges

- **Collaboration Challenges:** Freight operators are often hesitant to hand over consignments to third parties due to concerns about reliability, control and standards, which acts a barrier for efficient multi-operator networks. Uncertainty around whether to adopt a single-operator versus multi-operator models adds to the challenge.
- **Awareness Gaps:** Many industry players and local authorities lack an understanding of waterborne freight's benefits and requirements, that include the ability to operate 24-hours a day, unlike road freight where drivers need regular breaks.
- **Resource & Expertise Limitations:** Limited waterborne freight knowledge at local authorities often leads to resistance towards this mode. Shifting established practices requires significant resources and stakeholder buy-in.

6.3.3.2 Key Opportunities

- **Public Campaign & Awareness:** A targeted campaign promoting the shift from road to water freight could drive support for waterborne expansion by showcasing benefits like an overall reduction in HGV traffic and lower emissions. Effective messaging could engage the public and businesses, building momentum for investment and policy adjustments.

6.3.4 Social & Environment

6.3.4.1 Key Challenges

- **Planning:** Housing development and other competing land pressures compete with freight infrastructure, limiting space for freight operations and resulting in a lack of site allocations. The proximity of ports and wharves to environmentally protected areas adds complexity, while access and maintenance of wharves are also key challenges. It was highlighted that, in areas like the Solent, competition from marinas, leisure, and residential projects further restricts waterfront development for coastal shipping.
- **Congestion & Air Quality:** To support the transfer of goods on and off ships, waterborne may increase HGV traffic into ports, which could increase congestion and air quality pollution at port locations.

6.3.4.2 Key Opportunities

- **Reducing Emissions:** Emphasising the positive environmental impact of waterborne transport, such as reduced CO₂ emissions compared to road freight, could support gaining public and industry support for the transition. Additionally, shifting freight from road to water could free up road space for sustainable transport options, such as public transport.
- **Traffic Mitigation & Resilience:** Shifting more freight from road to water could ease congestion on key roadways, improving traffic flow and reducing emissions. Additionally, increasing the viability of additional transport modes,

such as waterborne, could increase supply chain reliability in the event of disruptions, such as rail strikes or fuel shortages.

- **Job Creation:** Revitalising smaller ports and terminals could create employment opportunities in areas with historically high unemployment.

6.3.5 Digital Technology

6.3.5.1 Key Challenges

- **Tracking & Liability Issues:** Effective waterborne logistics need digital systems for tracking, liability, and customs to ensure transparency and timely updates on goods' location, status, and availability, in order to be competitive with other modes, such as road transport.
- **Challenges with Last-Mile Logistics:** Digital solutions are critical for managing last-mile logistics in waterborne freight, as delays must be addressed immediately to meet customer expectations for speed and reliability.

6.3.5.2 Key Opportunities

- **Autonomous Shipping:** These technologies could also reduce operational costs and improve the competitiveness of waterborne freight.
- **Data:** There is a need for national government to collect higher quality data regarding goods and demand. Improved data collection on goods movement and demand patterns across the UK would provide crucial insights for optimising freight strategies.

6.3.6 Policy & Regulatory Barriers

6.3.6.1 Key Challenges

- **Urban Restrictions:** Local authorities often resist increases in industrial traffic through urban areas, making it difficult to secure necessary licenses and regulatory approvals for new waterborne freight services.
- **Limited Government Support:** Although government incentives, like the DfT freight mode shift grants, aim to make waterborne freight more competitive than road transport, they may not fully cover the full spectrum of support needed for expansion and pilot projects to demonstrate success.
- **Absence of Growth Targets:** The absence of national growth targets for waterborne freight indicates it is not a government priority. This is in contrast to other modes, like rail, which have clear expansion goals, leading to inconsistent support.
- **Regulatory Gaps:** The lack of standardised regulations for handling Dangerous Goods across IWWs requires individual assessments by Marine Coastguard Agency representatives. Working practices approved on one waterway, such as the River Thames, may not be permitted on others, such as the River Tyne, creating operational and compliance challenges.

6.3.6.2 Key Opportunities

- **Safeguarding Sites:** It is essential to safeguard existing waterborne infrastructure in planning policies to ensure they remain viable for future freight activities. It would be useful if local plans could support modal shift from HGVs to waterborne freight by acknowledging the role of any IWW and SSS opportunities in their area. This would also enable the protection of existing infrastructure where it exists especially when planning for nearby residential developments..
- **Government Incentives:** Central government grants and subsidies can promote shifts to waterborne transport, encouraging decisions beyond just cost. This financial support can drive investment in necessary infrastructure and services. For example, the Freight Facilities Grant by Transport for Scotland supported the additional development at the Carrs Flour Mill in Kirkcaldy Harbour (Transport for Scotland , 2021). The harbour has moved over 1 million tonnes of wheat by SSS and saved over 70,000 truck journeys in and out of the Kirkcaldy Mill (Forth Ports, 2023).
- **Consistent Communication:** Establishing a cross-departmental team led by a dedicated Minister for Logistics could streamline communication and accountability in government for freight operations, including those for waterborne.
- **Regulatory Clarity for E-commerce:** Establishing clear regulations for handling dangerous goods on IWW would support the growth of last-mile e-commerce logistics, expanding the market for waterborne freight.

6.4 Place-based Opportunities

As part of engagement activities, stakeholders were asked to suggest specific locations that may be suitable to support expansion of waterborne activities. These were collated and are outlined below:

- **Southampton & Solent Area:** Sites like the Marchwood Industrial Estate, Solent Gateway, and the Port of Southampton's Strategic Land Reserve offer strategic locations for freight and logistics operations. Southampton and the Solent area could test autonomous vessel solutions already operating in the area, such as Ocean Infinity, and short-distance electric ferries, which could serve as sustainable models for regional freight movement.
- **Southampton & Rail:** Ports such as Southampton are rail connected and aspire to increase rail's market share to 40% by 2026 (BBC, 2024), offering a potential opportunity for multi-modal integration. Building on work already conducted in the region when exploring this opportunity, such as the Solent to Midlands Rail Freight Study (Network Rail, 2021), will be important.
- **London Gateway & Port of Tilbury:** The continued expansion at London Gateway and the Port of Tilbury supports the need for feeder port services,

strengthening goods connections entering the TfSE area and reducing congestion at key points.

- **Expansion along the River Thames:** The River Thames offers a vital channel for expanding waterborne freight, particularly for materials like construction waste. Collaborations with Kent-based terminals could increase cargo volumes along the River Thames and support routes from Dartford to central London. Utilising electric vessels and light freight services along the River Thames could further reduce the load on road networks and create resilient logistics solutions.
- **Portsmouth & the Isle of Wight:** Developing off-site facilities near Portsmouth International Port could offer support for increased waterborne expansion. Enhanced cargo movement between the Isle of Wight, Fawley, and Portsmouth could lower transport costs and alleviate regional disparities. Small parcel services, such as Hoverparcels operated by Hovertravel, also present an efficient model for handling lightweight freight between these areas.
- **Gravesham:** As a key cargo hub within the Port of London, Gravesham offers strong potential for small-scale freight transport, particularly through Clipper passenger services from Gravesend into London. This could support parcel distribution, reduce road reliance, and streamline last-mile logistics. However, there are housing development pressures in close proximity, necessitating strategic planning to ensure sustained cargo handling capacity alongside urban growth.

6.5 Conclusion & Key Chapter Findings

This Chapter has provided critical stakeholder insights to understand the current level of support and feasibility of expanding waterborne freight in the TfSE area. Key findings are outlined below:

- **Competitiveness:** Crucially, stakeholders state that if waterborne options were currently commercially viable, they would already be more widely adopted by the private sector. However, whilst economic viability remains a central concern, engagement has indicated that there is support to explore waterborne freight expansion at specific sites within the TfSE area, provided they can compete effectively with established road and rail freight networks. These locations include Southampton, London Gateway, the River Thames, Portsmouth and the Isle of Wight.
- **Infrastructure & Investment:** Investment in waterborne freight infrastructure is challenging due to high costs, with ports lacking the financial capacity to undertake necessary upgrades independently.
- **Combined Transport Options:** A key opportunity lies in hybrid models, such as combined passenger and freight services, which could offset operational costs through passenger fares. Additionally, exploring the expansion of

waterborne freight should also be considered alongside sustainable freight modes such as rail and micromobility options.

- **Policy & Regulation:** Targeted government incentives and clearer regulations will be essential, such as establishing growth targets for waterborne freight and increased funding. Close collaboration with local authorities will also be key to safeguarding waterborne infrastructure within urban planning.
- **Coordination & Knowledge Gaps:** Building cross-sector partnerships and increasing the knowledge of waterborne freight and local authority issues so that port operators, and freight companies could help support pilot projects to increase awareness of its long-term environmental and operational benefits.

7 Chapter Seven – Key Challenges & Opportunities

7.1 Overview

In this Chapter, we assess the key challenges and opportunities that have emerged during development of this study and assess their ability to influence the expansion of waterborne freight in the TfSE area.

7.2 Approach

Chapters 2 to 6 were thoroughly reviewed to identify the key challenges and opportunities. To avoid duplication, where relevant, similar challenges and opportunities have been grouped together and combined. The themes have been informed by the categorisation framework used in Chapter 6. The impact and viability assessments have been informed by the evidence outlined in this report.

7.3 Key Challenges

Table 7-1 summarises the key challenges identified during development of this study. Each one has been assessed for its impact on expanding waterborne freight using the following scale:

- **High Impact:** Challenges that have a significant impact.
- **Medium Impact:** Challenges that have a notable influence.
- **Low Impact:** Challenges that exert a minor influence.

The table also includes the supporting rationale for each assessment.

Table 7-1: Key Challenges and Mitigating Actions

Challenge	Impact	Rationale	Potential Mitigation Actions
Market Factors & Commercial Viability			
Competing land pressures.	High	Competing land uses (housing, commercial development, etc.) near ports and waterways can drive up costs for land, making the expansion of waterborne freight more expensive.	Safeguard existing waterborne infrastructure via Local Plans policies to protect port land from repurposing for non-freight uses.
Commercial viability of waterborne against other modes.	High	Waterborne freight often struggles to compete with the flexibility, speed, and geographic coverage of road freight, particularly in time-sensitive industries.	Requires incentives and funding to mitigate investment costs and make it a more commercially viable option.
Limited goods types.	Medium	Not all goods are suitable to shift to waterborne freight, such as time-sensitive deliveries. This narrows and restricts the opportunities available to waterborne freight to certain goods.	Prioritise goods that are suitable for waterborne freight and focus efforts in those sectors.
Operational & Infrastructure			
Geographically constrained IWWs.	Medium	Expansion is constrained by the navigability of waterways for modern vessels, such as shallow waters, narrow channels and overall limited connectivity across the TfSE area.	Focus expansion efforts on regions where IWW are already navigable, such as the River Medway, or where can be feasibly upgraded.
Capacity constraints in and around ports.	High	Limited port capacity creates competition for land, increases costs, and hinders the potential for expanding waterborne freight.	Safeguard and allocate port land through planning policies and long-term development plans.
Low coastal rail connectivity and insufficient RFIs.	High	Limits the potential for effective multimodal transport systems.	Develop evidence base to secure investment to expand coastal rail connectivity and RFIs.

Challenge	Impact	Rationale Policy & Collaboration	Potential Mitigation Actions
Limited waterborne freight knowledge.	Medium	Lack of awareness about the benefits of waterborne freight can lead to resistance from stakeholders, such as local authorities, businesses, and the public.	Awareness raising and increasing knowledge, particularly within the public sector (e.g. local authorities) and freight logistics operators).
Waterborne freight is not a priority mode.	High	Often overlooked due to a lack of growth targets and prioritisation. Without funding and clear policy support, waterborne freight fails to gain momentum, especially in comparison to road or rail transport.	Advocate for government prioritisation by establishing clear national targets, policies and incentives.
Social & Environmental			
Increasing HGV movements.	High	Projected increases in HGV movements (17-28%) will exacerbate road congestion, carbon emissions, and pressure on infrastructure, making the need for alternative modes like waterborne freight more urgent.	Continue to promote waterborne freight as a sustainable solution to reduce road congestion and emissions.
Data for Decision Making			
Geospatial and commodity data lacks granular insights.	Medium	A lack of granular data on freight flows and commodity types hinders the ability to identify specific opportunities. Without this data, it is difficult to create effective business cases for waterborne freight expansion.	Enhance current geospatial data and commodity flow mapping through collaboration between the public and private sectors.

7.4 Key Opportunities

7.4.1 Broader Opportunities

The broader opportunities were assessed based on their viability and the scale of potential benefits:

- **Viability:** Considers the likelihood or ease of implementing the opportunity.
- **Impact:** Relates to how much freight could be moved from HGVs to waterborne transport.

These assessments were combined to produce an overall RAG rating, reflecting the cumulative impact of both factors:

- **Red:** Low impact and low viability.
- **Amber:** High impact with low/medium viability or medium/low impact with high viability.
- **Green:** High impact and high viability.

The results of this assessment and supporting rationale are outlined in Table 7-2.

Table 7-2: Enabling Opportunities Impact & Viability Assessment

Opportunity	Viability	Scale of Impact	Rationale	RAG
Market Factors & Commercial Viability				
Develop shared transport solutions for example providing combined freight and passenger transport services.	Medium	Low	The success of combined freight and passenger transport in the TfSE area shows that shared solutions are feasible in specific, high-demand routes with established infrastructure. This opportunity may be financially viable for routes where there is a high demand for passenger travel. In most cases, travel by land will be quicker and more attractive to passengers. Therefore, it could provide incremental, but limited overall, support for freight expansion.	
Support value added services such as vessel operators providing logistics services.	Medium	Low	It would be challenging for vessel operators to outcompete established service providers – indicating an uncertain financial viability. Additionally, the goods most suited to waterborne freight transport are less in need of these services, reducing customer demand and making the overall impact likely minimal.	
Operational & Infrastructure				
Focus on shifting Bulk & Aggregate Goods from HGV to waterborne.	High	High	Bulk & Aggregate Goods are highly suitable for waterborne transport due to their volume and relatively low time-sensitivity and the proven financial viability of transporting goods of this type by waterborne freight (between suitable locations). However, the viability of this shift depends on confirming suitable HGV flows exist within the TfSE area. If there are suitably large	

Opportunity	Viability	Scale of Impact	Rationale	RAG
			quantities of freight identified, shifting these to waterborne transport will have direct benefit.	
Expand IWW network by creating new IWW connections.	Low	High	The construction of new IWW connections faces substantial challenges, primarily high infrastructure costs and complex local planning restrictions. Financial viability of such projects would require long-term guarantees of sufficient freight volumes to recoup investment. However, an expanded IWW network could substantially increase the reach of waterborne freight solutions.	
Create RFIs at both ports and locations which produce or consume freight suitable for waterborne freight.	Medium	High	Whilst some ports already connect to the rail network, expanding these connections at other strategic sites could be constrained by the significant infrastructure investments required, potential space limitations at ports, and existing rail network capacity issues in the TfSE area. The financial viability of this depends on ensuring demand is sufficient to justify upgrades. Linking waterborne and rail provides the potential to remove a large amount of freight from HGVs.	
Integrate waterborne freight with last mile solutions, warehousing and other services.	Low	Low	Integrating waterborne freight for consumer goods is challenging due to the slower transit times, which do not align with the fast delivery demands typically required by consumers – compromising the financial viability of this opportunity.. As a result, the potential impact is relatively low.	

Opportunity	Viability	Scale of Impact	Rationale	RAG
Invest in infrastructure to allow operations of electric vessels.	Medium	Low	Feasible with adequate funding (medium viability of obtaining this) and supports environmental goals. However, this investment is unlikely to significantly boost freight volumes, as electric vessels don't address primary challenges in waterborne freight expansion, such as speed, cost-competitiveness, and the limited suitable good types.	
Invest in increasing port capacity and capability.	Medium	Medium	Feasible with sufficient funding and could facilitate waterborne freight if there is unmet demand due to current capacity limitations. However, there is limited evidence that port capacity and capability are significant constraints to the expansion of waterborne freight in the TfSE area. Therefore, its overall impact is likely to be limited unless there is clear evidence of demand being hindered by existing port infrastructure. May be financially viable if this demand growth is confirmed.	
Regenerate and rebuild coastal wharves on small waterways.	Medium	Low	Feasible with sufficient funding but presents challenges in terms of justifying the investment due to limited demand and capacity. Unlikely that wharves of this size will be able to accommodate freight volumes required to make a meaningful reduction in HGV use. Financial viability would require a clear case for sufficient demand to support such investments.	
Policy & Collaboration				

Opportunity	Viability	Scale of Impact	Rationale	RAG
Engage with stakeholders such as vessel operators, port operators, local authorities.	High	Medium	Many stakeholders are willing to engage. While engagement is essential to fostering cooperation and aligning objectives, the actual impact will be limited unless other core challenges—such as the financial viability of waterborne freight, infrastructure constraints, and regulatory barriers—are addressed.	
Increase the prioritisation of waterborne freight with central and local government. Possibly leading to financial incentives, clear growth ambitions and priority within planning policy.	High	High	Emphasising how the use of waterborne freight can complement some of central government’s key strategic objectives, such as decarbonisation and alleviating congestion, will strengthen the case for prioritisation. Central government impact, in particular financial incentives, could provide stimulus to improve the financial viability of waterborne freight.	
Work with neighbouring STBs to identify opportunities for transferring HGV freight to waterborne. This will also	Medium	High	Collaboration is feasible and viable, however identifying specific flows for shifting to waterborne transport will likely be difficult owing to lack of data. If there are suitably large quantities of freight identified, shifting these to waterborne transport will have direct benefit.	

Opportunity	Viability	Scale of Impact	Rationale	RAG
strengthen the business case with regards to economies of scale.				
Safeguard existing waterborne infrastructure in planning policies to ensure they remain viable for future freight activities.	Medium	High	Local authorities can achieve this through planning documents like Local Plans, though competing land development pressures may make such allocations challenging though financially viable. Safeguarding existing waterborne infrastructure is critical for maintaining waterborne freight operations. The overall impact is significant, as it ensures the continued use of vital infrastructure that could otherwise be repurposed for non-freight activities.	
Improve regulatory clarity for e-commerce such as regulations for handling dangerous goods on IWW.	Medium	Low	While regulatory improvements may make it easier to handle certain types of freight, the financial viability of e-commerce transport via waterborne modes remains limited. This is due to the fundamental mismatch between the slower transit speeds of waterborne freight and the time-sensitive nature of e-commerce. As a result, the overall impact of shifting consumer goods to waterborne transport is likely to be limited.	
Social & Environment				
Raise awareness in benefits of waterborne freight, building	High	Medium	Public sector and stakeholder understanding could improve support. This opportunity is likely to be financially viable, especially if communication is conducted through existing forums. However the	

Opportunity	Viability	Scale of Impact	Rationale	RAG
momentum for investment.			actual impact on increasing waterborne freight volumes is likely to remain medium unless some of the challenges to waterborne freight's financial viability can be overcome.	
Data for Decision Making				
Increase and enhance the data available from government sources (e.g. DfT and VOA).	Medium	High	Increasing and enhancing the availability of data from government sources is financially feasible but may be constrained by confidentiality concerns. Effective data would be crucial for overcoming barriers to expanding waterborne freight, especially by identifying and quantifying suitable freight flows.	
Develop a new freight model which fills the data gaps identified in this report.	Medium	Medium	New national freight models have been developed and could be adapted for the TfSE area. This presents a financially viable opportunity, given the existing models and the significant benefits they offer. These models could help identify specific HGV flows for transfer to waterborne freight, allowing for a more accurate identification of opportunities.	

7.4.2 Site-Specific Opportunities

During development of this study, it has become evident that certain sites/ports are more viable for waterborne freight expansion than others. To provide an insight on which sites should be considered for future prioritisation we have assessed the viability and impact of the sites/ports using the same framework for the broader opportunities. These findings will inform the study's recommendations.

Table 7-3: Site Specific Opportunity Assessment

Opportunity	Viability	Scale of Impact	Rationale	RAG
Collaborate with Kent-based terminals to increase freight transferred along the River Thames.	High	Low	Collaboration is financially viable, as existing resources can be utilised, making cost a minimal barrier. Stakeholders have also highlighted this as a promising opportunity. The impacts will be more localised to the Kent area, with modest reductions in HGV use within that region, such as on the routes like the M2. However, it is unlikely to significantly reduce freight congestion or emissions across the broader TfSE region.	
Increase the use of small ports (e.g. Rye Port and Folkstone).	Low	Low	Small ports could help expand the waterborne network, although there may be limitations in the types of freight that these ports can accommodate, as they may not handle the volume of freight needed for large-scale impacts. Financial viability depends on identifying niche markets or freight types that make these ports cost-effective.	
Southampton and Solent Area.	High	Medium	Identified as suitable for expansion with regards to SSS, with new technologies already being tested. The area's existing industrial capacity offers potential, however, the focus on finished goods rather than Bulk & Aggregate Goods may reduce the demand. Financial viability is promising given the region's industrial strengths, but success	

Opportunity	Viability	Scale of Impact	Rationale	RAG
			depends on sustained demand for waterborne freight.	
Increase combined passenger and freight transport in the Isle of Wight and Solent.	High	Medium	Could utilise existing vessels and operational frameworks and services e.g. Red Funnel , minimising the need for new infrastructure. Financial viability is supported by shared operational costs and the strong demand for passenger transport in this area, but sustained demand for combined services is essential. Although the impact will be localised, the initiative could serve as a model for similar projects in the area.	
Increase the amount of freight transferred to the port by rail at Southampton.	High	Medium	Southampton Port has a rail connection and aims to expand its rail freight share, with many other freight producers across the country also connected to rail. This creates potential to transfer some freight from rail to waterborne for part of the journey. However, it's unclear how many journeys are better suited for rail-water transport versus rail alone. The financial viability of this opportunity depends on whether such transfers provide cost advantages over rail-alone solutions.	
Expand waterborne freight in TfSE locations to feed into London Gateway & Port Tilbury	High	High	Multiple opportunities for increasing the size and capacity of ports in the TfSE area have already been discussed. London Gateway and Port of Tilbury expansion will likely increase additional	

Opportunity	Viability	Scale of Impact	Rationale	RAG
– which are experiencing an increase in freight traffic.			demand for waterborne freight at feeder ports. This opportunity is likely to be financially viable, as these locations can benefit from existing demand drivers and economies of scale.	
Develop off-site facilities to support increased waterborne freight at Portsmouth International Port.	Low	Low	Highlighted as viable by stakeholders, although it is unknown whether these facilities would be suitable for waterborne freight. Financial viability is contingent on proving demand and operational feasibility, which are currently unclear.	
Develop parcel services from Gravesend into London.	High	Medium	This concept was proposed by stakeholders as passenger services are already in operation, highlighting this opportunity is financial viability. Waterborne freight might offer quicker transit times into London, where congestion is an issue, but waterborne transport is generally not ideal for parcels due to slower transit times. The proportion of HGVs involved in parcel movements is small, so the impact of the intervention of HGV numbers would be moderate at best.	

7.5 Conclusion & Key Chapter Findings

This Chapter has analysed the challenges and opportunities identified throughout this study to identify actions which would enable an increase in the amount of freight shifted from HGVs to waterborne freight. Findings from this assessment offer valuable insights into the viability and potential impact of each identified opportunity. This analysis will serve as a basis for prioritising locations and providing recommendations on the key steps needed to increase the use of waterborne freight. The recommendations and priority locations are outlined in Chapter 8.

8 Chapter Eight – Key Findings, Conclusions & Next Steps

8.1 Overview

This Chapter outlines this study's key findings, conclusions and next steps and outlines a series of recommendations that could support waterborne freight expansion in the TfSE area.

8.2 Key Findings

The study findings are extensive. We have therefore summarised the key findings into the themes outlined below.

8.2.1 Market Factors & Commercial Viability

- **High Freight Volumes:** A significant volume of freight is loaded and unloaded from HGVs within the TfSE area, including commodity types well-suited for waterborne transport, such as aggregates, metals, and petroleum products. These goods are ideal for bulk shipping due to their non-time-sensitive nature and cost efficiency.
- **Road Freight Dominance:** Despite high freight volumes, road freight remains dominant due to its flexibility, established network, and the speed demanded by consumers.
- **Cost Competitiveness:** While stakeholders are supportive of expanding waterborne freight, cost competitiveness remains the primary challenge. For waterborne freight to grow, it must become more commercially viable than road and rail options.
- **Hybrid Models:** Hybrid models, such as combining passenger and freight services or integrating waterborne with rail, could improve viability by sharing costs. However, the limited rail connectivity in the TfSE area would need to be enhanced to support this integration.

8.2.2 Operational & Infrastructure

- **Logistical Challenges:** Expanding waterborne freight in the TfSE area faces logistical challenges and high infrastructure costs, particularly for upgrading port facilities to handle increased cargo and warehousing needs.
- **Fragmented IWW Network:** The fragmented IWW network limits continuous freight movement and would require significant investment to enable viable alternatives to road transport, resulting in SSS having more potential.
- **SSS Potential:** While the geography of southern ports suggests potential for SSS, most ports specialise in specific cargo types, limiting growth to specific goods categories.

8.2.3 Policy & Collaboration

- **Lack of Incentives:** The absence of government incentives and long-term regulatory frameworks impedes the challenge of making waterborne freight competitive with other modes, such as established road and rail networks.
- **Supportive Policies:** Supportive policies could counteract some of the challenges by offering stability. For instance, growth targets could support the prioritisation of waterborne freight, planning policies could protect waterborne infrastructure from competing land use, and financial incentives could enable pilot projects, thereby building momentum for the adoption of waterborne freight. National government is responsible for setting this strategic direction, developing the necessary policies and regulations, and offering financial support and incentives.
- **Knowledge Sharing:** Increasing knowledge and expertise of waterborne freight will be imperative, particularly within the public sector so that the benefits and opportunities of waterborne freight are understood and inform decision making, including the pursuit of cross-sector partnerships.
- **Regional Level:** TfSE plays a crucial role in offering strategic direction, ensuring that waterborne freight initiatives align with regional transport and economic goals.

8.2.4 Social & Environment

- **Environmental & Social Impacts:** The heavy reliance on road freight in the TfSE area contributes to congestion, air pollution, and carbon emissions, affecting urban and coastal communities. Shifting a portion of freight to waterborne modes could help mitigate these environmental and social impacts.
- **Localised Congestion:** Increased port activity could add localised congestion near port areas.
- **Job Creation:** Expanding waterborne freight could also create additional and new job opportunities.

8.2.5 Data for Decision Making

- **Data Gaps:** Data gaps, particularly in goods type and origin-destination details, limit the ability to assess the feasibility of shifting HGV freight to waterborne modes. Detailed data on current freight movements, such as the types of goods being transported, their exact routes, and specific origin-destination point, would help provide a more detailed evidence base to inform feasibility.
- **Confidentiality Concerns:** Developing robust freight modelling systems could address these gaps, although data limitations would remain. For instance, confidentiality concerns mean that the freight and logistics sector are not open to data sharing, which will continue to impede public sector planning and decision-making.

8.3 Priority Locations for Expanding Waterborne Freight

This study has identified a number of priority locations for waterborne expansion (see Table 7-3).

8.3.1 Isle of Wight & Solent

- **Existing Infrastructure:** This region could utilise existing vessels and operational frameworks to build on this successful model, minimising the need for extensive new infrastructure.
- **Impact:** While the impact may be localised, this initiative could serve as a scalable model for similar projects.

8.3.2 Southampton

- **Rail Connectivity:** With established rail connectivity, Southampton Port is positioned to expand its rail freight share. There may also be opportunities to use waterborne freight as part of these additional rail journeys where potential destinations are accessible via both rail and port connections, however more research is needed.
- **Impact:** It is currently unclear how many journeys are better suited for rail-water transport versus rail alone.

8.3.3 Port of London Authority

- **Gateway for Expansion:** Whilst outside of the TfSE area, London Gateway and Port of Tilbury are actively expanding, creating opportunities to increase the demand for waterborne freight at smaller feeder ports. This could include ports such as Chantham Docks and the Port of Sheerness, however these options will need investigating further and validated with stakeholders.
- **Impact:** Expansion here could attract a greater volume of bulk and containerised goods for redistribution within the TfSE area. Investment in supporting infrastructure and intermodal links at these ports will be essential.

8.4 Study Conclusion

This study has demonstrated that there is some potential for shifting some road freight to waterborne modes within the TfSE area. However, there are a number of key challenges including:

- **Data:** Improved availability and use of data will enable better identification and optimisation of suitable goods and routes for waterborne freight.
- **Cost Competitiveness:** Waterborne freight must become more cost-competitive compared to road and rail transport.
- **Infrastructure Development:** Ports and intermodal connections require significant investment to accommodate increased freight volumes.
- **Policy & Incentives:** Financial incentives, long-term regulatory frameworks and targeted investments that foster collaboration between public and private stakeholders are needed. to promote a fundamental shift away from

road freight. Without these, waterborne options frequently lack the commercial appeal necessary for broad private sector adoption.

Despite these challenges there are opportunities and potential benefits:

- **Bulk Goods & Port Access** Shifting specific types of goods, such as bulk commodities, and in regions with well-established port access such as Southampton, the Solent and the Port of London Authority.
- **Environmental & Economic Benefits:** Transitioning freight from road to waterborne modes can reduce congestion and air pollution as well as support job creation, particularly in port-related activities and associated supply chains.

8.5 Recommendations

To build on the study findings, several recommendations have been identified that can help support the future increase in the use of waterborne freight as outlined below.

Table 8-1: Recommendations

Stakeholder	Recommendation
TfSE	<ul style="list-style-type: none"> • TfSE to liaise with the DfT about possibility of widening data collection in relation to waterborne freight to obtain more detailed information on freight volumes and inter-coastal UK routes which can offer a greater granularity to guide the further investigation of using waterborne freight as a viable alternative to both road and rail. • Encourage knowledge sharing between freight and logistics, waterborne freight operators and local authorities through the Freight Awareness Programme, possibly using memoranda of understanding to protect commercial sensitivity. • Where appropriate, support coordination across local authorities, businesses, and stakeholders to maximise the identification of opportunities and to create a cohesive approach. • Where applicable, support engagement and further discussions with key stakeholders to continue to explore waterborne freight expansion at identified priority expansion sites.
Local Planning Authorities	<p>Where appropriate we suggest local planning authorities explore:</p> <ul style="list-style-type: none"> • How and where waterborne freight can be integrated into local planning and land-use policies. This could include, where relevant, safeguarding existing waterborne infrastructure and providing opportunities in

Stakeholder	Recommendation
	<p>local plans to increase the provision of waterborne infrastructure.</p> <ul style="list-style-type: none"> • Opportunities to improve knowledge on the benefits and issues related to waterborne freight, such as through engagement with TfSE's Freight Awareness Programme.
Local Transport Authorities	<p>Where appropriate we suggest local transport authorities explore:</p> <ul style="list-style-type: none"> • Improved access for freight at local ports and/or other waterborne freight infrastructure, such as wharves, when updating local transport plans • Opportunities to improve knowledge on the benefits and issues related to waterborne freight, such as through engagement with the Freight Awareness Programme.
Ports & Harbour Authorities	<p>Where relevant we suggest port and harbour authorities:</p> <ul style="list-style-type: none"> • Continue to maintain and upgrade port facilities to support waterborne freight operations as funding allows. • Work with other transport bodies and freight operators to improve multi-user access for freight operators to improve cost-effectiveness and usage. • Continue to coordinate with local authorities on environmental regulations, such as air quality management, and operational regulations, such as health and safety.
Industry Representatives e.g. RHA & Logistics UK	<ul style="list-style-type: none"> • Continue to advocate for policy support and funding for waterborne freight within the sector. • Where possible, provide industry guidance on best practices for integrating waterborne freight with other transport modes. • Support data-sharing initiatives to improve efficiency and optimise logistics such as sharing data on freight, flows and routes, to support infrastructure business cases, planning and policymaking.
Freight Operators & Logistic Providers	<ul style="list-style-type: none"> • Consider exploring opportunities to develop and adapt logistics operations to integrate waterborne freight into supply chains where feasible. • Through representative organisations collaborate with other operators for shared transport solutions and efficiencies where relevant. • Where applicable, support data-sharing initiatives. • Where possible, actively engage with stakeholders to align efforts, support shared goals, and address sector

Stakeholder	Recommendation
	challenges collaboratively, such as through the Wider South East Freight Forum.
Warehousing Providers	<ul style="list-style-type: none"> Where relevant, and as funding allows, develop and/or expand warehousing infrastructure in proximity to key waterborne transport hubs.

As a result of these challenges, the study has not been able to demonstrate that increasing the volume of waterborne freight in the TfSE area is currently financially viable. The report makes a number of recommendations about what would be needed to improve financial viability. However, even if it was found to be viable, it is unlikely to have significant impact on carbon emissions, road traffic congestion and economic growth and would deliver negligible returns for the scale of investment anticipated. Any further work would be reliant on obtaining better data on which to assess its potential in greater detail, and in the current economic climate, the significant financial investment needed for infrastructure improvements at the ports and inland waterways is unlikely to be forthcoming. Therefore, there is little prospect of the stakeholders taking the actions necessary to support an increase in the viability of waterborne freight in the TfSE area in the near future

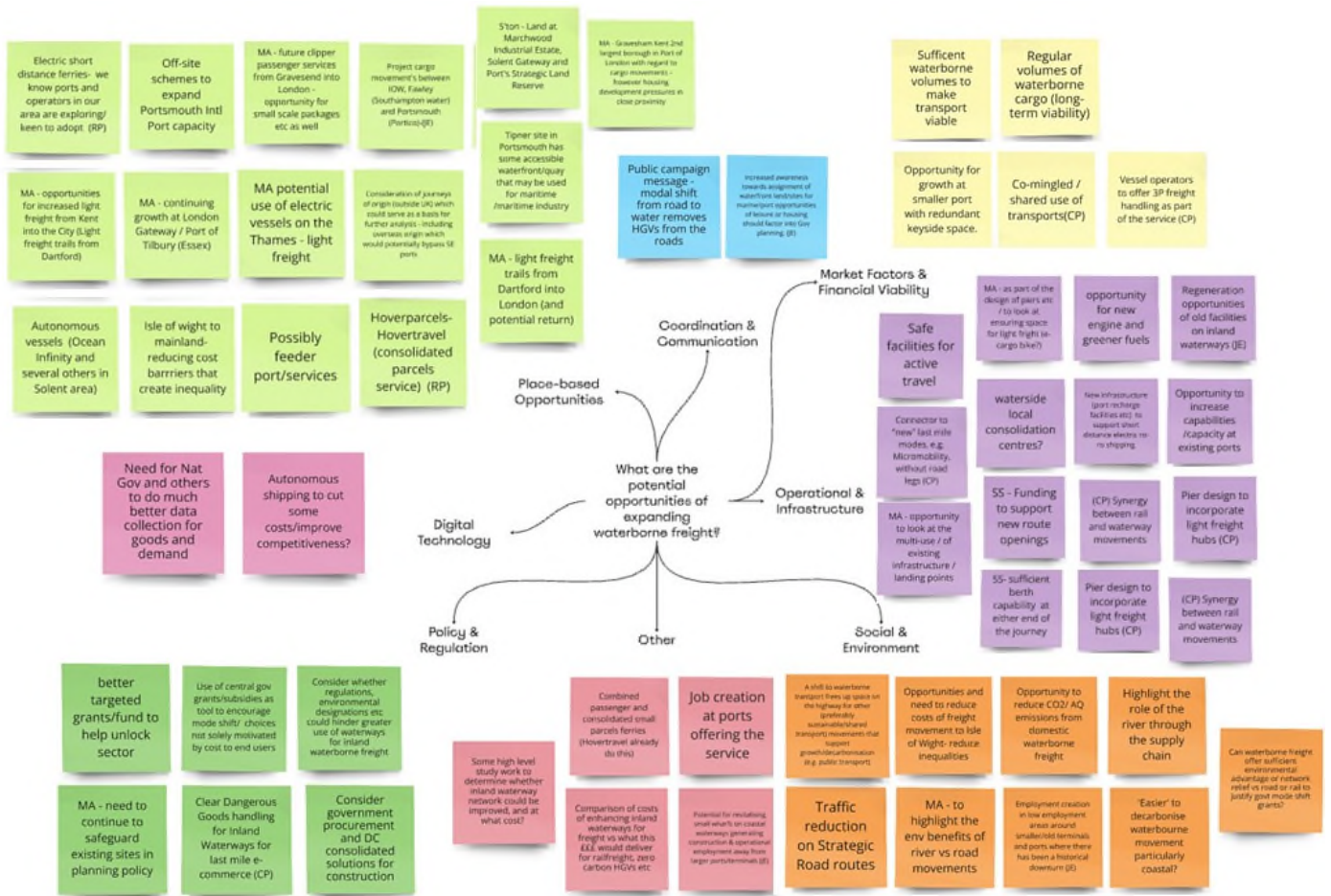
9 Appendix

9.1 Appendix A - Stakeholder Insights

Figure 9-1: Potential Challenges for Waterborne Freight (Miro Insights)



Figure 9-2: Potential Opportunities for Waterborne Freight (Miro Insights)



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Report to: Partnership Board –Transport for the South East

Date of meeting: 17 March 2025

By: Chief Officer, Transport for the South East

Title of report: Wider South East Rail Partnership Position Paper

Purpose of report: To comment on the contents of the STBs' Wider South East Rail Partnership draft Position Paper and agree the objectives and delivery activities as set out in the draft Position Paper.

RECOMMENDATION:

The members of the Partnership Board are recommended to comment on the contents of the STBs' Wider South East Rail Partnership draft Position Paper and agree the objectives and delivery activities as set out in the draft Position Paper.

1. Background

1.1 The Wider South East Rail Partnership (WSERP) has been established in recognition of the need to provide a unified, pan-regional voice for the rail needs of the wider south east (WSE). The Partnership aims to bridge the gap between local, regional, and national priorities, ensuring that the unique characteristics of the WSE are recognised in decision-making as rail reform is progressed.

1.2 The Partnership comprises Transport for the South East, England's Economic Heartland and Transport East alongside the Great British Railways Transition Team (GBRTT), Transport for London (TfL), Network Rail (NR) and the Department for Transport (DfT). As reported to the Board previously, there have been four meetings of the Partnership to date, with the last meeting taking place in January 2025.

2. The Draft Position Paper

2.1 The role of the position paper is to set out the Sub-national Transport Bodies' (STBs) perspective on: the strategic context for rail in the wider south east; the specific challenges and opportunities for the railway in the region; the role and objectives of WSERP; and the activities that will ensure that the Partnership delivers the vision as set out in the paper.

2.2 The draft Position Paper is contained in Appendix 1. The Position Paper aims to ensure that the WSERP:

- continues to be a useful forum for the STBs;
- helps to deliver each STBs' vision as set out their respective transport strategies;
- will ensure the needs of the rail passengers across the wider south east are met; and
- will take account of the future role of the new strategic authorities as these emerge across the wider south east.

2.3 The draft Position Paper recognises that currently STBs are best placed to represent all our constituent local authorities and businesses. It has been written to guide our engagement in the Partnership, setting out the need for closer integration between the STBs, GBR, NR, TfL, DfT and other strategic authorities as they develop.

2.4 The draft Position Paper covers the following themes:

- The importance of the Wider South East and London to the wider economy and important role rail plays in supporting the economy of the Wider South East.
- The role of the Partnership for the STBs in providing a unified, pan-regional voice for the rail needs of the region, ensuring that the unique characteristics of the region are recognised in decision-making and rail reform.
- The role of the Partnership in providing a 'ready-made' framework that can continue to enable a co-ordinated approach to rail planning across the region's Mayoral Strategic Authorities (MSA) as they are formed.

2.5 The draft Position paper sets out the draft objectives for the Partnership:

- Articulate investment priorities and secure funding for the area and our respective strategies and strategic investment programmes.
- Enhance integration across modes and political boundaries.
- Help passenger demand recover and strengthen the industry's finances.
- Promote rail freight growth and modal shift.
- Advance Net Zero and wider environmental goals
- Unlock the economic potential of the Wider South East.

2.6 Members of the Partnership Board are recommended to agree these objectives.

The actions that the Partnership will take to achieve these objectives are set out in the draft Positions paper. These are as follows:

- Data and insights – collaboration between the partners to align the evidence bases of the STBs, TfL, NR and GBR and identify strategic priorities and interventions, ensuring investments are targeted where they will deliver the greatest impact.
- Policy alignment and impact - ensure the STB strategies complement local, regional and national initiatives, including the Government's Missions, and Secretary of State's Priorities, as well as longer term pipelines and planning frameworks such as the Rail Network Enhancements Pipeline (RNEP) and the High-Level Output Specification (HLOS).
- Integrated National Transport Strategy - ensure the wider south east rail network supports the implementation of the government's evolving Strategy.
- Collaborative Working – work with DfT, Network Rail, GBR, TfL, operator representatives and existing and emerging strategic authorities to address national and cross-boundary rail travel opportunities. As the rail industry reforms and the role of GBR is strengthened, we look forward to working with evolving industry and devolved structures to secure the best outcomes for the wider south east's residents and businesses, recognising that the south east STBs current represent 34 local authority transport authorities.
- Government and Industry Engagement and Advocacy - we will regularly collaborate with all industry partners to promote our priorities and local insights and work with these partners to shape the future of the railways. Through this

partnership, the STBs will discharge their role set out in the LGCDA2016 to provide formal advice to the Secretary of State on wider south east rail priorities in a co-ordinated way.

- We will also provide regular updates to stakeholders including DfT, the rail industry and existing and emerging devolved authorities, including quarterly reviews during active planning phases, and we will work to ensure our partnership remains transparent and accountable.

Members of the Partnership Board are recommended to agree these actions.

3. Potential impact of devolution on the Partnership

3.1 There is still uncertainty about the impact of the proposals for devolution and local government reorganisation in the TfSE area. There is also uncertainty about the impact of the re-nationalisation of the train operating companies in our area, the role of the Operator of Last Resort and the formation of GBR. At the meeting of the Partnership in January 2025, a discussion took place about the implications of the English Devolution White Paper and the future alignment of the different geographical boundaries of the rail sector, the STBs and the strategic authorities. It was agreed that an effective alignment should be sought and that this issue should be fed into the partners' responses to the expected consultation about the future shape and organisation of GBR.

4. Conclusions and recommendations

4.1 The WSERP provides an important mechanism to bridge the gap between local, regional, and national priorities, ensuring that the unique characteristics of the WSE are recognised in decision-making and rail reform.

4.2 Members of the Partnership Board are recommended to comment on the contents of the STBs' Wider South East Rail Partnership draft Position Paper and agree the objectives and delivery activities as set out in the draft Position Paper.

RUPERT CLUBB
Chief Officer
Transport for the South East

Contact Officer: Kate Over
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Making the Case for the Wider South East's Railway

A Position Paper for the Wider South East Rail Partnership

Final Draft Version | February 2025

Headlines

- **The opportunity** - The wider south east (WSE) plays a key role in driving the government's growth mission. With the right investment in infrastructure, including rail, the area is well-placed to attract employers, drive inward investment and deliver productivity increases.
- **The enabler** - An integrated WSE rail network will drive higher economic growth by connecting leading clusters of priority growth sectors with a growing skilled workforce and globally significant institutions. The Wider South East Rail Partnership (WSERP) provides a framework for bringing together strategic partners at the right scale to co-ordinate investment and policy priorities across this significant part of England's rail network.
- **The action** – Working with all partners, the WSERP provides a coherent single voice to government on investment, policy and systems approaches required to enable the wider south east rail network, including London to work as an integrated network. It enables Sub-national Transport Bodies (STBs), existing and future strategic authorities, Transport for London, the Department for Transport, and the rail industry to plan an integrated rail network in the south east.
- **What next** This partnership presents a 'ready-made' framework to lead the strategic debate and coordinate planning for rail across the South East of England, including as new strategic authorities come forward.

Introduction

The Wider South East (WSE) is the powerhouse of the United Kingdom's economy, contributing significantly to the national gross value added (GVA) and supporting vital industries that drive innovation and growth. As home to the nation's busiest rail corridors, key international gateways, and globally significant sectors like finance, biosciences, and advanced manufacturing, the WSE's rail network is indispensable—not only for the region but for the entire country. Every day, millions of people and goods rely on these critical connections, yet the network faces increasing challenges from underinvestment, recovering demand, and the urgent need to decarbonise.

The WSE Rail Partnership brings together three Sub-National Transport Bodies (STBs) – England’s Economic Heartland, Transport East, and Transport for the South East in collaboration with Department for Transport, GBRTT, Network Rail, and Transport for London. Formed in line with the principles of the Williams-Shapps Review, our collective mission is to champion a transformative vision for the region’s rail network. We aim to ensure the network meets the needs of passengers, freight, and businesses while supporting government priorities for economic growth, net zero, and equitable prosperity.

This paper sets out the strategic importance of rail in the WSE, identifies key challenges and opportunities, and defines how the WSE Rail Partnership can deliver tangible improvements that benefit not just the region but the entire UK. Together, we can unlock the full potential of the WSE’s rail network and secure its future as the backbone of a resilient, inclusive, and sustainable transport system for both the WSE and the UK as a whole.

The Role of Rail in the WSE

The Wider South East (WSE) makes a significant contribution to the UK economy. In 2022, the WSE area contributed **25%** of the UK’s gross value added (GVA). When the WSE is considered alongside London – which captures GVA added by commuters who live outside the capital – this figure rises to nearly half of the country’s total economic output.

The railway is a vital enabler of this region’s economic success. It connects globally significant industries, including finance, biosciences, advanced manufacturing, and creative sectors such as film and media, as well as airports and ports. These industries depend on reliable and efficient rail links between their hubs to foster collaboration, innovation, and growth.

As home to the UK’s largest labour market, **the WSE’s relationship with London is critically important.** Rail facilitates the daily commute of millions, expands labour market catchments, and provides vital links between London and the UK’s busiest ports and airports. This connectivity underpins the UK’s international trade and mobility, cementing the WSE’s role as a gateway for the national economy.

Rail also offers a sustainable alternative to car and road freight travel, easing congestion on key roads such as the M25 and A14 while reducing harmful emissions. Rail freight, in particular, plays a pivotal role in removing heavy goods vehicles (HGVs) from motorways, improving air quality and reducing carbon footprints across the region.

The WSE region heavily relies on and makes a significant contribution to the financial sustainability of the nation’s rail network. The Train Operating Companies that serve the WSE¹ and London account for approximately **50%** of the nation’s farebox revenue, and the yield per resident in the WSE and London area is **53%** higher than the rest of the UK. The WSE’s residents demonstrate a significantly higher reliance on rail, making **77%** more journeys by train than the UK average outside London, underscoring the region’s exceptional propensity for rail travel compared to most other areas.

¹ Chiltern; East Anglia; Elizabeth Line; Essex Thameside; London Overground; South Eastern; South Western; and Thameslink, Southern and Great Northern.

Strategic Challenges and Opportunities

The WSE's railway faces significant challenges in a post-pandemic environment, including:

- **Significant fiscal constraints** due to the lasting impacts of the COVID-19 pandemic and structural changes in passenger demand. Hybrid working patterns have reduced peak travel demand, particularly among commuters, affecting revenue streams. It is unknown how far the observed recovery in peak time travel will continue. Rising operational costs, inflationary pressures, and affordability challenges further strain resources. These pressures highlight the need for targeted investments that deliver high value for money and adapt to evolving passenger and freight needs.
- **Connectivity gaps beyond London are poor.** While corridors between the WSE and London are generally well-served, non-London routes, such as East-West links between Bristol/Swindon, Oxford, Cambridge, Ipswich, Norwich and Stansted, or Brighton and Southampton, remain uncompetitive with car travel. These gaps hinder regional economic integration and exacerbate congestion on major road networks.
- **Outside the Transport for London (TfL) area, the transport system is poorly integrated** across different transport modes, as well as across different political and institutional boundaries. This results in fragmented journeys, inconsistent ticketing, and poor alignment of services. A coordinated approach is essential to create a seamless and user-friendly transport network across the WSE.
- **Concurrent devolution, local government reform and rail reform** raise the possibility of multiple changes to accountabilities and risks in disjointed decision-making during the intervening period. This Partnership provides a consistent framework for government, the rail industry, strategic authorities and STBs to keep the focus on strategic rail priorities and issues will be needed.

However, we also see significant opportunities for the railway in the WSE, including:

- **Leisure travel:** Post-pandemic shifts have boosted demand for leisure travel, presenting opportunities for rail to capture a larger share of this growing market, particularly where network capacity is available and outside of peak times. By offering competitively priced, tailored services, the WSE rail network can support tourism while driving regional economic growth.
- **Freight and logistics:** The demand for sustainable logistics provides a significant opportunity to promote rail freight, particularly from ports such as Felixstowe, Southampton and London Gateway to the Midlands and North. Investment in freight corridors will reduce road congestion and emissions, supporting the UK's decarbonisation goals and targets for rail freight growth.
- **Sustainable growth:** Rail can help unlock opportunities for sustainable economic growth by facilitating the development of residential and employment sites while providing new residents and employees sustainable travel options.

- **The wider landscape of reform**, whilst in some respects a challenge, creates an opportunity for a better-aligned set of accountabilities for strategic rail decisions in the future.

Role and Objectives of the Partnership

The WSE Rail Partnership aims to provide a unified, pan-regional voice for the rail needs of the WSE. Through the STB Boards and their constituent Local Transport Authorities (LTAs), STBs represent the interests of passengers and wider economic stakeholders in our area. The WSE Rail Partnership aims to bridge the gap between local, regional, and national priorities, ensuring that the unique characteristics of the WSE are recognised in decision-making and rail reform. We recognise that while LTAs are best placed to address localised needs, a regional body is needed to deliver the strategic oversight required for region wide improvements. As Mayoral Strategic Authorities are formed across the wider south east, the WSERP provides a 'ready-made' framework to co-ordinate their strategy and plan for rail across the WSE. Through membership of the STBs, the partnership also provides current and newly created authorities with a framework to shape strategic rail through a transitional period.

This partnership therefore aims to complement LTAs, TfL, Network Rail, Great British Railways (GBR), and the Department for Transport by offering a strategic and regional perspective that aligns investments with broader economic and environmental goals such as set out in the industrial strategy.

In the short to medium term, the partnership's objectives are to:

- **Articulate investment priorities and secure funding for the area:** Over the last seven years each STB has worked to develop a comprehensive evidence base, strategies, and plans that set out how investing in rail scheme schemes in the area can contribute to government priorities including housing, net zero, and the industrial strategy. We recognise that this complements work undertaken by TfL, and we want the wider rail industry to have due regard to this and work with us to deliver our ambitions. While we recognise resources are highly constrained, encouraging announcements regarding fiscal rule changes from the 2024 Autumn Budget may present an opportunity to progress many priorities over the next parliament.
- **Enhance integration across modes and political boundaries:** We want to develop seamless connections between rail, bus, and active travel options, creating a genuinely integrated transport network. This can also include integrated planning with road networks given the multi-modal accountabilities of STBs.
- **Help passenger demand recover and strengthen the industry's finances:** We want to help the industry recover demand and revenue by delivering a more reliable, accessible, and integrated rail network that supports passengers' diverse needs, from commuting to leisure travel. We also see a role for sustainable development as a way of generating new demand for rail.
- **Promote rail freight growth and modal shift:** We are keen to relieve pressure on our congested roads and help government deliver its ambitions to increase rail freight to reduce HGV traffic and support cleaner, more efficient logistics.

- **Advance Net Zero and wider environmental goals:** We support rail decarbonisation and interventions that promote modal shift to rail and will work with partners to ensure the rail network plays a leading role in decarbonising transport across the WSE.
- **Unlock the economic potential of the Wider South East:** We believe rail can drive economic growth, enabling new housing developments, expanding labour markets, and supporting high-growth industries.

Delivery

We will deliver the WSE Rail Partnership's Objectives – as well as wider Government Goals – through the following activities:

- **Data and insights:** We will collaborate to align evidence bases from STBs, TfL, and Network Rail to identify and plan for strategic priorities and interventions. This will ensure investments are targeted where they will deliver the greatest impact.
- **Policy alignment and impact:** We will ensure STB strategies complement local, regional and national initiatives, including the Government's Missions, and Secretary of State's Priorities, as well as longer term pipelines and planning frameworks such as the Rail Network Enhancements Pipeline (RNEP) and the High-Level Output Specification (HLOS). We will aim to influence policy and investment decisions through robust evidence and strategic alignment, rather than lobbying. This approach will ensure the WSE acts with credibility and maximises its impact on national priorities.
- **Integrated National Transport Strategy:** Supporting the development and delivery of the future Integrated National Transport Strategy - the long term, people centred strategy for integrating transport. The organisations in the Wider South East Rail Partnership take a holistic multi modal approach to planning connectivity, meaning that connectivity on rail should be complemented by connectivity to the rail network by all modes, including public transport and active travel, to provide seamless door to door travel. Advice and data supplied by the partnership will support this approach.
- **Collaborative working:** We recognise that the WSE plays a key role in the national economy and shares strong economic and transport links with London. We will therefore work with DfT, Network Rail, GBR, TfL, operator representatives and existing and emerging strategic authorities to address national and cross-boundary travel opportunities. As the rail industry reforms and the role of GBR is strengthened, we look forward to working with evolving industry and devolved structures to secure the best outcomes for the WSE's residents and businesses, recognising that the South East STBs currently represent 34 local transport authority partners.
- **Government and industry engagement and advocacy:** We will regularly collaborate with all industry partners to promote our priorities and local insights and work with these partners to shape the future of the railways. Through this partnership, the STBs will discharge their role set out in the LGCDA2016 to provide formal advice to the Secretary of State on WSE rail priorities in a co-ordinated way.

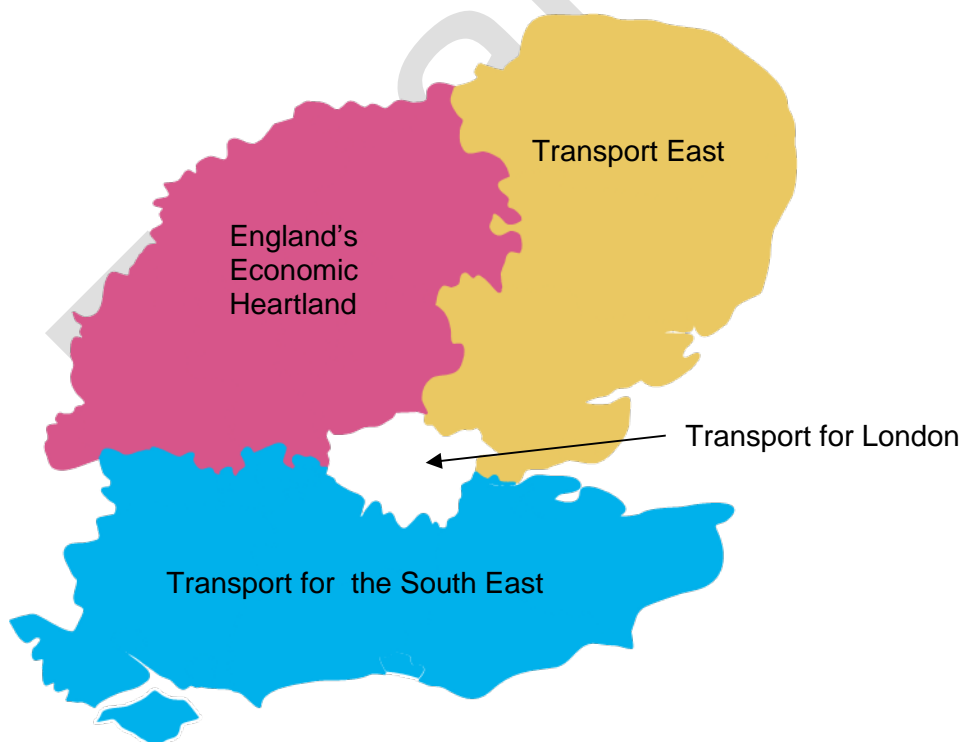
- **Transparent communication:** We will provide regular updates to stakeholders including DfT, the rail industry and existing and emerging devolved authorities, including quarterly reviews during active planning phases, and we will work to ensure our partnership remains transparent and accountable.

Conclusion

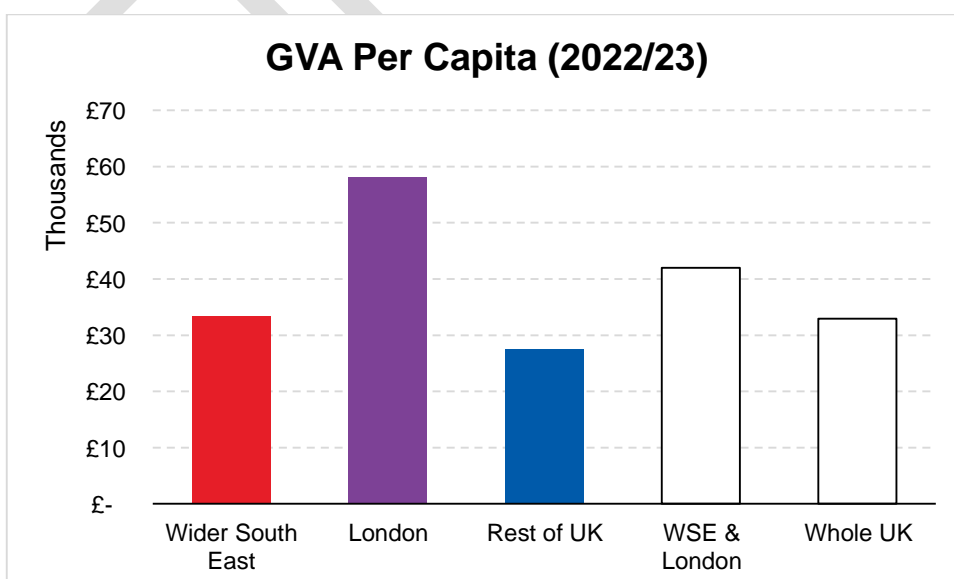
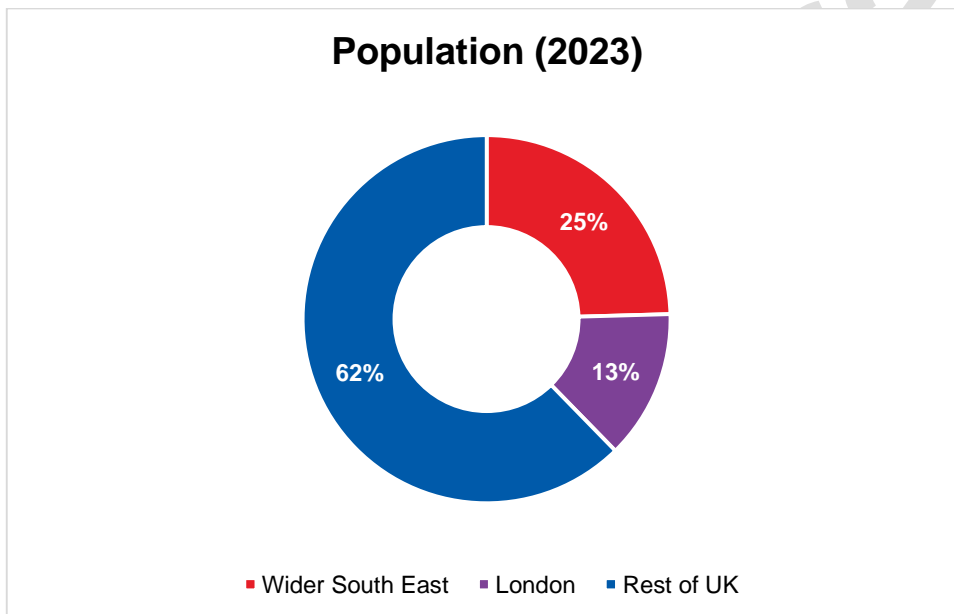
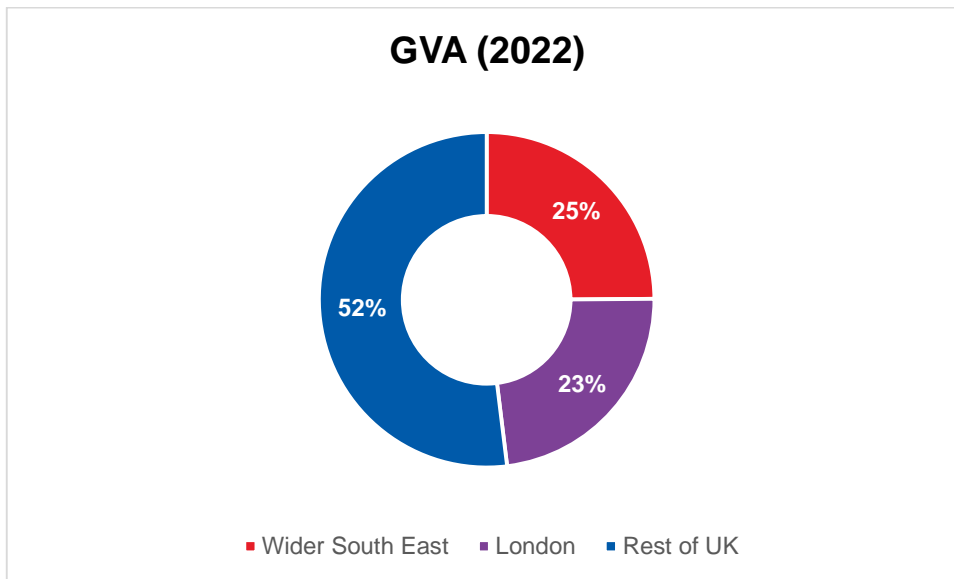
The WSE is fundamental to the UK's economic prosperity, environmental sustainability, and transport connectivity. As a region that generates nearly half of the country's economic output when combined with London, and as a region that demonstrates exceptional reliance on rail, it is clear that the WSE's transport network is crucial to securing long-term prosperity for the wider UK. By addressing connectivity gaps, supporting decarbonisation, and enhancing rail's role in freight and passenger travel, the WSE can continue to drive national growth and deliver on key government priorities.

Looking ahead, the WSE Rail Partnership will focus on strengthening dialogue with government, industry, and stakeholders to influence future funding and policy decisions. A priority will be advancing initiatives that integrate rail with other transport modes, ensuring seamless and sustainable journeys for passengers and freight. By fostering innovative collaboration and aligning with national objectives, the partnership will secure the rail network's position as the backbone of a resilient, inclusive, and sustainable transport system for the WSE and beyond.

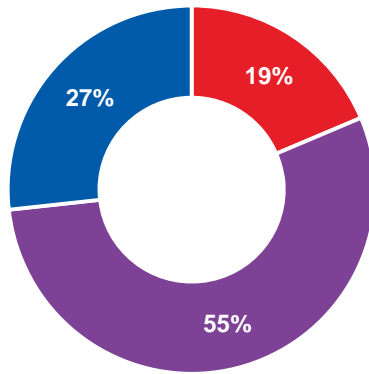
Map of the Wider South East Rail Partnership area:



Appendix – Key Statistics

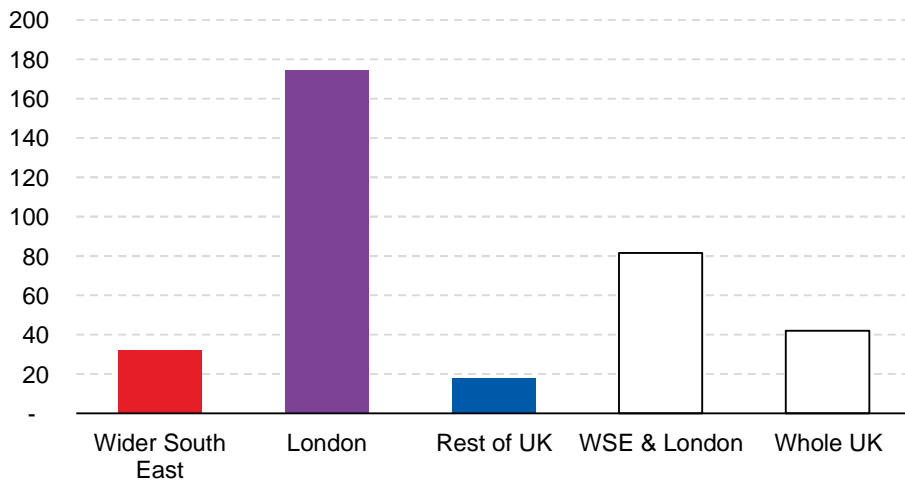


Station Exits and Entries (2023)

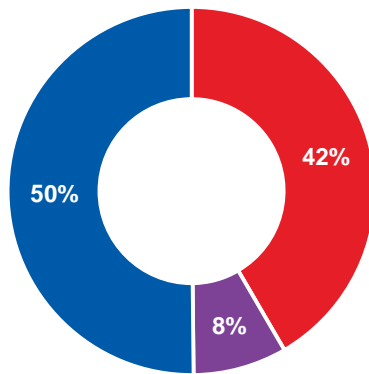


■ Wider South East ■ London ■ Rest of UK

Rail Trips Per Capita (2022/23)



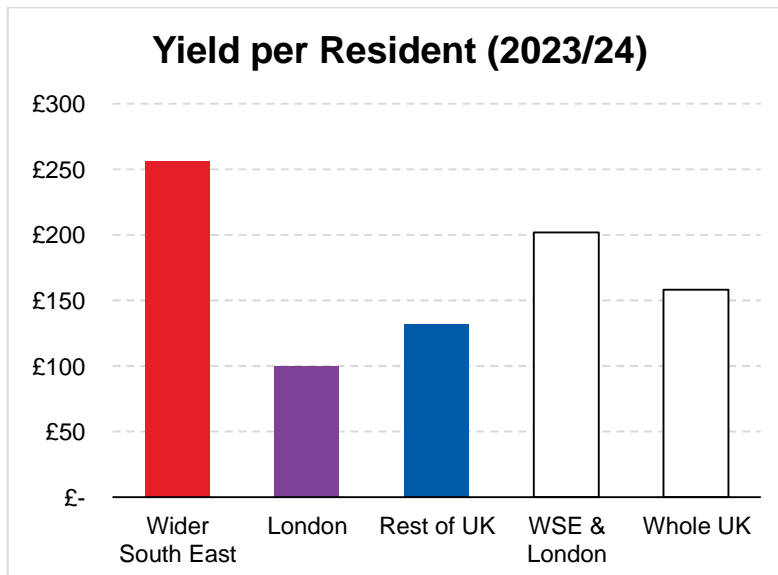
Revenue (2023/24)



■ Wider South East ■ London ■ Rest of UK

Please note the following regarding the revenue split shown above:

- The revenue is only able to be split between operators, most of which operate across the different geographic areas shown
- The chart therefore gives a guide to revenue split, based on where particular operators mostly run trains as follows:
 - London: Elizabeth Line and Overground franchises only
 - South East: Chiltern; East Anglia; Essex Thameside; South Eastern; South Western; Thameslink, Southern and Great Northern.
 - Rest of UK: remainder of operators, including Long Distance operators that service some places within the South East- e.g. GWR, GNER etc'
- The same applies to the yield (revenue) per resident chart below.



Report to: Partnership Board –Transport for the South East

Date of meeting: 17 March 2025

By: Chief Officer, Transport for the South East

Title of report: Scheme Development Support 2025-26

Purpose of report: To agree the schemes that will receive scheme development support funding in 2025-26

RECOMMENDATIONS:

The members of the Partnership Board are recommended to:

- 1) **Comment on the progress and approach to Local Authority Scheme Development work; and**
 - 2) **Agree which schemes are to receive development support in 2025-26 (as set out in Table 1).**
-

1. Introduction

1.1 This report sets out Transport for the South East's (TfSE) proposals for allocating scheme development funding in the financial year 2025-26 to support the delivery of schemes within the Strategic Investment Plan (SIP).

2. Background

2.1 Over the past two financial years, the TfSE budget has included an allocation to support early-stage scheme development work. This workstream supports our local transport authorities (LTA) and other delivery partners to progress scheme development through either a feasibility study or Strategic Outline Business Case (SOBC) stage in circumstances where they are unable to fund or resource the work themselves.

2.2 The TfSE budget for 2025/26 includes a funding allocation for further scheme development work. The level of funding that has been allocated is £150,000. The amount of funding available in 2025/26 is less than in previous years, which means we will be able to support fewer schemes.

3. Approach to identifying schemes

3.1 The criteria for assessing a scheme's eligibility remained unchanged from previous years. These criteria are:

- The scheme is named in the SIP.
- Funding is for a feasibility study or SOBC.
- Maximum funding allocation of £100,000.

3.2 Following feedback from both the Partnership Board and our local transport authorities and reflecting that the amount of funding available is reduced for 2025/26, the approach to identifying which specific schemes should receive the funding has been different to that used previously. However, we have maintained a collaborative, light touch approach, working with constituent authorities through Transport Strategy Working Group (TSWG) and Senior Officer Group (SOG).

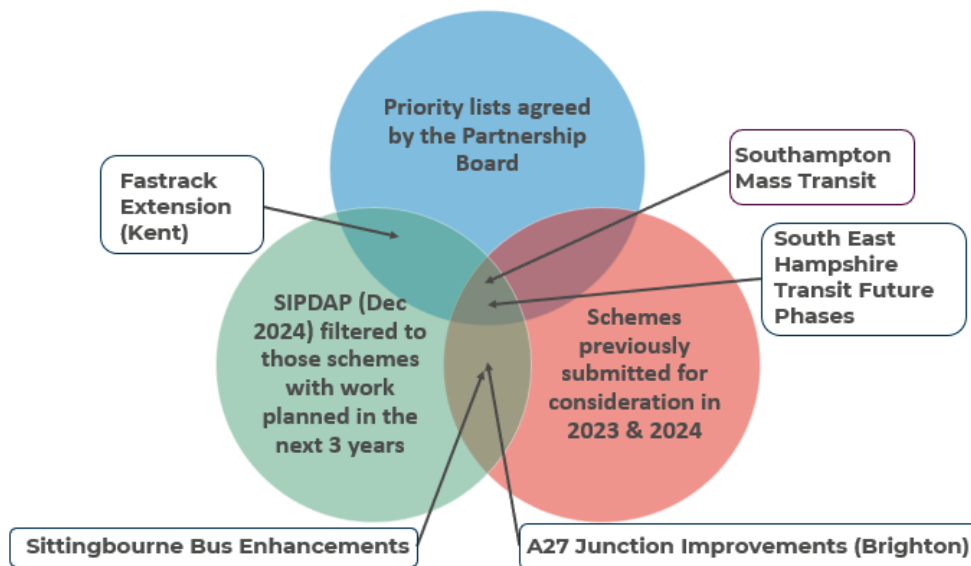
3.3 At their meeting in October 2024, the Partnership Board agreed four lists of short-term priority schemes for the TFSE area that were subsequently submitted to the DfT. Additionally, through the Strategic Investment Plan Delivery Action Plan (SIP DAP) updates, we have gained a good understanding of which schemes are due to progress in the next three years. Discussions at TSWG and SOG indicated support for an approach where the limited funding available should be directed towards those schemes that were included on the priority lists, for which an expression of interest for support funding had previously been submitted, and for which scheme development work had been identified as being required in the next three years.

3.4 Three lists of schemes that met the eligibility criteria were prepared as follows:

- The priority lists agreed by the Partnership Board.
- Schemes previously submitted for consideration in 2023 & 2024 that have not already progressed.
- The updated SIPDAP (Dec 2024) filtered to those schemes with work planned in the next 3 years, that are of high priority (but excluding active travel).

3.5 A shortlist of five schemes was then compiled consisting of those that appeared on more than one of the three lists above. This is illustrated in Figure 1 below. In terms of the highest priorities to receive development support funding, the South East Hampshire Rapid Transit scheme and Southampton Mass Transit scheme both feature in all three lists. The Fastrack Extension (Kent) is considered to be a higher priority than the Sittingbourne Bus Enhancements and A27 Brighton Junction Improvements as it was included in the lists of short term priorities submitted to DfT.

Figure 1 – Venn Diagram of Schemes Prioritised for Development Support 2025-26



4. Allocation of development funding

4.1 The draft TfSE budget for 2025/26 approved by the Partnership Board at their meeting in January 2025, contained a provisional allocation of £150,000 towards scheme development funding. This amount is now confirmed following confirmation of the funding that TfSE will receive from DfT.

4.2 A table showing the shortlisted schemes, along with their anticipated draw on development funding is shown below. With £150,000 available, it is proposed that development funding is allocated to South East Hampshire Rapid Transit and Southampton Mass Transit for 2025/26.

Table 1 – Proposed allocation of funding to schemes.

Scheme name	Development Funding ask	Allocated funding in 2025/26
South East Hampshire Rapid Transit	£50,000	Yes
Southampton Mass Transit	£100,000	Yes
Fastrack Extension (Kent)	£50,000	No
A27 Brighton Junction Improvements	£100,000	No
Sittingbourne Bus Enhancements	£100,000	No

4.4 The actual scheme funding allocations remain provisional until estimates for undertaking the scheme development work are sought and agreed. The programme needs to retain a certain amount of flexibility, should the final ask alter from current assumptions, and the other shortlisted schemes could be reconsidered should either the funding position, or the final scheme ask, change.

4.7 Each LTA in receipt of funding will be required to complete a grant agreement. Where funding is to be provided for work to be completed by the LTA directly, the accompanying grant agreement will require a clause to assure work is procured in alignment with each authorities' own procurement standing orders. Funds will only be

released incrementally following provision of evidence that agreed project milestones have been reached.

4.3 In previous years it has proved difficult to complete the development work within the financial year, due to late confirmation of DfT funding and then subsequent approval of the schemes that are to receive funding support. With the earlier funding settlement received this year, the Partnership Board are asked to approve the two schemes prioritised through the process set out above, in order to initiate legal and grant agreement work early so that the development work can begin at the start of the next financial year.

5. Conclusions and Recommendation

5.1 The TfSE budget for 2025/26 includes an allocation to provide further scheme development support to our LTA's and delivery partners. Work has been carried out with TSWG and SOG to identify a shortlist of potential schemes that align with TfSE priorities and that can be progressed.

5.2 With the early confirmation of DfT funding, Partnership Board Members are recommended to approve the two schemes (as set out in Table 1) to receive development support in 2025-26.

RUPERT CLUBB

Chief Officer

Transport for the South East

Contact Officer: Sarah Valentine

Email: Sarah.Valentine@transportforthesoutheast.org.uk

Report to: Partnership Board –Transport for the South East

Date of meeting: 17 March 2025

By: Chief Officer, Transport for the South East

Title of report: Regional Active Travel Strategy and Action Plan Development

Purpose of report: To agree the Transport for the South East Regional Active Travel Strategy and Action Plan.

RECOMMENDATIONS:

Members of the Partnership Board are recommended to:

- (1) Comment on the changes to the Regional Active Travel Strategy and Action Plan that have been made following the Partnership Board meeting on 28 October 2024; and**
 - (2) Agree the revised version of the Transport for the South East Regional Active Travel Strategy and Action Plan.**
-

1. Introduction

1.1 The purpose of this report is to ask members of the Partnership Board to agree the revised version of the Transport for the South East (TfSE) Regional Active Travel Strategy and Action Plan (RATSAP).

2. Background

2.1 At their meeting in October 2024 Members of the Partnership Board considered a report that asked them to agree the RATSAP. A number of comments were made about the document at that meeting, in particular about the regional active travel network map. In view of this, an additional opportunity to comment on the network map was offered to TfSE's local transport authorities and those districts and boroughs that had been involved with the development of Local Walking and Cycling Infrastructure Plans (LCWIPs). A number of comments were received and as a result, a number of amendments have been made. The purpose of this report is to seek agreement on the revised version of the RATSAP.

3. Amendments to the Regional Active Travel Strategy and Action Plan

3.1 Following the Board Meeting in October 2024, those across the TfSE area who had been involved in the development of Local Walking and Cycling Infrastructure Plans (LCWIPs) were given an opportunity to comment on the regional active travel network. A copy of the technical note that was circulated inviting comments is included in **Appendix 1**. This document set out:

- The role of the RATSAP;
- The role of stakeholder engagement in its development;
- The way in which the strategic network had been developed and its role in complementing and supporting work being undertaken at a local level;
- The mechanism for providing further feedback on the strategic network map.

3.2 Importantly, the technical note set out the relationship between the strategic active travel network and the cycling and walking improvements that have been identified in LCWIPS, including the following:

- The Strategic Active Travel Network is an aspirational and indicative network that will be updated as appropriate. The network does not take precedence over local plans for active travel but rather seeks to join up existing and planning routes across boundaries and highlight opportunities for future work.
- The Strategic Active Travel Network is designed to complement and support, rather than duplicate, the work being undertaken at a local level. The network seeks to support and connect areas where there are planned LCWIP routes, by providing connections between hubs that are not covered by an LCWIP and joining up cross-boundary routes that may not otherwise be promoted by individual LTAs.
- The Strategic Active Travel Network is not a blueprint of specific routes or infrastructure for delivery but is intended to act as a guide for LTAs and delivery partners within the region to reference in their own plans, funding bids, and scheme delivery plans in the way which they feel it is most appropriate.
- The strategic nature of this network means that it can be used to identify where joined up working could take place, as well as cross-boundary collaboration. As a regional body, TfSE will seek to support and encourage coordination between organisations where and when it is appropriate.
- Some of the strategic network is comprised of longer-distance corridors. These corridors seek to address current gaps in the network at a local level, such as joining up schemes and services across LTA boundaries, as well as greater consistency in active travel facilities across the region. Longer sections of the network have the potential to support journeys of different lengths and using different forms of active travel, including first- and last-mile journeys and integration with public transport for multi-modal journeys.

A number of comments were received in response to the circulation of this technical note from the following local authorities:

- Canterbury City Council;
- Maidstone Borough Council;
- Dover District Council;
- Sevenoaks District Council;
- East Sussex County Council;
- Mid Sussex District Council;
- Chichester District Council;
- Southampton City Council;
- West Berkshire Council;

A copy of the comments received and the amendments that have been made to the network map are set out in **Appendix 2**. A revised copy of the map is included in **Appendix 3**.

3.3 In addition to the correspondence was received from Cllr Matt Boughton the Leader at Tonbridge and Malling Borough Council and Partnership Board Member setting out a number of concerns about the RATSAP. These followed on from the issues that he raised at the Partnership Board meeting on 28 October about the strategic active travel network map. A meeting was held between officers from TfSE, Tonbridge and Malling District Council and Kent County Council to discuss these concerns. It was agreed that the text clarifying the status of the strategic network map set out in the technical note circulated after the Partnership Board meeting on 28 October 2024 (set out above), should be included in the main body of the RATSAP report. A copy of the RATSAP report containing this amendment is included in **Appendix 4**.

3.4 Members of the Partnership Board are recommended to agree the revised copy of the RATSAP included in **Appendix 4**, which includes an amended copy of the strategic active travel network maps set out in **Appendix 3**.

4. Financial considerations

4.1 The total cost of the development of the RATSAP was £72,000 which was funded from the grant awarded to TfSE by the Department for Transport in 2023/24 and 2024/25.

5. Conclusions and recommendations

5.1 The draft Regional Active Travel Strategy & Action Plan (RATSAP) was developed in response to the call to action from our stakeholders. An additional opportunity to comment on it was provided following the Partnership Board meeting on 28 October 2024. A number of amendments have been made to it in response to the comments that were received and members of the Partnership Board are recommended to agree the RATSAP contained in **Appendix 4**.

RUPERT CLUBB
Chief Officer
Transport for the South East

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Appendix 1 – Technical Note inviting comments on the Strategic Active Travel Network Map

Regional Active Travel Strategy & Action Plan

Further comments on the Strategic Active Travel Network Map
Technical Note

The purpose of this Technical Note is to address questions and concerns raised about the Strategic Active Travel Network map at the 28 October 2024 Partnership Board meeting. Please read this Technical Note and provide feedback and justification using the attached comments log on any adjustments you feel need to be made to the Strategic Active Travel Network before the final version of the map is published.

Much of this information set out in this technical note can be found within the Regional Active Travel Strategy and Action Plan (RATSAP) and its supporting Technical Reports, however where further explanation has been provided, this will be included in the final versions of the relevant documents.

Introduction

Background

Transport for the South East (TfSE) has developed a Regional Active Travel Strategy and Action Plan (RATSAP) to support the economic, social, and environmental strategic goals identified in TfSE's adopted Transport Strategy and Strategic Investment Plan. The development of the RATSAP involved identification and appraisal of a strategic regional active travel network for the TfSE area with accompanying action plan.

Goals of RATSAP Development & Delivery

From the beginning of the RATSAP's development, through to delivery, the following goals underline the work done:

- **Aggregate, compliment, and support** the work being undertaken by local transport authorities at the local level.
- **Join-up schemes across boundaries**, identify opportunities for joint working, share best practice, and help with funding applications.
- **Create a strategy and action plan** that understood, promoted, and supported by a wide range of partners.

Stakeholder Engagement

Regular engagement with the Regional Active Travel Steering Group, alongside specific inputs from subject specialists and local transport operators, has been crucial to identifying opportunities, challenges, and local issues that can be addressed through the RATSAP while maintaining a balance between regional focus and the work being done on a local level by Local Transport Authorities (LTAs). The RATSAP has been supported by stakeholder engagement predominantly through:

- **Regional Active Travel Steering Group (RATSG)** meetings which have guided the methodology and outputs of each stage through participation in workshops and critically reviewing technical reports, as well as development of the RATSAP aim and objectives, challenges and opportunities, and the action plan. The Steering Group is comprised of representatives from all 16 LTAs, along with national operators and partner organisations.
- **Focus groups** with transport operators, active mode specialists, and research and innovation organisations to gain further insights into challenges and opportunities.

Network Development

Network Identification

A Strategic Active Travel Network was identified as part of the development of the RATSAP. It was developed by mapping strategic hubs and corridors identified by joining up local active travel plans and the clustering of hub types. The hub types identified as strategic by Steering Group members during workshop sessions and are as follows:

- Education
- Employment
- Healthcare
- Transport
- New developments
- Tourism

Using data provided by the LTAs, as well as available national datasets, the strategic hub types were mapped and then sense checked by Steering Group members.

NODES

Steering Group members expressed desire to consider locations what would typically be left out of analysis and would benefit from inclusion in the network. These locations have been labelled separately to hubs as 'nodes'. Nodes were identified by using [Transport for the North's Transport-Related Social Exclusion \(TRSE\) tool](#). The data from the TRSE tool was paired with the population data of Lower Super Output Area (LSOA) to filter out areas where the density is too low (lower than 2,346 persons per square kilometre) to warrant being served by the Strategic Active Travel Network. The remaining areas were then marked with 'nodes' and sense checked with Steering Group members.

Notes on the Network

- The Strategic Active Travel Network is an aspirational and indicative network that will be updated as appropriate. The network does not take precedence over local plans for active travel, but rather seeks to join up existing and planning routes across boundaries and highlight opportunities for future work.
- The Strategic Active Travel Network is designed to complement and support, rather than duplicate, the work being done at a local level. The network seeks to support and connect areas where there are planned LCWIP routes, by providing connections between hubs that are not covered by an LCWIP and joining up cross-boundary routes that may not otherwise be promoted by individual LTAs.
- The Strategic Active Travel Network is not a blueprint of specific routes or infrastructure for delivery but is intended to act as a guide for LTAs and delivery partners within the region to reference in their own plans, funding bids, and scheme delivery plans in the way which they feel it is most appropriate.
- The strategic nature of this network means that it can be used to identify where joined up working could take place, as well as cross-boundary collaboration. As a regional body, TfSE will seek to support and encourage coordination between organisations where and when it is appropriate.
- Some of the strategic network is comprised of longer-distance corridors. These corridors seek to address current gaps in the network at a local level, such as joining up schemes and services across LTA boundaries, as well as greater consistency in active travel facilities across the region. Longer sections of the network have the potential to support journeys of different lengths and using different forms of active travel, including first- and last-mile journeys and integration with public transport for multi-modal journeys.

Action

Please read this Technical Note and provide feedback and justification using the attached comments log on any adjustments you feel need to be made to the Strategic Active Travel Network before the final version of the map is published.

Please submit any comments you may have to katie.lamb@transportforthesoutheast.org.uk by **13 December 2024 at 12:00 (noon)**. Please do not hesitate to get in touch if you have any questions.

Appendix 2 - Comments received on the Strategic Network Map

LTA Area	Borough/District Area	Type & Location(s)	Action to be taken
Kent	Canterbury City Council	H Hersden	Change to node
Kent	Canterbury City Council	H Chilham	Change to node
Kent	Maidstone Borough Council	C Maidstone to Ashford	Add
Kent	Maidstone Borough Council	C Maidstone to Lidsing	Change Walderslade to Lidsing
Kent	Maidstone Borough Council	C Maidstone to Marden	Add
Kent	Sevenoaks District Council	H Bat & Ball	Add
Kent	Sevenoaks District Council	H Knockholt	Add
Kent	Sevenoaks District Council	H Leigh	Add
Kent	Sevenoaks District Council	H Godden Green	Remove, reposition corridors accordingly (Sevenoaks-Borough Green, Sevenoaks-Otford & Kemsing, West Kingsdown-Otford & Kemsing)
West Berks		H Cold Ash	Remove, remove Cold Ash-Thatcham corridor and reposition cross regional corridor to Didcot from Newbury
West Berks		C Bramley to Reading	Add, remove corridor Burghfield Common-Arborfield Garrison
West Berks		C Tadley-Bramley	Add, remove corridor Woolhampton-Bramley
West Berks		C Tadley-Lower Padworth	Add, remove corridor Woolhampton-Tadley
West Berks		C Greenham-Overton	Remove
East Sussex		C Glynde-Polegate	Add, remove corridor Newhaven-Hailsham
East Sussex		C Polegate-Westham	Add
Southampton		H Southampton	Move hub to western side of the river, reposition corridor Southampton-North Baddesley accordingly
West Sussex	Chichester District Council	H Southbourne	Change to Emsworth & Southbourne
West Sussex	Chichester District Council	O Chichester Harbour	Add green shading and label for Chichester Harbour National Landscape
Surrey		H Laleham	Remove, reposition corridor (Ashford-Staines upon Thames)

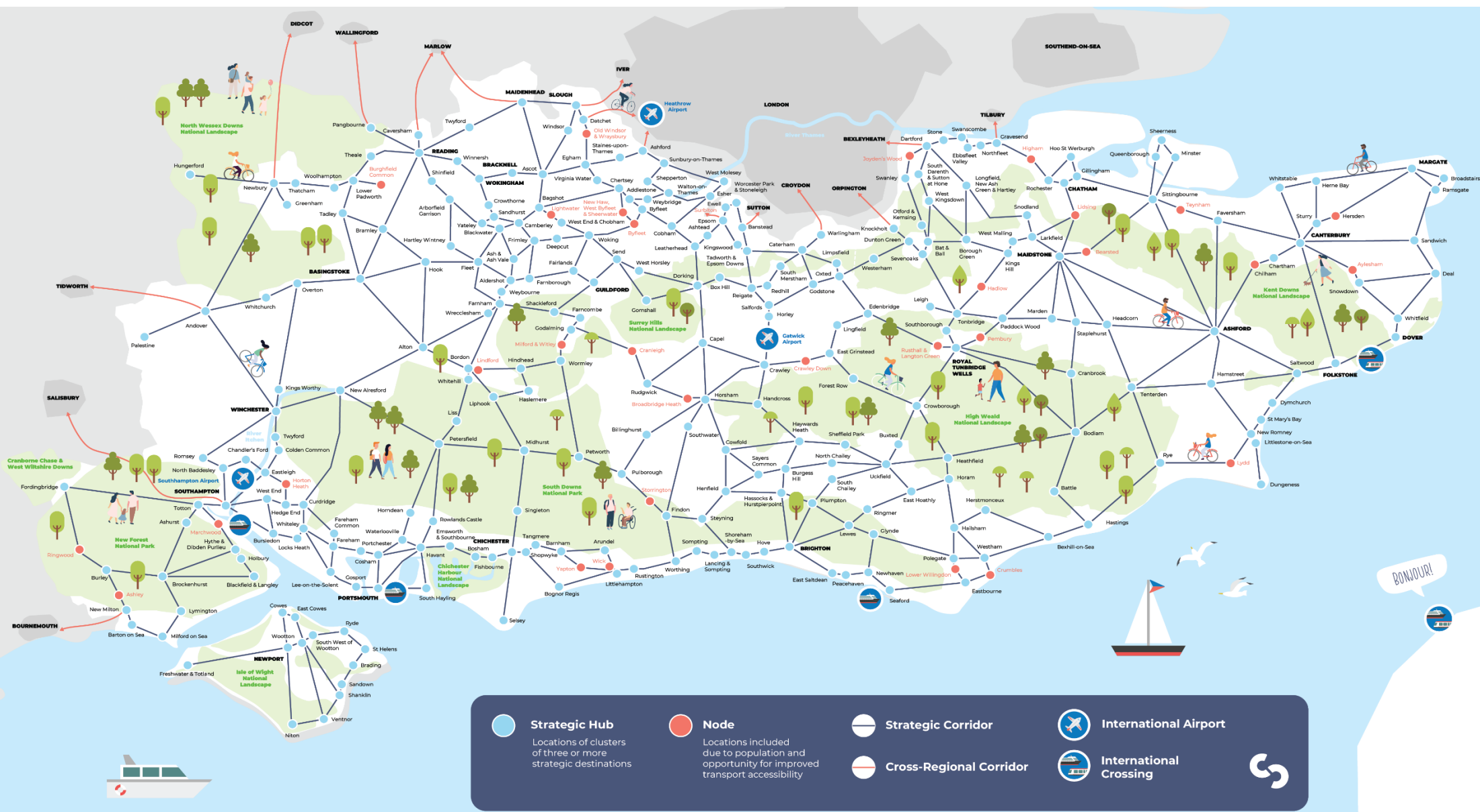
Key

H = hub

C = corridor

O = other

Appendix 3 - Strategic Active Travel Network for the TfSE Area



This is an aspirational and indicative network that will be updated as appropriate.

Regional Active Travel Strategy and Action Plan



Date issued: 10/03/25
Document status: Final
Version number: 1.0

Version Number	Date	Summary
v0.1	12/06/24	Initial draft for client review
v0.2	08/07/24	Revisions to the strategy
v0.3	25/07/24	Revised action plan
v0.4	20/09/24	Revision following stakeholder comments
v0.5	04/10/24	Minor revisions
v0.6	18/10/24	Final draft issue
v0.7	27/11/24	Revisions (in progress) based on PB feedback
v1.0	10/03/25	Final version

Photo credits on cover page (clockwise)

- Docked Beryl bikes & Voi scooters in Southampton (Katie Lamb, 2023)
- Kid riding on back of ecaro bike with adult (Arjun Rajah, 2023)
- Dominos delivery ebikes in Lewes (Katie Lamb, 2024)
- Kidical Mass Brighton Event (Alex Bamford, 2023)
- Redhill Station wayfinding, package lockers, and cycle parking (Katie Lamb, 2024)
- Cyclists at sunrise by Churchill Square in Brighton (Katie Lamb, 2023)



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Contents

Executive Summary	1
1 Introduction	2
1.1 Background	2
1.2 Engagement Overview	2
1.3 Purpose of this Strategy and Action Plan	3
1.4 Document Structure	3
2 Baseline Summary	4
2.1 Overview	4
2.2 Aim and Objectives	4
2.3 Policy and Strategy Review	5
2.4 Regional Context	7
2.5 Existing and Planned Active Travel Network and Hubs	8
2.6 Existing and Potential Active Travel Demand	9
2.7 LTA Active Travel Progression	10
2.8 Key Challenges	12
2.9 Key Opportunities	14
3 Regional Active Travel Network	16
3.1 Overview	16
3.2 Key Principles	16
3.3 Summary of Methodology and Outputs	17
3.4 Identified Strategic Active Travel Network	17
3.5 Next Steps	17
4 Network Appraisal	20
4.1 Overview	20
4.2 Approach	20
4.3 Appraisal Framework Overview	21
4.4 Appraisal Outcomes	22
5 Action Plan	23
5.1 Overview	23
5.2 Approach	23
6 Conclusion	29
References	30

Executive Summary

Transport for the South East (TfSE) has developed this Regional Active Travel Strategy and Action Plan (RATSAP) to advance economic, social, and environmental goals outlined in its Transport Strategy and Strategic Investment Plan. This document summarises the development of the RATSAP, which involved collating and analysing technical baseline evidence, identifying and appraising a strategic regional active travel network, and developing an action plan with stakeholders to maximise the opportunities derived from the RATSAP process.

1 Introduction

Chapter at a glance

This chapter provides an overview of the project and the purpose of the Regional Active Travel Strategy and Action Plan.

1.1 Background

Transport for the South East (TfSE) has developed a Regional Active Travel Strategy and Action Plan (RATSAP) to support the economic, social, and environmental strategic goals identified in TfSE’s adopted Transport Strategyⁱ and Strategic Investment Planⁱⁱ.

The outputs of this first phase of the RATSAP have involved identification and appraisal of a strategic regional active travel network for the TfSE area, development of an initial action plan for delivering this network and maximisation of the opportunities identified throughout the RATSAP development. The second phase will then involve implementation of the strategy and action plan. The technical work in this first phase was split into five stages, as summarised in Figure 1-1.

- In **Stage 1 (Governance)**, we assembled a Steering Group to provide strategic guidance throughout all Stages of RATSAP development.
- In **Stage 2 (Baseline)**, we developed an Evidence Base Report for the TfSE area, which summarised key policies and data sets, existing and proposed active travel infrastructure, and expected trends in active travel demand.
- In **Stage 3 (Strategic Network)**, we identified a strategic active travel network for the TfSE area comprising of strategic corridors, strategic hubs, and nodes, summarised within a Network Identification Report.
- In **Stage 4 (Appraisal)**, we developed a framework for network appraisal and set out appraisal outcomes, summarised within a Network Appraisal Report.
- In **Stage 5 (Strategy and Action Plan Development)**, we developed a final Strategy, summarising key findings from earlier stages of the RATSAP, supported by an action plan.



Figure 1-1: Project Stages of developing the TfSE Regional Active Travel Strategy and Action Plan

1.2 Engagement Overview

Regular engagement with the Regional Active Travel Steering Group, alongside specific inputs from subject specialists and local transport operators, has been crucial to identifying opportunities, challenges, and local issues that can be addressed through the RATSAP while maintaining a balance between regional focus and the work being done on a local level by Local Transport Authorities (LTAs). The RATSAP has been supported by stakeholder engagement predominantly through:

- **Regional Active Travel Steering Group (RATSG)** meetings which have guided the methodology and outputs of each stage through participation in workshops and critically reviewing technical reports, as well as development of the RATSAP aim and objectives, challenges and opportunities, and the action plan.
- **Focus groups** with transport operators, active mode specialists, and research and innovation organisations to gain further insights into challenges and opportunities.

1.3 Purpose of this Strategy and Action Plan

This document has been produced for Stage 5 of the RATSAP development (see Figure 1-1), which summarises the key outcomes from earlier stages of the RATSAP process and is supported by recommendations and actions. The document has been developed using the outcomes from previous stages, namely:

1. The aim and objectives of the RATSAP, which were defined in collaboration with the RATSG in Stage 1.
2. Challenges and opportunities identified through the Evidence Base Report produced in Stage 2.
3. A strategic active travel network that was developed using a methodology co-developed with RATSG members in Stages 3 and 4.
4. Exploration of recommendations and actions for the strategy and action plan collected in the RATSG meetings in Stage 5.

1.4 Document Structure

This document is structured as follows:

- **Chapter 2 – Baseline Summary**

This chapter provides a summary of the key outcomes and findings from the Baseline Report.

- **Chapter 3 – Regional Active Travel Network**

This chapter provides an overview of the proposed Strategic Active Travel network for the TfSE area and the methodology that was developed to identify the network.

- **Chapter 4 – Network Appraisal**

This chapter provides an overview of the appraisal framework for assessing the strategic network, including the methodology adopted, its associated framework, data analysis, and assumptions.

- **Chapter 5 – Conclusion**

This chapter presents a summary of the strategy, its outcomes, and next steps for the RATSAP.

- **Chapter 6 – Action Plan**

This chapter provides an overview of the approach adopted and implemented to identify actions for the RATSAP and presents these against identified themes of commonality.

This document is supported by a series of Technical Appendices:

- **Technical Appendix A:** Evidence Base Report
- **Technical Appendix B:** Network Identification Report
- **Technical Appendix C:** Network Appraisal Report

2 Baseline Summary

Chapter at a glance

This chapter provides an overview of the Baseline Stage findings and key identified challenges and opportunities.

2.1 Overview

The purpose of the Baseline Stage (Stage 2) is to provide a robust evidence base through assessing the current state of active travel across the TfSE area, including:

- Reviewing current active travel related strategies and policies, and understanding the progress being made by the LTAs in the TfSE area regarding active travel schemes and initiatives.
- Gaining a better understanding of the existing and future planned active travel network across the region.
- Determining the current and potential active travel demand.
- Identifying relevant challenges and opportunities.

The Baseline Stage also included a review of best practice from other active travel strategies, as well as the development of the RATSAP aim and objectives. This chapter includes the following sections:

- Aim and Objectives
- Policy and Strategy Review
- Regional Context
- Existing and Planned Active Travel Infrastructure
- Existing and Potential Active Travel Demand
- LTA Active Travel Progression

2.2 Aim and Objectives

The RATSAP is underpinned by an aim and set of objectives, established to guide its development and to ensure alignment with existing TfSE workstreams and strategies. They have been co-developed with the RATSG and informed by best practice examples including national active travel guidance, as promoted by Active Travel England (ATE), and frameworks from Scotland and Wales. The Transport Strategy for the South East's Strategic Goals formed an important starting point for the aim and objectives of the RATSAP, which align with the Transport Strategy.

The aim of the TfSE RATSAP is to:

Develop a high quality, safe, convenient, and accessible strategic regional active travel network that is well-connected and integrated with other modes to increase the proportion of journeys made by active modes within the TfSE area.

There are four strategic objectives which support achieving the aim.

- Reduce transport-related pollution and emissions to improve health, address climate change, and protect and enhance our environment by providing a regional active travel network.
- Improve health and wellbeing through the delivery of a regional active travel network that improves connectivity and integration between active travel and other transport modes.
- Identify and reduce inequalities by providing an integrated, accessible, and inclusive regional active travel network that increases access for active travel and multi-modal journeys.
- Support economic wellbeing by creating places that attract tourism and inward investment through improvements in placemaking and infrastructure that supports active travel.

2.3 Policy and Strategy Review

Several tiers of active travel-related policies, strategies, and delivery plans were reviewed:

- **National:** Policies and strategies produced by the Department for Transport (DfT) and ATE.
- **Regional:** Policies and strategies produced by TfSE in partnership with the 16 LTAs in the TfSE area.
- **Local:** Policies and strategies produced by the 16 LTAs and Local Planning Authorities (LPAs: district, borough, town, and parish councils), including Local Cycling and Walking Infrastructure Plans (LCWIPs).

2.3.1 National

Policy at a national level is dominated by the UK-wide target to meet net zero carbon emissions by 2050. Increasing the proportion of journeys made by active modes is a core element of delivering transport decarbonisation alongside supporting improved health and economic outcomes, as set out in policy including Gear Change – A bold vision for cycling and walkingⁱⁱⁱ and Future of Mobility: Urban Strategy^{iv}.

2.3.2 Regional

The principal regional policy document is the Transport Strategy for the South East^v, which was prepared in partnership with the 16 LTAs and other key stakeholders. The Strategy is built on three strategic goals (Economic, Social, and Environmental), which have a related set of priorities to help achieve them. At the time of preparing this report, TfSE was in the process of refreshing their Transport Strategy. RATSAP has been developed in conjunction with this to ensure a coordinated approach.

The Strategic Investment Plan^{vi} is also a key policy document. It was developed with key partners and provides a framework for future investment in strategic transport infrastructure and services across the TfSE area to 2050.

2.3.3 Local

The 16 LTAs across the TfSE area have each produced their own suite of transport policies and strategies. This includes Local Transport Plans, Climate Change or Climate Emergency Strategies, Joint Health and Wellbeing Strategies, and Bus Service Improvement Plans. There are 64 LCWIPs, or equivalent local active travel plan or strategy, currently in production or complete across the region (as of September 2024). In line with DfT guidance^{vii}, LCWIPs identify and prioritise future upgrades to the walking and cycling network. LCWIPs typically cover a small, focused area (e.g. 10km from a city, town or village), however, some cover a much broader area (e.g. an entire county). shows a spatial summary of the LCWIPs adopted and in progress across the TfSE area.

¹ Published under the 2019 to 2022 Johnson Conservative Government

Figure 2-1: LCWIP Status in the TfSE Area (as of March 2025)



2.4 Regional Context

The Baseline Stage included analysis of contextual data to ensure the RATSAP reflected the differing needs of the TfSE area and used an inclusive approach to the development of a regional active travel network. This analysis included:

- **Demographics:** Age and population distributions, compared to the rest of England.
- **Socio-Economics:** Deprivation, activity levels, limiting long-term illness, and active travel commuting levels across the population.
- **Land Use:** Locations of facilities, distribution of built-up areas, and future allocated development sites.
- **Environment:** Locations of protected and designated landscapes.

2.4.1 Demographics

A demographic analysis of the TfSE area demonstrated that the majority of the area is sparsely populated. The most densely populated areas are the built-up areas on the outskirts of London and along the coastline. This variation in population density highlighted some challenges regarding network design and ensuring that rural communities are integrated. Analysis of cycling commuting journeys using Census data presented a strong correlation with population density, a result of the shorter journey distances within these areas due to greater availability of facilities and amenities which caters for active travel. This highlighted the ongoing importance of local active travel planning and the need for the RATSAP to complement and support this.

2.4.2 Socio-Economics

Socio-economic analysis showed the spatial variation in deprivation across the TfSE area. The coastal and built up areas experience concentrated pockets of higher deprivation whereas rural areas tend to be less deprived but encompass larger areas. Active travel infrastructure can help address deprivation through improving health, travel affordability, and access to employment, education, and key services. This highlights the RATSAP's potential to target interventions in areas where there are existing inequalities and deprivation. Spatial analysis of physical activity levels and limiting long-term illnesses (LLTIs) demonstrated a positive correlation with deprivation, further highlighting the potential role of active travel in addressing these issues.

2.4.3 Land Use

Existing education and healthcare facilities were mapped and analysed. As key facilities, their spatial distribution helped understand where people might want to travel to by active modes. They are distributed throughout the TfSE area but clustered around villages, towns, and built-up areas, with higher numbers of facilities in areas of higher population density. This analysis was supported by also mapping future planned developments.

2.4.4 Environment

There are several different protected landscapes and designated areas within the TfSE area including National Landscapes, National Parks, Special Protection Areas, Special Areas of Conservation, and Sites of Special Scientific Interest. These designations need to be taken into account in the ongoing planning of new active travel routes and corridors, as in many cases disruption to the landscape will need to be minimised. However, these areas also indicate where there may be natural spaces for the public to enjoy which would benefit from being connected to local communities to encourage access for leisure and tourism purposes.

2.5 Existing and Planned Active Travel Network and Hubs

As part of the development of the RATSAP, a review of existing and planned active travel infrastructure, and its integration with public transport, provided a basis on which to identify and improve the strategic active travel network. This analysis comprised of:

- **Existing Active Travel Network:** Including Public Rights of Way (PROWs), long distance routes and trails, the National Cycle Network (NCN), local cycling infrastructure, reported collisions involving active modes, and shared micromobility schemes.
- **Existing Public Transport Hubs and Rail Network:** Including public bus routes, rail lines and stations, and public ferry services.
- **Future Planned Active Travel Network:** Collated from LTAs based on LCWIP plans and schemes.

2.5.1 Existing Active Travel Network

Mapping and analysis of the existing active travel network within the TfSE area showed that the majority of the network is comprised of PROWs. These paths are the main source of connectivity for pedestrians, but are also open to a variety of users and purposes depending on the route type, including cyclists, equestrians, and motorists. While this network is expansive, there are some rural areas where the network is sparse (e.g. the south west of Kent, East Sussex, West Berkshire, and the south west of Hampshire), and even some cases of urban areas with limited PROW networks (e.g. Brighton and Hove). There are also sections of PROW that provide access to natural assets, such as the South Downs National Park, either on their own or as part of longer distance walking routes. These assets are critical to the RATSAP as the routes within them support both the leisure and visitor economies, making them an important part of the network to consider as part of the strategy.

The cycle network in the TfSE area comprises local cycle paths and the long distance NCN which is managed by Sustrans. There are different types of infrastructure, including on-road, shared use, and fully separated/dedicated paths. E-mobility sharing /rental is also available in specific locations across the TfSE area, including e-bicycles and Brompton folding bicycles at rail stations. These facilities are largely focused in urban areas to serve the shorter trip distances that people make in town and city centres. There are also three e-scooter rental schemes running within the TfSE area. It is however noted that cycle infrastructure is not well recorded, hampering the ability to accurately identify the existing network.

Safety remains a critical concern for active travellers across the region, as mapping of collisions involving pedestrians and/or cyclists showed widespread incidents. Unsurprisingly there are clusters of collisions within densely populated areas, which is a challenge for encouraging modal shift towards walking, wheeling, cycling, and riding due to actual and perceived safety issues when interacting with other vehicles.

2.5.2 Existing Public Transport Hubs and Rail Network

Mapping of the bus network across the TfSE area showed a high level of coverage across most of the region. There is a denser network in urban areas, and some rural areas appear to be underserved. Although frequency of services was not able to be mapped, it is likely to have highlighted known challenges around access to services on a regular basis, particularly in rural areas.

Rail stations mostly provide connectivity between built up areas with a handful of smaller, rural stations constituting important hubs for these communities. However, due to the clustering of stations around urban areas, there are large parts of the TfSE area that lack easy access to a rail station without relying on an intermediary form of

transport, such as a bus, taxi, private vehicle, or suitable active travel connection. Rail lines also cause severance due to a lack of appropriate crossing points and may have implications for the delivery of new active travel corridors.

There are also several ferry ports along the south coast providing domestic services which are particularly important for commuting, leisure, and tourism.

Integration of these public transport hubs into the TfSE active travel network is essential for enabling strategic journeys which cover longer distances. This includes connecting people in less built-up areas with their local station where bus access is poor.

2.5.3 Future Planned Active Travel Network

Understanding the planned active travel network across the TfSE area was important for aligning proposals within the strategy with future works. However, this exercise highlighted the challenges LTAs face around data collection and collation, particularly in a geospatial format, meaning some proposals were not able to be incorporated.

2.6 Existing and Potential Active Travel Demand

Existing and potential future active travel demand was analysed to understand how the RATSAP and the strategic active travel network can support these journeys. This incorporates:

- **Existing Active Travel Demand:** Including for commuting as recorded in the Census and observed cycle flows from LTA count sites.
- **Potential Future Active Travel Demand:** Supported by Census commuting data, desire lines between origins and destinations, and propensity to cycle.

2.6.1 Existing Active Travel Demand

Analysis of Census data showed the commuting patterns between different origin and destination points for various modes of travel. This data was used to highlight commuting demand for walking, wheeling, cycling, and riding and the resulting desire lines were mapped. Active travel commuting trips are focused within and around built-up areas, from nearby suburbs and villages. The greatest concentration of these trips can be found in Southampton, Portsmouth, and Brighton and Hove.

Cycling demand was also analysed for 2022 and 2023 (using the most recent available year), based on an average of count points provided by LTAs, supplemented with DfT road traffic statistics. The daily demand per 100,000 residents is highest in Reading, followed by Southampton and Brighton and Hove. In contrast, West Berkshire, Kent, Isle of Wight, East Sussex, and Hampshire have comparatively lower cycling demand. Overall, daily cycle counts in most LTAs are lower than the 2022 national and regional averages.

Walking demand data was also requested from LTAs but was not widely or consistently available. This is partly due to the challenges of data collection, as well as wider issues such as privacy concerns, the difficulties of observing pedestrian behaviour, and the resource requirement for this kind of data collection.

2.6.2 Potential Future Active Travel Demand

To assess future active travel potential, overall travel demand across the TfSE area was analysed using desire lines between different origins and destinations. The purpose of this was to capture demand for shorter trips which can be fulfilled by active travel alone, as well as medium length trips which may require another mode in conjunction with active travel.

Built-up areas along the south coast and on the border of London exhibit elevated levels of interconnection, highlighting a greater potential for active travel journeys in

these areas. There are also several areas within the rural central belt of the TfSE area that have a higher demand for short and medium length trips, including Basingstoke, Crawley, and Ashford. This demonstrates the importance of connecting people in lower density areas with the facilities and amenities they require and highlights the important role that public transport has to play to offer both local and regional connections.

The Propensity to Cycle Tool^{viii} was also used to highlight areas with a high probability of mode shift to cycling based on trip distance, population, and topography. Based on Census data, there is generally a low propensity to cycle across the TfSE area, although it is higher within built-up areas primarily due to shorter travel distances required.

Analysis such as this can help pinpoint areas for targeted investment and infrastructure improvements to maximise modal shift and uptake of active travel.

2.7 LTA Active Travel Progression

An online survey was conducted to gather information from LTAs in the TfSE area on their current progress with and promotion of active travel in their area, as well as what they feel are the key barriers to this work. Using the survey results, an Active Travel Progression Model (ATPM) was developed to deliver a quantitative analysis of active travel policy and intervention progress across the TfSE area. The ATPM has been designed to be an auditing tool which can be used to identify where LTAs are on a spectrum of preparedness for supporting active travel uptake. The ATPM can also help to identify the gaps and activities that need to be prioritised for LTAs to make further progress. Seven elements were considered essential to effective and comprehensive active travel planning and implementation:

- **Active Travel Strategy:** Presence of a strategy and ambition for active travel, including targets, outcomes, and the proportion of built-up areas that are covered.
- **Active Travel Action Plan:** Presence of an active travel action plan, including ownership, timescales, delivery mechanisms, and costs.
- **Funding:** Recent experience of securing funding, including diversity of sources.
- **Delivery:** Progress with scheme delivery, internal planning, and delivery support from dedicated officers.
- **Design and Planning:** Establishment, adoption, and breadth of active travel infrastructure design standards, including if this is embedded in the planning system.
- **Engagement:** Extent and consistency of stakeholder and public engagement, including engagement inputs into decision making processes.
- **Data, Monitoring and Evaluation:** Extent and organisation of recent active travel demand data and presence of monitoring and evaluation processes.

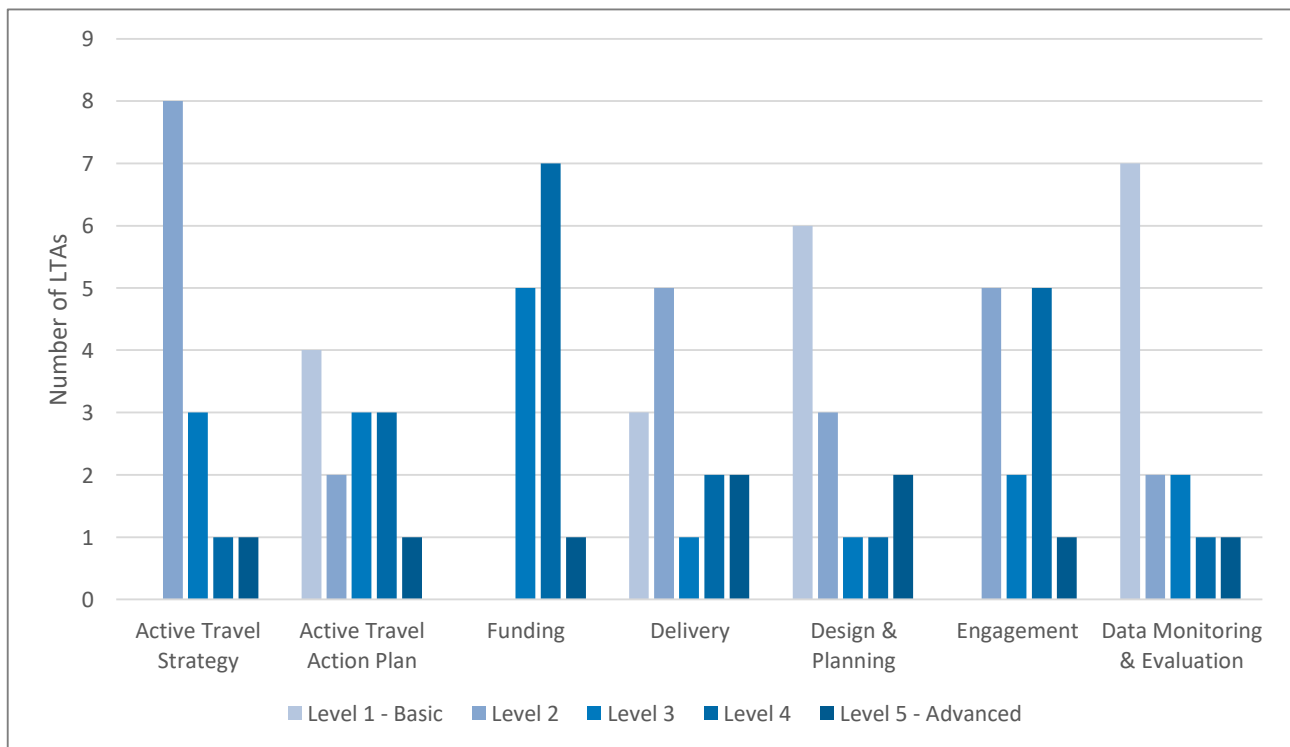
Each category was split into five levels (ranging from 1 to 5), where level 1 represents a basic standard, whilst level 5 demonstrates a more advanced level of development.

2.7.1 Active Travel Progression Model Results

Of the 13 out of 16 TfSE LTAs that responded to the survey, eight have active travel targets of some sort, while nine have some form of overarching active travel strategy or action plan. Key barriers to the delivery of active travel schemes were identified as funding, local community pushback, and political will.

The results of the ATPM are shown in Figure 2-2 and highlight LTAs' strengths in accessing funding and showcase extensive experience of engagement as part of the delivery of active travel schemes. However, written responses from LTAs identified funding and engagement as some of the biggest barriers to active travel delivery. In contrast, areas such as data, monitoring and evaluation, and design and planning were highlighted by the LTAs as weak points. The written responses noted that these areas could be supported by the development of the RATSAP by identifying gaps in data collection and bringing together data inputs from all LTAs to form a baseline to use as the basis for monitoring and evaluation of active travel progress across the region.

Figure 2-2: LTA Active Travel Progression Model Results by Level and Category



2.8 Key Challenges

- **Active Travel Progression Model:** The results of the analysis conducted using the ATPM show the progress with the development and implementation of active travel plans and infrastructure varies markedly across the TfSE area. This is particularly the case with the identification of future committed active travel schemes, with parts of the TfSE area not currently being covered by an LCWIP.
- **Ambition versus Funding:** There is clear evidence of ambition to introduce active travel improvements across the TfSE area. However, the structure, availability, and the scale of the current funding sources means that they are not sufficient or fit for purpose. There is an opportunity for the RATSAP to support and add weight to previously identified schemes, such as those in LCWIPs, where they support the strategic active travel network.
- **E-Scooter Legislation Uncertainty:** It is unclear whether private use of e-scooters will be legalised in future. This creates a potential constraint in terms of the role of e-scooters within the RATSAP (e.g. in terms of enabling greater distances to be covered).
- **Potential Threats to Delivery:** Key challenges raised by LTAs in progressing active travel locally were local community pushback, funding, and political will. Particular concerns are associated with initiatives relating to road space reallocation and value for money when mode share is usually dominated by the private car. These present potential threats to the implementation of the strategy.
- **Local Data Provision:** Several data gaps exist that risk project delays and an inconsistency in evidence across the TfSE area, particularly for observed pedestrian demand. A more consistent, robust approach to active travel flow monitoring is needed to support the development of active travel schemes, and the monitoring of their outcomes across the region.
- **Socio-Economic Inequalities:** The correlation between Limiting Long-Term Illness, physical activity, and deprivation highlights significant socio-economic inequalities across the region. Tackling these disparities to improve health outcomes and quality of life for residents in these areas is a complex challenge that requires a range of solutions. Although the introduction of active travel infrastructure can help address these inequalities, it can only do so as part of a comprehensive package of measures.
- **Increasing Physical Activity:** Identifying barriers to physical activity where residents are less physically active will be essential, alongside implementing effective initiatives to increase activity levels. Like car dependency, this is a complex challenge that will require a strategy alongside the provision of active travel infrastructure.
- **Car Dependency:** Encouraging use of sustainable modes of transport for short journeys, particularly in areas with established car dependent habits, will require cultural and mindset shifts. Travel behaviour changes are not solved through the delivery of active travel infrastructure alone and will require other measures to accomplish mode shift. Although multi-modal journeys can be made easier and more attractive, there is still a challenge to shift habits from private motor vehicles to trips requiring public transport, multiple modes, and interchanges due to the embedded habits and perceived convenience of driving.
- **Conservation vs. Development:** Development policy or other regulatory restrictions (e.g. environmental, landscape, or other designations), may limit the ability to provide active travel infrastructure in some locations.

- **Balancing Safety and Mobility:** Achieving a balance between promoting sustainable transport options and road safety is paramount, as safety and the perception of safety are common barriers to the uptake of cycling and micromobility. This presents a challenge to ensure the network is consistently safe, well-designed, and well-maintained across the local areas and the region.
- **Network Gaps:** Lack of appropriate infrastructure in many areas presents a challenge. Future development of the network should consider the appropriate types of infrastructure, including incorporating natural surveillance, to maximise cycle use.
- **Confidence in Public Transport:** Sparse or infrequent bus services in parts of the TfSE area, as well as an ongoing pattern of service cuts, pose a challenge for integrating the bus network with the strategic active travel network.
- **Multi-Use Paths:** Leveraging and promoting multi-use paths that cater for various users (including pedestrians, cyclists, wheelers, riders, and e-scooters) can maximise active travel usage and future-proof the network (e.g. as micromobility trends evolve). However, there may be conflicting needs and design requirements between different user types, and multi-use paths may not be appropriate in all place types, especially where demand is greater.
- **Community Engagement:** Engagement with the community can present a challenge in gaining buy-in for schemes that may compromise other modes (e.g. road space reallocation) and good community engagement can be costly and time-consuming.
- **Low Propensity in Less Built-Up Areas:** Evidence suggests that low density areas have lower potential to shift to active travel, partly due to longer distances required and the sparsity of services and amenities in these areas. This means it may be more challenging to encourage behaviour change and deliver modal shift away from the private car in these locations. Greater integration with public transport services to provide multi-modal options will be required.
- **Infrastructure Adaptation:** Promoting active travel as a preferred mode of transport will require meaningful infrastructure investment, particularly in areas where infrastructure is currently lacking or substandard. Implementing these changes will require significant additional investment which presents further challenges given the current funding environment.
- **Behaviour Change Campaigns:** The provision of infrastructure alone will not change travel behaviour, as demonstrated by examples of poorly planned active travel infrastructure provision without accompanying promotion that have resulted in low active travel uptake. Implementing campaigns and behaviour change initiatives alongside the provision of infrastructure can encourage residents and visitors to consider active travel, support positive first experiences of active travel, and emphasise key co-benefits such as health, reduced traffic, and cost savings.

2.9 Key Opportunities

- **Local Active Travel Progression:** Most LTAs in the TfSE area have an overarching active travel strategy or action plan and there are 43 adopted LCWIPs or equivalent (and 21 LCWIPs or equivalent in development) as of September 2024. These include statements of local ambitions and opportunities for active travel, as well as identification of future schemes. The RATSAP can build on and further support this progression and encourage joint working across LTA boundaries.
- **Transport Strategy for the South East KPIs:** There are established active travel related KPIs (e.g. length of NCN), which have informed the RATSAP and for which the RATSAP can support delivery.
- **Ageing Population:** It is important to address the needs of the age distribution in the TfSE area, including an ageing demographic, through well-designed, safe, and accessible active travel infrastructure. Active travel presents an opportunity to prevent isolation and support physical and mental health benefits in the older population alongside other age groups.
- **Built-Up Area Infrastructure:** There is a higher proportion of active adults and closer proximity of services and amenities within built-up areas. There is an opportunity to further enhance this potential through the provision of active travel infrastructure and investment, to promote active lifestyles, and encourage a shift from private motor vehicle trips.
- **Socio-Economic Empowerment:** Evidence from development of the RATSAP demonstrated a correlation between deprivation and activity levels. As poor health is an indicator of deprivation, it can be addressed through improving physical activity levels in these areas. There are also several co-benefits, such as improving access to jobs and education, at little or no cost, for those without access to a car and therefore improving socio-economic outcomes. In addition, improving physical activity to prevent and improve poor health has the potential to save public money.
- **Natural Landscapes:** There are many designated areas of natural beauty in the TfSE area, including National Parks and Natural Landscapes. There is an opportunity to provide active travel access to and within these areas, for both residents and visitors, to promote physical and mental health benefits within these natural environments through walking, wheeling, cycling, or riding.
- **Multi-Modal Access to Key Facilities:** Many areas of the region do not have access to key amenities by active travel because of distance. There is therefore an opportunity for the RATSAP to integrate with the public transport network and multi-modal hubs to provide multi-modal journey opportunities, including those across LTA boundaries.
- **Local Economy:** An enhanced regional active travel network will support increased numbers of both resident, commuter, and visitor journeys that help support local economic growth. There is an opportunity therefore for the RATSAP to consider growth areas and key visitor attractions.
- **School-Based Schemes:** Utilising education facilities as a key hub to engage the younger population with active travel initiatives (e.g. cycle to school schemes; cycle training) will be an important mechanism for instilling positive behaviours and generating cultural change.
- **Leisure Routes:** There are several large-demand visitor destinations and attractions in TfSE area which present an opportunity for providing active travel access to these sites. This is beneficial for local communities and economies through attracting more visitors travelling more sustainably.

Transport for the South East Regional Active Travel Strategy and Action Plan

Strategy and Action Plan

- **Existing Infrastructure and Plans:** Active travel infrastructure in the region includes local dedicated cycle infrastructure, PROWs, hiking routes, national trails, and the NCN. However, it has not been planned as an overall network leaving often disjointed or discontinuous links. This presents an opportunity to further develop and connect with existing and proposed infrastructure when developing a strategic active travel network.
- **Longer Distance Travel:** A strategic active travel network can support longer distance travel across the region. Longer distance active travel can better connect communities in rural areas to the facilities and services they need, as well as integrate with existing longer distance routes, such as the NCN and hiking routes, to further promote leisure trips.
- **Multi-Modal Integration:** There is an opportunity to integrate the strategic active travel network with the extensive bus, rail, and domestic ferry networks and hubs to promote and integrate first- and last-mile active travel solutions. This will reduce the need to rely on private vehicles for longer journeys and increase the range of options for people travelling sustainably. This will require effective planning to coordinate schedules, infrastructure, and wayfinding.
- **Micromobility Integration:** The strategy can support an inclusive strategic network that considers a range of modes, has a forward look on micromobility, and supports first- and last- mile journeys.
- **Targeted Intervention:** Identifying areas with existing and potential active travel demand offers an opportunity to target infrastructure in areas of high demand, thereby maximising opportunities and accelerating uptake. This includes new infrastructure provision or improving existing infrastructure.
- **Short Distance Trips:** Hotspots of demand for short (under 5km) and very short (under 1.5km) distance trips highlight areas of potential for active travel as a preferred mode of transport, especially in more urban or built-up areas. Delivering new and improved strategic active travel infrastructure to and from these areas will support making active travel the default choice.
- **Community Engagement:** Involving local communities in the planning and development of the strategic active travel network is key to understanding local issues and contexts regarding active travel. This presents an opportunity to engage with residents, leverage local knowledge, and help obtain buy-in from the community.

Further detail on the Baseline Stage is included in Technical Appendix A.

3 Regional Active Travel Network

Chapter at a glance

This chapter provides an overview of the Strategic Active Travel Network for the TfSE area and the methodology that was developed to identify the network.

3.1 Overview

The strategic active travel network identification methodology for the RATSAP was developed using work undertaken in Stages 1 and 2. Specifically, this was informed by:

- The aim and objectives of the RATSAP which were defined in collaboration with the RATSG in Stage 1.
- Challenges and opportunities identified in Stage 2.
- Feedback from the RATSG on the proposed methodology.

3.2 Key Principles

Several key principles were established to support the development of a methodology for the strategic network identification. These principles are based on findings from Stage 2 and discussions with the Steering Group.

- **High-Level Planning:** The strategic network consists of 'corridors', which have no fixed alignment and represent the intention to link two hubs together, rather than assuming specific routes. This high-level network of desire lines indicates where strategic movement for the region is. Specific alignments and designs of this network are not part of RATSAP as delivery of corridors are under local jurisdiction.
- **Strategic Destinations:** Following workshop outcomes with the Steering Group, six types of hubs were identified that are considered to be strategic destinations at a regional level. These destinations include employment, transport nodes (rail and bus stops), education, healthcare, tourism, and new developments.
- **Facilitating Active Travel:** Some of the strategic network is comprised of long-distance corridors. These corridors seek to address current gaps in the network at a local level, such as joining up schemes and services across LTA boundaries, as well as greater consistency in active travel facilities across the region. Longer sections of the network have the potential to support journeys of different lengths and by different kinds of active travel, including first- and last-mile journeys and integration with public transport.
- **Supporting Local Authorities:** There are a number of aspects of the relationship between the strategic network and the work being undertaken by local authorities that need to be borne in mind. These are as follows:
 - The strategic network is an aspirational and indicative network that will be updated as appropriate. The network does not take precedence over local plans for active travel but rather seeks to join up existing and planning routes across boundaries and highlight opportunities for future work.
 - The strategic network is designed to complement and support, rather than duplicate, the work being undertaken at a local level. The network seeks to support and connect areas where there are planned LCWIP routes, by providing connections between hubs that are not covered by an LCWIP and by joining up cross-boundary routes that may not otherwise be promoted by individual LTAs.
 - The strategic network is not a blueprint of specific routes or infrastructure for delivery but is intended to act as a guide for LTAs and delivery partners within the region to reference in their own plans, funding bids, and scheme delivery plans in the way which they feel it is most appropriate.

Transport for the South East Regional Active Travel Strategy and Action Plan

Strategy and Action Plan

- The strategic nature of this network means that it can be used to identify where joined up working could take place, as well as cross-boundary collaboration. As a regional body, TfSE will seek to support and encourage coordination between organisations where and when it is appropriate.
- Some of the strategic network is comprised of longer-distance corridors. These corridors seek to address current gaps in the network at a local level, such as joining up schemes and services across LTA boundaries, as well as greater consistency in active travel facilities across the region. Longer sections of the network have the potential to support journeys of different lengths and using different forms of active travel, including first- and last-mile journeys and integration with public transport for multi-modal journeys.
- **Regional Active Travel Steering Group:** To reflect local priorities and challenges, there has been regular engagement with the RATSG at several stages of the process, using both group discussions and focused breakout workshops to gather feedback on the proposals, data sources, and methodology development.
- **Next Steps:** Further work will be required, in partnership with LTAs, to deliver the aim and objectives of the RATSAP. The strategic network will need to be responsive to changes, such as when routes are delivered by local authorities, there are changes in priority, and funding availability. The network identification methodology was therefore developed to be flexible, replicable, and support refinements and updates in the future.

3.3 Summary of Methodology and Outputs

The strategic network identification process was comprised of the following four tasks:

- **Task 1 – Destination Mapping:** Strategic destinations across the TfSE area were mapped, then divided into grid squares of 1km to reflect reasonable accessibility by active modes.
- **Task 2 – Hub Identification:** Clusters of different destination types and themes across the whole TfSE area were identified, which were aggregated and mapped to form strategic hubs.
- **Task 3 – Corridor Identification:** High-level strategic corridors were identified by linking together the strategic hubs identified in Task 2.
- **Task 4 – Accessibility Mapping:** Using Transport for the North's Transport Related Social Exclusion work^{ix}, nodes were identified which have low levels of access to transport and are at risk of being disregarded from the network due to size or available facilities and services. The paths of the nearest corridors were then updated to consider these nodes.

3.4 Identified Strategic Active Travel Network

Error! Reference source not found. displays the strategic active travel network for the TfSE area, including the location of strategic hubs, strategic corridors, and nodes. Further detail on the Network Identification Stage is included in Technical Appendix C. The RATSAP including the strategic active travel network, was circulated for comment prior to finalisation. A number of comments were received on the network and a number of changes were made to reflect these comments.

3.5 Next Steps

The following should be considered for the next steps for the initial network developed:

Transport for the South East Regional Active Travel Strategy and Action Plan

Strategy and Action Plan

- **Existing and Planned Networks:** There is further work required to understand how the strategic network complements existing and planned active travel networks, including those proposed as part of the Strategic Investment Plan and in local active travel plans such as LCWIPs. There will be some strategic corridors identified that are provided already in existing plans in full or in part. This further work would ensure the corridor does not duplicate but instead join-up, align, and complement existing and planned active travel networks and plans.
- **Cross-Regional Corridors:** The TfSE area shares its boundary with England's Economic Heartland, Western Gateway, Transport East, and Greater London. Engagement is ongoing with these authorities to understand how any existing regional active travel work can be used to develop cross-regional strategic corridors between strategic hubs identified in the TfSE area and strategic hubs in these neighbouring areas.

Transport for the South East Regional Active Travel Strategy and Action Plan

Strategy and Action Plan

Figure 3-1: Strategic Active Travel Network for the TfSE Area



This is an aspirational and indicative network that will be updated as appropriate.

4 Network Appraisal

Chapter at a glance

This chapter provides an overview of the appraisal framework used to assess the network, including the methodology adopted, its associated framework, data analysis, and assumptions.

4.1 Overview

Stage 4 sets out the appraisal framework and the results from applying this to the strategic active travel network. The methodology was developed using work undertaken in Stages 1, 2, and 3. Specifically, this was informed by:

- The aim and objectives of the RATSAP which were defined in collaboration with the RATSG in Stage 1.
- Challenges and Opportunities identified in Stage 2.
- The Strategic Active Travel Network identified in Stage 3.
- Feedback from the RATSG on a proposed methodology.

4.2 Approach

- **Objectives-Led Framework:** The appraisal framework has been structured using the RATSAP Objectives agreed by the RATSG. Appraisal metrics that assess the network were linked to these objectives to maximise alignment of the appraisal methodology and outcomes with the Objectives of the strategy.
- **Regional Active Travel Steering Group:** There has been regular engagement with the RATSG to develop the appraised network, using both group discussions and focused breakout workshops, to gather feedback on the developing framework and methodology.
- **Appraisal of Hubs:** The appraisal of the network focused on strategic corridors. The role of a strategic hub is to support the corridors through providing local active travel infrastructure that links users to the strategic corridors. There is limited value to strategic hub appraisal in the context of strategic network appraisal, as the purpose of the hubs is to indicate the presence of trip attractors and generators, rather than being part of the appraised network.
- **Evidence-Based Assessment:** Appraisal metrics use existing regional data and evidence to ensure an objective approach that is consistent across the whole TfSE area.
- **Active Travel Modes:** The appraisal framework has been developed to assess the network for all active travel modes (walking, wheeling, cycling, and riding). While some of the strategic network supports long-distance journeys, the purpose of the network is to facilitate connectivity along shorter distances and cross-boundary corridors, rather than encouraging active travel along the full corridor. This means that the network has potential to support a variety of active travel journeys, including first- and last-mile trips and integration with public transport.
- **Equal Weightings:** The consensus among the RATSG members was to not apply relative weightings to metrics or objectives in the appraisal framework. This means each metric within any objective, and therefore each objective, has equal importance in the appraisal of the network.
- **Deliverability:** Deliverability evaluation of the network is at a very early stage in understanding. It has provided additional high-level information about network elements for further consideration in future phases of RATSAP work. However, there are still many deliverability factors that cannot be properly assessed at this stage. Deliverability does not influence the appraisal of the network due to the high-level nature of the strategic network.

- **Appraisal Outcomes:** Assessment of the strategic corridors provides insight into how they perform against one another and why. The appraisal process does not seek to filter the appraised strategic network elements, rather compare corridors given the framework's objectives and deliverability criteria. Its outcomes are intended to provide indicative strengths and weaknesses of corridors in relation to objectives, and within a regional context. It is not intended to dictate or negate any local priorities.
- **Flexible Methodology and Next Steps:** The appraisal methodology has been automated where possible and designed to futureproof the framework and provide flexibility for future changes or updates. As a high-level network, the strategic network will need to be responsive to changes, such as when routes are delivered by local authorities, as well as changes to various factors including the deliverability of routes and whether there is an opportunity for collaboration on funding with transport network operators (e.g. National Highways, Sustrans, and Canal and River Trust).

4.3 Appraisal Framework Overview

The appraisal framework was comprised of two steps:

- **Step 1: Objective-Based Metric Assessment** – Each of the RATSAP's four objectives was supported by a series of metrics used to assess the strategic corridors. A score was calculated for each of the objectives, for each strategic corridor.
- **Step 2: Deliverability Assessment** – High-level deliverability criteria were used to assess the potential challenges and opportunities of infrastructure delivery associated with the strategic corridors. This provides additional information associated with the network but does not impact the appraisal scores.

4.4 Appraisal Outcomes

The strategic corridors were assessed using the developed appraisal framework. Table 4-1 summarises the average scores across all strategic corridors for each objective and in total. Strategic corridors, on average, score highest for Objective 1 and lowest for Objective 3 & Objective 4.

Table 4-2 summarises the number of strategic corridors associated with each deliverability metric assessed. The majority of strategic corridors have potential to be severed where they cross existing rail lines or the Strategic and Major Road Networks. There are some potential opportunities for collaboration with the Canal and River Trust (14 strategic corridors) and LTA partnerships (74 strategic corridors), but the majority of strategic corridors may have potential for collaboration with National Highways or the opportunity for funding associated with the Major Road Network.

Objective	Average Score*	Score Range*
Objective 1: Reduce Transport-Related Pollution & Emissions	2.2	1.5 to 2.8
Objective 2: Improve Health & Wellbeing	2.0	1.0 to 3.0
Objective 3: Inclusive & Accessible	1.8	1.0 to 3.0
Objective 4: Sustainable Growth	1.8	1.0 to 3.0
Total	7.8	5.8 to 10.0
*Out of a possible 3.0 for individual objective scores and 12.0 for the all-objectives score		

Table 4-1: Average Objective Scores for Strategic Corridors

Theme	Metric	Number of Strategic Corridors*
Network Integration	Existing Active Travel Infrastructure	429 (with an average score of 2.0 out of 3.0)
Network Integration	Active Travel Plans	421
Severance	Strategic/Major Road	319
Severance	Major Watercourse	211
Severance	Rail Line	353
Collaboration	NCN	214
Collaboration	Strategic/Major Road	319
Collaboration	Canal and River Trust	14
Collaboration	Cross-LTA	74
Flood Risk	Flood Risk	147
Protected Landscape	National Park, Natural Landscape, Site of Special Scientific Interest, Special Area of Conservation, Special Protection Area	299
*Out of a possible 429 strategic corridors		

Table 4-2: Sum of Strategic Corridors Meeting Deliverability Metric Assessment Criteria

Further detail on the Appraisal Stage is in Technical Appendix C.

5 Action Plan

Chapter at a glance

This chapter presents the actions which are recommended to be taken forward, as well as an overview of how they have been developed.

5.1 Overview

A key outcome of this project is the identification of forward-looking actions aligned with the challenges and opportunities identified. The actions identified offer a mix of 'hard' and 'soft' measures to create a holistic programme of actions. These actions are framed for TfSE as the lead organisation, however collaboration and coordination with various partners and stakeholders is needed for the successful delivery of each action. Each action assigned partners and stakeholders to assist in further development with TfSE, which includes those who were engaged with as part of the development of the RATSAP and incorporates both national and regional level engagement and collaboration.

5.2 Approach

Following the collation of key challenges and opportunities, a list of potential actions was identified. These actions were presented to the RATSG to allow stakeholders to provide feedback and input. During this workshop, stakeholders discussed what actions would be most useful and helped clarify scope and applicability of actions. After revision and consideration, eight actions were identified. Table 5-1 summarises each action and its page number. The following information is included for each action:

- Action ID
- Action title
- Action description
- Locational context
 - Local: applicable for individual authorities
 - Regional: applicable for a wider area, either for the entire TfSE region or a subset of the region
 - National: applicable for the entire TfSE region and beyond
- Partners and stakeholders
- TfSE's role

Transport for the South East Regional Active Travel Strategy and Action Plan

Strategy and Action Plan

ID	Action	Description	Page
1	Regional Active Travel Steering Group	Convening of key stakeholders from across transport and adjacent sectors to provide strategic direction and feedback on RATSAP delivery.	26
2	Funding	Improvements to active travel funding, including opportunities and availability.	26
3	Local Plans & Strategies	Up-to-date and cross-boundary consideration of local active travel plans and strategies for greater consistency and collaboration across the region.	27
4	Knowledge Sharing	Sharing of active travel resources, evidence, opportunities, and lessons learned to support consistency and efficacy across the region and beyond.	27
5	Data & Evidence	Enhance and expand upon data and evidence availability across the region to support active travel development and delivery, as well as future work streams.	28
6	Cross-Boundary Collaboration	Encourage cross-boundary collaboration of schemes to join-up work across authorities and achieve more cohesive and effective outcomes.	28
7	Network Delivery	Support local authorities through feasibility, development, and funding of strategic active travel corridors and hubs across the region.	29
8	Integration	Collaborate with operators on the integration of active travel within their services and schemes.	29

Table 5-1 Action Plan Summary

Action 1: Regional Active Travel Steering Group (RATSG)

Convene key stakeholders from across transport and adjacent sectors to provide strategic direction and feedback on RATSAP delivery.

Locational Context

Regional

Partners & Stakeholders

- Local authorities
- Central Government
- Relevant special interest and advocacy groups

TfSE Roles

- Revise the RATSG Terms of Reference and request invited members to opt-in their commitment.
- Facilitate three meetings a year, all held online with a desire for one to be held in-person.
- Establish reoccurring agenda items on:
 - latest announcements/developments of significance for the region
 - roundtable of current challenges in development and delivery, as well as opportunities for collaboration
 - progression of RATSAP implementation
- Identify and plan topical presentations, workshops, training, and/or site visits based on current RATSAP implementation and RATSG member input.
- Encourage collaboration and knowledge sharing across the region both during and outside of RATSG meetings.

Action 2: Funding

Improve active travel funding, including facilitating and encouraging funding collaboration, supporting funding applications, and seeking to address challenges with active travel funding.

Locational Context

Local/Regional

Partners & Stakeholders

- Local authorities
- Central Government

TfSE Roles

- Engage with Central Government on active travel funding, emphasising scale of ambition and funding gap.
- Disseminate funding opportunities and information to stakeholders, including through RATSG, the TfSE Centre of Excellence funding page, and other TfSE standing meetings where appropriate.
- Identify further opportunities for funding active travel, centrally and locally, including to support network maintenance and upkeep.

Action 3: Local Plans & Strategies

Up-to-date and cross-boundary consideration of local active travel plans and strategies for greater consistency and collaboration across the region.

Locational Context

Local

Partners & Stakeholders

- Local authorities

TfSE Roles

- Participate in local active travel plan and strategy development through stakeholder engagement (e.g. workshops, consultation).
- Facilitate cross-boundary coordination and collaboration where appropriate.
- Provide available data, insights, and best practice to support consistent and joined-up local plans and strategies.

Action 4: Knowledge Sharing

Sharing of active travel resources, evidence, opportunities, and lessons learned to support consistency and efficacy across the region and beyond.

Locational Context

Regional/National

Partners & Stakeholders

- Local authorities
- Central Government
- Other sub-national transport bodies

TfSE Roles

- Engage with the RATSG to identify active travel resource gaps, including available data and information.
- Collaborate with other sub-national transport bodies and Central Government on the development of new workstreams where appropriate.
- Regular review and updates of active travel content on the Centre of Excellence website to ensure information is accurate and useful.
- Identify and respond to requests for new content and workstreams (i.e. guidance, studies, tools, etc.) through the Centre of Excellence. Potential workstreams to explore, but not limited to:
 - Cycle parking guidance
 - Behaviour change guidance
 - Active travel engagement guidance
 - Study tours
 - Training
 - Webinars
 - Active travel image database
 - Regional Active Travel Quarterly Newsletter
 - Social media posts
 - Business cases

Action 5: Data & Evidence

Enhance and expand upon data and evidence availability across the region to support active travel development and delivery, as well as future work streams.

Locational Context

Regional

Partners & Stakeholders

- Local authorities
- Central Government
- Public transport and mobility operators
- Research organisations, academia, and universities

TfSE Roles

- Facilitate and support cross-organisation and cross-sector sharing of existing data.
- Engage with partners and stakeholders to understand requirements, challenges, data and information availability, and lessons learned.
- Collect primary data on a regional scale that can be used for policy development and funding applications.
- Explore development of a data management portal to support ease of access to and sharing of collected data.
- Explore development of guidance on data collection to improve consistency and reliability of data collected across the region.

Action 6: Cross-Boundary Collaboration

Encourage cross-boundary collaboration of schemes to join-up work across authorities and achieve more cohesive and effective outcomes.

Locational Context

Local/Regional

Partners & Stakeholders

- Local authorities
- Public transport and mobility operators
- Other sub-national transport bodies

TfSE Roles

- Highlight opportunities for collaboration and working across boundaries (including cross-regional) to local authorities and other relevant delivery partners.
- Support local authorities working collaboratively to develop actions for implementation, including sharing information, expertise, and best practice.
- Facilitate joint working and 'buddy up' local authorities who share similar typology challenges and opportunities.

Action 7: Network Delivery

Support local authorities through feasibility, development, and funding of strategic active travel corridors and hubs across the region.

Locational Context

Local/Regional

Partners & Stakeholders

- Local authorities
- Central government

TfSE Role

- Work to progress corridors and hubs across the region, including:
 - Support for local authorities with feasibility studies of strategic corridors and hubs to progress and develop the strategic active travel network.
 - Refresh the strategic active travel network when appropriate.
 - Engage with partners and stakeholders to continually refresh and deepen understanding of challenges and opportunities in active travel delivery.
 - Work with delivery partners to secure additional funding, such as with developers to support new developments.
 - Support the introduction of Mobility Hubs.

Action 8: Integration

Collaborate with bus and rail operators on the integration of active travel within their services and schemes.

Locational Context

Regional/National

Partners & Stakeholders

- Local authorities
- Central Government
- Public transport and mobility operators
- Research organisations, academia, and universities

TfSE Roles

- Encourage and facilitate cross-organisation collaboration for improved integration across public transport and active modes.
- Engage with partners and stakeholders to share insights across organisations and identify clear integration opportunities. Potential opportunities to explore, but not limited to:
 - Explore cycle parking and storage options with operators to support multi-modal journeys.
 - Encourage coordinated promotions of sustainable travel between operators and local authorities.
 - Identify opportunities for shared mobility hire schemes to compliment services, such as Brompton Lockers at railway stations.
 - Support pilot trials through identification of potential pilot projects and locations, as well as collaboration between authorities, operators, and institutions.

6 Conclusion

The development of the RATSAP has provided the TfSE area with a clear, concise, and evidence-based document that identifies key opportunities and challenges for developing a high quality, safe, convenient, and accessible active travel network across the region. It has been co-developed with stakeholders to:

- Establish the aims and objectives for the RATSAP to support its overall direction and purpose.
- Understand the current state of active travel in the region, including planning delivery progress by LTAs.
- Explore challenges and opportunities for active travel across the TfSE area.
- Develop a high-level strategic active travel network comprising of strategic corridors and hubs.
- Provide a catalogue of appraised strategic corridors alongside their respective scores and deliverability assessment outcomes.
- Develop an action plan to guide and progress active travel across the TfSE area.

The appraised strategic active travel network provides TfSE and its constituent authorities with a vision for regional active travel, highlighting where joint working will be required and beneficial. The action plan provides a menu of actions which respond to the challenges identified, which have been explored with the Regional Active Travel Steering Group. Engagement will continue to be a key part of RATSAP to build partnerships and collaboration, check and challenge actions, and maintain accountability as actions are progressed. The RATSAP ultimately seeks to uplift and unify active travel across the TfSE region.

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Report to: Partnership Board –Transport for the South East

Date of meeting: 17 March 2025

By: Chief Officer, Transport for the South East

Title of report: Transport Strategy Refresh

Purpose of report: To provide an update on the development of the Draft Transport Strategy.

RECOMMENDATION:

The members of the Partnership Board are recommended to comment on the progress being made with the development of the Draft Transport Strategy.

1. Introduction

1.1 The purpose of this report is to provide a progress update on the development of the Draft Transport Strategy and supporting Draft Integrated Sustainability Appraisal (ISA) following the Partnership Board's decision that they should be published for public consultation.

2. Background

2.1 At the Partnership Board meeting on 9 December 2024, the Partnership Board agreed that the Draft Transport Strategy and associated Draft ISA should be subject to public consultation for a period of 12 weeks. The overall timeline for the development of the Transport Strategy is shown in **Appendix 1**.

3. Public Consultation

3.1 The public consultation on the Draft Transport Strategy and ISA commenced on 10 December 2024 and concluded on 7 March 2025. A range of engagement activities were undertaken to encourage organisations and individuals to respond to the consultation.

3.2 On Thursday 30 January, a meeting of the Transport Forum was held, the purpose of which was to assist the Transport Forum in developing its own response to the Draft Transport Strategy. This forum was held at the Institution of Civil Engineers in London, and was attended by 25 members of the forum. The activities focussed on getting more detailed feedback from the forum members on each of the five missions included in the strategy. This included feedback on any areas of each of the missions that could be improved and anything that had been missed.

3.3 A series of Strategy Roadshow events have been held to engage with members of the public. All day events were held at the following locations:

- Portsmouth - Southsea Library - 3 February 2025
- Brighton - Jubilee Library – 5 February 2025
- Southampton- Central Library 12 February 2025
- Canterbury Library - 13 February 2025
- Guildford Library - 24 February 2025
- Wokingham Library - 25 February 2025
- Number 11, St Thomas's Square, Ryde – 28 February 2025
- Hastings Library – 3 March 2025

3.4 Popular themes raised by those attending these roadshows included the following:

- Buses, notably their reliability, the need for flat and integrated fares, and many people praising the quality of local bus services;
- Trains, notably issues with their reliability and cost of tickets;
- The need to invest in transport infrastructure of all types;
- The urgent need to invest in making sure transport networks were well maintained and resilient against the effects of climate change.

3.5 The TfSE team also offered a number of strategy surgery sessions that provided key stakeholders with the opportunity to ask questions in advance of submitting their consultation responses.

3.6 TfSE were approached by several organisations to either take part in one of their meetings, or run a dedicated engagement workshop with them. Engagement took place with the following organisations:

- The Chartered Institution of Highways and Transportation (South East Branch)
- The Transport Planning Society
- Logistics UK
- Gatwick Airport
- Heathrow Airport
- Kent and Medway NHS Trust
- The Business Services Association

4. Communications Activity

4.1 A communications campaign was undertaken to encourage people and organisations to respond to the consultation. This included the following:

- a promotional video informing people about the strategy and encouraging them to respond to the consultation;
- an ongoing social media campaign, including short video on the draft Transport Strategy content;
- press releases shared with the technical press, and press across the region;
- briefing packs shared with communications teams within our partners, for them to share with their local press contacts, as appropriate;
- editions of the TfSE Podcast focussing on the draft Transport Strategy.

5. Consultation report

5.1 As reported at the 9 December Partnership Board meeting, a consultation report will be prepared now that consultation has ended. This report will:

- summarise how the consultation was undertaken;
- present an analysis of the responses to the online questionnaire survey and the written responses received;
- identify key findings from the questionnaire survey, written responses, workshops, roadshows; and,
- make recommendations about possible amendments that may be needed to the draft Transport Strategy and ISA to reflect the feedback received.

5.2 A copy of the consultation report will be submitted to the July 2025 Partnership Board meeting, alongside a copy of the Draft Final Transport Strategy and ISA. The covering report will identify any proposed changes to reflect the feedback received during the consultation for the Partnership Board to agree. Following that Board meeting a number of constituent authorities may wish to take the agreed draft final strategy back through their decision making process. A final version of the Strategy and ISA will therefore be presented to the October meeting of the Partnership Board for agreement prior to submission to Government.

6. Financial considerations

6.1 As reported to the Partnership Board in January 2024, the total cost of the transport strategy refresh is forecast at £724,000. This cost is being met from the Department of Transport grant allocations for 2023/24 and 2024/25.

7. Conclusions and recommendations

7.1 In conclusion, the consultation on the Draft Transport Strategy and ISA has now concluded. The Partnership Board are recommended to comment on the progress with the finalisation of the Draft Transport Strategy and ISA.

RUPERT CLUBB

Chief Officer

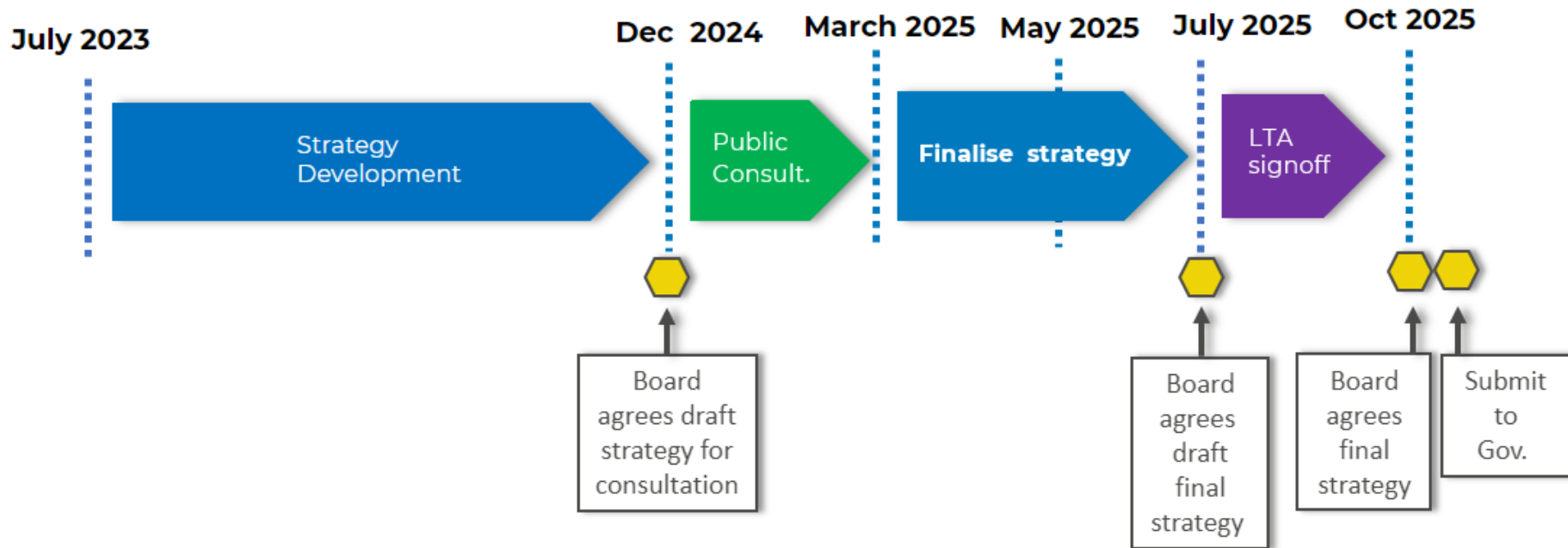
Transport for the South East

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Appendix 1 – Timeline for the Transport Strategy Refresh



Report to: Partnership Board –Transport for the South East

Date of meeting: 17 March 2025

By: Co-Chairs, Business Advisory Group

Title of report: Business Advisory Group

Purpose of report: To update the Partnership Board on the recent work of the Business Advisory Group

RECOMMENDATION:

The members of the Partnership Board are recommended to review and comment on the recent work of the Business Advisory Group.

1. Introduction

1.1 The Business Advisory Group (BAG) was formed in October 2024. It is co-chaired by Vince Lucas and Daniel Ruiz. The group provides a business voice to support, advise and contribute to the Partnership Board.

2. Business Advisory Group – recent meetings

2.1 The BAG met on Thursday 25 February virtually.

2.2 The BAG received an update on the recent Partnership Board meeting that took place in January, the Business Plan 2025/26, Centre of Excellence and the Transport Strategy Refresh consultation.

2.3 The BAG reviewed the upcoming Integrated National Transport Strategy Roadshow and how the business voice is a valuable input into the day. Representatives from the BAG will attend the roadshow, incorporating feedback from the group.

3. Business Advisory Group – Opportunities and Challenges

3.1 As set out within the Terms of Reference the Business Advisory Group allows each member to raise their top transport related opportunities and challenges for business. The following were identified:

- **Alternative Fuels** – a challenge that has been identified by the group is implementing alternative fuels, which impacts different sectors. The BAG heard about the success of hydrogen buses in Crawley and opportunities for different types of fuel. The group discussed several factors which are impacting the use

of alternative fuels such as planning restrictions and storage of hydrogen. A case study is being prepared on the hydrogen buses. The group will review this topic again at future meetings and look to ensure this is a key topic for the upcoming Wider BAG meeting taking place in July.

- **Heathrow Western Rail Access** – TfSE have met with Thames Valley Chamber of Commerce and Network Rail to discuss the economic refresh study. TfSE have offered support with communication and speaking to officials.
- **Skills** – The current challenge of skills gaps was raised by several of the representatives on the BAG. Chambers of commerce raised awareness of the Local Skills Improvement Plans which they lead on to identify those gaps that colleges / providers should develop on.
- **Port of Dover** – EU entry exit system, awaiting implementation date. Impacts to the infrastructure, freight, tourism and local business. Heard the planning that Eurotunnel have implemented using a kiosk approach and AI for traffic modelling.
- **Buses** – challenges with the buses fare cap which has increased from £2, to £3 for a year, not all operators are using the fare cap due to the increase. Seeking better certainty on funding.
- **Freight** – Eurotunnel are looking at a piece of work to move more freight on to the railways, engaging with Network Rail.

4. Conclusions and recommendations

4.1 The Partnership Board is recommended to note the progress of the Business Advisory Group.

Daniel Ruiz and Vince Lucas
Co-Chairs – Business Advisory Group
Transport for the South East

Contact Officer: Jessica Lelliott

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Report to: Partnership Board –Transport for the South East

Date of meeting: 17 March 2025

By: Chair of Transport Forum

Title of report: Advisory Panel and Transport Forum Update

Purpose of report: To update the Partnership Board on the Transport Forum and Advisory Panel.

RECOMMENDATION:

The members of the Partnership Board are recommended to note the recent work of the Transport Forum and Advisory Panel.

1. Introduction

1.1 The fifth meeting of the Advisory Panel took place on 6 March 2025.

1.2 The first in-person meeting of the Transport Forum for 2025 took place on 30 January in London. This meeting focussed on developing a formal response to the draft Transport Strategy Consultation from the Transport Forum.

2. Transport Forum

2.1 The first in person Transport Forum event of 2025 took place on January 30 in London. The session had good attendance from regional partners including Network Rail, National Highways, local transport authorities and representatives from transport operators and user groups.

2.2 As part of the in-person event stakeholders had the opportunity to ask questions on the Transport Strategy which was at the time out for consultation. Following this, attendees had the chance to work with facilitators to suggest any additions to each of the five missions. The purpose of the session was to compile a formal response to the consultation on behalf of the Forum. As already confirmed at the previous in-person meeting of the Transport Forum this response would be considered as part of the consultation report.

2.3 Following the meeting, TfSE officers used the outcomes from the day to compile a response to the consultation. This was signed off by the Chair and has been formally submitted as the Transport Forum response. Members of the Transport Forum were encouraged to complete the consultation on behalf of their organisation or as an individual on addition to the Forum response.

3. Advisory Panel

3.1 In the meeting on March 6 the Advisory Panel provided feedback from their thematic groups. The Advisory Panel noted that thematic groups were well attended and providing use for their respective areas of work.

3.2 There was good discussion around the strength of cross collaboration between the groups, and it was noted themes were often not limited to just one area of work. TfSE officers agreed to take away an action to look at increasing the opportunities for group collaboration, in line with a wider review of TfSE's current stakeholder groups.

3.3 The Advisory Panel also felt that it would be useful for each group to have clear outputs and next steps to identify ways in which their work could evolve.

4. Conclusions and recommendations

4.1 It is recommended that the Partnership Board note the work of the Transport Forum and Advisory Panel.

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

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Report to: Partnership Board –Transport for the South East

Date of meeting: 17 March 2025

By: Chief Officer, Transport for the South East

Title of report: Delivery of the Strategic Investment Plan

Purpose of report: To provide an update on work to support the delivery of the Strategic Investment Plan

RECOMMENDATION:

The members of the Partnership Board are recommended to comment on 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 requires several partners, including Transport for the South East (TfSE), local transport authorities, National Highways, Network Rail and Department for Transport (DfT), to work closely together to develop and deliver the schemes and policy interventions it sets out. Several different approaches to bring forward schemes are also 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 further work.

2.2 This report provides an update on the work that supports delivery of the interventions in the SIP, ensuring the required analytical tools are available, our partners have the support they need as they develop and deliver schemes, and that the reporting on benefits realisation arising from both the place-based and global interventions included in the SIP is taking place.

3. SIP Delivery Action Plan

3.1 The information within the Delivery Action Plan (DAP) for the SIP has been updated through November and December 2024 via a series of meetings with each delivery partner to review the schemes. The information gathered as part of this exercise provides valuable insight as to how partners are progressing with the delivery

of schemes across the region and helps shape the support TfSE seeks to provide partners as they bring forward schemes. An updated SIP DAP report can be found in **Appendix 1**.

3.2 The information in the DAP is fed into the prioritisation framework tool and this update will further improve our ability to filter and prioritise schemes as and when required.

3.3 We have also been able to collate information regarding the required funding level for scheme development work over the next three years based on forecasts of scheme progress and stages planned. This information will be used by TfSE to help make the case for appropriate development funding for delivery partners, ideally with longer term funding certainty. This information will be updated annually as part of the DAP update process.

4. Interactive Story Map

4.1 The Interactive Story Map is an easy map-based tool to help users find the interventions displayed in the SIP and now includes the information from the updated Delivery Action Plan.

5. Scheme Development Work

5.1 The TfSE budget has included funding to work with partners to support and undertake scheme development work to deliver SIP schemes over the last two years. This workstream supports delivery partners to progress scheme development through either feasibility study or Strategic Outline Business Case (SOBC) stage in circumstances where they are not able to fund or resource the work themselves.

5.2 The schemes that have been funded in financial years 2023/4 and 2024/5 are shown in Tables 1 & 2 in **Appendix 2**. Through this programme TfSE has been able to support 12 schemes to date. Six schemes will have progressed through Feasibility work (2 are yet to start with project scoping currently underway). Six further schemes (2 are yet to start with project scoping and contract review currently underway) are being supported through an SOBC. All 12 of these projects would not have been able to progress without support from TfSE to ensure there is a pipeline of schemes ready for delivery in the coming years.

5.3 The draft TfSE budget for 2025/26 includes a funding allocation to provide further support for scheme development work. The proposed schemes to be taken forward in 2025/26 are detailed in the separate Scheme Development Support report (Agenda Item 12).

6. Major Road Network (MRN) and Large Local Majors (LLM)

6.1 TfSE continues 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.

6.2 We continue to provide further support to scheme promoters, including training and guidance on business case development, through the Centre of Excellence and Analytical Framework.

7. Third Road Investment Strategy (RIS3)

7.1 The announcement of the Draft RIS3 has been delayed and National Highways have been given a one-year extension of RIS2 with an interim settlement. It is our understanding that the Draft RIS3 will be published Spring 2025, and we will be maintaining a dialogue with both National Highways and DfT as that process evolves.

8. Analytical Framework

8.1 We held the third TfSE Modelling and Appraisal Forum in January 2025 which focused on data collection and sharing. A presentation from Drakewell (a specialist traffic data company) showcased their latest developments and best practice related to the traffic data and analysis platform C2-Traffic, which is widely used in this region by seven LTAs. The presentation generated valuable discussions around data collection and sharing. Officers were generally supportive of sharing data with TfSE for coherent and consistent analysis and expressed interest in accessing regional data that TfSE is collecting or planning to collect, such as development logs, the regional travel survey, and mobile network data.

8.2 The regional travel survey data collection has been completed, with over 6,000 responses collected across the region. This will provide a statistically robust sample size for analysing evolving travel behavior since the pandemic. The data is currently undergoing a validation process. The final raw data and summary dashboards will be shared through the Centre of Excellence platform.

8.3 We are currently scoping options for the purchase of mobile network data, which is an essential dataset for travel demand analysis. We are gathering data specifications by engaging with several LTAs that have expressed interest in using the data for their forthcoming transport model updates.

8.4 In terms of analytical tool development, we are progressing with the development of the South East Highway Assignment Model (SEHAM) as planned. The draft report for the proof-of-concept study of the North Regional Transport Modelling System has been received and is currently being finalised. We will share the findings with the Board once the report is complete.

8.5 We participated the DfT's workshop on overcoming barriers to AI adoption at the Transport AI Conference. While gaining insights into the DfT's ambitions to accelerate AI adoption in the transport sector, we remain fully aware of key challenges, particularly around data discoverability and quality, skills and workforce readiness, and regulation and governance. We will continue to engage with the DfT on this subject and explore opportunities to accelerate the adoption of AI in our work and analysis.

9. Monitoring and Evaluation Work

9.1 The Delivery Action Plan forms the baseline from which monitoring and evaluation of delivery of schemes within the SIP are measured. The information has been updated with the current position (Dec 2024) of each of the proposed schemes with delivery partners and will be reported in the TfSE annual report. Through this exercise we are able to identify how schemes are progressing, what is in the pipeline and where schemes have faltered or paused.

9.2 Work is underway to gather and analyse data in readiness for the publication of a second “State of the Region report”, which will update the information in first version published in 2023.

9.3 To support the increasing outputs from the above workstreams, TfSE has been gathering requirements for a central system to store data. Working with our host authority, East Sussex County Council, we have agreed on a PostgreSQL database solution. In 25/26 we will build the data architecture around this central repository, creating a regional data hub.

10. Financial Considerations

10.1 The work set out in this report is being funded from the DfT grant allocation awarded to TfSE for 2024/25.

11. Conclusions

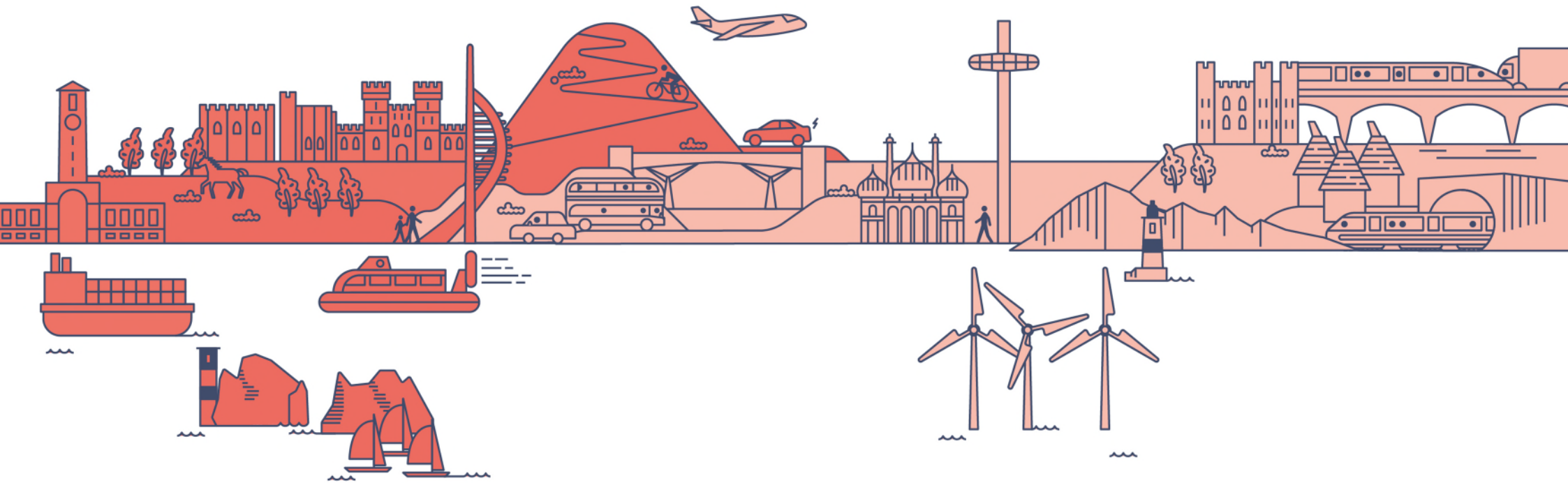
11.1 The Partnership Board is recommended to comment on the progress of a range of workstreams that support the delivery of the Strategic Investment Plan.

RUPERT CLUBB
Chief Officer
Transport for the South East

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Delivery Action plan



Transport for the South East
February 2025



Contents

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Delivery Action plan	0	A36/Wessex Main Line (New Forest)	56
Introduction	2	A303/West of England Main Line (Andover – Basingstoke) ..	59
Aims	2	M4/Great Western Main Line/Reading – Taunton Line (Newbury – Slough)	62
Method	2	M25 (Dartford – Slough)	66
Structure of the report.....	2	A228/A249/A278/A289/Chatham Main Line/Sheerness Line (Medway Ports)	70
M2/A2/Chatham Main Line (Dartford – Dover)	3	A228/A229/Medway Valley Line (Maidstone – Medway Towns) 4	74
A299/Chatham Main Line (Faversham – Ramsgate)	9	Redhill – Tonbridge/South Eastern Main Line (Ashford - Redhill)	77
M20/A20/High Speed 1/South Eastern Main Line (Dover – Sidcup)	12	A25/North Downs Line (Guildford – Redhill)	80
A21/Hastings Line (Hastings – Sevenoaks)	17	A31/A322/A329/A331/North Downs Line (Guildford - Reading) 8	84
A22/A264/Oxted Line (Crawley – Eastbourne)	21	A28/A290/A291 (Canterbury – Whitstable)	89
M23/A23/Brighton Main Line (Brighton – Coulsdon)	26	A27/A259/A2070/East Coastway Line/Marshlink Line (Ashford – Brighton)	92
A24/A264/A29/Arun Valley Line (Crawley – Fontwell)	32	M27/A27/A31/West Coastway Line/East Coastway Line (Brighton – Ringwood)	97
A3/A27/M275/Portsmouth Direct Line (Portsmouth – Surbiton) 36	36	Summary findings	105
M3/M27/M271/A33/A326/South Western Main Line (Southampton – Sunbury)	42	Progress through project stages	105
A33/Basingstoke – Reading Line (Basingstoke – Reading) .	49	Delivery partners	105
A34/South Western Main Line/Basingstoke – Reading Line (Basingstoke - Reading)	52	Next Steps	105
		Appendix A Intervention descriptions	106

Delivery Action Plan

Introduction

Aims

The Delivery Action Plan builds on the Strategic Investment Plan and identifies the interventions on which progress will likely be made in the next three years. For these schemes the plan identifies who will lead the work and how TfSE can support.

Method

Steer has conducted two rounds of engagement with delivery partners including all local transport authorities in the TfSE area as well as National Highways and Network Rail. Through this engagement a database of plans for development and delivery of each intervention within the TfSE Strategic Investment Plan has been compiled.

Structure of the report

Interventions are presented by strategic corridor with the following information:

A corridor overview describing the routes included in the corridor,
The strategic role of the corridor,
Key corridor issues; and
A map showing the SIP interventions on or adjacent to the corridor.

In addition, there are tables showing:

Current and next stage of development or delivery defined as follows:

- Feasibility Study
- Strategic Outline Business Case
- Outline Business Case (including surveys, design, modelling and stakeholder engagement)
- Powers/Consents
- Procurement
- Full Business Case
- Construction/Implementation
- Opening

Progress planned in the next three years (where no progress is planned the cells are greyed out).

The profile of progress over the next three years, (where progress is expected, but the years of that progress is not yet known the entry is TBC)

The delivery partner/s which will lead on the next stage of scheme development or delivery; and

TfSE's role in supporting or leading on:

- Programme management
- Pre-feasibility work & funding
- (Joint) Scheme promoter
- Business case & scheme development & funding
- Use of analytical framework
- Advocacy & securing funding
- Procurement & sourcing
- Resource capacity & capability funding

M2/A2/Chatham Main Line (Dartford – Dover)

Corridor overview

A2 and M2 roads on an axis from the north west around Dartford to the south east at Dover,

The Chatham Main Line rail link along similar alignment.

Strategic role

The corridor connects North Kent, Medway and the Port of Dover to London and the M25. It is served by High Speed 1 and has significant new infrastructure proposals in the form of the Lower Thames Crossing.

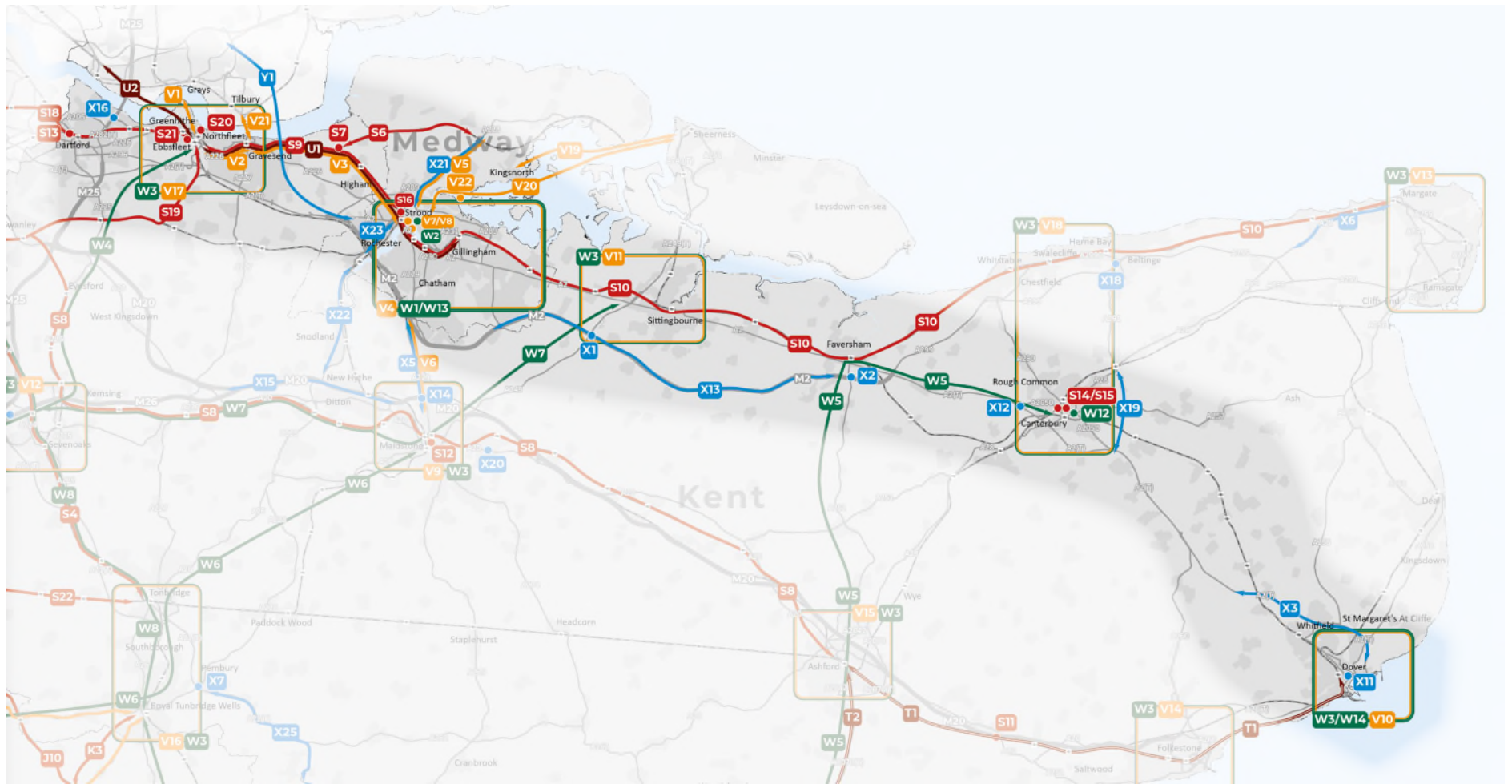
Key issues

The highway network is vulnerable to disruption at Dover due to the back-up of freight traffic and subsequent congestion. Congestion on the A2 between Dartford and the Medway Towns, particularly during the AM peak.

The corridor, though relatively large and disparate, is the third most-deprived in the South East.

There is significant out-commuting from the Medway Towns due to an imbalance of housing and jobs in the area, putting pressure on the wider transport network, with significant further housing development planned.

Thameslink and other peak-hour services to/from London stations and the corridor experience high levels of crowding. Rail links into Central London are only dual tracked in many cases, so long-distance services are forced to share tracks with metro services on approaches to London termini. This constrains rail capacity and reliability on the corridor. The flat junction at Rochester Bridge is another notable rail bottleneck.



M2/A2/Chatham Main Line (Dartford – Dover)

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
S1	St Pancras International Domestic High Speed Platform Capacity	Medium (2030s)		0	0	1				HS1 Ltd	B, D, F
S2	London Victoria Capacity Enhancements	Medium (2030s)	Renewals Programme / Property Scheme	2	2	3	3			Network Rail	B, D, F
S3	Bakerloo Line Extension	Medium (2030s)		1	2	3				Transport for London	F
S7	North Kent Line / Hundred of Hoo Railway - Rail Chord	Medium (2030s)		0	0	2				Network Rail / medway	B, D, E, F
S9	North Kent Line - Service Enhancements	Short (2020s)		0	0	1	1			DfT	B, D, E, F
S10	North Kent Line / Chatham Main Line - Line Speed Enhancements	Medium (2030s)		0	0	1	1			Network Rail	B, D, E, F
S13	Dartford Station Remodelling/Relocation	Medium (2030s)		1	0	1				?	F
S14	Canterbury Interchange Rail Chord	Medium (2030s)		0	0	1				Network Rail	B, D, E, F
S15	New Station - Canterbury Interchange	Long (2040s)		0	0	1				TfSE / Kent County Council / Canterbury City Council	B, D, E, F
S16	New Strood Rail Interchange	Medium (2030s)		0	1	2	TBC	TBC	TBC	Network Rail/Medway Council	B, D, E, F
S18	Crossrail - Extension from Abbey Wood to Dartford/Ebbsfleet	Medium (2030s)		2	0	3				C2E Consortium (led by LB Bexley)	B, D, E, F

5

Legend	
1. Feasibility Study	A. Programme management
2. Strategic Outline Business Case	B. Pre-feasibility work & resource funding
3. Outline Business Case (including surveys, design, modelling and stakeholder engagement)	C. (Joint) Scheme promoter
4. Powers/Consents	D. Business case & scheme development & funding
5. Procurement	E. Use of analytical framework
6. Full Business Case	F. Advocacy & securing funding
7. Construction/Implementation	G. Procurement & sourcing
8. Opening	H. Resource capacity & capability funding

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
S19	High Speed 1 / Waterloo Connection Chord - Ebbsfleet Southern Rail Access	Medium (2030s)		0	0	1				TfSE / Kent County Council	D, F
S20	Ebbsfleet International (Northfleet Connection)	Medium (2030s)		0	0	1				Ebbsfleet Development Corporation	B, D, E, F
S21	Ebbsfleet International (Swanscombe Connection)	Long (2040s)		0	0	1				Network Rail	B, D, E, F
U1	High Speed 1 - Link to Medway (Chatham)	Long (2040s)		0	0	1	N/A	N/A	N/A	TfSE / HS1 Ltd / Medway Council	B, D, E, F
U2	High Speed 1 - Additional Services to West Coast Main Line	Short (2020s)		0	0	1				HS1 Ltd	B, D, E, F
V1	Fastrack Extension - Swanscombe Peninsula	Medium (2030s)		0	0	2	N/A	N/A	N/A	Kent County Council	B, D, E, F
V2	Fastrack Optimisation and Extension - Dartford - Northfleet - Ebbsfleet - Gravesend	Short (2020s)		0	1	2	1	1	2	Kent County Council	B, D, E, F
V3	Fastrack Extension - Medway	Short (2020s)		0	1	2	1	1	2	Kent County Council	D, F
V4	Medway Mass Transit	Medium (2030s)		0	0	1				Medway Council	B, D, E, F
V7	Medway Mass Transit - Chatham to Medway City Estate New Bridge	Medium (2030s)		0	0	1	N/A	N/A	N/A	TfSE / Medway Council	B, D, F, H
V8	Medway Mass Transit - Chatham to Medway City Estate Water Taxi	Long (2040s)		0	0	1	N/A	N/A	N/A	TfSE / Medway Council	B, D, F, H
V10	Dover Bus Rapid Transit	Short (2020s)	Housing Infrastructure Fund	7	7	8	7	8	8	Kent County Council	A, B, C, D, E, F, G, H
V11	Sittingbourne Bus Enhancements	Short (2020s)		0	0	1				Kent County Council	A, B, C, D, E, F, G, H
V17	Thames Gateway/Gravesham Bus Enhancements	Short (2020s)	BSIP	3	6	5	3	4, 5	7	Kent County Council	B, D, E, F, H

6

Legend	
1. Feasibility Study	A. Programme management
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3. Outline Business Case (including surveys, design, modelling and stakeholder engagement)	C. (Joint) Scheme promoter
4. Powers/Consents	D. Business case & schema development & funding
5. Procurement	E. Use of analytical framework
6. Full Business Case	F. Advocacy & securing funding
7. Construction/Implementation	G. Procurement & sourcing
8. Opening	H. Resource capacity & capability funding

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
V21	Ferry Crossings - Gravesend to Tilbury Enhancements	Medium (2030s)		0	0	1				Private operators	B, D, E, F, H
W1	Medway Active Travel Enhancements	Short (2020s)		0	0	1	N/A	N/A	N/A	Medway Council	B, D, E, F, H
W2	Medway Active Travel - Chatham to Medway City Estate River Crossing	Long (2040s)		0	0	1	N/A	N/A	N/A	Medway Council	A, B, C, D, E, F, G, H
W3	Kent Urban Active Travel Infrastructure	Short (2020s)	KCWIP	0	0	1				Kent County Council	A, B, C, D, E, F, G, H
W12	Canterbury Placemaking and Demand Management Measures	Short (2020s)	Levelling Up Fund Rnd 2	2	3	4	3	7	7	Kent County Council / Canterbury City Council	B, D, F, H
W13	Medway Placemaking and Demand Management Measures	Short (2020s)		0	0	1	N/A	N/A	N/A	Medway Council	B, D, F, H
W14	Dover Placemaking and Demand Management Measures	Short (2020s)	Levelling Up Fund Rnd 2	0	0	3	3	7	7	Kent County Council / Dover District Council	F
X1	M2 Junction 5 (RIS2)	Short (2020s)	RIS2	6	7	8	TBC	TBC	TBC	National Highways	B, D, F, H
X2	A2 Brenley Corner Enhancements (RIS3 Pipeline)	Medium (2030s)	RIS pipeline (funding subject to RIS)	2	2	3	TBC	TBC	TBC	National Highways	B, D, F
X3	A2 Dover Access (RIS3 Pipeline)	Medium (2030s)	RIS pipeline (funding subject to RIS)	2	2	3	TBC	TBC	TBC	National Highways	B, D, E, F, H
X8	Digital Operations Stack and Brock	Medium (2030s)		0	0	1	TBC	TBC	TBC	National Highways	B, F
X10	Kent Lorry Parks (Long Term Solution)	Short (2020s)		0	0	1	TBC	TBC	TBC	National Highways	A, D, F, H
X11	Dover Freight Diversification	Short (2020s)		0	0	1				Network Rail	A, F

7

Legend	
1. Feasibility Study	A. Programme management
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3. Outline Business Case (including surveys, design, modelling and stakeholder engagement)	C. (Joint) Scheme promoter
4. Powers/Consents	D. Business case & scheme development & funding
5. Procurement	E. Use of analytical framework
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7. Construction/Implementation	G. Procurement & sourcing
8. Opening	H. Resource capacity & capability funding

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
X13	M2 Junction 4 - Junction 7 Smart Motorway (SMP)	Short (2020s)	SMP - Paused	0	0	1	TBC	TBC	TBC	National Highways	F
X19	Canterbury East Relief Road	Long (2040s)		0	0	1	N/A			Kent County Council / Canterbury City Council	F
Y1	Lower Thames Crossing	Medium (2030s)	RIS Funded (Nationally Significant Infrastructure Project)	3	4	6	N/A	N/A	N/A	National Highways	F

Legend	
1. Feasibility Study	A. Programme management
2. Strategic Outline Business Case	B. Pre-feasibility work & resource funding
3. Outline Business Case (including surveys, design, modelling and stakeholder engagement)	C. (Joint) Scheme promoter
4. Powers/Consents	D. Business case & schema development & funding
5. Procurement	E. Use of analytical framework
6. Full Business Case	F. Advocacy & securing funding
7. Construction/Implementation	G. Procurement & sourcing
8. Opening	H. Resource capacity & capability funding

A299/Chatham Main Line (Faversham – Ramsgate)

Corridor overview

The A299 east-west road between Faversham and Ramsgate, along the North Kent coast on its way to the Thanet Towns,

The Chatham Main Line rail link along similar alignment.

Strategic role

The corridor links the Strategic Road Network (i.e. M2 junction 7) to the North Kent coastal towns of Whitstable and Herne Bay and the Thanet Towns; Margate, Broadstairs and Ramsgate. It also provides a link to the Port of Ramsgate and Manston Airport, though these are not major international gateways at present.

Key issues

1. The corridor is the most deprived in the South East with some of the highest levels of planned residential development and job growth in the region (40% job growth is planned from 2018 to 2035). Improved transport and connectivity will likely play an important role in ensuring a successful development path for these economically challenged areas.
2. Congestion hotspots exist on the Major Road Network where the A299 passes through Sevenscore Roundabout and at the Lord of the Manor junction with the A256 outside Ramsgate.

Rail journey times between London and North East Kent are relatively slow, despite improvements in recent years with the introduction of high-speed services.

The Thanet Towns are relatively isolated from other major economic hubs in the South East.



A299/Chatham Main Line (Faversham – Ramsgate)

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
S14	Canterbury Interchange Rail Chord	Medium (2030s)		0	0	1				Network Rail	B, D, E, F
S15	New Station - Canterbury Interchange	Long (2040s)		0	0	1				TfSE / Kent County Council / Canterbury City Council	B, D, E, F
V13	Thanet Bus Enhancements	Short (2020s)	BSIP	7	7	8	3	8		Kent County Council	A, B, C, D, E, F, G, H
W12	Canterbury Placemaking and Demand Management Measures	Short (2020s)	Levelling Up Fund Rnd 2	2	3	4	3	7	7	Kent County Council / Canterbury City Council	B, D, F, H
X6	A28 Birchington, Acol and Westgate-on-Sea Relief Road (MRN)	Short (2020s)	MRN	2	3	4	3	3	4	Kent County Council	F
X18	Herne Relief Road	Short (2020s)		7	0	8				Kent County Council	F

Legend	
1. Feasibility Study	A. Programme management
2. Strategic Outline Business Case	B. Pre-feasibility work & resource funding
3. Outline Business Case (including surveys, design, modelling and stakeholder engagement)	C. (Joint) Scheme promoter
4. Powers/Consents	D. Business case & scheme development & funding
5. Procurement	E. Use of analytical framework
6. Full Business Case	F. Advocacy & securing funding
7. Construction/Implementation	G. Procurement & sourcing
8. Opening	H. Resource capacity & capability funding

M20/A20/High Speed 1/South Eastern Main Line (Dover – Sidcup)

Corridor overview

The M20 and A20 roads on an axis from the north west around London/the M25 to the south east around Folkestone and Dover,

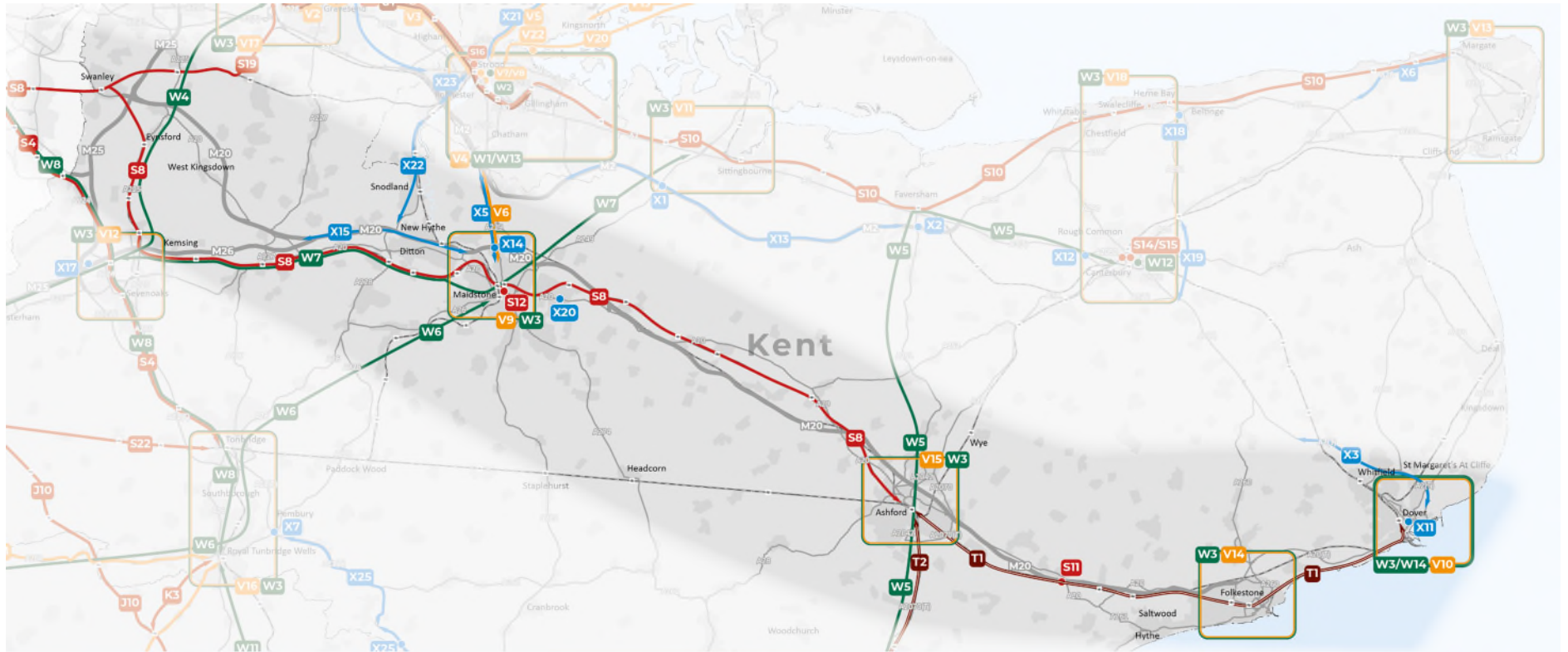
The South Eastern Main Line rail link along similar alignment, High Speed 1 from Ashford International.

Strategic role

Plays an important strategic role, both in the South East and nationally, serving two of the most important international gateways in the country – the Channel Tunnel at Folkestone and the Port of Dover.

Key issues

1. Maidstone is a road congestion bottleneck in the centre of the corridor, particularly during the AM peak.
2. The ‘Operation Brock’ and ‘Operation Stack’ traffic management procedures can also cause significant congestion on southeastern parts of the corridor (and elsewhere) when there is disruption at Dover.
3. Rail journey times between London and Maidstone are relatively slow (1 hour) compared to HS1 services between London and Ashford International (around 35 minutes).
4. The corridor has significant planned residential development and job growth. 101,341 new homes are planned to 2035, along with 32% job growth. Development will be concentrated primarily around Maidstone and Ashford respectively. increasing the need to build capacity on the corridor’s transport network.



M20/A20/High Speed 1/South Eastern Main Line (Dover – Sidcup)

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
S1	St Pancras International Domestic High Speed Platform Capacity	Medium (2030s)		0	0	1				HS1 Ltd	B, D, F
S2	London Victoria Capacity Enhancements	Medium (2030s)	Renewals Programme / Property Scheme	2	2	3	3			Network Rail	B, D, F
S3	Bakerloo Line Extension	Medium (2030s)		1	2	3				Transport for London	F
S4	South Eastern Main Line - Chislehurst to Tonbridge Capacity Enhancements	Medium (2030s)		0	1	7	7			Network Rail	B, D, F
S5	London Victoria to Shortlands Capacity Enhancements	Medium (2030s)		0	0	1				Network Rail	F
S8	Thameslink - Extension to Maidstone and Ashford	Short (2020s)	Southeastern Timetable	7	0	9				DfT	E, F
S11	Otterpool Park/Westenhanger Station Platform Extensions and Station Upgrade	Medium (2030s)		1	0	2				Folkestone and Hythe / Homes England	F
S12	Integrated Maidstone Stations	Medium (2030s)		0	0	1				Maidstone Borough Council	B, D, E, F
S14	Canterbury Interchange Rail Chord	Medium (2030s)		0	0	1				Network Rail	B, D, E, F
S17	Rail Freight Gauge Clearance Enhancements	Short (2020s)		1	2	2				Network Rail	B, D, E, F
S19	High Speed 1 / Waterloo Connection Chord - Ebbsfleet Southern Rail Access	Medium (2030s)		0	0	1				TfSE / Kent County Council	D, F
S21	Ebbsfleet International (Swanscombe Connection)	Long (2040s)		0	0	1				Network Rail	B, D, E, F
T1	High Speed East - Dollands Moor Connection	Medium (2030s)		0	0	1				HS1 Ltd	D, E, F

Legend	
1. Feasibility Study	A. Programme management
2. Strategic Outline Business Case	B. Pre-feasibility work & resource funding
3. Outline Business Case (including surveys, design, modelling and stakeholder engagement)	C. (Joint) Scheme promoter
4. Powers/Consents	D. Business case & scheme development & funding
5. Procurement	E. Use of analytical framework
6. Full Business Case	F. Advocacy & securing funding
7. Construction/Implementation	G. Procurement & sourcing
8. Opening	H. Resource capacity & capability funding

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TFSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
U2	High Speed 1 - Additional Services to West Coast Main Line	Short (2020s)		0	0	1				HS1 Ltd	B, D, E, F
V9	Maidstone Bus Enhancements	Short (2020s)		0	0	1		1	1	Kent County Council	A, B, C, D, E, F, G, H
V10	Dover Bus Rapid Transit	Short (2020s)	Housing Infrastructure Fund	7	7	8	7	8	8	Kent County Council	A, B, C, D, E, F, G, H
V14	Folkestone Bus Enhancements	Short (2020s)		0	0	1				Kent County Council	B, D, E, F, H
V15	Ashford Bus Enhancements	Short (2020s)		0	0	1				Kent County Council	F
W3	Kent Urban Active Travel Infrastructure	Short (2020s)	KCWIP	0	0	1				Kent County Council	A, B, C, D, E, F, G, H
W6	Tonbridge - Maidstone National Cycle Network Enhancements	Short (2020s)		0	0	1				Sustrans	F
W14	Dover Placemaking and Demand Management Measures	Short (2020s)	Levelling Up Fund Rnd 2	0	0	3	3	7	7	Kent County Council / Dover District Council	F
X7	A228 Colts Hill Strategic Link (MRN Pipeline)	Medium (2030s)	MRN Pipeline	0	0	2				Kent County Council	B, F
X8	Digital Operations Stack and Brock	Medium (2030s)		0	0	1	TBC	TBC	TBC	National Highways	B, F
X9	A20 Enhancements for Operations Stack & Brock	Short (2020s)		0	0	1	TBC	TBC	TBC	National Highways / Kent County Council	B, F
X10	Kent Lorry Parks (Long Term Solution)	Short (2020s)		0	0	1	TBC	TBC	TBC	National Highways	A, D, F, H
X11	Dover Freight Diversification	Short (2020s)		0	0	1				Network Rail	A, F
X14	M20 Junction 6 Sandling Interchange Enhancements	Medium (2030s)		0	0	1	TBC	TBC	TBC	National Highways	F

15

Legend	
1. Feasibility Study	A. Programme management
2. Strategic Outline Business Case	B. Pre-feasibility work & resource funding
3. Outline Business Case (including surveys, design, modelling and stakeholder engagement)	C. (Joint) Scheme promoter
4. Powers/Consents	D. Business case & scheme development & funding
5. Procurement	E. Use of analytical framework
6. Full Business Case	F. Advocacy & securing funding
7. Construction/Implementation	G. Procurement & sourcing
8. Opening	H. Resource capacity & capability funding

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
X15	M20 Junction 3 - Junction 5 Smart Motorway	Medium (2030s)	SMP	8	0		N/A	N/A	N/A	National Highways	F
X20	New Maidstone South East Relief Road	Long (2040s)		0	0	1				Kent County Council / Maidstone Borough Council	F

Legend	
1. Feasibility Study	A. Programme management
2. Strategic Outline Business Case	B. Pre-feasibility work & resource funding
3. Outline Business Case (including surveys, design, modelling and stakeholder engagement)	C. (Joint) Scheme promoter
4. Powers/Consents	D. Business case & scheme development & funding
5. Procurement	E. Use of analytical framework
6. Full Business Case	F. Advocacy & securing funding
7. Construction/Implementation	G. Procurement & sourcing
8. Opening	H. Resource capacity & capability funding

A21/Hastings Line (Hastings – Sevenoaks)

Corridor overview

The A21 north-south road between Sevenoaks in West Kent and Hastings on the East Sussex coast,

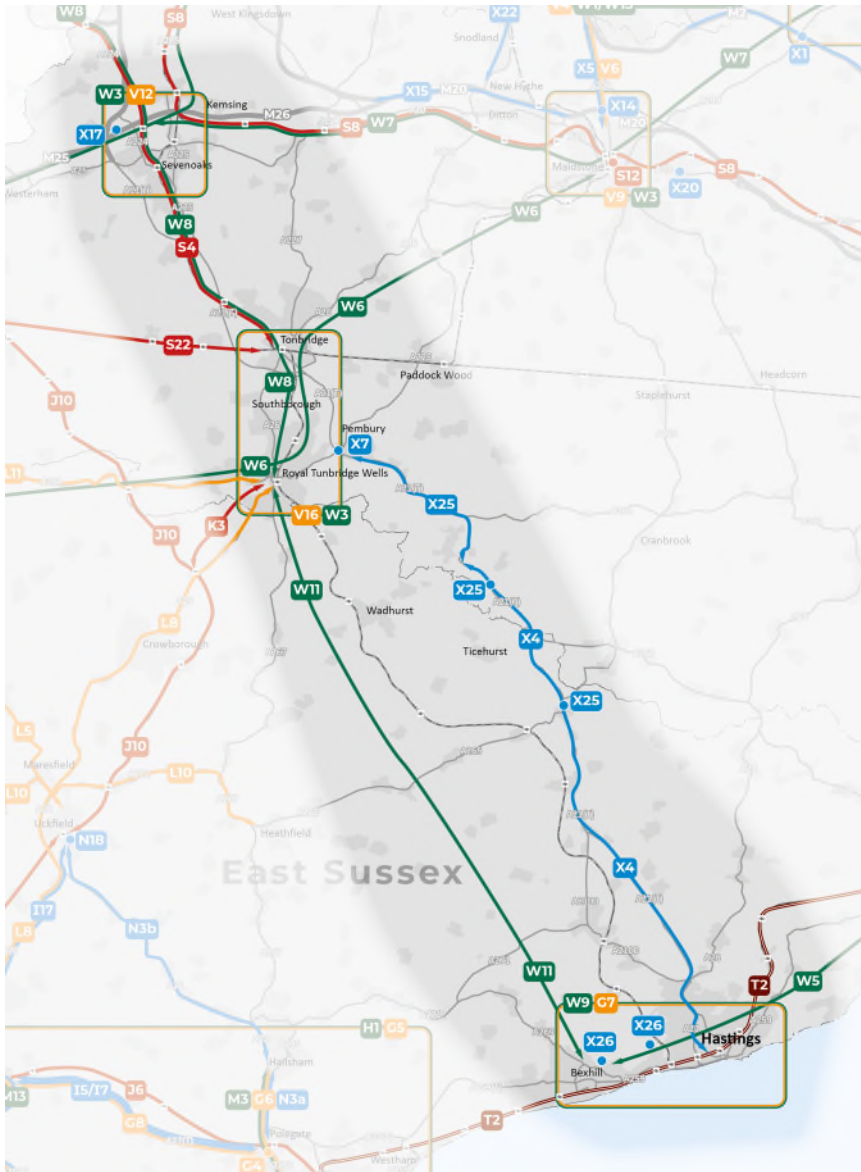
The Hastings Line rail link along similar alignment.

Strategic role

There are significant variations in socioeconomic outcomes across the corridor; it connects some of the South East's wealthiest districts, Sevenoaks and Tunbridge Wells, to one of its most deprived towns, Hastings.

Key issues

1. Poor road and rail connectivity, especially south of Royal Tunbridge Wells. Journey times both to/from London and along the Sussex coast are slower than other corridors in the South East.
2. Most of the corridor is in environmentally protected areas, including the Metropolitan Green Belt, the Kent Downs and High Weald Areas of Outstanding Natural Beauty, and several historic parks and gardens. This may materially constrain its development potential.
3. The least developed part of the Strategic Road Network in the region.



A21/Hastings Line (Hastings – Sevenoaks)

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
G7	Hastings/Bexhill Mass Rapid Transit	Medium (2030s)		0	1	1				East Sussex County Council	B, D, E, F, H
K3	Spa Valley Line Modern Operations Reopening - Eridge to Tunbridge Wells West to Tunbridge Wells	Medium (2030s)		1	1	2				TfSE	B, D, F
L8	A26 Corridor Lewes - Royal Tunbridge Wells Rural Bus Service Enhancements	Short (2020s)	BSIP (East Sussex)	0	1	1	7	7		East Sussex County Council	A, B, C, D, E, F, G, H
L11	A264 Corridor Rural Bus Service Enhancements	Long (2040s)		0	1	1				Surrey County Council / West Sussex County Council	B, D, E, F, H
M8	East Sussex Inter-urban Active Travel Infrastructure	Short (2020s)		0	1	1				Sustrans / East Sussex County Council	F
S2	London Victoria Capacity Enhancements	Medium (2030s)	Renewals Programme / Property Scheme	2	2	3	3			Network Rail	B, D, F
S3	Bakerloo Line Extension	Medium (2030s)		1	2	3				Transport for London	F
S4	South Eastern Main Line - Chislehurst to Tonbridge Capacity Enhancements	Medium (2030s)		0	1	7	7			Network Rail	B, D, F
S5	London Victoria to Shortlands Capacity Enhancements	Medium (2030s)		0	0	1				Network Rail	F
V12	Sevenoaks Bus Enhancements	Short (2020s)		0	0	1				Kent County Council	A, B, C, D, E, F, G, H
V16	Royal Tunbridge Wells/Tonbridge Bus Enhancements	Short (2020s)		0	0	2				Kent County Council	B, D, E, F, H

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
W6	Tonbridge - Maidstone National Cycle Network Enhancements	Short (2020s)		0	0	1				Sustrans	F
W8	Bromley - Sevenoaks - Royal Tunbridge Wells National Cycle Network Enhancements	Short (2020s)		0	0	1				Sustrans	F
W10	East Sussex Inter-urban Active Travel Infrastructure	Short (2020s)		0	0	1				Sustrans / East Sussex County Council	B, D, F, H
W11	Royal Tunbridge Wells - Hastings National Cycle Network Enhancements	Short (2020s)		0	0	1				Sustrans / East Sussex County Council	B, D, F, H
X4	A21 Safety Enhancements (RIS3 Pipeline, brought forward to RP2)	Medium (2030s)	RIS 2	3	7	1	N/A	N/A	N/A	National Highways	A, B, C, D, E, F, G, H
X7	A228 Colts Hill Strategic Link (MRN Pipeline)	Medium (2030s)	MRN Pipeline	0	0	2				Kent County Council	B, F
X25	A21 Kippings Cross to Lamberhurst Dualling and Flimwell and Hurst Green Bypasses	Long (2040s)		0	0	1	TBC	TBC	TBC	National Highways	F
X26	Hastings and Bexhill Distributor Roads	Long (2040s)		1	0	1	N/A	N/A	N/A	Rother District Council	B, D, F, H

A22/A264/Oxted Line (Crawley – Eastbourne)

Corridor overview

The A264 and A22 north-south roads between Crawley/Gatwick and Eastbourne,

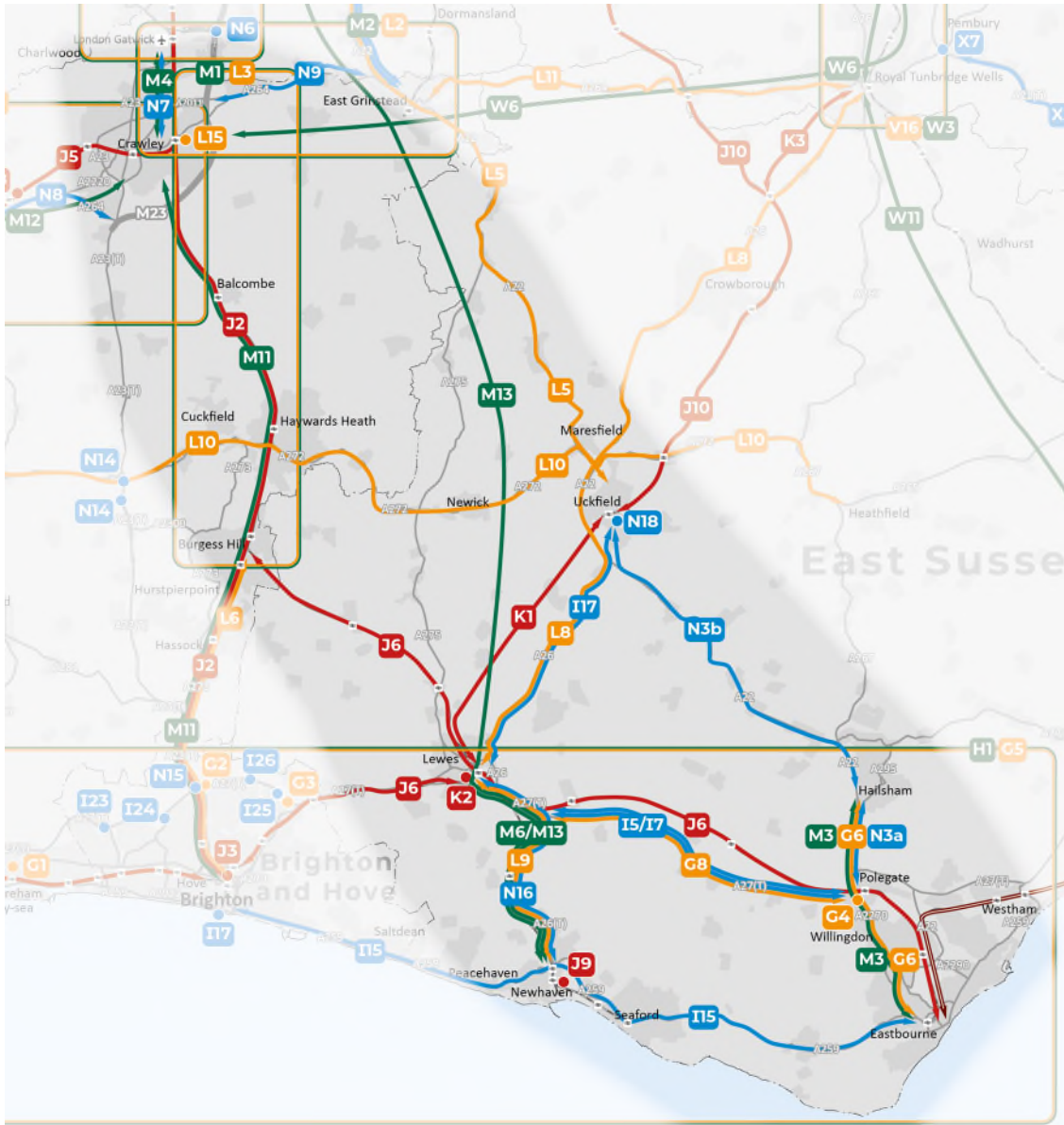
The Oxted Line rail links two branches terminating in East Grinstead and Uckfield respectively.

Strategic role

Links Gatwick Airport to Eastbourne via East Grinstead and Uckfield. The key highways on this corridor form part of the Major Road Network. Passes through diverse geography, from 'Gatwick Diamond' economic hub (Gatwick and Crawley), through rural countryside to Eastbourne. At its southern end it includes short sections of the A2270 and A2021 roads, which link the A22 to the A259 corridor.

Key issues

1. There is no continuous railway route along this corridor, although many towns are served by stations on routes that cut across this corridor.
2. There is socioeconomic disparity on the corridor. There is a large concentration of priority sector jobs in the Crawley/Gatwick area to its north and pockets of deprivation and lower levels of educational attainment in Hailsham and Eastbourne to its south. Much of the rest of the corridor passes through rural and relatively affluent areas.
3. There are several road traffic congestion hotspots on the corridor. These include the A27/A22 junction north of Eastbourne and between East Grinstead and Felbridge, where the A264 merges with the A22. There is also a significant pinch-point at Boship Roundabout outside Hailsham as the dual carriageway narrows to a single lane.
4. Poor inter-urban public transport connectivity, no direct rail services between East Grinstead and Uckfield or Uckfield and Eastbourne. Similarly, there are few (if any) direct bus services between Uckfield and Hailsham/Lewes/Eastbourne.



A22/A264/Oxted Line (Crawley – Eastbourne)

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
G4	Eastbourne/Polegate Strategic Mobility Hub	Medium (2030s)		0	1	1				Network Rail / East Sussex County Council	
G5	Sussex Coast Mass Rapid Transit	Medium (2030s)		0	1	2			1	TfSE / West Sussex County Council / Brighton and Hove City Council / East Sussex County Council	B, D, E, F
G6	Eastbourne/Wealden Mass Rapid Transit	Short (2020s)	BSIP	2	1	4	3, 4, 5	5, 6, 7	7	East Sussex County Council	B, D, F
H1	Sussex Coast Active Travel Enhancements (including LCWIPs)	Short (2020s)		7	1	1	1,2,3,4,5,6,7	1,2,3,4,5,6,7	1,2,3,4,5,6,7	West Sussex County Council/Brighton & Hove City Council	B, D, E, F, H
I15	A259 South Coast Road Corridor - Eastbourne to Brighton (BSIP)	Short (2020s)	BSIP	2	1	7	3,4,5	5,6,7	7	East Sussex County Council	A, D, F, H
	A259 South Coast Road Corridor - Eastbourne to Brighton (MRN)	Short (2020s)	MRN	2	1	3	2, 3	3, 4	4, 6	East Sussex County Council	A, B, D, F, H
J10	Uckfield Branch Line - Hurst Green to Uckfield Electrification	Medium (2030s)		2	1	3				Network Rail	B, D, E, F
K1	Uckfield - Lewes Wealden Line Reopening - Traction and Capacity Enhancements	Medium (2030s)		1	1	2				TfSE	F
K3	Spa Valley Line Modern Operations Reopening - Eridge to Tunbridge Wells West to Tunbridge Wells	Medium (2030s)		1	1	2				TfSE	B, D, F
L1	Fastway+B106 Extension: Crawley - Horsham	Medium (2030s)		0	1	1				TfSE / West Sussex County Council	B, D, E, F

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
L2	Fastway Extension: Crawley - East Grinstead	Short (2020s)	MRN Pipeline	0	1	1				TfSE / West Sussex County Council / Surrey County Council	B, D, E, F
L4	Fastway Extension: Crawley - Redhill	Short (2020s)		0	1	1			1	TfSE / Surrey County Council / West Sussex County Council	B, D, E, F
L5	A22 Corridor Rural Bus Service Enhancements	Short (2020s)		0	1	1		1	1	Surrey County Council / East Sussex County Council	B, D, E, F
	A22 Corridor Rural Bus Service Enhancements	Short (2020s)	BSIP (East Sussex)	0	1	1	7	7		Surrey County Council / East Sussex County Council	B, D, E, F
L8	A26 Corridor Lewes - Royal Tunbridge Wells Rural Bus Service Enhancements	Short (2020s)	BSIP (East Sussex)	0	1	1	7	7		East Sussex County Council	A, B, C, D, E, F, G, H
L11	A264 Corridor Rural Bus Service Enhancements	Long (2040s)		0	1	1				Surrey County Council / West Sussex County Council	B, D, E, F, H
L15	Three Bridges Strategic Mobility Hub	Short (2020s)	Crawley Growth Programme	3	1	5				West Sussex County Council	B, D, E, F, H
M2	East Grinstead Local Active Travel Infrastructure	Short (2020s)		0						West Sussex County Council	B, D, E, F, H
M3	Eastbourne/Hailsham Local Active Travel Infrastructure	Short (2020s)		0	1	1	1	3	4, 5, 6, 7	East Sussex County Council	B, D, E, F, H
M4	Gatwick/Crawley Local Active Travel Infrastructure	Short (2020s)	Crawley Growth Programme	0						West Sussex County Council	B, D, E, F, H
M8	East Sussex Inter-urban Active Travel Infrastructure	Short (2020s)		0	1	1				Sustrans / East Sussex County Council	F

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
M9	Surrey Inter-urban Active Travel Infrastructure	Short (2020s)		0	1	1	1	1		Surrey County Council	F
M10	West Sussex Inter-urban Active Travel Infrastructure	Short (2020s)		0						West Sussex County Council	F
M13	London - Paris New "Avenue Verte"	Medium (2030s)		0	1	1				Surrey County Council / West Sussex County Council / East Sussex County Council	B, D, F, H
N1	A22 N Corridor (Tandridge) - South Godstone to East Grinstead Enhancements (LLM Pipeline)	Short (2020s)	LLM Pipeline	0	0	1		1	2	Surrey County Council / West Sussex County Council	B, D, F, H
N3a	A22 Corridor Package	Short (2020s)	MRN	6	6	5	4, 5	6, 7	7	East Sussex County Council	B, D, F, H
N3b	A22 Corridor - Hailsham to Uckfield (MRN Pipeline)	Short (2020s)	MRN Pipeline	1	2	1	1	1, 2	3	East Sussex County Council	B, D, F, H
N4	A2270/A2101 Corridor Movement and Access Package (MRN Pipeline)	Short (2020s)	MRN Pipeline	0	1	1	1	1	2	East Sussex County Council	B, D, F, H
N7	A23 Carriageway Improvements - Gatwick to Crawley	Medium (2030s)		0	1	1	TBC	TBC	TBC	National Highways	A, F
N9	A264 Crawley - East Grinstead Dualling and Active Travel Infrastructure	Short (2020s)	MRN pipeline	0	1	3		1	2	West Sussex County Council	A, B, D, F, H
N17	A26 Lewes - Uckfield Enhancements	Medium (2030s)		0	1	1	1	1	2	East Sussex County Council	F
N18	A22 Uckfield Bypass Dualling	Short (2020s)	MRN pipeline	0	1	1	1	1, 2	3	East Sussex County Council	F
N19	A22 Smart Road Trial Proposition Study	Short (2020s)		3	1	4				Surrey County Council	F
W6	Tonbridge - Maidstone National Cycle Network Enhancements	Short (2020s)		0	0	1				Sustrans	F
W10	East Sussex Inter-urban Active Travel Infrastructure	Short (2020s)		0	0	1				Sustrans / East Sussex County Council	B, D, F, H

M23/A23/Brighton Main Line (Brighton – Coulsdon)

Corridor overview

The M23/A23 north-south roads between Coulsdon and Brighton and Hove,

Parts of the A27 and A26 roads around Brighton and Hove,

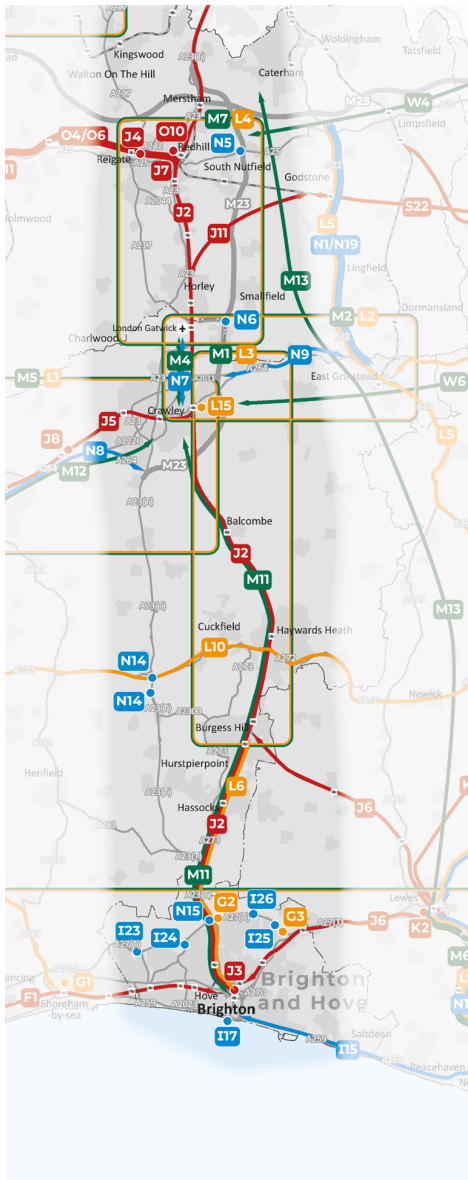
The Brighton Main Line rail link (and the East Coastway Line between Wivelsfield and Seaford) also serves the corridor along similar alignment.

Strategic role

Connects one of the region's largest urban areas, Brighton and Hove, to Gatwick Airport and London to the North. The corridor also serves the Port of Newhaven and Shoreham.

Key issues

1. The Brighton Main Line is one of the busiest rail links in the South East and serves its two busiest stations (Gatwick Airport and Brighton). Its services terminate or pass through some of the busiest stations in London with high levels of crowding. There are also capacity constraints at Three Bridges in Crawley, where several parts of the rail network merge.
2. There are several road traffic congestion hotspots on the corridor. These include its intersection with the M25, parts of the A23 and A27 around Brighton and Hove and Lewes respectively, and parts of the M23 on approach to Gatwick Airport.
3. The corridor is encompassed by several protected areas, including the Metropolitan Greenbelt, the South Downs National Park and the High Weald/Surrey Hills Areas of Outstanding Natural Beauty. Partly because of this, it also has some of the lowest levels of planned development and housing affordability in the South East.



M23/A23/Brighton Main Line (Brighton – Coulsdon)

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
G2	A27/A23 Patcham Interchange Strategic Mobility Hub	Short (2020s)	TfSE Scheme Development Fund	0	1	2	1	2	3	Brighton & Hove City Council	
G5	Sussex Coast Mass Rapid Transit	Medium (2030s)		0	1	2			1	TfSE / West Sussex County Council / Brighton and Hove City Council / East Sussex County Council	B, D, E, F
H1	Sussex Coast Active Travel Enhancements (including LCWIPs)	Short (2020s)		7	1	1	1,2,3,4,5,6,7	1,2,3,4,5,6,7	1,2,3,4,5,6,7	West Sussex County Council/Brighton & Hove City Council	B, D, E, F, H
I15	A259 South Coast Road Corridor - Eastbourne to Brighton (BSIP)	Short (2020s)	BSIP	2	1	7	3,4,5	5,6,7	7	East Sussex County Council	A, D, F, H
	A259 South Coast Road Corridor - Eastbourne to Brighton (MRN)	Short (2020s)	MRN	2	1	3	2, 3	3, 4	4, 6	East Sussex County Council	A, B, D, F, H
I23	A27 Hangleton Junction Enhancements	Medium (2030s)		0	1	1	TBC	TBC	TBC	B&H	F
I24	A27 Devils Dyke Junction Enhancements	Medium (2030s)		0	1	1	TBC	TBC	TBC	B&H	F
I25	A27 Falmer Junction Enhancements	Medium (2030s)		0	1	1	TBC	TBC	TBC	B&H	B, D, E, F
J1	Croydon Area Remodelling Scheme	Long (2040s)	Brighton Main Line Upgrade Programme	3	1	6				Network Rail	B, D, E, F
J2	Brighton Main Line - 100mph Operation	Medium (2030s)		0	1	1				Network Rail	F

Legend	
1. Feasibility Study	A. Programme management
2. Strategic Outline Business Case	B. Pre-feasibility work & resource funding
3. Outline Business Case (including surveys, design, modelling and stakeholder engagement)	C. (Joint) Scheme promoter
4. Powers/Consents	D. Business case & scheme development & funding
5. Procurement	E. Use of analytical framework
6. Full Business Case	F. Advocacy & securing funding
7. Construction/Implementation	G. Procurement & sourcing
8. Opening	H. Resource capacity & capability funding

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
J3	Brighton Station Additional Platform	Medium (2030s)		0	1	1				Network Rail	F
J7	Brighton Main Line - Reinstate Cross Country Services	Long (2040s)		0	1	1				TfSE / DfT / Surrey County Council / West Sussex County Council	B, D, E, F
J9	Newhaven Port Capacity and Rail Freight Interchange Upgrades	Medium (2030s)		0	1	1				Newhaven Port Authority	F
J11	Redhill Aerodrome Chord	Medium (2030s)		0	1	1				Network Rail	B, D, E, F
K1	Uckfield - Lewes Wealden Line Reopening - Traction and Capacity Enhancements	Medium (2030s)		1	1	2				TfSE	F
L1	Fastway+B106 Extension: Crawley - Horsham	Medium (2030s)		0	1	1				TfSE / West Sussex County Council	B, D, E, F
L3	Fastway Extension: Haywards Heath - Burgess Hill	Medium (2030s)		0	1	1				TfSE / West Sussex County Council	B, D, E, F
L4	Fastway Extension: Crawley - Redhill	Short (2020s)		0	1	1			1	TfSE / Surrey County Council / West Sussex County Council	B, D, E, F
L6	A23 Corridor Rural Bus Service Enhancements	Long (2040s)		0	1	1				Surrey County Council / West Sussex County Council	A, B, C, D, E, F, G, H
L9	A26 Corridor Newhaven Area Rural Bus Service Enhancements	Short (2020s)	BSIP	0	1	1				East Sussex County Council	A, B, C, D, E, F, G, H
L11	A264 Corridor Rural Bus Service Enhancements	Long (2040s)		0	1	1				Surrey County Council / West Sussex County Council	B, D, E, F, H
L15	Three Bridges Strategic Mobility Hub	Short (2020s)	Crawley Growth Programme	3	1	5				West Sussex County Council	B, D, E, F, H

Legend	
1. Feasibility Study	A. Programme management
2. Strategic Outline Business Case	B. Pre-feasibility work & resource funding
3. Outline Business Case (including surveys, design, modelling and stakeholder engagement)	C. (Joint) Scheme promoter
4. Powers/Consents	D. Business case & scheme development & funding
5. Procurement	E. Use of analytical framework
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7. Construction/Implementation	G. Procurement & sourcing
8. Opening	H. Resource capacity & capability funding

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
M1	Burgess Hill/Haywards Heath Local Active Travel Infrastructure	Short (2020s)	Burgess Hill Growth Programme	0						West Sussex County Council	B, D, E, F, H
M4	Gatwick/Crawley Local Active Travel Infrastructure	Short (2020s)	Crawley Growth Programme	0						West Sussex County Council	B, D, E, F, H
M6	Lewes/Newhaven Local Active Travel Infrastructure	Short (2020s)		0	1	1	1	3	4, 5, 6, 7	East Sussex County Council	F
M7	Reigate/Redhill Local Active Travel Infrastructure	Short (2020s)		0	1	1	1	1		Surrey County Council	F
M9	Surrey Inter-urban Active Travel Infrastructure	Short (2020s)		0	1	1	1	1		Surrey County Council	F
M10	West Sussex Inter-urban Active Travel Infrastructure	Short (2020s)		0						West Sussex County Council	F
M11	New London - Brighton National Cycle Network Corridor	Medium (2030s)		0	1	1				Surrey County Council / West Sussex County Council / East Sussex County Council	F
M13	London - Paris New "Avenue Verte"	Medium (2030s)		0	1	1				Surrey County Council / West Sussex County Council / East Sussex County Council	B, D, F, H
N1	A22 N Corridor (Tandridge) - South Godstone to East Grinstead Enhancements (LLM Pipeline)	Short (2020s)	LLM Pipeline	0	0	1		1	2	Surrey County Council / West Sussex County Council	B, D, F, H
N5	M23 Junction 8a New Junction and Link Road - Redhill	Long (2040s)		0	1	1	TBC	TBC	TBC	National Highways	A, B, D, F, H
N6	M23 Junction 9 Enhancements - Gatwick	Medium (2030s)		0	1	1	TBC	TBC	TBC	National Highways	A, B, D, F, H
N7	A23 Carriageway Improvements - Gatwick to Crawley	Medium (2030s)		0	1	1	TBC	TBC	TBC	National Highways	A, F
N10	Crawley Western Link Road and Active Travel Infrastructure	Medium (2030s)		0	1	1				West Sussex County Council	F

Legend	
1. Feasibility Study	A. Programme management
2. Strategic Outline Business Case	B. Pre-feasibility work & resource funding
3. Outline Business Case (including surveys, design, modelling and stakeholder engagement)	C. (Joint) Scheme promoter
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Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
N14	A23 Hickstead and Bolney Junction Enhancements	Medium (2030s)		0	1	1	TBC	TBC	TBC	National Highways	F
N15	A23/A27 Patcham Interchange Junction Enhancements	Short (2020s)		1	1	1	1	2,3	4,5,6,7	Brighton & Hove City Council/National Highways	F
N16	A26 Lewes - Newhaven Realignment and Junction Enhancements	Short (2020s)		0	1	1				National Highways	F
N19	A22 Smart Road Trial Proposition Study	Short (2020s)		3	1	4				Surrey County Council	F
O10	Redhill Station Track Capacity Improvement	Medium (2030s)		1	0	2	2			Network Rail	B, D, E, F
S22	Gatwick - Kent Service Enhancements	Short (2020s)	Strategic Advice	1	0	2	1			DfT	B, D, E, F

Legend	
1. Feasibility Study	A. Programme management
2. Strategic Outline Business Case	B. Pre-feasibility work & resource funding
3. Outline Business Case (including surveys, design, modelling and stakeholder engagement)	C. (Joint) Scheme promoter
4. Powers/Consents	D. Business case & scheme development & funding
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8. Opening	H. Resource capacity & capability funding

A24/A264/A29/Arun Valley Line (Crawley – Fontwell)

Corridor overview

The A264, A24 and A29 north-south roads between Crawley and Fontwell/Chichester,

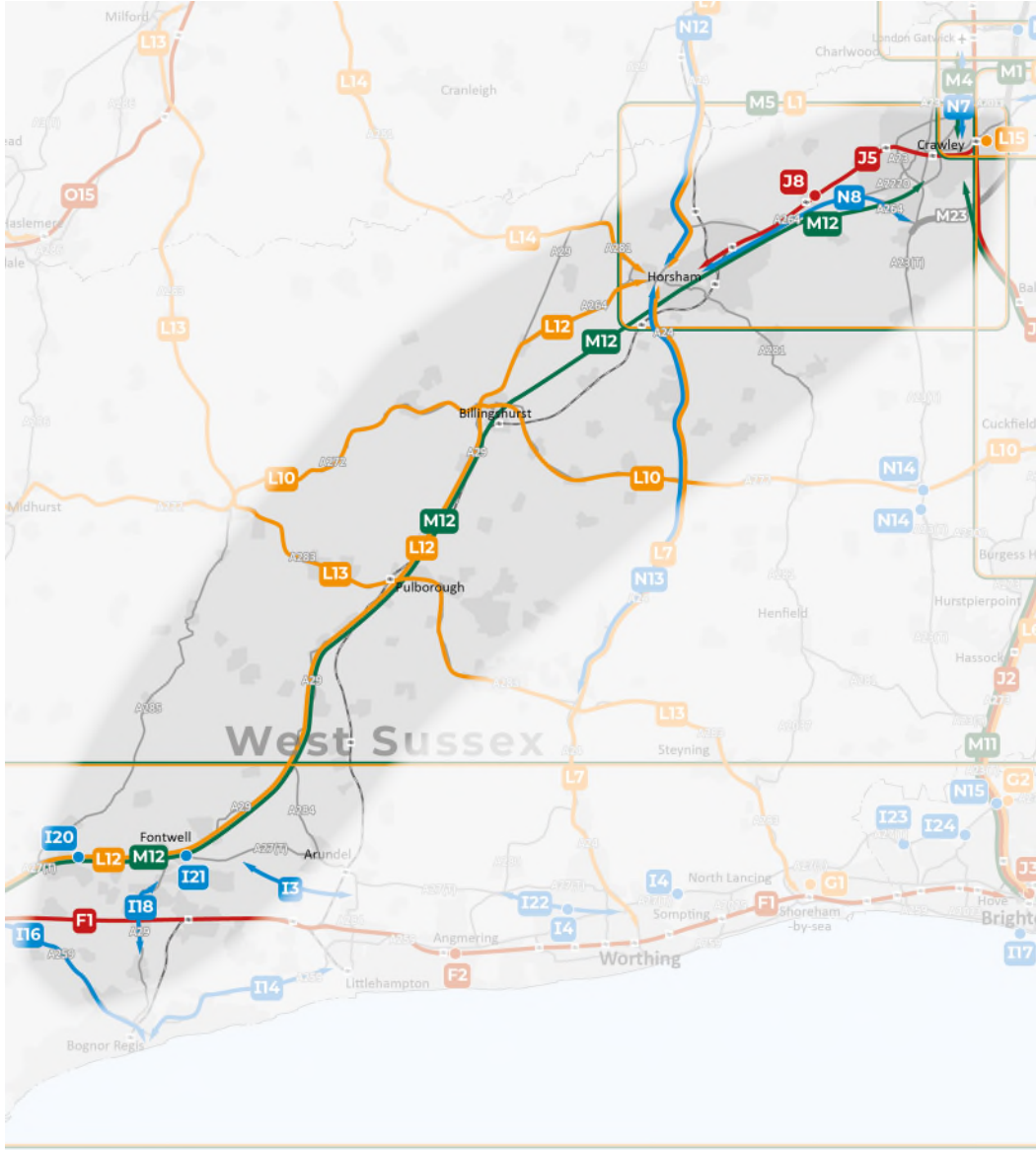
The Arun Valley Line rail link along similar alignment.

Strategic role

The corridor provides rapid onward connectivity to/from Gatwick Airport, the UK's second-busiest airport, as far south as Fontwell/Chichester.

Key issues

1. The corridor has the highest concentration of priority sector jobs of any corridor in this study (16%). Despite this, its median earnings and levels of housing affordability are below the regional average.
2. Much of the corridor passes through protected areas, such as the High Weald Area of Outstanding Natural Beauty and the South Downs National Park, which could limit the scope for future development. Though there is notable planned residential development in both Horsham and Crawley, overall levels of planned residential development and job growth on the corridor are slightly below the regional average.
3. Journey times by rail on the corridor are relatively slow due to track alignment south of Horsham. Some stations also have relatively short platforms, limiting capacity for stopping services. As with the Brighton Main Line, radial passenger services between the corridor and London experience high levels of crowding.



A24/A264/A29/Arun Valley Line (Crawley – Fontwell)

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
G5	Sussex Coast Mass Rapid Transit	Medium (2030s)		0	1	2			1	TfSE / West Sussex County Council / Brighton and Hove City Council / East Sussex County Council	B, D, E, F
H1	Sussex Coast Active Travel Enhancements (including LCWIPs)	Short (2020s)		7	1	1	1,2,3,4,5,6,7	1,2,3,4,5,6,7	1,2,3,4,5,6,7	West Sussex County Council/Brighton & Hove City Council	B, D, E, F, H
I14	A259 Bognor Regis to Littlehampton Enhancement (MRN)	Short (2020s)	MRN	3	1	6	3	4	6	West Sussex County Council	B, F
I18	A29 Realignment including combined Cycleway and Footway	Short (2020s)		5	1	7				West Sussex County Council	F
I21	A27 Fontwell Junction Enhancements	Medium (2030s)		0	1	1	TBC	TBC	TBC	National Highways	A, B, D, F, H
J5	Arun Valley Line - Faster Services	Short (2020s)		0	1	1		1		Network Rail	F
J8	New Station to the North East of Horsham	Medium (2030s)		0	1	1				Network Rail/Third Party	B, D, E, F
L1	Fastway+B106 Extension: Crawley - Horsham	Medium (2030s)		0	1	1				TfSE / West Sussex County Council	B, D, E, F
L7	A24 Corridor Rural Bus Service Enhancements	Long (2040s)		0	1	1				Surrey County Council / West Sussex County Council	A, B, C, D, E, F, G, H
L11	A264 Corridor Rural Bus Service Enhancements	Long (2040s)		0	1	1				Surrey County Council / West Sussex County Council	B, D, E, F, H

Legend	
1. Feasibility Study	A. Programme management
2. Strategic Outline Business Case	B. Pre-feasibility work & resource funding
3. Outline Business Case (including surveys, design, modelling and stakeholder engagement)	C. (Joint) Scheme promoter
4. Powers/Consents	D. Business case & schema development & funding
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6. Full Business Case	F. Advocacy & securing funding
7. Construction/Implementation	G. Procurement & sourcing
8. Opening	H. Resource capacity & capability funding

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
L12	A29 Corridor Rural Bus Service Enhancements	Long (2040s)		0	1	1				Surrey County Council / West Sussex County Council	B, D, E, F, H
L13	A283 Corridor Rural Bus Service Enhancements	Long (2040s)		0	1	1				Surrey County Council / West Sussex County Council	B, D, E, F, H
L14	A281 Corridor Rural Bus Service Enhancements	Long (2040s)		0	1	1				Surrey County Council / West Sussex County Council	B, D, E, F, H
L15	Three Bridges Strategic Mobility Hub	Short (2020s)	Crawley Growth Programme	3	1	5				West Sussex County Council	B, D, E, F, H
M5	Horsham Local Active Travel Infrastructure	Short (2020s)		0						West Sussex County Council	B, D, F, H
M10	West Sussex Inter-urban Active Travel Infrastructure	Short (2020s)		0						West Sussex County Council	F
M12	New Crawley - Chichester National Cycle Network Corridor	Medium (2030s)		0	1	1				West Sussex County Council	F
N2	A24/A243 Knoll Roundabout and M25 Junction 9a (MRN Pipeline)	Medium (2030s)	MRN Pipeline	0	0	1	1	1	2	Surrey County Council	B, D, F, H
N8	A264 Horsham - Pease Pottage Carriageway Enhancements	Medium (2030s)		0	1	3				West Sussex County Council	A, F
N10	Crawley Western Link Road and Active Travel Infrastructure	Medium (2030s)		0	1	1				West Sussex County Council	F
N11	A24 Dorking Bypass	Medium (2030s)		0	1	1				Surrey County Council	F
N12	A24 Horsham to Washington Junction Improvements	Short (2020s)		0	1	1				West Sussex County Council	F
N13	A24 Corridor Improvements Horsham to Dorking (LLM Pipeline)	Short (2020s)	MRN pipeline	1	2	2		1	2	Surrey County Council / West Sussex County Council	F

Legend	
1. Feasibility Study	A. Programme management
2. Strategic Outline Business Case	B. Pre-feasibility work & resource funding
3. Outline Business Case (including surveys, design, modelling and stakeholder engagement)	C. (Joint) Scheme promoter
4. Powers/Consents	D. Business case & scheme development & funding
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8. Opening	H. Resource capacity & capability funding

A3/A27/M275/Portsmouth Direct Line (Portsmouth – Surbiton)

Corridor overview

The A3 north-south road between the M25 and Portsmouth,

The A27 and M275 roads around Portsmouth,

The Portsmouth Direct Line rail link also serves the corridor along similar alignment,

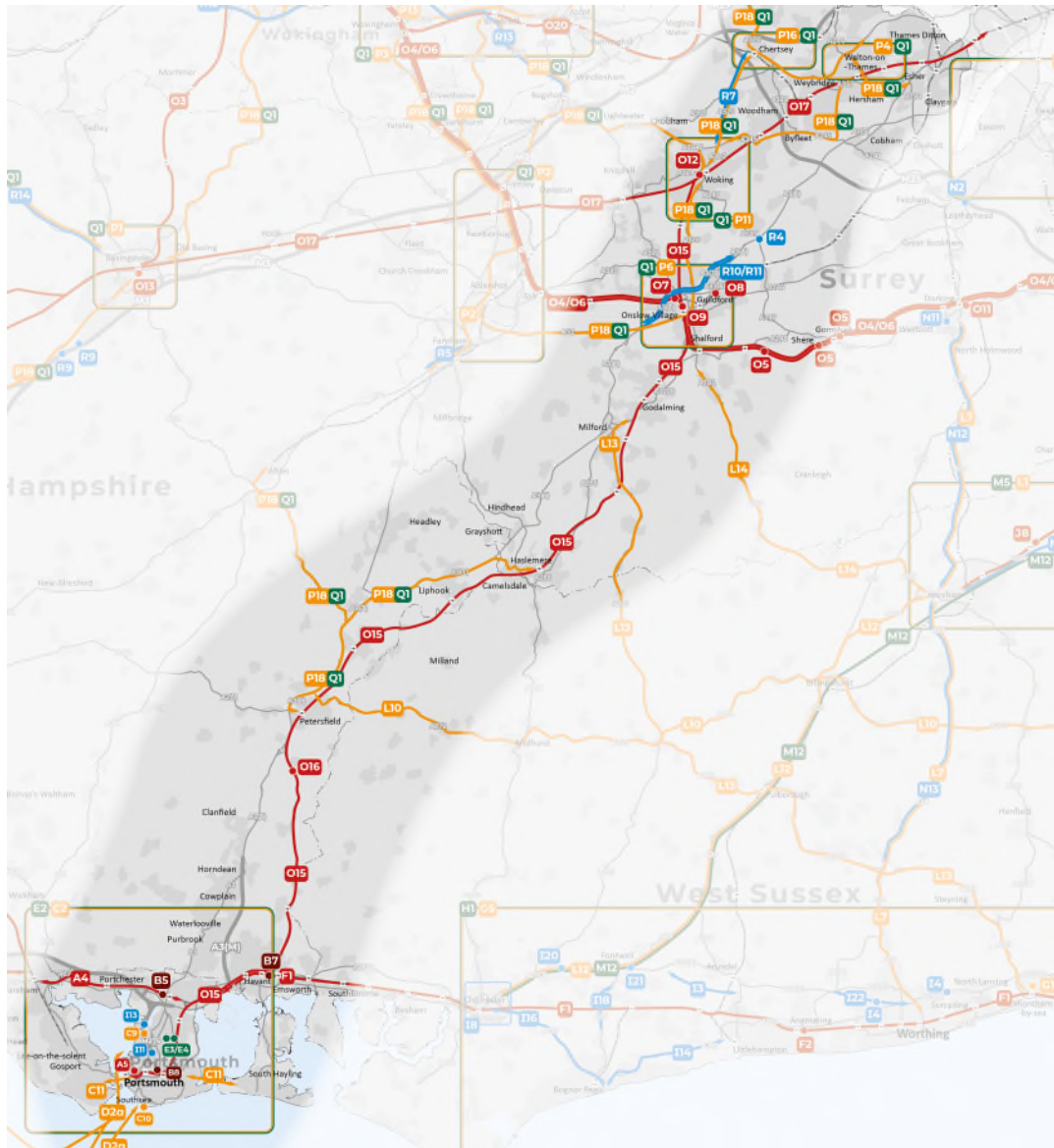
There are ferry services between Portsmouth and the Isle of Wight, the Channel Islands and mainland Europe.

Strategic role

The corridor connects Portsmouth International Port, a major international gateway, to the Strategic Road Network. It also serves two of the region's largest urban areas, Portsmouth and Guildford, on a direct route to London/the M25.

Key issues

1. Journey times between London and Portsmouth by rail are typically ninety minutes or more on the Portsmouth Direct Line, whereas journey times between London and Southampton by rail (over approximately the same distance) can be as low as seventy-one minutes. Radial passenger services between the corridor and London also experience high levels of crowding.
2. The corridor encompasses several protected areas, including the Metropolitan Greenbelt, the Chichester Harbour Area of Outstanding Natural Beauty and the South Downs National Park, which could limit the scope for future development. Though there is notable planned residential development in Portsmouth and on the northern end of the corridor, Housing is expensive on this corridor, and this is unlikely to improve in the near future as the number of new homes planned for this (relatively long) corridor is low.
3. While most of this corridor passes through relatively prosperous areas, there are significant pockets of deprivation in Portsmouth and its surrounding urban area.
4. Parts of the Strategic Road Network pass through urban areas at several points on the corridor, including Portsmouth city centre (between the M275 and Portsmouth International Port) and where the A3 passes close to Guildford town centre. This negatively impacts air quality and road safety in these areas.



A3/A27/M275/Portsmouth Direct Line (Portsmouth – Surbiton)

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
A5	Portsmouth Station Platforms	Medium (2030s)	Solent Connectivity demand modelling	0	1	2	2	2	2	Network Rail/ Solent Transport	B, D, F, H
B7	Havant Rail Freight Hub	Medium (2030s)		0	1	1				TfSE	B, D, E, F
B8	Fratton Rail Freight Hub	Long (2040s)	Not in any formal programme	0	1	1	1	1	1	Network Rail & PIP	B, D, E, F
C2	South East Hampshire Rapid Transit Future Phases	Medium (2030s)		0	1	1	3	3	3	Portsmouth City Council / Hampshire County Council	B, D, E, F
C9	Tipner Transport Hub (M275 Junction 1)	Medium (2030s)		0	1	3	5, 6	5, 6	5, 6	Portsmouth City Council	B, D, F, H
C10	Southsea Transport Hub	Short (2020s)	Feasibility underway - PCC internal	0	1	1	1	2	4,5,7	Portsmouth City Council	B, D, F
C11	Improved Gosport - Portsmouth and Portsmouth - Hayling Island Ferries	Short (2020s)		0	1	1	1	1	1	Hampshire County Council / Portsmouth City Council	B, D, F, H
D1	Isle of Wight Mass Transit System	Medium (2030s)		0	1	1				Isle of Wight Council	B, D, F, H
D1a	Bus Mass Transit - Newport to Yarmouth	Medium (2030s)		0	1	1				Isle of Wight Council	B, D, F, H
D1b	Bus Mass Transit - Newport to Ryde	Medium (2030s)		1	1	2				Isle of Wight Council	B, D, F, H
D1c	Bus Mass Transit - Newport to Cowes	Medium (2030s)		2	1	4				Isle of Wight Council	B, D, F, H

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
D1d	Isle of Wight Railway Service Enhancements	Medium (2030s)		6	1	8	8	8	8	South Western Railways / Network Rail / Isle of Wight Council	B, D, F, G, H
D1e	Isle of Wight Railway Extensions or Mass Transit alternative - Shanklin to Ventnor	Medium (2030s)		2	1	3				Isle of Wight Council	B, D, F, G, H
D1f	Isle of Wight Railway Extensions or Mass Transit alternative - Shanklin to Newport	Medium (2030s)		0	1	1				Isle of Wight Council	B, D, F
D2	Isle of Wight Ferry Service Enhancements	Short (2020s)		0	1	1				Isle of Wight Council	B, D, F
D2a	Operating Hours and Frequency Enhancements	Short (2020s)		0	1	1				Operator / Isle of Wight Council / Solent Transport	B, D, F
E2	South East Hampshire Area Active Travel (including LCWIPs)	Short (2020s)	Ongoing. Some (relatively minor) infrastructure elements of the Portsmouth LCWIP will be delivered through ATF 4 funding	0	1	1	1 to 7 for different elements	1 to 7 for different elements	1 to 7 for different elements	Portsmouth City Council / Hampshire County Council	B, D, F
E3	Active Travel Bridge Extension	Medium (2030s)		0	1	1	1	1	1	Portsmouth City Council	B, D, F
E4	Portsmouth Eastern Road East-West Bridge	Medium (2030s)		0	1	1	1	1	1	Portsmouth City Council	A, B, D, F
E6	Isle of Wight Active Travel Enhancements	Short (2020s)		0	1	1				Isle of Wight Council	B, D, F
E6a	Active Travel Enhancements - Newport to Yarmouth	Short (2020s)		0	1	1				Isle of Wight Council	B, D, F

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
E6b	Active Travel Enhancements - Newport to Ryde	Short (2020s)		0	1	1				Isle of Wight Council	B, D, F
E6c	Active Travel Enhancements - Newport to Cowes	Short (2020s)		0	1	1				Isle of Wight Council	
I11	Portsmouth City Centre Road (LLM)	Medium (2030s)	LLM	1	1	3	2	3	4	PCC	F
I13	New Bridge from Horsea to Tipner	Medium (2030s)	Not in any formal programme	0	1	1	1	1	1	PCC	B, F
L13	A283 Corridor Rural Bus Service Enhancements	Long (2040s)		0	1	1				Surrey County Council / West Sussex County Council	B, D, E, F, H
M9	Surrey Inter-urban Active Travel Infrastructure	Short (2020s)		0	1	1	1	1		Surrey County Council	F
O2	Southern Access to Heathrow	Long (2040s)		1	1	1				DfT	F
O12	South West Main Line / Portsmouth Direct Line - Woking Area Capacity Enhancement	Long (2040s)	Main Line Phase 2 Strategic Study	1	1	2				Network Rail	B, D, E, F
O15	Portsmouth Direct Line - Line Speed Enhancements	Short (2020s)	Main Line Phase 2 Strategic Study	1	0	2				Network Rail	B, D, E, F
O16	Portsmouth Direct Line - Buriton Tunnel Upgrade	Long (2040s)		0	0	1				Network Rail	B, D, E, F
P2	Blackwater Valley Mass Rapid Transit	Short (2020s)		0	0	1				Surrey County Council / Hampshire County Council	B, D, E, F
P6	Guildford Sustainable Movement Corridor	Short (2020s)		0	1	1				Surrey County Council	B, D, E, F, H
P11	Woking Bus Enhancements	Short (2020s)		0	0	1	1			Surrey County Council	B, D, E, F, H

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
P18	Berkshire, Hampshire and Surrey Inter-urban Bus Enhancements	Short (2020s)		0	0	1				Surrey County Council / Hampshire County Council	B, D, E, F, H
Q1	Berkshire, Hampshire and Surrey Urban and Inter-urban Active Travel Infrastructure	Short (2020s)		0	0	1			1	Surrey County Council / Hampshire County Council	B, D, E, F, H
R4	A3/A247 Ripley South (RIS3 Pipeline)	Medium (2030s)	RIS pipeline (funding subject to RIS)	1	1	2	TBC	TBC	TBC	National Highways	B, D, E, F, H
R10	A3 Guildford Local Traffic Segregation	Medium (2030s)		0	0	1	TBC	TBC	TBC	National Highways	A, F
R11	A3 Guildford Long Term Solution	Long (2040s)		0	0	1	TBC	TBC	TBC	National Highways	A, B, D, F, H

M3/M27/M271/A33/A326/South Western Main Line (Southampton – Sunbury)

Corridor overview

The M3 north-south road between Sunbury and Southampton,

The M27, M271, A33 and A326 roads around Southampton,

The Port of Southampton,

The South Western Main Line rail link also serves the corridor along similar alignment,

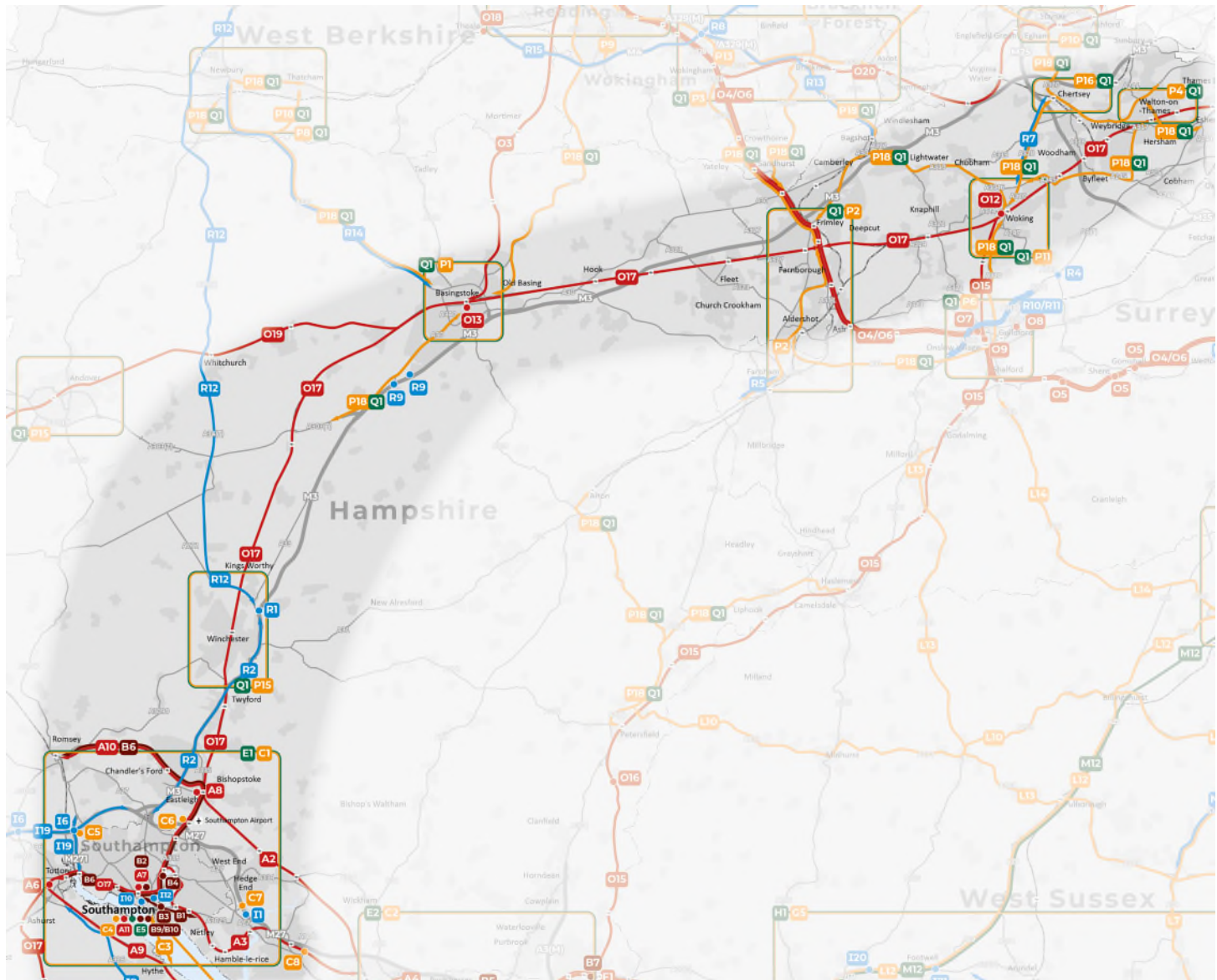
There are ferry services between Southampton and the Isle of Wight.

Strategic role

The corridor connects the Port of Southampton, a major international gateway and one of the busiest ports in the country, to the Strategic Road Network. Southampton Airport, which typically serves between 1.5 and 2 million passengers per year, is also on the corridor's road and rail network. Southampton is the largest city in the region and Basingstoke is one of its fastest-growing towns.

Key issues

1. There are several road traffic congestion hotspots on the corridor. These include the M3 between Winchester and Southampton, the M3 between Fleet and the M25, and some of the access roads and junctions between the M3 and the Port of Southampton (i.e., the M27, M271, A33 and A326). This congestion slows down freight movements on the corridor and has the potential to worsen as the Port of Southampton expands.
2. There are clusters of historic road traffic incidents on the corridor where it enters Southampton, particularly on and around the M271 and A33, including incidents resulting in people being killed or seriously injured.
3. The South Western Main Line experiences significant crowding during peak hours. Many peak hour trains are already operating at maximum length, limiting the scope for additional capacity on these services.
4. There is a significant imbalance in the development of jobs and homes along this corridor. Housing development is focused on Basingstoke, while employment growth is more concentrated in Southampton.



M3/M27/M271/A33/A326/South Western Main Line (Southampton – Sunbury)

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
A6	South West Main Line - Totton Level Crossing Removal	Medium (2030s)	Solent Connectivity demand modelling	0	1	2	2	2	2	Network Rail/ Solent Transport	B, C, D, E, F, G, H
A7	Southampton Central Station Upgrade and Timetabling	Medium (2030s)	Solent Connectivity demand modelling	0	1	2	2	2	2	Network Rail/ Solent Transport	D, E, F
A8	Eastleigh Station Platform Flexibility	Medium (2030s)	Solent Connectivity demand modelling	1	1	2	2	2	2	Network Rail/ Solent Transport	D, E, F
A9	Waterside Branch Line Reopening	Short (2020s)		6	1	2	6			Network Rail	D, E, F
A11	Additional Rail Freight Paths to Southampton	Medium (2030s)	Solent to Reading Freight Study	0	1	2	1	1	2	Network Rail/ National Highways	D, E, F
B2	New Southampton Central Station	Medium (2030s)	Solent Transport Prospectus	0	1	1				Southampton/Network Rail	D, E, F
B3	New City Centre Station	Long (2040s)		0	1	1				Southampton City Council	D, E, F
B4	South West Main Line - Mount Pleasant Level Crossing Removal	Long (2040s)		0	1	2	3			Network Rail	D, E, F
B6	Eastleigh to Romsey Line - Electrification	Medium (2030s)	Class 158/159 Replacement/ West of England Line Decarbonisation	1	1	2		2		Network Rail/ SWR/ DfT	D, E, F
B9	Southampton Container Port Rail Freight Access and Loading Upgrades	Medium (2030s)		0	1	1				ABP	B, D, E, F
B10	Southampton Automotive Port Rail Freight Access and Loading Upgrades	Medium (2030s)		0	1	1				ABP	B, D, E, F

Legend	
1. Feasibility Study	A. Programme management
2. Strategic Outline Business Case	B. Pre-feasibility work & resource funding
3. Outline Business Case (including surveys, design, modelling and stakeholder engagement)	C. (Joint) Scheme promoter
4. Powers/Consents	D. Business case & schema development & funding
5. Procurement	E. Use of analytical framework
6. Full Business Case	F. Advocacy & securing funding
7. Construction/Implementation	G. Procurement & sourcing
8. Opening	H. Resource capacity & capability funding

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
C1	Southampton Mass Transit	Medium (2030s)	BSIP	1	1	2				Hampshire County Council / Southampton City Council	B, D, E, F
C3	New Southampton to Fawley Waterside Ferry Service	Medium (2030s)		0	1	1				Hampshire County Council / Southampton City Council	B, D, E, F
C4	Southampton Cruise Terminal Access for Mass Transit	Medium (2030s)		0	1	1				Southampton City Council	B, D, E, F
C5	M271 Junction 1 Strategic Mobility Hub	Short (2020s)		1	1	5	5	6	7	Southampton City Council / Hampshire County Council	B, D, F
C6	M27 Junction 5 / Southampton Airport Strategic Mobility Hub	Short (2020s)		0	1	1				Hampshire County Council / Southampton City Council	B, D, F
C7	M27 Junction 7/8 Strategic Mobility Hub	Medium (2030s)		0	1	1				Hampshire County Council	F
C8	M27 Junction 9 Strategic Mobility Hub	Medium (2030s)		0	1	1				Hampshire County Council	F
D1	Isle of Wight Mass Transit System	Medium (2030s)		0	1	1				Isle of Wight Council	B, D, F, H
D1a	Bus Mass Transit - Newport to Yarmouth	Medium (2030s)		0	1	1				Isle of Wight Council	B, D, F, H
D1b	Bus Mass Transit - Newport to Ryde	Medium (2030s)		1	1	2				Isle of Wight Council	B, D, F, H
D1c	Bus Mass Transit - Newport to Cowes	Medium (2030s)		2	1	4				Isle of Wight Council	B, D, F, H
D1d	Isle of Wight Railway Service Enhancements	Medium (2030s)		6	1	8	8	8	8	South Western Railways / Network Rail / Isle of Wight Council	B, D, F, G, H
D1e	Isle of Wight Railway Extensions or Mass Transit alternative - Shanklin to Ventnor	Medium (2030s)		2	1	3				Isle of Wight Council	B, D, F, G, H

45

Legend	
1. Feasibility Study	A. Programme management
2. Strategic Outline Business Case	B. Pre-feasibility work & resource funding
3. Outline Business Case (including surveys, design, modelling and stakeholder engagement)	C. (Joint) Scheme promoter
4. Powers/Consents	D. Business case & schema development & funding
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Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
D1f	Isle of Wight Railway Extensions or Mass Transit alternative - Shanklin to Newport	Medium (2030s)		0	1	1				Isle of Wight Council	B, D, F
D2	Isle of Wight Ferry Service Enhancements	Short (2020s)		0	1	1				Isle of Wight Council	B, D, F
D2a	Operating Hours and Frequency Enhancements	Short (2020s)		0	1	1				Operator / Isle of Wight Council / Solent Transport	B, D, F
D2b	New Summer Route - Ryde to Southampton	Short (2020s)		0	1	1				Isle of Wight Council	B, D, F
E1	Southampton Area Active Travel (including LCWIPs)	Short (2020s)	TCF/ATF/LTP/Developer	1	1	2	N/A	N/A	N/A	Southampton	B, D, F
E5	Southampton City Centre Placemaking	Short (2020s)	TCF	1	1	2	N/A	N/A	N/A	Southampton	B, D, F
E6	Isle of Wight Active Travel Enhancements	Short (2020s)		0	1	1				Isle of Wight Council	B, D, F
E6a	Active Travel Enhancements - Newport to Yarmouth	Short (2020s)		0	1	1				Isle of Wight Council	B, D, F
E6b	Active Travel Enhancements - Newport to Ryde	Short (2020s)		0	1	1				Isle of Wight Council	B, D, F
E6c	Active Travel Enhancements - Newport to Cowes	Short (2020s)		0	1	1				Isle of Wight Council	
I1	M27 Junction 8 (RIS2)	Short (2020s)		3	1	4	TBC	TBC	TBC	National Highways	B, D, E, F, H
I6	Southampton Access (M27 Junction 2 and Junction 3) (RIS3 Pipeline)	Medium (2030s)	RIS Pipeline (subject to Funding)	3	1	4	TBC	TBC	TBC	National Highways	F
I9	A326 Capacity Enhancements (LLM)	Short (2020s)	LLM	2	1	4	3	3	4	HCC	F
I10	West Quay Realignment (LLM)	Medium (2030s)	LLM	1	2	3		3		Southampton City Council	F

46

Legend	
1. Feasibility Study	A. Programme management
2. Strategic Outline Business Case	B. Pre-feasibility work & resource funding
3. Outline Business Case (including surveys, design, modelling and stakeholder engagement)	C. (Joint) Scheme promoter
4. Powers/Consents	D. Business case & schema development & funding
5. Procurement	E. Use of analytical framework
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Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
I12	Northam Rail Bridge Replacement and Enhancement (MRN)	Short (2020s)	MRN	2	3	6	3	6	7	Southampton/Network Rail	B, F
I19	M27/M271 Smart Motorway(s)	Long (2040s)		0	1	1	TBC	TBC	TBC	National Highways	A, F
M9	Surrey Inter-urban Active Travel Infrastructure	Short (2020s)		0	1	1	1	1		Surrey County Council	F
O2	Southern Access to Heathrow	Long (2040s)		1	1	1				DfT	F
O12	South West Main Line / Portsmouth Direct Line - Woking Area Capacity Enhancement	Long (2040s)	Main Line Phase 2 Strategic Study	1	1	2				Network Rail	B, D, E, F
O13	South West Main Line / Basingstoke Branch Line - Basingstoke Enhancement Scheme	Medium (2030s)	Main Line Phase 2 and Solent to Reading Strategic Studies	1	1	2				Network Rail	B, D, E, F
O17	South West Main Line - Digital Signalling	Medium (2030s)	SWML Strategic Study/ Main Line Phase 2 Strategic Study	0	0	1				Network Rail	B, D, E, F
O20	Reading to Waterloo Service Enhancements	Medium (2030s)	Wessex Suburban Strategic Study (Phase 2)	0	1	2	1			Network Rail/ SWR	B, D, E, F
P1	Basingstoke Mass Rapid Transit	Short (2020s)		0	0	1				Hampshire County Council	B, D, E, F
P3	Bracknell/Wokingham Bus Enhancements	Short (2020s)		0	1	1	1	2	2	Joint	B, D, F
P4	Elmbridge Bus Enhancements	Short (2020s)		0	0	1	1			Surrey County Council	B, D, E, F
P10	Spelthorne Bus Enhancements	Short (2020s)		0	0	1				Surrey County Council	B, D, E, F, H
P11	Woking Bus Enhancements	Short (2020s)		0	0	1	1			Surrey County Council	B, D, E, F, H

Legend	
1. Feasibility Study	A. Programme management
2. Strategic Outline Business Case	B. Pre-feasibility work & resource funding
3. Outline Business Case (including surveys, design, modelling and stakeholder engagement)	C. (Joint) Scheme promoter
4. Powers/Consents	D. Business case & scheme development & funding
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Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
P14	Winchester Bus Enhancements	Short (2020s)		0	0	1				Hampshire County Council	B, D, E, F, H
P16	Runnymede Bus Enhancements	Short (2020s)		0	0	1	1			Surrey County Council	B, D, E, F, H
P17	London Heathrow Airport Bus Access Enhancements	Short (2020s)		0	0	1				Surrey County Council	A, B, C, D, E, F, G, H
P18	Berkshire, Hampshire and Surrey Inter-urban Bus Enhancements	Short (2020s)		0	0	1				Surrey County Council / Hampshire County Council	B, D, E, F, H
Q1	Berkshire, Hampshire and Surrey Urban and Inter-urban Active Travel Infrastructure	Short (2020s)		0	0	1			1	Surrey County Council / Hampshire County Council	B, D, E, F, H
R1	M3 Junction 9 (RIS2)	Short (2020s)	RIS2	3	4	5	TBC	5	TBC	National Highways	B, D, E, F, H
R2	M3 Junction 9 - Junction 14 Smart Motorway (SMP)	Short (2020s)		7	7	8	TBC	TBC	TBC	National Highways	B, D, E, F, H
R7	A320 North Corridor (HIF)	Short (2020s)	HIF	2	5	7	5	5	5	Surrey County Council	F
R9	M3 Junction 7 and Junction 8 Safety and Capacity Enhancements	Short (2020s)		0	0	1				Hampshire County Council	B, F

Legend	
1. Feasibility Study	A. Programme management
2. Strategic Outline Business Case	B. Pre-feasibility work & resource funding
3. Outline Business Case (including surveys, design, modelling and stakeholder engagement)	C. (Joint) Scheme promoter
4. Powers/Consents	D. Business case & scheme development & funding
5. Procurement	E. Use of analytical framework
6. Full Business Case	F. Advocacy & securing funding
7. Construction/Implementation	G. Procurement & sourcing
8. Opening	H. Resource capacity & capability funding

A33/Basingstoke – Reading Line (Basingstoke – Reading)

Corridor overview

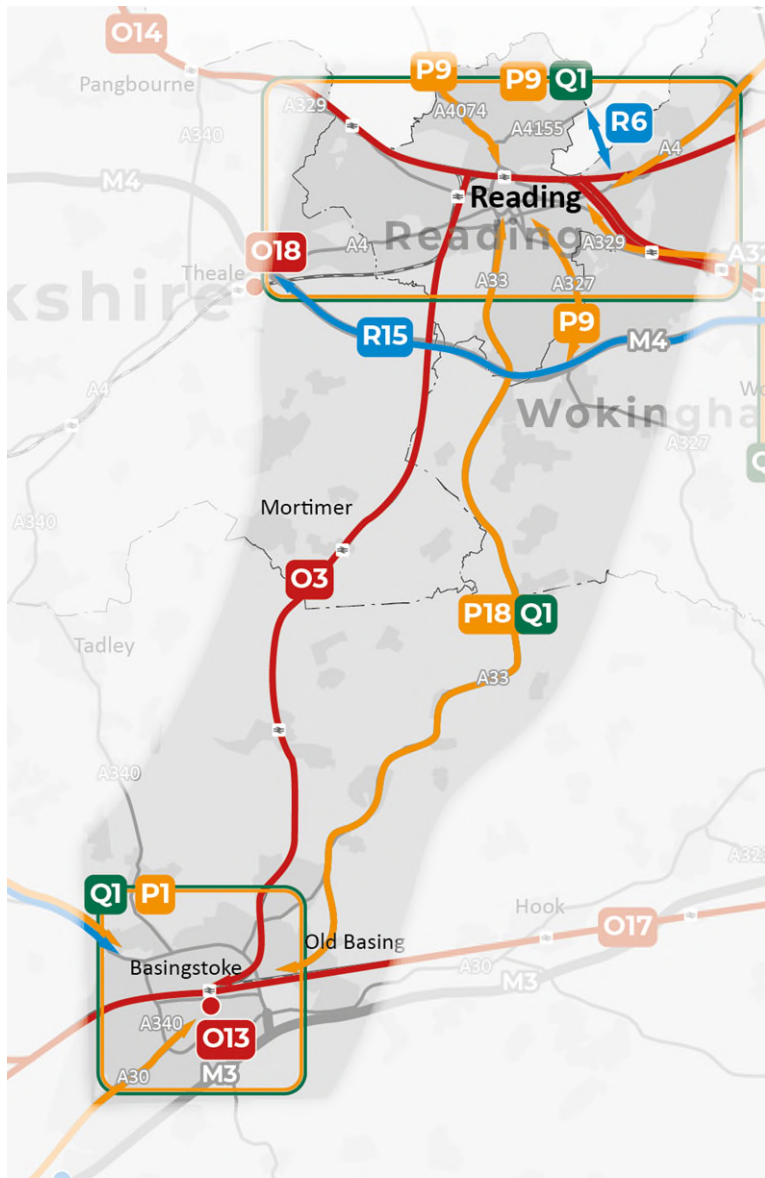
The A33 north-south road between Reading and Basingstoke, The Basingstoke – Reading Line rail link along a similar alignment.

Strategic role

The corridor connects Reading and Basingstoke, two major economic hubs in the region with significant commuter demand. It also connects to one of the most important east-west corridors in the country, i.e. the M4 and Great Western Main Line.

Key issues

1. Much of the northern end of the corridor is covered by Air Quality Management Areas (AQMAs). This includes Reading town centre and its radial routes and parts of the M4 intersecting the corridor.
2. Road traffic congestion hotspots can be identified on the corridor, particularly where the A33 intersects the M4, as well as more moderate congestion along several stretches of the A33 between Swallowfield and Basingstoke.
3. The Basingstoke – Reading Line is very crowded during peak hours. It is also not electrified, limiting capacity for through services from Reading to destinations such as Southampton and precluding electric services to/from London Paddington. Some of the intermediate stations on the platform have short platforms, limiting capacity for stopping services.
4. Significant housing development is planned for this corridor. However, the number of planned homes outnumbers the number of planned jobs by nearly 3 to 1.



A33/Basingstoke – Reading Line (Basingstoke – Reading)

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
O3	Reading to Basingstoke Enhancements	Long (2040s)		1	1	2				Network Rail	F
O13	South West Main Line / Basingstoke Branch Line - Basingstoke Enhancement Scheme	Medium (2030s)	Main Line Phase 2 and Solent to Reading Strategic Studies	1	1	2				Network Rail	B, D, E, F
O14	Cross Country Service Enhancements	Short (2020s)	Main Line Phase 2 Strategic Study	1	0	1				CrossCountry/ DfT	B, D, E, F
P1	Basingstoke Mass Rapid Transit	Short (2020s)		0	0	1				Hampshire County Council	B, D, E, F
P9	Reading Mass Rapid Transit	Short (2020s)		4	5	6				Reading Borough Council	B, D, E, F, H
P18	Berkshire, Hampshire and Surrey Inter-urban Bus Enhancements	Short (2020s)		0	0	1				Surrey County Council / Hampshire County Council	B, D, E, F, H
Q1	Berkshire, Hampshire and Surrey Urban and Inter-urban Active Travel Infrastructure	Short (2020s)		0	0	1			1	Surrey County Council / Hampshire County Council	B, D, E, F, H

Legend	
1. Feasibility Study	A. Programme management
2. Strategic Outline Business Case	B. Pre-feasibility work & resource funding
3. Outline Business Case (including surveys, design, modelling and stakeholder engagement)	C. (Joint) Scheme promoter
4. Powers/Consents	D. Business case & schema development & funding
5. Procurement	E. Use of analytical framework
6. Full Business Case	F. Advocacy & securing funding
7. Construction/Implementation	G. Procurement & sourcing
8. Opening	H. Resource capacity & capability funding

A34/South Western Main Line/Basingstoke – Reading Line (Basingstoke - Reading)

Corridor overview

The A34 north-south road between the Berkshire – Oxfordshire border and Winchester,

The Basingstoke – Reading Line rail link serves the corridor on an adjacent alignment to the east,

Parts of the Great Western Main Line north west of Reading,

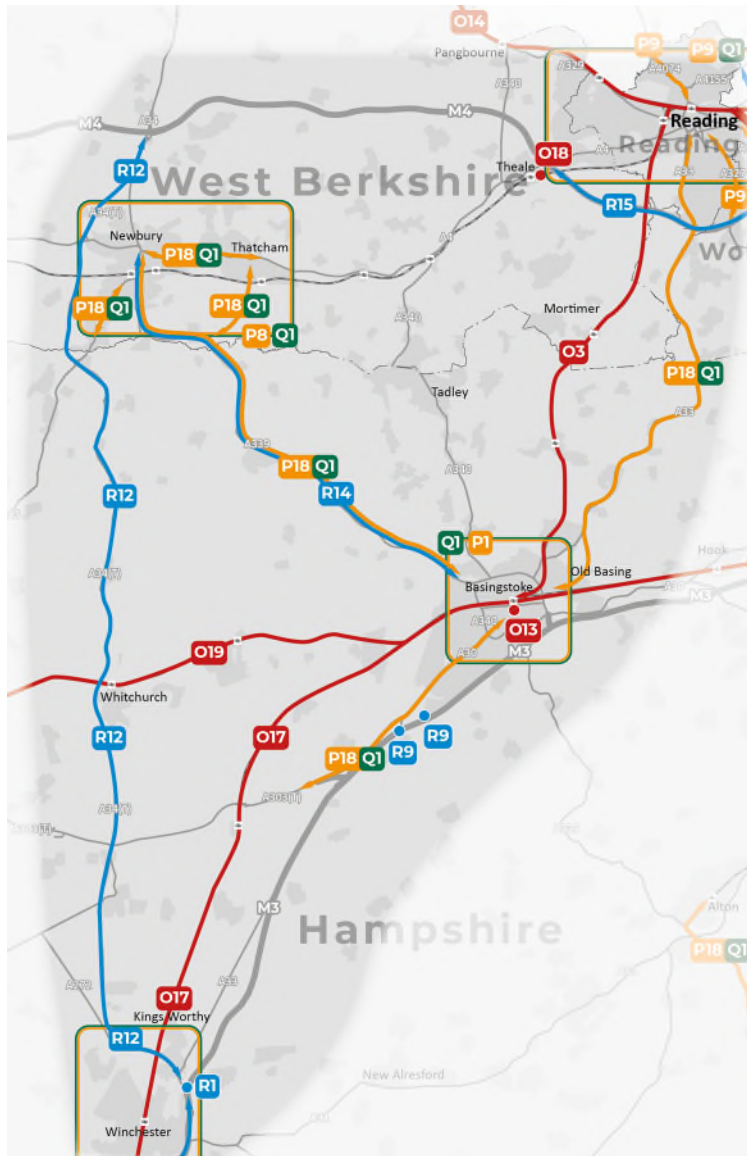
The South Western Main Line between Basingstoke and Winchester.

Strategic role

Supports freight movements in the region connecting the Port of Southampton to the Midlands via Newbury. It also connects to one of the most important east-west corridors in the country, i.e. the M4 and Great Western Main Line.

Key issues

1. There is a notable cluster of historic road traffic incidents on the corridor around the A34/A303 junction, including incidents resulting in people being killed or seriously injured.
2. Congestion hotspot just outside Winchester on approach to junction 9 of the M3. This junction forms the southern end of the A34.
3. Significant residential development is planned for the corridor. However, the number of planned homes greatly exceeds the number of planned jobs. Many new residents may travel outside the corridor to seek employment. The Basingstoke – Reading Line is very crowded during peak hours, and increased demand for travel from new residents would likely further worsen this issue.



A34/South Western Main Line/Basingstoke – Reading Line (Basingstoke - Reading)

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
O13	South West Main Line / Basingstoke Branch Line - Basingstoke Enhancement Scheme	Medium (2030s)	Main Line Phase 2 and Solent to Reading Strategic Studies	1	1	2				Network Rail	B, D, E, F
O14	Cross Country Service Enhancements	Short (2020s)	Main Line Phase 2 Strategic Study	1	0	1				CrossCountry/ DfT	B, D, E, F
O17	South West Main Line - Digital Signalling	Medium (2030s)	SWML Strategic Study/ Main Line Phase 2 Strategic Study	0	0	1				Network Rail	B, D, E, F
P1	Basingstoke Mass Rapid Transit	Short (2020s)		0	0	1				Hampshire County Council	B, D, E, F
P8	Newbury/Thatcham Bus Enhancements	Short (2020s)	Jet Black Bus Services	7	8	0	N/A	N/A	N/A	West Berks Council	B, D, E, F, H
P9	Reading Mass Rapid Transit	Short (2020s)		4	5	6				Reading Borough Council	B, D, E, F, H
P14	Winchester Bus Enhancements	Short (2020s)		0	0	1				Hampshire County Council	B, D, E, F, H
P18	Berkshire, Hampshire and Surrey Inter-urban Bus Enhancements	Short (2020s)		0	0	1				Surrey County Council / Hampshire County Council	B, D, E, F, H
Q1	Berkshire, Hampshire and Surrey Urban and Inter-urban Active Travel Infrastructure	Short (2020s)		0	0	1			1	Surrey County Council / Hampshire County Council	B, D, E, F, H

Legend	
1. Feasibility Study	A. Programme management
2. Strategic Outline Business Case	B. Pre-feasibility work & resource funding
3. Outline Business Case (including surveys, design, modelling and stakeholder engagement)	C. (Joint) Scheme promoter
4. Powers/Consents	D. Business case & scheme development & funding
5. Procurement	E. Use of analytical framework
6. Full Business Case	F. Advocacy & securing funding
7. Construction/Implementation	G. Procurement & sourcing
8. Opening	H. Resource capacity & capability funding

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
R2	M3 Junction 9 - Junction 14 Smart Motorway (SMP)	Short (2020s)		7	7	8	TBC	TBC	TBC	National Highways	B, D, E, F, H
R12	A34 Junction and Safety Enhancements	Short (2020s)		1	0	2	TBC	TBC	TBC	National Highways	F
R14	A339 Newbury to Basingstoke Safety Enhancements	Short (2020s)	Joint A339 Corridor Study concluded, with Hants CC withdrawing	8	0	2	N/A	N/A	N/A	Hampshire	F

Legend	
1. Feasibility Study	A. Programme management
2. Strategic Outline Business Case	B. Pre-feasibility work & resource funding
3. Outline Business Case (including surveys, design, modelling and stakeholder engagement)	C. (Joint) Scheme promoter
4. Powers/Consents	D. Business case & schema development & funding
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6. Full Business Case	F. Advocacy & securing funding
7. Construction/Implementation	G. Procurement & sourcing
8. Opening	H. Resource capacity & capability funding

A36/Wessex Main Line (New Forest)

Corridor overview

The A36 road on an axis from the south east around the M27 to the north west around the Hampshire – Wiltshire border,

The Wessex Main Line rail link also serves the corridor along an adjacent alignment to the north east.

Strategic role

While this corridor is relatively short, it provides important east – west connectivity between the South East, the South West and the West of England. It is also close to the Port of Southampton.

Key issues

1. Median earnings on the corridor are markedly lower than the regional average. There are also significant areas of deprivation in western and central parts of Southampton that are directly served by the Wessex Main Line.
2. The Wessex Main Line experiences high levels of crowding during peak hours. There is some planned residential development along its route, i.e. in Romsey, but this is unlikely to be significant enough to materially affect demand for travel. The cascading of additional rolling stock to the Wessex Main Line is intended to help alleviate crowding and other capacity issues.
3. There are some road traffic congestion hotspots on the corridor. The most significant congestion exists where the A36 intersects the A3090 and M27, respectively, but more moderate congestion continues along the A36 as far as Blackhill. Peak hour highway demand is the lowest of any corridor in this study, but the proposed expansion of the Port of Southampton to the west has the potential to increase the volume of freight traffic moving along the corridor.

A36/Wessex Main Line (New Forest)

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
A7	Southampton Central Station Upgrade and Timetabling	Medium (2030s)	Solent Connectivity demand modelling	0	1	2	2	2	2	Network Rail/ Solent Transport	D, E, F
B2	New Southampton Central Station	Medium (2030s)	Solent Transport Prospectus	0	1	1				Southampton/Network Rail	D, E, F
B3	New City Centre Station	Long (2040s)		0	1	1				Southampton City Council	D, E, F
B6	Eastleigh to Romsey Line - Electrification	Medium (2030s)	Class 158/159 Replacement/ West of England Line Decarbonisation	1	1	2		2		Network Rail/ SWR/ DfT	D, E, F
C1	Southampton Mass Transit	Medium (2030s)	BSIP	1	1	2				Hampshire County Council / Southampton City Council	B, D, E, F
E1	Southampton Area Active Travel (including LCWIPs)	Short (2020s)	TCF/ATF/LTP/Developer	1	1	2	N/A	N/A	N/A	Southampton	B, D, F
E5	Southampton City Centre Placemaking	Short (2020s)	TCF	1	1	2	N/A	N/A	N/A	Southampton	B, D, F
I12	Northam Rail Bridge Replacement and Enhancement (MRN)	Short (2020s)	MRN	2	3	6	3	6	7	Southampton/Network Rail	B, F

Legend	
1. Feasibility Study	A. Programme management
2. Strategic Outline Business Case	B. Pre-feasibility work & resource funding
3. Outline Business Case (including surveys, design, modelling and stakeholder engagement)	C. (Joint) Scheme promoter
4. Powers/Consents	D. Business case & schema development & funding
5. Procurement	E. Use of analytical framework
6. Full Business Case	F. Advocacy & securing funding
7. Construction/Implementation	G. Procurement & sourcing
8. Opening	H. Resource capacity & capability funding

A303/West of England Main Line (Andover – Basingstoke)

Corridor overview

The A303 east-west road between Basingstoke and the Hampshire – Wiltshire border,

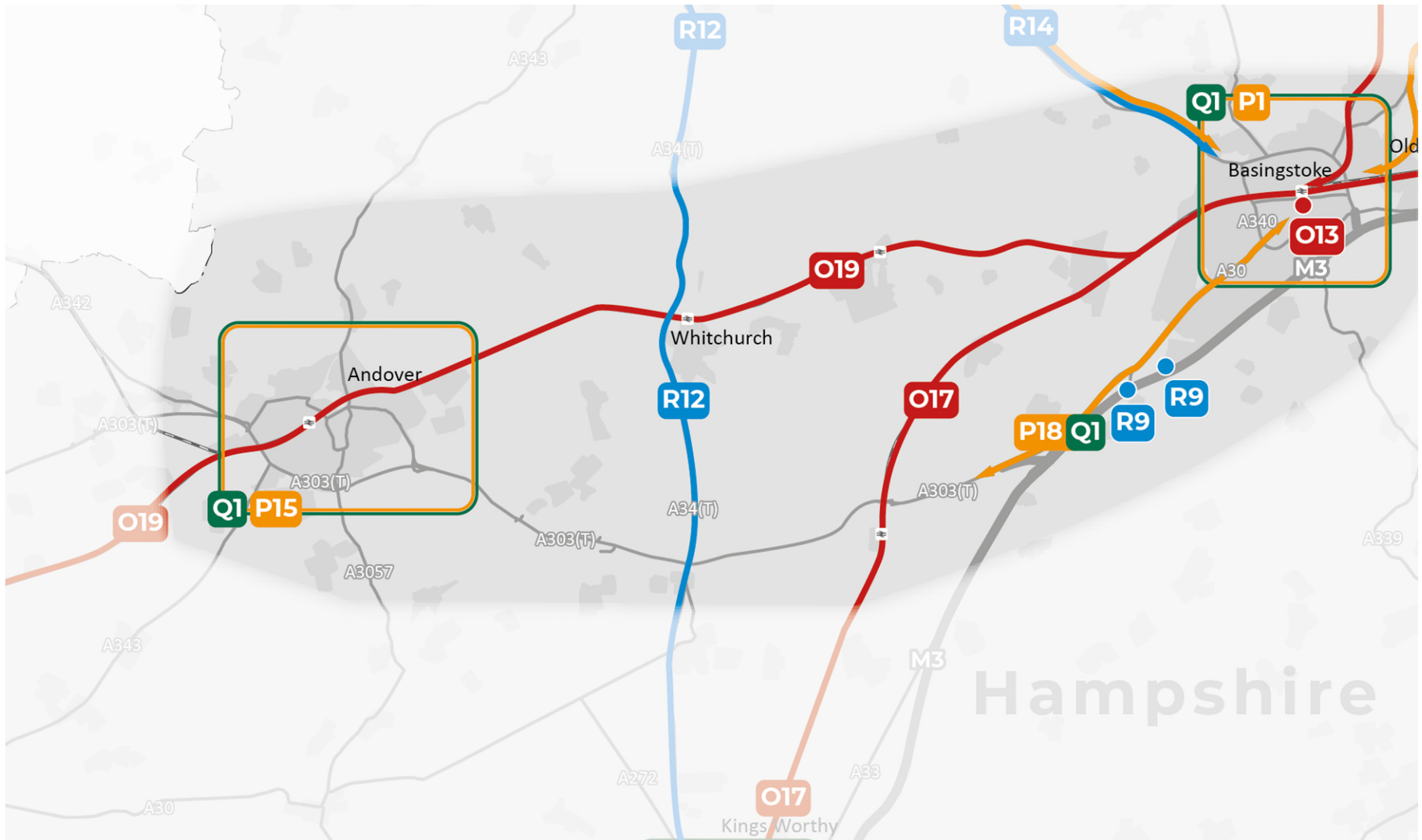
The West of England Main Line rail link along similar alignment.

Strategic role

The corridor connects the South East to the South West of England, including two of the South East's larger urban centres, Andover and Basingstoke. It also connects Andover to London and the rest of the South East.

Key issues

1. There is little planned job growth on the corridor but there is sizeable planned residential development. Many of the development sites are at the periphery of Andover and Basingstoke, some distance from shops, services and public transport hubs. These towns may become less self-contained in the future, driving new residents to seek employment outside the corridor and thereby increasing demand for travel.
2. The West of England Main Line is not electrified and carries diesel-powered services between London Waterloo and the South West (as far as Exeter). It also experiences high levels of crowding during the AM peak on its radial passenger services.
3. There is a notable cluster of historic road traffic incidents on the corridor around the A34/A303 junction, including incidents resulting in people being killed or seriously injured.



A303/West of England Main Line (Andover – Basingstoke)

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
A10	West of England Service Enhancements	Medium (2030s)	Yeovil Junction to Salisbury Service Enhancement SOBC	1	1	3	2	2			D, E, F
O19	West of England Main Line - Electrification from Basingstoke to Salisbury	Medium (2030s)	Class 158/159 Replacement/ West of England Line Decarbonisation	0	1	2		2		Network Rail/ SWR/ DfT	B, D, E, F
P1	Basingstoke Mass Rapid Transit	Short (2020s)		0	0	1				Hampshire County Council	B, D, E, F
P15	Andover Bus Enhancements	Short (2020s)		0	0	1				Hampshire County Council	B, D, E, F, H
P18	Berkshire, Hampshire and Surrey Inter-urban Bus Enhancements	Short (2020s)		0	0	1				Surrey County Council / Hampshire County Council	B, D, E, F, H
Q1	Berkshire, Hampshire and Surrey Urban and Inter-urban Active Travel Infrastructure	Short (2020s)		0	0	1			1	Surrey County Council / Hampshire County Council	B, D, E, F, H
R9	M3 Junction 7 and Junction 8 Safety and Capacity Enhancements	Short (2020s)		0	0	1				Hampshire County Council	B, F
R14	A339 Newbury to Basingstoke Safety Enhancements	Short (2020s)	Joint A339 Corridor Study concluded, with Hants CC withdrawing	8	0	2	N/A	N/A	N/A	Hampshire	F

Legend	
1. Feasibility Study	A. Programme management
2. Strategic Outline Business Case	B. Pre-feasibility work & resource funding
3. Outline Business Case (including surveys, design, modelling and stakeholder engagement)	C. (Joint) Scheme promoter
4. Powers/Consents	D. Business case & schema development & funding
5. Procurement	E. Use of analytical framework
6. Full Business Case	F. Advocacy & securing funding
7. Construction/Implementation	G. Procurement & sourcing
8. Opening	H. Resource capacity & capability funding

M4/Great Western Main Line/Reading – Taunton Line (Newbury – Slough)

Corridor overview

The M4 east-west road between the Berkshire – Wiltshire border and Slough,

The Great Western Main Line rail link along similar alignment,

The Reading – Taunton Line provides a rail link west of Reading.

Strategic role

Directly serves Heathrow Airport, the largest international gateway in the South East and the busiest airport in Europe.

Provides east-west connectivity between London, the Thames Valley, the South West of England and Wales.

Key issues

1. There is significant socioeconomic disparity along the corridor, with several pockets of deprivation in Reading and Slough. For example, in 2018 median earnings in Slough were £31,388 whereas in Wokingham they were £40,373.
2. There are some road traffic congestion hotspots on the corridor. These are between junction 4b and junction 6 of the M4 around Slough as well as between junction 10 and junction 12 of the M4 around Reading. There are also wider problems with road safety and air quality on the M4, particularly between Reading and the M25. The proposed expansion of Heathrow Airport could add additional pressure to the highway network.
3. The Great Western Main Line is one of the busiest rail links in the South East and its radial passenger services experience high levels of crowding. Some alleviation of this issue is provided by new Crossrail services and the proposed Western Rail Access to Heathrow scheme will provide additional capacity on the corridor.
4. The branch lines serving Henley-on-Thames, Marlow/Bourne End and Windsor are currently unelectrified, which presents operational challenges as many services on the mainline now use electric trains removing the option for these mainline services to continue onto branch lines..



M4/Great Western Main Line/Reading – Taunton Line (Newbury – Slough)

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
O1	Western Rail Link to Heathrow	Medium (2030s)	RNEP	5	0	6				Network Rail	F
O14	Cross Country Service Enhancements	Short (2020s)	Main Line Phase 2 Strategic Study	1	0	1				CrossCountry/ DfT	B, D, E, F
O18	Theale Strategic Rail Freight Terminal	Short (2020s)		3	0	4	4			Network Rail	B, D, E, F
P3	Bracknell/Wokingham Bus Enhancements	Short (2020s)		0	1	1	1	2	2	Joint	B, D, F
P7	Slough/Windsor/Maidenhead Area Bus Enhancements	Short (2020s)		4	4	5				Slough Borough Council / Windsor and Maidenhead Borough Council	B, D, E, F, H
P8	Newbury/Thatcham Bus Enhancements	Short (2020s)	Jet Black Bus Services	7	8	0	N/A	N/A	N/A	West Berks Council	B, D, E, F, H
P9	Reading Mass Rapid Transit	Short (2020s)		4	5	6				Reading Borough Council	B, D, E, F, H
P12	A4 Reading - Maidenhead - Slough - London Heathrow Airport Mass Rapid Transit	Short (2020s)		0	0	1				Slough Borough Council / Reading Borough Council / Windsor and Maidenhead Borough Council / TfSE	B, D, E, F, H
P17	London Heathrow Airport Bus Access Enhancements	Short (2020s)		0	0	1				Surrey County Council	A, B, C, D, E, F, G, H
P18	Berkshire, Hampshire and Surrey Inter-urban Bus Enhancements	Short (2020s)		0	0	1				Surrey County Council / Hampshire County Council	B, D, E, F, H

64

Legend	
1. Feasibility Study	A. Programme management
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4. Powers/Consents	D. Business case & schema development & funding
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6. Full Business Case	F. Advocacy & securing funding
7. Construction/Implementation	G. Procurement & sourcing
8. Opening	H. Resource capacity & capability funding

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
Q1	Berkshire, Hampshire and Surrey Urban and Inter-urban Active Travel Infrastructure	Short (2020s)		0	0	1			1	Surrey County Council / Hampshire County Council	B, D, E, F, H
R3	A404 Bisham Junction (RIS3 Pipeline)	Medium (2030s)	RIS pipeline (funding subject to RIS)	0	0	1	TBC	TBC	TBC	National Highways	B, D, E, F, H
R6	New Thames Crossing East of Reading (LLM)	Long (2040s)	MRN Pipeline	0	0	1				Reading Borough Council / Wokingham Borough Council	F
R14	A339 Newbury to Basingstoke Safety Enhancements	Short (2020s)	Joint A339 Corridor Study concluded, with Hants CC withdrawing	8	0	2	N/A	N/A	N/A	Hampshire	F
R15	M4 Junction 3 to Junction 12 Smart Motorway (SMP)	Short (2020s)	SMP	6	7	8	TBC	TBC	TBC	National Highways	B, D, E, F

Legend	
1. Feasibility Study	A. Programme management
2. Strategic Outline Business Case	B. Pre-feasibility work & resource funding
3. Outline Business Case (including surveys, design, modelling and stakeholder engagement)	C. (Joint) Scheme promoter
4. Powers/Consents	D. Business case & scheme development & funding
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6. Full Business Case	F. Advocacy & securing funding
7. Construction/Implementation	G. Procurement & sourcing
8. Opening	H. Resource capacity & capability funding

M25 (Dartford – Slough)

Corridor overview

The M25 between Dartford in the east and Slough in the west. It is a road corridor only,

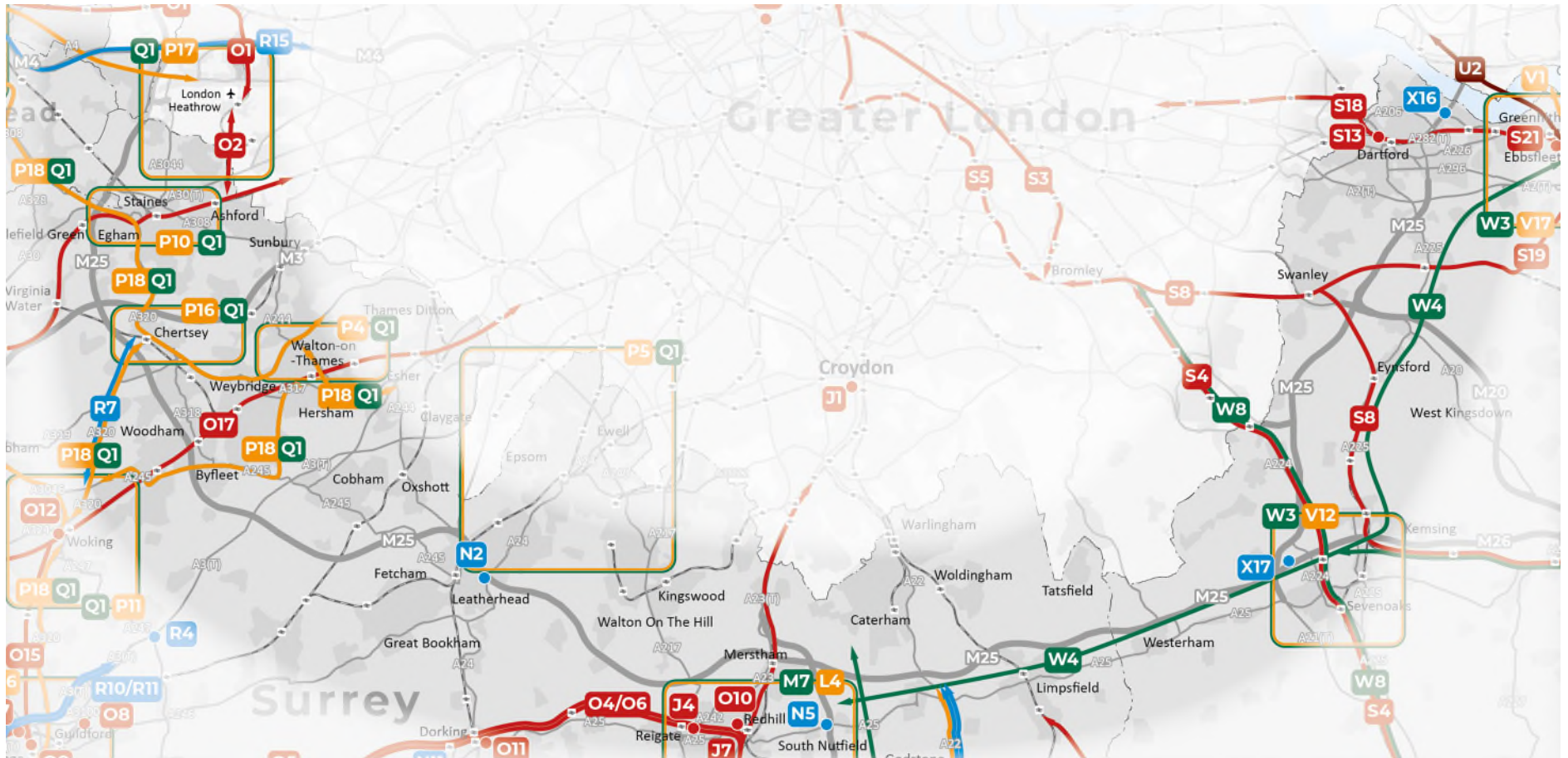
There is no equivalent railway that mirrors the corridor of the M25, although the North Downs Line runs nearby in places.

Strategic role

Centred on one of the busiest and one of the widest roads in Europe. All road and rail routes in and out of London from the South East must pass through it.

Key issues

1. The corridor is the busiest in the South East in terms of road traffic. This comes with significant areas of congestion, particularly along the south-west quadrant of the M25, as well as around Oxted and further east near the Dartford Crossing.
2. There are road safety issues on the corridor around the Dartford Crossing. There are clusters of historic road traffic incidents in this area, including incidents resulting in people being killed or seriously injured.
3. Notable concentration of deprivation in the Dartford area.



M25 (Dartford – Slough)

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
M9	Surrey Inter-urban Active Travel Infrastructure	Short (2020s)		0	1	1	1	1		Surrey County Council	F
P4	Elmbridge Bus Enhancements	Short (2020s)		0	0	1	1			Surrey County Council	B, D, E, F
P5	Epsom/Ewell Bus Enhancements	Short (2020s)		0	0	1				Surrey County Council	B, D, E, F, H
P10	Spelthorne Bus Enhancements	Short (2020s)		0	0	1				Surrey County Council	B, D, E, F, H
P16	Runnymede Bus Enhancements	Short (2020s)		0	0	1	1			Surrey County Council	B, D, E, F, H
P17	London Heathrow Airport Bus Access Enhancements	Short (2020s)		0	0	1				Surrey County Council	A, B, C, D, E, F, G, H
P18	Berkshire, Hampshire and Surrey Inter-urban Bus Enhancements	Short (2020s)		0	0	1				Surrey County Council / Hampshire County Council	B, D, E, F, H
Q1	Berkshire, Hampshire and Surrey Urban and Inter-urban Active Travel Infrastructure	Short (2020s)		0	0	1			1	Surrey County Council / Hampshire County Council	B, D, E, F, H
R7	A320 North Corridor (HIF)	Short (2020s)	HIF	2	5	7	5	5	5	Surrey County Council	F
V21	Ferry Crossings - Gravesend to Tilbury Enhancements	Medium (2030s)		0	0	1				Private operators	B, D, E, F, H
W4	Kent Inter-urban Active Travel Infrastructure	Short (2020s)	KCWIP	0	0	1				Kent County Council	A, B, C, D, E, F, G, H
X16	M25 Junction 1a Enhancements	Short (2020s)		0	0	1	TBC	TBC	TBC	National Highways	B, D, F

Legend	
1. Feasibility Study	A. Programme management
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3. Outline Business Case (including surveys, design, modelling and stakeholder engagement)	C. (Joint) Scheme promoter
4. Powers/Consents	D. Business case & schema development & funding
5. Procurement	E. Use of analytical framework
6. Full Business Case	F. Advocacy & securing funding
7. Construction/Implementation	G. Procurement & sourcing
8. Opening	H. Resource capacity & capability funding

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
X17	M25 Junction 5 Enhancements	Long (2040s)		0	0	1	TBC	TBC	TBC	National Highways	F
X19	Canterbury East Relief Road	Long (2040s)		0	0	1	N/A			Kent County Council / Canterbury City Council	F

Legend	
1. Feasibility Study	A. Programme management
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8. Opening	H. Resource capacity & capability funding

A228/A249/A278/A289/Chatham Main Line/Sheerness Line (Medway Ports)

Corridor overview

The A228, A289 and A278 roads on a north-south axis to the west,

The A249 road on a north-south axis to the east,

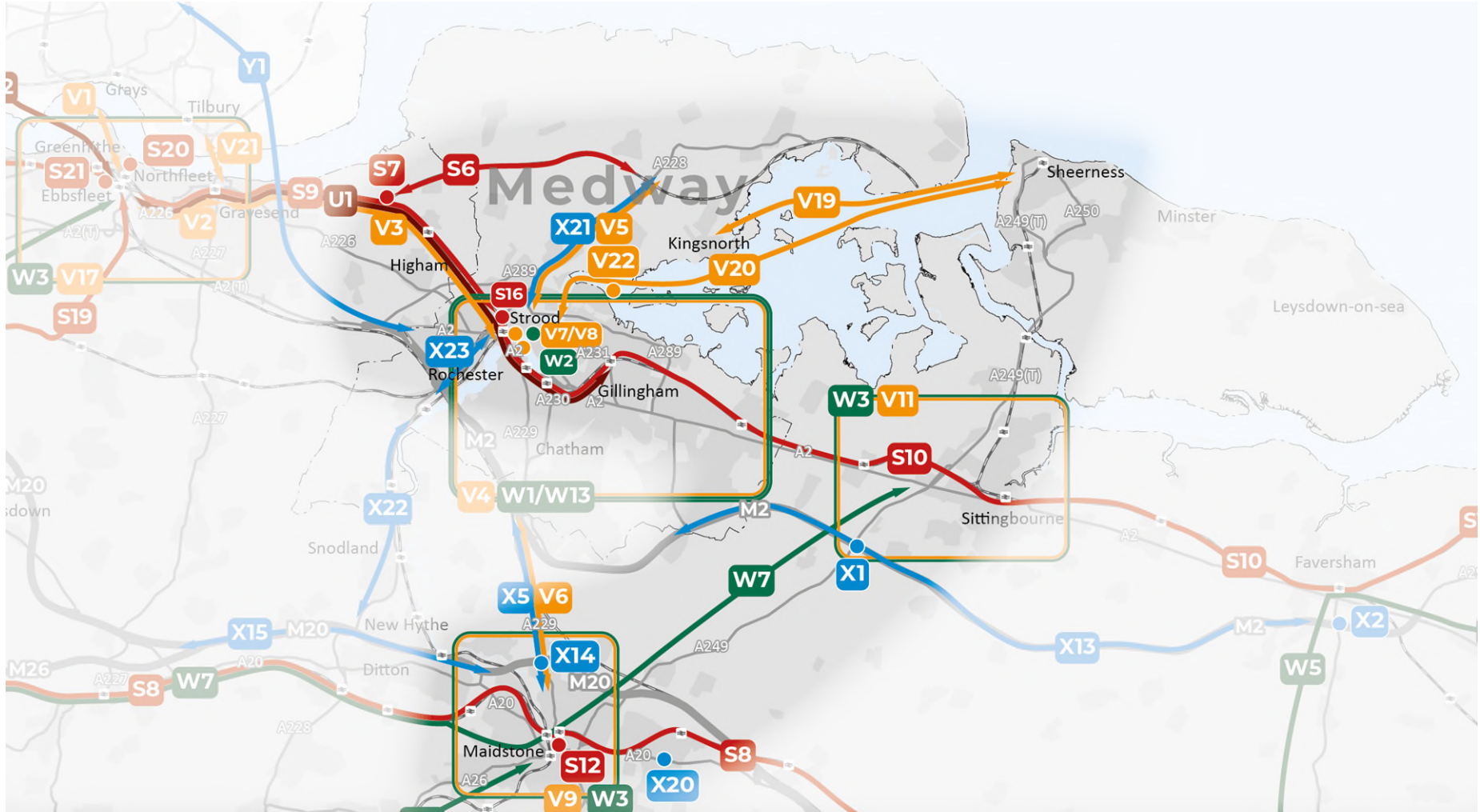
The Chatham Main Line/Sheerness Line rail link from Sittingbourne to the Isle of Sheppey.

Strategic role

Connects the Strategic Road Network and railway network with the Medway Ports.

Key issues

1. There are high levels of traffic congestion on the A249 where it intersects with the M2 and M20 respectively, particularly during the AM peak.
2. The corridor has the second highest level of deprivation of any corridor in this study, with deprivation concentrated around the Medway Towns, Sittingbourne and the Isle of Sheppey. While deprivation is a product of a wide range of factors, transport connectivity being just one, improving transport connectivity could enhance access to education and skills opportunities for a larger proportion of the population – supporting alleviation of deprivation.
3. Due to its proximity to the Medway Estuary, there are significant environmental considerations on parts of the corridor (i.e. coastal areas) which may be challenging to balance with future growth. Nevertheless, the corridor has a low housing affordability ratio with significant planned residential development and job growth.



A228/A249/A278/A289/Chatham Main Line/Sheerness Line (Medway Ports)

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
S6	Hoo Peninsula Passenger Rail Services (HIF)	Medium (2030s)	HIF Withdrawn	2	2	4	N/A	N/A	N/A	Medway Council	B, D, E, F
S7	North Kent Line / Hundred of Hoo Railway - Rail Chord	Medium (2030s)		0	0	2				Network Rail / medway	B, D, E, F
S12	Integrated Maidstone Stations	Medium (2030s)		0	0	1				Maidstone Borough Council	B, D, E, F
S16	New Strood Rail Interchange	Medium (2030s)		0	1	2	TBC	TBC	TBC	Network Rail/Medway Council	B, D, E, F
V4	Medway Mass Transit	Medium (2030s)		0	0	1				Medway Council	B, D, E, F
V5	Medway Mass Transit - Extension to Hoo Peninsula	Medium (2030s)		0	0	2				Medway Council	B, D, E, F
V7	Medway Mass Transit - Chatham to Medway City Estate New Bridge	Medium (2030s)		0	0	1	N/A	N/A	N/A	TfSE / Medway Council	B, D, F, H
V8	Medway Mass Transit - Chatham to Medway City Estate Water Taxi	Long (2040s)		0	0	1	N/A	N/A	N/A	TfSE / Medway Council	B, D, F, H
V11	Sittingbourne Bus Enhancements	Short (2020s)		0	0	1				Kent County Council	A, B, C, D, E, F, C, H
V19	Ferry Crossings - New Sheerness to Hoo Peninsula Service	Medium (2030s)		0	0	1				Private operators	B, D, E, F, H
V20	Ferry Crossings - Sheerness to Chatham/Medway City Estate/Strood Enhancements	Medium (2030s)		0	0	1				Private operators	B, D, E, F, H
V22	Inland Waterway Freight Enhancements	Medium (2030s)		0	0	1				Private operators	B, D, E, F, H

Legend	
1. Feasibility Study	A. Programme management
2. Strategic Outline Business Case	B. Pre-feasibility work & resource funding
3. Outline Business Case (including surveys, design, modelling and stakeholder engagement)	C. (Joint) Scheme promoter
4. Powers/Consents	D. Business case & schema development & funding
5. Procurement	E. Use of analytical framework
6. Full Business Case	F. Advocacy & securing funding
7. Construction/Implementation	G. Procurement & sourcing
8. Opening	H. Resource capacity & capability funding

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
W1	Medway Active Travel Enhancements	Short (2020s)		0	0	1	N/A	N/A	N/A	Medway Council	B, D, E, F, H
W2	Medway Active Travel - Chatham to Medway City Estate River Crossing	Long (2040s)		0	0	1	N/A	N/A	N/A	Medway Council	A, B, C, D, E, F, G, H
W3	Kent Urban Active Travel Infrastructure	Short (2020s)	KCWIP	0	0	1				Kent County Council	A, B, C, D, E, F, G, H
W7	Sevenoaks - Maidstone - Sittingbourne National Cycle Network Enhancements	Short (2020s)		0	0	1				Sustrans	B, D, F, H
W13	Medway Placemaking and Demand Management Measures	Short (2020s)		0	0	1	N/A	N/A	N/A	Medway Council	B, D, F, H
X21	A228 Hoo Peninsula Enhancements	Short (2020s)		0	0	1				Medway Council	F
X23	Strood Riverside Highway Enhancement and Bus Lane	Medium (2030s)		0	0	1	N/A	N/A	N/A	Medway Council	F

Legend	
1. Feasibility Study	A. Programme management
2. Strategic Outline Business Case	B. Pre-feasibility work & resource funding
3. Outline Business Case (including surveys, design, modelling and stakeholder engagement)	C. (Joint) Scheme promoter
4. Powers/Consents	D. Business case & schema development & funding
5. Procurement	E. Use of analytical framework
6. Full Business Case	F. Advocacy & securing funding
7. Construction/Implementation	G. Procurement & sourcing
8. Opening	H. Resource capacity & capability funding

A228/A229/Medway Valley Line (Maidstone – Medway Towns)

Corridor overview

The A228 and A229 north-south roads between the Medway Towns in the north and Maidstone in the south,

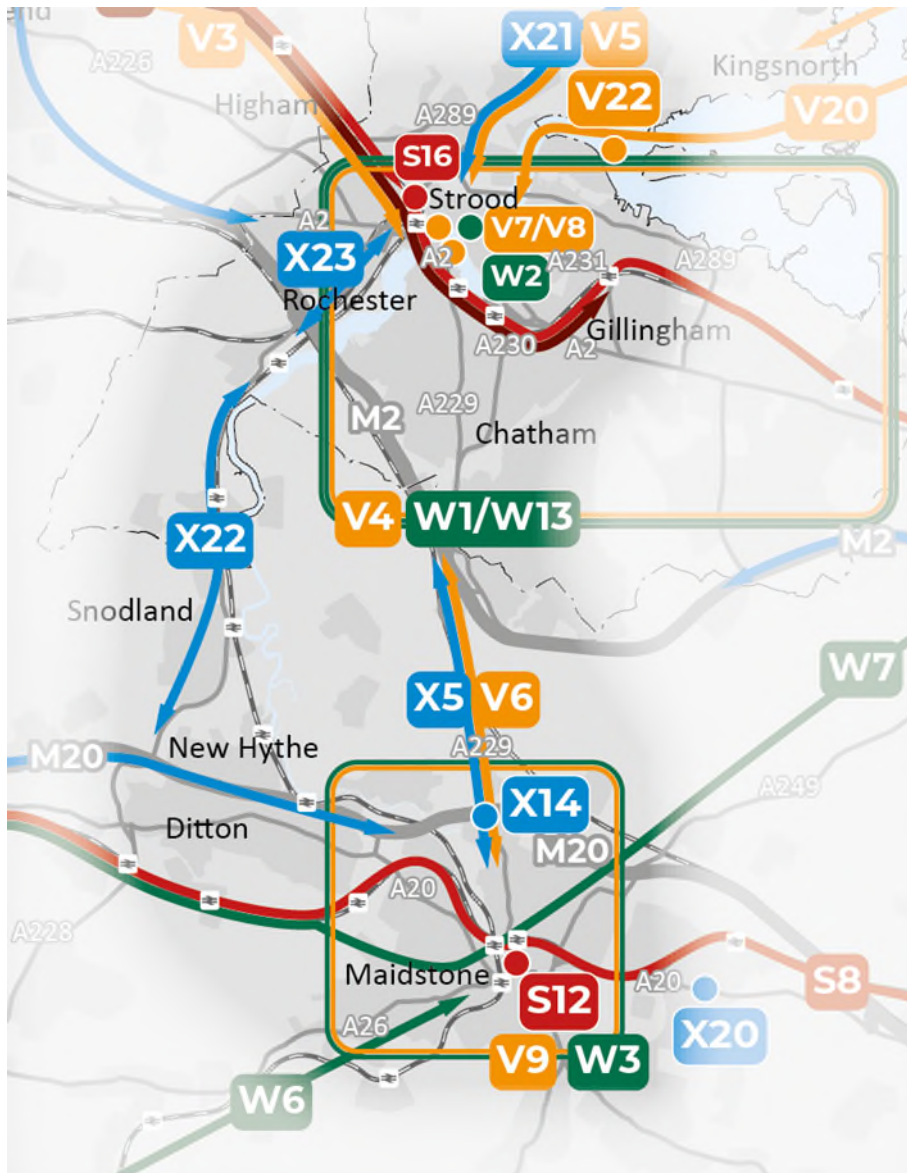
The Medway Valley Line rail link along similar alignment.

Strategic role

The corridor connects the Medway Towns to Maidstone which in turn enables onward connectivity to other parts of the South East by rail. It also links two key radial corridors on Strategic Road Network (the M2 and M20).

Key issues

1. The proposed Lower Thames Crossing could worsen congestion in the future by encouraging traffic to switch between the M2 and M20.
2. Significant planned residential development and job growth, meaning transport demand is likely to increase over the medium to long run.
3. The M20/A229 junction is part of an Air Quality Management Area.
4. The corridor has the lowest level of educational attainment in the South East It also has one of the lowest concentrations of priority sector jobs in the region.



A228/A229/Medway Valley Line (Maidstone – Medway Towns)

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
S7	North Kent Line / Hundred of Hoo Railway - Rail Chord	Medium (2030s)		0	0	2				Network Rail / medway	B, D, E, F
S12	Integrated Maidstone Stations	Medium (2030s)		0	0	1				Maidstone Borough Council	B, D, E, F
S16	New Strood Rail Interchange	Medium (2030s)		0	1	2	TBC	TBC	TBC	Network Rail/Medway Council	B, D, E, F
V4	Medway Mass Transit	Medium (2030s)		0	0	1				Medway Council	B, D, E, F
V6	Medway to Maidstone Bus Priority	Short (2020s)		2	3	3	3	3	3	Kent County Council	B, D, F, H
V22	Inland Waterway Freight Enhancements	Medium (2030s)		0	0	1				Private operators	B, D, E, F, H
W1	Medway Active Travel Enhancements	Short (2020s)		0	0	1	N/A	N/A	N/A	Medway Council	B, D, E, F, H
W3	Kent Urban Active Travel Infrastructure	Short (2020s)	KCWIP	0	0	1				Kent County Council	A, B, C, D, E, F, C, H
W13	Medway Placemaking and Demand Management Measures	Short (2020s)		0	0	1	N/A	N/A	N/A	Medway Council	B, D, F, H
X5	A229 Bluebell Hill Junction Upgrades (LLM)	Short (2020s)	LLM	2	3	4	3	3	3	Kent County Council	B, D, E, F, H
X7	A228 Colts Hill Strategic Link (MRN Pipeline)	Medium (2030s)	MRN Pipeline	0	0	2				Kent County Council	B, F
X22	A228 Medway Valley Enhancements	Medium (2030s)		0	1	2				Kent County Council	F

Legend	
1. Feasibility Study	A. Programme management
2. Strategic Outline Business Case	B. Pre-feasibility work & resource funding
3. Outline Business Case (including surveys, design, modelling and stakeholder engagement)	C. (Joint) Scheme promoter
4. Powers/Consents	D. Business case & schema development & funding
5. Procurement	E. Use of analytical framework
6. Full Business Case	F. Advocacy & securing funding
7. Construction/Implementation	G. Procurement & sourcing
8. Opening	H. Resource capacity & capability funding

Redhill – Tonbridge/South Eastern Main Line (Ashford - Redhill)

Corridor overview

The Redhill – Tonbridge Line,

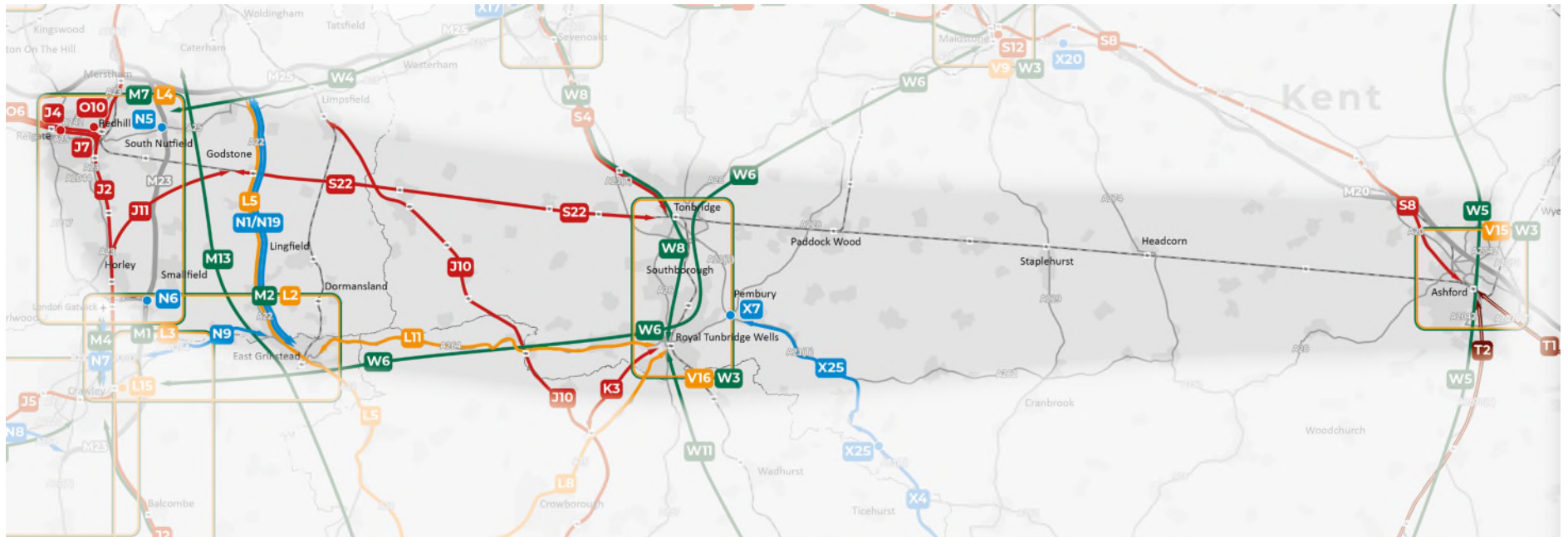
The South Eastern Main Line between Tonbridge and Ashford International.

Strategic role

With Eurostar services at Ashford International and rapid onward connectivity to Gatwick Airport from Redhill, the corridor is in reach of international gateways at both ends.

Key issues

1. There are no direct rail services running along the entire length of the corridor at present.
2. Two rail franchises split the services at Tonbridge. The western (Southern) part of the corridor is not electrified. The eastern (South Eastern) part is. This reduces the coherence of the corridor.
3. Low number of jobs in priority sectors, suggesting improved connectivity to economic hubs is needed.
4. The corridor has significant planned residential development (69,825 homes from 2018 to 2035) and job growth (25% from 2018 to 2035), so it is likely that the demand for transport and connectivity will notably increase in the coming years.



Redhill – Tonbridge/South Eastern Main Line (Ashford - Redhill)

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
O10	Redhill Station Track Capacity Improvement	Medium (2030s)		1	0	2	2			Network Rail	B, D, E, F
S22	Gatwick - Kent Service Enhancements	Short (2020s)	Strategic Advice	1	0	2	1			DfT	B, D, E, F
V15	Ashford Bus Enhancements	Short (2020s)		0	0	1				Kent County Council	F
VI6	Royal Tunbridge Wells/Tonbridge Bus Enhancements	Short (2020s)		0	0	2				Kent County Council	B, D, E, F, H

Legend	
1. Feasibility Study	A. Programme management
2. Strategic Outline Business Case	B. Pre-feasibility work & resource funding
3. Outline Business Case (including surveys, design, modelling and stakeholder engagement)	C. (Joint) Scheme promoter
4. Powers/Consents	D. Business case & scheme development & funding
5. Procurement	E. Use of analytical framework
6. Full Business Case	F. Advocacy & securing funding
7. Construction/Implementation	G. Procurement & sourcing
8. Opening	H. Resource capacity & capability funding

A25/North Downs Line (Guildford – Redhill)

Corridor overview

The A25, from Guildford in the west to Redhill in the east via Dorking,

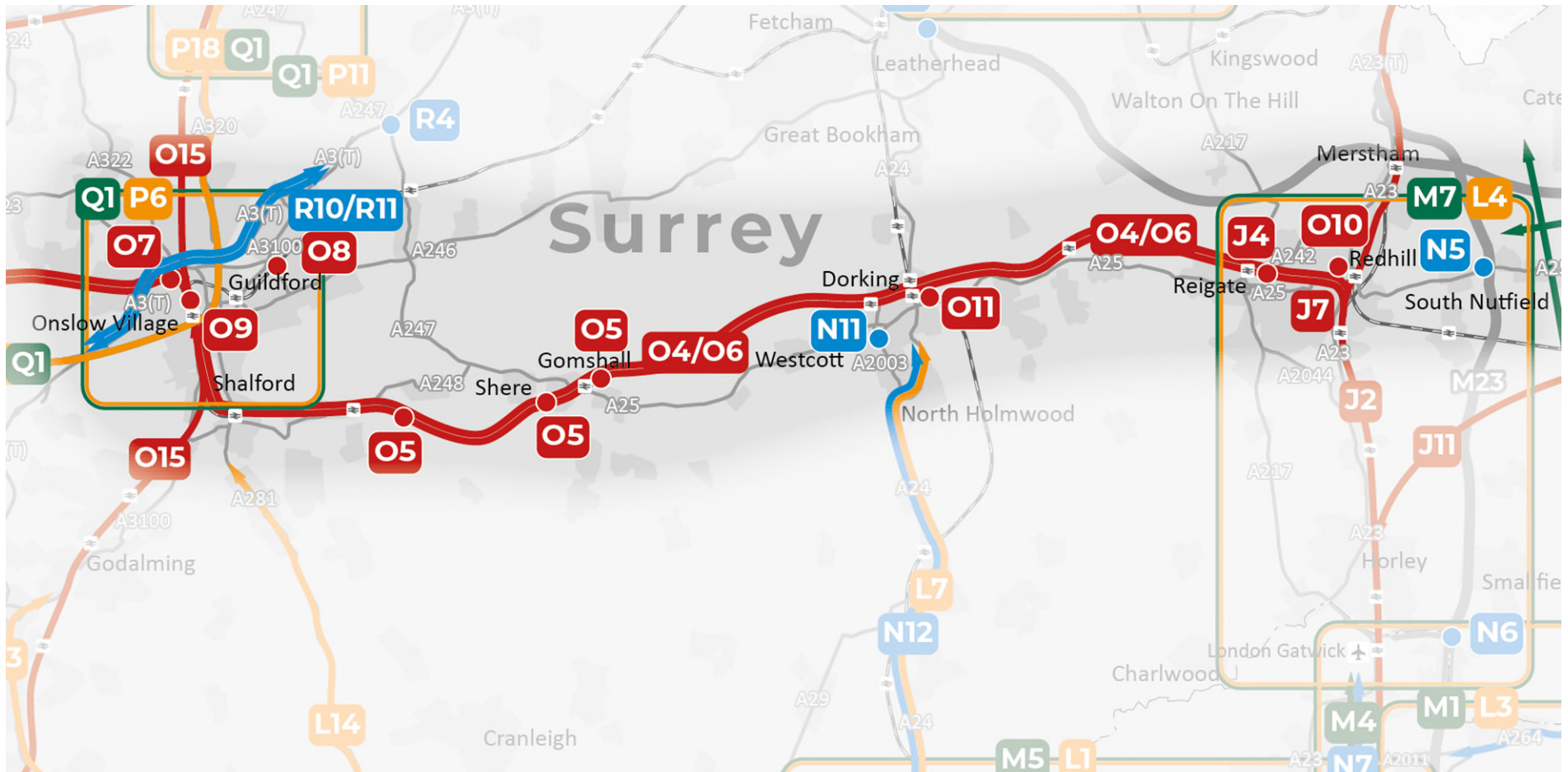
A single rail link in the North Downs Line along similar alignment.

Strategic role

Provides cross-regional connectivity, linking one of the South East's largest towns, Guildford, to Redhill via Dorking. The corridor is also relatively close to Gatwick Airport, a major international gateway.

Key issues

1. The North Downs Line is not electrified, provides just two trains per hour. It also has infrastructure constraints complicating major improvements, including relatively slow line speeds, short station platforms and several level crossings (e.g. with the A25).
2. The corridor runs entirely through the Metropolitan Green Belt (i.e. the Surrey Hills) and is adjacent to several Sites of Special Scientific Interest. This significantly constrains its development potential as any future initiatives will have to achieve a careful balance with environmental considerations.
3. The corridor is the wealthiest in the South East, with median earnings of £36,204. It is also the third best educated corridor in this study.
4. Despite having the highest median earnings, the corridor has the least affordable housing in the South East. In 2018 its average house price/earnings ratio was 12.2 to 1.



A25/North Downs Line (Guildford – Redhill)

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
J4	Reigate Station Upgrade	Medium (2030s)	Brighton Mainline Upgrade Programme	3	1	6				Network Rail	F
J7	Brighton Main Line - Reinstatement Cross Country Services	Long (2040s)		0	1	1				TfSE / DfT / Surrey County Council / West Sussex County Council	B, D, E, F
M7	Reigate/Redhill Local Active Travel Infrastructure	Short (2020s)		0	1	1	1	1		Surrey County Council	F
M9	Surrey Inter-urban Active Travel Infrastructure	Short (2020s)		0	1	1	1	1		Surrey County Council	F
O4	North Downs Line - Decarbonisation	Medium (2030s)		1	2	3	1			Network Rail	F
O5	North Downs Line - Level Crossing Removals	Medium (2030s)		0		2	0			Network Rail	F
O6	North Downs Line - Service Level and Capacity Enhancements	Medium (2030s)	North Downs Strategic Study and Wessex Suburban Strategic Study (Phase 1)	0		2	1			Network Rail	B, E, F
O7	Guildford Station Redevelopment	Short (2020s)	Solum Redevelopment	6	7	8	7			Network Rail/ Solum	A, B, C, D, E, F, G
O8	New Station Guildford West (Park Barn)	Medium (2030s)		3	6	6	6			Surrey CC/ Guildford BC	B, D, E, F
O9	New Station Guildford East (Marrow)	Medium (2030s)		1	0	2				Martin Grant Homes/ Guildford BC	B, D, E, F
O10	Redhill Station Track Capacity Improvement	Medium (2030s)		1	0	2	2			Network Rail	B, D, E, F

Legend	
1. Feasibility Study	A. Programme management
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3. Outline Business Case (including surveys, design, modelling and stakeholder engagement)	C. (Joint) Scheme promoter
4. Powers/Consents	D. Business case & schema development & funding
5. Procurement	E. Use of analytical framework
6. Full Business Case	F. Advocacy & securing funding
7. Construction/Implementation	G. Procurement & sourcing
8. Opening	H. Resource capacity & capability funding

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
O11	Dorking Deepdene Station Upgrade	Medium (2030s)		0	0	1				Network Rail	B, D, E, F
P6	Guildford Sustainable Movement Corridor	Short (2020s)		0	1	1				Surrey County Council	B, D, E, F, H
P18	Berkshire, Hampshire and Surrey Inter-urban Bus Enhancements	Short (2020s)		0	0	1				Surrey County Council / Hampshire County Council	B, D, E, F, H
Q1	Berkshire, Hampshire and Surrey Urban and Inter-urban Active Travel Infrastructure	Short (2020s)		0	0	1			1	Surrey County Council / Hampshire County Council	B, D, E, F, H
R10	A3 Guildford Local Traffic Segregation	Medium (2030s)		0	0	1	TBC	TBC	TBC	National Highways	A, F
R11	A3 Guildford Long Term Solution	Long (2040s)		0	0	1	TBC	TBC	TBC	National Highways	A, B, D, F, H

Legend	
1. Feasibility Study	A. Programme management
2. Strategic Outline Business Case	B. Pre-feasibility work & resource funding
3. Outline Business Case (including surveys, design, modelling and stakeholder engagement)	C. (Joint) Scheme promoter
4. Powers/Consents	D. Business case & schema development & funding
5. Procurement	E. Use of analytical framework
6. Full Business Case	F. Advocacy & securing funding
7. Construction/Implementation	G. Procurement & sourcing
8. Opening	H. Resource capacity & capability funding

A31/A322/A329/A331/North Downs Line (Guildford - Reading)

Corridor overview

The A329 and A322 roads running from the M4 outside Reading, through Bracknell to the M3,

The A331 and A31 roads running from the M3 in the Blackwater Valley to Guildford,

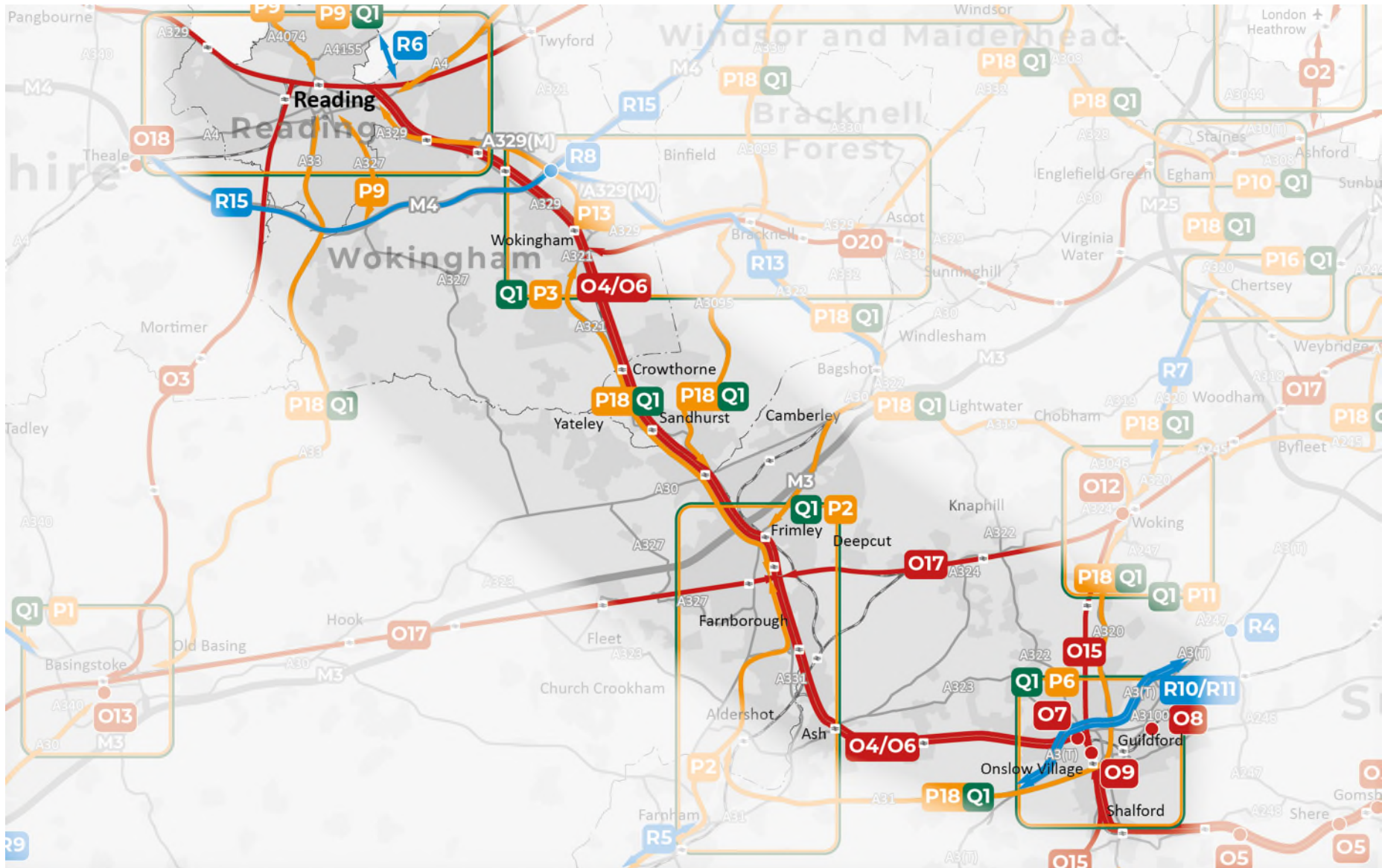
The North Downs Line rail link along similar alignment.

Strategic role

The corridor plays an important role as it provides a rail and road link between Guildford and Reading, as well as between the M3 and the M4. It connects areas with high concentrations of priority sector jobs compared to the regional average.

Key issues

1. The A31 west of Guildford suffers from high levels of congestion, particularly during the AM peak. The A329 and A329(M) also experience high levels of congestion around Wokingham and the junction with the M4.
2. The M4/A329/A329(M) junction is part of an Air Quality Management Area.
3. Road safety issues in Bracknell town centre.



A31/A322/A329/A331/North Downs Line (Guildford - Reading)

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
M9	Surrey Inter-urban Active Travel Infrastructure	Short (2020s)		0	1	1	1	1		Surrey County Council	F
O2	Southern Access to Heathrow	Long (2040s)		1	1	1				DfT	F
O4	North Downs Line - Decarbonisation	Medium (2030s)		1	2	3	1			Network Rail	F
O6	North Downs Line - Service Level and Capacity Enhancements	Medium (2030s)	North Downs Strategic Study and Wessex Suburban Strategic Study (Phase 1)	0		2	1			Network Rail	B, E, F
O7	Guildford Station Redevelopment	Short (2020s)	Solum Redevelopment	6	7	8	7			Network Rail/Solum	A, B, C, D, E, F, G
O8	New Station Guildford West (Park Barn)	Medium (2030s)		3	6	6	6			Surrey CC/Guildford BC	B, D, E, F
O9	New Station Guildford East (Marrow)	Medium (2030s)		1	0	2				Martin Grant Homes/Guildford BC	B, D, E, F
O14	Cross Country Service Enhancements	Short (2020s)	Main Line Phase 2 Strategic Study	1	0	1				CrossCountry/DfT	B, D, E, F
O20	Reading to Waterloo Service Enhancements	Medium (2030s)	Wessex Suburban Strategic Study (Phase 2)	0	1	2	1			Network Rail/SWR	B, D, E, F
P2	Blackwater Valley Mass Rapid Transit	Short (2020s)		0	0	1				Surrey County Council / Hampshire County Council	B, D, E, F
P3	Bracknell/Wokingham Bus Enhancements	Short (2020s)		0	1	1	1	2	2	Joint	B, D, F

86

Legend	
1. Feasibility Study	A. Programme management
2. Strategic Outline Business Case	B. Pre-feasibility work & resource funding
3. Outline Business Case (including surveys, design, modelling and stakeholder engagement)	C. (Joint) Scheme promoter
4. Powers/Consents	D. Business case & schema development & funding
5. Procurement	E. Use of analytical framework
6. Full Business Case	F. Advocacy & securing funding
7. Construction/Implementation	G. Procurement & sourcing
8. Opening	H. Resource capacity & capability funding

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
P6	Guildford Sustainable Movement Corridor	Short (2020s)		0	1	1				Surrey County Council	B, D, E, F, H
P9	Reading Mass Rapid Transit	Short (2020s)		4	5	6				Reading Borough Council	B, D, E, F, H
P13	A329/B3408 Reading - Bracknell/Wokingham Mass Rapid Transit	Short (2020s)		0	0	1				Bracknell Forest Council / Reading Borough Council / Wokingham Borough Council	B, D, E, F, H
	A329/B3408 Reading - Bracknell/Wokingham Mass Rapid Transit	Short (2020s)		0	1	1	1	2	2	Bracknell Forest Council / Wokingham Borough Council	B, D, E, F, H
P18	Berkshire, Hampshire and Surrey Inter-urban Bus Enhancements	Short (2020s)		0	0	1				Surrey County Council / Hampshire County Council	B, D, E, F, H
Q1	Berkshire, Hampshire and Surrey Urban and Inter-urban Active Travel Infrastructure	Short (2020s)		0	0	1			1	Surrey County Council / Hampshire County Council	B, D, E, F, H
R5	A31 Farnham Corridor (LLM)	Short (2020s)	LLM	2	2	3		3	3	Surrey County Council	B, D, F, H
R6	New Thames Crossing East of Reading (LLM)	Long (2040s)	MRN Pipeline	0	0	1				Reading Borough Council / Wokingham Borough Council	F
R8	M4 Junction 10 Safety Enhancements	Short (2020s)		0	0	2	TBC	TBC	TBC	National Highways	F
R10	A3 Guildford Local Traffic Segregation	Medium (2030s)		0	0	1	TBC	TBC	TBC	National Highways	A, F

87

Legend	
1. Feasibility Study	A. Programme management
2. Strategic Outline Business Case	B. Pre-feasibility work & resource funding
3. Outline Business Case (including surveys, design, modelling and stakeholder engagement)	C. (Joint) Scheme promoter
4. Powers/Consents	D. Business case & schema development & funding
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7. Construction/Implementation	G. Procurement & sourcing
8. Opening	H. Resource capacity & capability funding

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
R11	A3 Guildford Long Term Solution	Long (2040s)		0	0	1	TBC	TBC	TBC	National Highways	A, B, D, F, H
R13	A322 and A329(M) Smart Corridor	Short (2020s)	Part delivered	7	7	7	2	6	7	Bracknell Forest Council	F

Legend	
1. Feasibility Study	A. Programme management
2. Strategic Outline Business Case	B. Pre-feasibility work & resource funding
3. Outline Business Case (including surveys, design, modelling and stakeholder engagement)	C. (Joint) Scheme promoter
4. Powers/Consents	D. Business case & scheme development & funding
5. Procurement	E. Use of analytical framework
6. Full Business Case	F. Advocacy & securing funding
7. Construction/Implementation	G. Procurement & sourcing
8. Opening	H. Resource capacity & capability funding

A28/A290/A291 (Canterbury – Whitstable)

Corridor overview

The A290 and the A291, two north-south roads linking Canterbury to Whitstable and Herne Bay respectively,

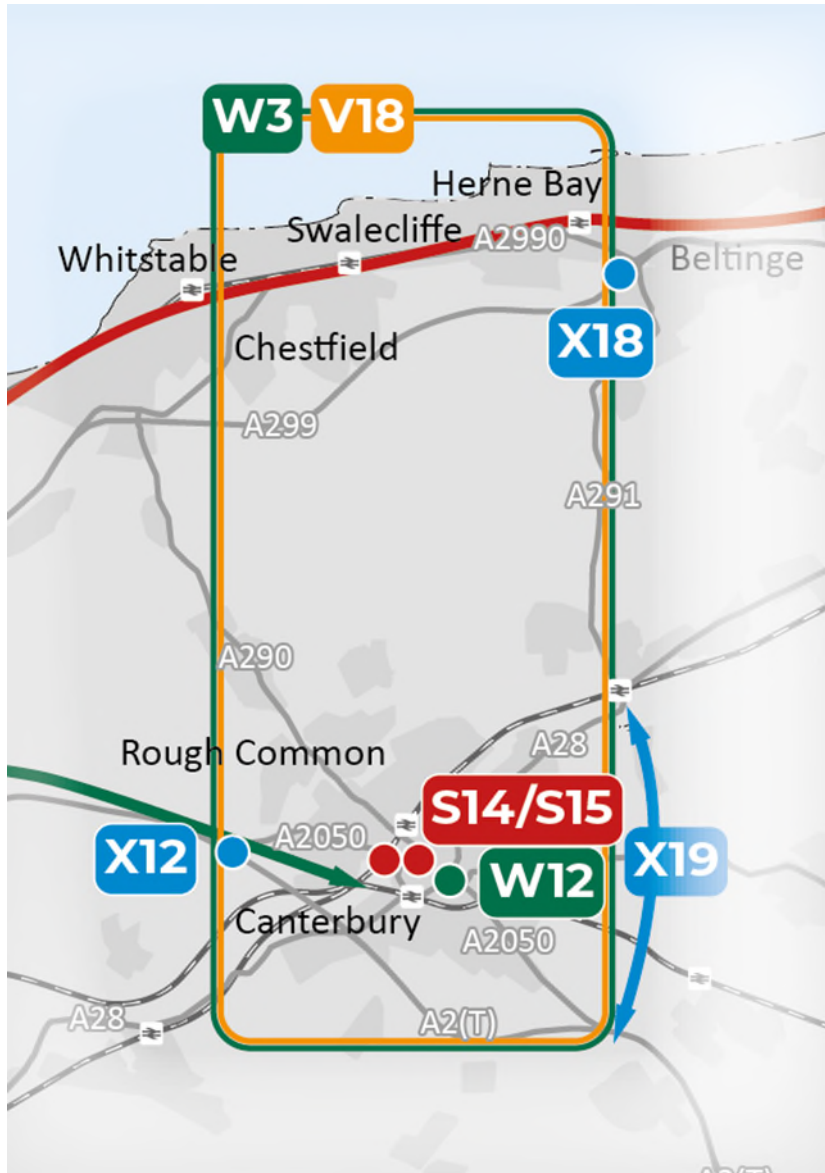
A section of the A28 through Canterbury itself.

Strategic role

Plays an important role in connecting three economic hubs in East Kent. It serves a socioeconomically diverse area, with pockets of urban deprivation on the North Kent coast and some more prosperous areas around Canterbury. Canterbury is a major regional centre with three universities and a major trip attractor, Canterbury Cathedral.

Key issues

1. There is significant congestion along the A290 and A291 through Canterbury and the A28/A291 junction in Sturry. The city has a restrictive urban realm (i.e. narrow streets) which limits capacity for road traffic. There is also road traffic congestion in Whitstable town centre during the summer season.
2. There is a lack of strategic interchange between Canterbury's two city centre railway stations and its main bus station. All three locations are at least a ten-minute walk from each other.
3. There are relatively limited public transport choices throughout the corridor, and where there are services, they are slow.



A28/A290/A291 (Canterbury – Whitstable)

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
V18	Canterbury/Whitstable/Herne Bay Bus Enhancements	Short (2020s)		0	0	1				Kent County Council	B, D, E, F, H
W12	Canterbury Placemaking and Demand Management Measures	Short (2020s)	Levelling Up Fund Rnd 2	2	3	4	3	7	7	Kent County Council / Canterbury City Council	B, D, F, H
X12	A2 Canterbury Junctions Enhancements	Medium (2030s)		0	0	1	TBC	TBC	TBC	National Highways	A, B, D, F, H
X19	Canterbury East Relief Road	Long (2040s)		0	0	1	N/A			Kent County Council / Canterbury City Council	F

Legend	
1. Feasibility Study	A. Programme management
2. Strategic Outline Business Case	B. Pre-feasibility work & resource funding
3. Outline Business Case (including surveys, design, modelling and stakeholder engagement)	C. (Joint) Scheme promoter
4. Powers/Consents	D. Business case & schema development & funding
5. Procurement	E. Use of analytical framework
6. Full Business Case	F. Advocacy & securing funding
7. Construction/Implementation	G. Procurement & sourcing
8. Opening	H. Resource capacity & capability funding

A27/A259/A2070/East Coastway Line/Marshlink Line (Ashford – Brighton)

Corridor overview

The A27, A259 and A2070 east-west roads, from Brighton and Hove in the west to Ashford in the east, passing through or close to several other urban centres including Eastbourne and Hastings

The East Coastway Line/Marshlink Line rail link along similar alignment.

Strategic role

The corridor links towns and cities along the south coast, providing onward connectivity to ports and other international gateways at Folkestone, Newhaven and Shoreham, as well as Ashford International railway station.

Key issues

1. The A259 and A2070 are often narrow and traverse several sharp turns and level crossings. Their route passes directly through the centres of Hastings and Bexhill, negatively impacting vulnerable road users and contributing to high levels of congestion in the area.
2. The issues with the highway described above, and its routing through dense urban areas, are factors in the corridor's relatively high number of road safety incidents. Road safety is also affected by the higher car and population density of urban areas like Brighton, Eastbourne, Hastings and Bexhill.
3. The corridor contains some of the most deprived wards in the South East, including in Brighton, Eastbourne, Hastings and Bexhill. Median earnings are also markedly lower than the regional average. This is likely to be due in part to gaps in connectivity and remoteness from more prosperous parts of the South East.

A27/A259/A2070/East Coastway Line/Marshlink Line (Ashford – Brighton)

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
G3	Falmer Strategic Mobility Hub	Short (2020s)		0	1	1	1	2	3	Brighton & Hove City Council	
G4	Eastbourne/Polegate Strategic Mobility Hub	Medium (2030s)		0	1	1				Network Rail / East Sussex County Council	
G5	Sussex Coast Mass Rapid Transit	Medium (2030s)		0	1	2			1	TfSE / West Sussex County Council / Brighton and Hove City Council / East Sussex County Council	B, D, E, F
G6	Eastbourne/Wealden Mass Rapid Transit	Short (2020s)	BSIP	2	1	4	3, 4, 5	5, 6, 7	7	East Sussex County Council	B, D, F
G7	Hastings/Bexhill Mass Rapid Transit	Medium (2030s)		0	1	1				East Sussex County Council	B, D, E, F, H
G8	A27 Falmer – Polegate Bus Stop and Layby Improvements	Medium (2030s)		1	1	3	TBC	TBC	TBC	National Highways	A, B, C, D, F, G, H
H1	Sussex Coast Active Travel Enhancements (including LCWIPs)	Short (2020s)		7	1	1	1,2,3,4,5,6,7	1,2,3,4,5,6,7	1,2,3,4,5,6,7	West Sussex County Council/Brighton & Hove City Council	B, D, E, F, H
I5	A27 East of Lewes Package (RIS2)	Short (2020s)	RIS2	6	1	8				National Highways	D, F, H
I7	A27 Lewes - Polegate (RIS3 Pipeline)	Medium (2030s)	RIS Pipeline (subject to Funding)	2	1	3	TBC	TBC	TBC	National Highways	F
I15	A259 South Coast Road Corridor - Eastbourne to Brighton (BSIP)	Short (2020s)	BSIP	2	1	7	3,4,5	5,6,7	7	East Sussex County Council	A, D, F, H
	A259 South Coast Road Corridor - Eastbourne to Brighton (MRN)	Short (2020s)	MRN	2	1	3	2, 3	3, 4	4, 6	East Sussex County Council	A, B, D, F, H

94

Legend	
1. Feasibility Study	A. Programme management
2. Strategic Outline Business Case	B. Pre-feasibility work & resource funding
3. Outline Business Case (including surveys, design, modelling and stakeholder engagement)	C. (Joint) Scheme promoter
4. Powers/Consents	D. Business case & schema development & funding
5. Procurement	E. Use of analytical framework
6. Full Business Case	F. Advocacy & securing funding
7. Construction/Implementation	G. Procurement & sourcing
8. Opening	H. Resource capacity & capability funding

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
I17	A259 (King's Road) Seafront Highway Structures Renewal Programme (MRN)	Short (2020s)	MRN	3	1	6	2,3	4,5,6	7	Brighton & Hove City Council	A, D, F, H
I25	A27 Falmer Junction Enhancements	Medium (2030s)		0	1	1	TBC	TBC	TBC	B&H	B, D, E, F
J3	Brighton Station Additional Platform	Medium (2030s)		0	1	1				Network Rail	F
J6	East Coastway Line - Faster Services	Short (2020s)		0	0	1	1	1		Network Rail	F
K1	Uckfield - Lewes Wealden Line Reopening - Traction and Capacity Enhancements	Medium (2030s)		1	1	2				TfSE	F
K2	Uckfield - Lewes Wealden Line Reopening - Reconfiguration at Lewes	Medium (2030s)		1	1	2				TfSE	B, D, E, F
L10	A272 Corridor Rural Bus Service Enhancements	Long (2040s)		0	1	1				West Sussex County Council	B, D, E, F, H
M3	Eastbourne/Hailsham Local Active Travel Infrastructure	Short (2020s)		0	1	1	1	3	4, 5, 6, 7	East Sussex County Council	B, D, E, F, H
M8	East Sussex Inter-urban Active Travel Infrastructure	Short (2020s)		0	1	1				Sustrans / East Sussex County Council	F
N4	A2270/A2101 Corridor Movement and Access Package (MRN Pipeline)	Short (2020s)	MRN Pipeline	0	1	1	1	1	2	East Sussex County Council	B, D, F, H
T2	High Speed 1 / Marsh Link - Hastings, Bexhill and Eastbourne Upgrade	Medium (2030s)		2	2	3				Network Rail	B, D, E, F
V15	Ashford Bus Enhancements	Short (2020s)		0	0	1				Kent County Council	F
W5	Faversham - Canterbury - Ashford - Hastings National Cycle Network Enhancements	Short (2020s)		0	0	1				Sustrans	B, D, E, F
W9	East Sussex Local Active Travel Infrastructure	Short (2020s)		0	0	1				East Sussex County Council	B, D, F, H

95

Legend	
1. Feasibility Study	A. Programme management
2. Strategic Outline Business Case	B. Pre-feasibility work & resource funding
3. Outline Business Case (including surveys, design, modelling and stakeholder engagement)	C. (Joint) Scheme promoter
4. Powers/Consents	D. Business case & schema development & funding
5. Procurement	E. Use of analytical framework
6. Full Business Case	F. Advocacy & securing funding
7. Construction/Implementation	G. Procurement & sourcing
8. Opening	H. Resource capacity & capability funding

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
W10	East Sussex Inter-urban Active Travel Infrastructure	Short (2020s)		0	0	1				Sustrans / East Sussex County Council	B, D, F, H
X24	A259 Level Crossing Removals - East of Rye	Medium (2030s)		0	0	1	TBC	TBC	TBC	National Highways	F
X26	Hastings and Bexhill Distributor Roads	Long (2040s)		1	0	1	N/A	N/A	N/A	Rother District Council	B, D, F, H

Legend	
1. Feasibility Study	A. Programme management
2. Strategic Outline Business Case	B. Pre-feasibility work & resource funding
3. Outline Business Case (including surveys, design, modelling and stakeholder engagement)	C. (Joint) Scheme promoter
4. Powers/Consents	D. Business case & scheme development & funding
5. Procurement	E. Use of analytical framework
6. Full Business Case	F. Advocacy & securing funding
7. Construction/Implementation	G. Procurement & sourcing
8. Opening	H. Resource capacity & capability funding

M27/A27/A31/West Coastway Line/East Coastway Line (Brighton – Ringwood)

Corridor overview

The A31, M27 and A27 east-west roads, From Ringwood (on the Hampshire/Dorset border) in the west to Brighton and Hove in the east, passing through or close to several urban centres including Southampton, Portsmouth and Chichester.

The West Coastway Line/East Coastway Line rail link along a similar alignment.

Strategic role

The longest in corridor studied, has the largest population, and serves some of the region's largest economic hubs in Southampton, Portsmouth and Brighton. It also serves major ports at Southampton and Portsmouth.

Key issues

1. The highway along the corridor is of variable quality, passing through urban areas and flat junctions with some sections of single carriageway. Congestion is particularly acute on the A31 at Ringwood, parts of the M27 around Southampton, and the A27 at Chichester, Lancing and Worthing. There is a lot of interaction and conflict between different types of road users and local and regional traffic.
2. An Air Quality Management Area (AQMA) in place on the A27 at Lancing and Worthing. Further AQMAs in place in urban areas including Southampton, Portsmouth and Brighton.
3. The railway network is broadly attempting to serve both a long-distance market (with non-stopping services) and a local market (with frequent stopping services) and there is limited infrastructure in place to adequately serve these markets simultaneously. Railway services in the corridor often originate far outside it, leading to poorer than average reliability.



M27/A27/A31/West Coastway Line/East Coastway Line (Brighton – Ringwood)

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
A1	Solent Connectivity Strategic Study	Medium (2030s)	Solent Connectivity demand modelling	0	2	3	2	2	2	Network Rail/ Solent Transport	B, C, D, E, F, G, H
A2	Botley Line Double Tracking	Medium (2030s)	Solent Connectivity demand modelling	0	1	2	2	2	2	Network Rail/ Solent Transport	B, C, D, E, F, G, H
A3	Netley Line Signalling and Rail Service Enhancements	Medium (2030s)	Solent Connectivity demand modelling	0	1	2	2	2	2	Network Rail/ Solent Transport	B, D, E, F, H
A4	Fareham Loop / Platform	Medium (2030s)	Solent Connectivity demand modelling	0	1	2	2	2	2	Network Rail/ Solent Transport	B, D, E, F, H
A5	Portsmouth Station Platforms	Medium (2030s)	Solent Connectivity demand modelling	0	1	2	2	2	2	Network Rail/ Solent Transport	B, D, F, H
A7	Southampton Central Station Upgrade and Timetabling	Medium (2030s)	Solent Connectivity demand modelling	0	1	2	2	2	2	Network Rail/ Solent Transport	D, E, F
A8	Eastleigh Station Platform Flexibility	Medium (2030s)	Solent Connectivity demand modelling	1	1	2	2	2	2	Network Rail/ Solent Transport	D, E, F
B1	Southampton Central Station - Woolston Crossing	Long (2040s)		0	1	1				Southampton City Council	D, E, F
B2	New Southampton Central Station	Medium (2030s)	Solent Transport Prospectus	0	1	1				Southampton/Network Rail	D, E, F
B3	New City Centre Station	Long (2040s)		0	1	1				Southampton City Council	D, E, F

Legend	
1. Feasibility Study	A. Programme management
2. Strategic Outline Business Case	B. Pre-feasibility work & resource funding
3. Outline Business Case (including surveys, design, modelling and stakeholder engagement)	C. (Joint) Scheme promoter
4. Powers/Consents	D. Business case & schema development & funding
5. Procurement	E. Use of analytical framework
6. Full Business Case	F. Advocacy & securing funding
7. Construction/Implementation	G. Procurement & sourcing
8. Opening	H. Resource capacity & capability funding

Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
B5	Cosham Station Mobility Hub	Short (2020s)	Cosham is one of the schemes currently progressing via TfSE business case development funding	1	1	3	2		4,5,7	Portsmouth City Council	D, E, F
B7	Havant Rail Freight Hub	Medium (2030s)		0	1	1				TfSE	B, D, E, F
B8	Fratton Rail Freight Hub	Long (2040s)	Not in any formal programme	0	1	1	1	1	1	Network Rail & PIP	B, D, E, F
C1	Southampton Mass Transit	Medium (2030s)	BSIP	1	1	2				Hampshire County Council / Southampton City Council	B, D, E, F
C2	South East Hampshire Rapid Transit Future Phases	Medium (2030s)		0	1	1	3	3	3	Portsmouth City Council / Hampshire County Council	B, D, E, F
C5	M271 Junction 1 Strategic Mobility Hub	Short (2020s)		1	1	5	5	6	7	Southampton City Council / Hampshire County Council	B, D, F
C6	M27 Junction 5 / Southampton Airport Strategic Mobility Hub	Short (2020s)		0	1	1				Hampshire County Council / Southampton City Council	B, D, F
C7	M27 Junction 7/8 Strategic Mobility Hub	Medium (2030s)		0	1	1				Hampshire County Council	F
C8	M27 Junction 9 Strategic Mobility Hub	Medium (2030s)		0	1	1				Hampshire County Council	F
E1	Southampton Area Active Travel (including LCWIPs)	Short (2020s)	TCF/ATF/LTP/Developer	1	1	2	N/A	N/A	N/A	Southampton	B, D, F

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Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
E2	South East Hampshire Area Active Travel (including LCWIPs)	Short (2020s)	Ongoing. Some (relatively minor) infrastructure elements of the Portsmouth LCWIP will be delivered through ATF 4 funding	0	1	1	1 to 7 for different elements	1 to 7 for different elements	1 to 7 for different elements	Portsmouth City Council / Hampshire County Council	B, D, F
E3	Active Travel Bridge Extension	Medium (2030s)		0	1	1	1	1	1	Portsmouth City Council	B, D, F
E4	Portsmouth Eastern Road East-West Bridge	Medium (2030s)		0	1	1	1	1	1	Portsmouth City Council	A, B, D, F
E5	Southampton City Centre Placemaking	Short (2020s)	TCF	1	1	2	N/A	N/A	N/A	Southampton	B, D, F
F1	West Coastway Strategic Study	Medium (2030s)		1	1	2		2		Network Rail / Govia Thameslink Railway	
F2	West Worthing Level Crossing Removal	Medium (2030s)		0	1	1				TfSE / West Sussex County Council	
G1	Shoreham Strategic Mobility Hub	Medium (2030s)		0	1	1			N/A	West Sussex County Council	
G2	A27/A23 Patcham Interchange Strategic Mobility Hub	Short (2020s)	TfSE Scheme Development Fund	0	1	2	1	2	3	Brighton & Hove City Council	
G5	Sussex Coast Mass Rapid Transit	Medium (2030s)		0	1	2			1	TfSE / West Sussex County Council / Brighton and Hove City Council / East Sussex County Council	B, D, E, F

Legend	
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Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
H1	Sussex Coast Active Travel Enhancements (including LCWIPs)	Short (2020s)		7	1	1	1,2,3,4,5,6,7	1,2,3,4,5,6,7	1,2,3,4,5,6,7	West Sussex County Council/Brighton & Hove City Council	B, D, E, F, H
I1	M27 Junction 8 (RIS2)	Short (2020s)		3	1	4	TBC	TBC	TBC	National Highways	B, D, E, F, H
I2	A31 Ringwood Strategic Traffic (RIS2)	Short (2020s)	RIS2	8	1					National Highways	A, B, C, D, E, F, G, H
I3	A27 Arundel Bypass (RIS2)	Short (2020s)		3	1	1	TBC	TBC	TBC	National Highways	B, D, E, F, H
I4	A27 Worthing and Lancing Improvement (RIS2)	Short (2020s)		2	1	1				National Highways	B, D, E, F, H
I6	Southampton Access (M27 Junction 2 and Junction 3) (RIS3 Pipeline)	Medium (2030s)	RIS Pipeline (subject to Funding)	3	1	4	TBC	TBC	TBC	National Highways	F
I8	A27 Chichester Improvements (RIS3 Pipeline)	Medium (2030s)	RIS Pipeline (subject to Funding)	2	1	3	TBC	TBC	TBC	National Highways	F
I10	West Quay Realignment (LLM)	Medium (2030s)	LLM	1	2	3		3		Southampton City Council	F
I12	Northam Rail Bridge Replacement and Enhancement (MRN)	Short (2020s)	MRN	2	3	6	3	6	7	Southampton/Network Rail	B, F
I13	New Bridge from Horsea to Tipner	Medium (2030s)	Not in any formal programme	0	1	1	1	1	1	PCC	B, F

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Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
I14	A259 Bognor Regis to Littlehampton Enhancement (MRN)	Short (2020s)	MRN	3	1	6	3	4	6	West Sussex County Council	B, F
I16	A259 Chichester to Bognor Regis Enhancement (MRN Pipeline)	Short (2020s)	MRN Pipeline	1	1	3	1	2	3	West Sussex County Council	A, D, F, H
I18	A29 Realignment including combined Cycleway and Footway	Short (2020s)		5	1	7				West Sussex County Council	F
I19	M27/M271 Smart Motorway(s)	Long (2040s)		0	1	1	TBC	TBC	TBC	National Highways	A, F
I20	A27 Tangmere Junction Enhancements	Medium (2030s)		0	1	1	TBC	TBC	TBC	National Highways	A, D, F, H
I21	A27 Fontwell Junction Enhancements	Medium (2030s)		0	1	1	TBC	TBC	TBC	National Highways	A, B, D, F, H
I22	A27 Worthing (Long Term Solution)	Long (2040s)		0	1	1	TBC	TBC	TBC	National Highways	A, D, F, H
I23	A27 Hangleton Junction Enhancements	Medium (2030s)		0	1	1	TBC	TBC	TBC	B&H	F
I24	A27 Devils Dyke Junction Enhancements	Medium (2030s)		0	1	1	TBC	TBC	TBC	B&H	F
J3	Brighton Station Additional Platform	Medium (2030s)		0	1	1				Network Rail	F

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Map Ref.	Intervention name	Phasing	Current programme	Project stage			Timescales			Who leads the next step	Role of TfSE
				Completed	Underway	Next steps	2025/26	2026/27	2027/28		
L10	A272 Corridor Rural Bus Service Enhancements	Long (2040s)		0	1	1				West Sussex County Council	B, D, E, F, H
M10	West Sussex Inter-urban Active Travel Infrastructure	Short (2020s)		0						West Sussex County Council	F
M12	New Crawley - Chichester National Cycle Network Corridor	Medium (2030s)		0	1	1				West Sussex County Council	F

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Summary findings

Through the engagement and analysis conducted to date the following conclusions can be drawn.

Out of a total of 293 strategic investment plan interventions delivery partners expect to see development or delivery progress in 123 interventions. With the remaining 170 not expected to see development or delivery progress in the next 3 years.

Progress through project stages

The table below sets out how many interventions have either begun or passed through each project stage.

Table 1: Intervention project stages completed and begun

Project stage	Completed	Underway
Feasibility Study	38	24
Strategic Outline Business Case	24	16
Outline Business Case	15	8
Powers/Consents	3	5
Procurement	2	2
Full Business Case	7	3
Construction/Implementation	9	10
Opening	1	1

A total of 62 interventions have completed feasibility study and strategic outline business case stage.

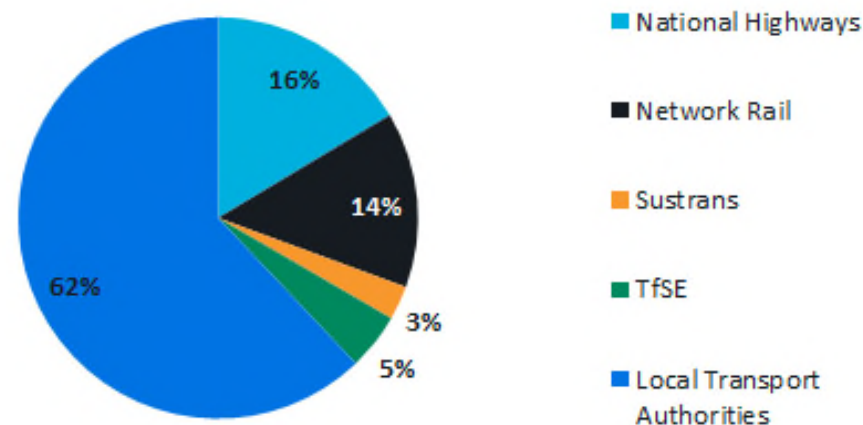
There is currently some level of project development or delivery underway in 69 of the TfSE interventions.

Of the 123 interventions on which development or delivery is expected in the next three years, 61 have not yet completed the first project stage.

Delivery partners

The chart below sets out each delivery partner and the number of interventions on which they lead the next step.

Figure 1: Delivery partners leading the next step of TfSE interventions



Total of 219 interventions expected to see delivery of development in the next three years

The next step for almost two thirds (136) of interventions is to be led by Local Transport Authorities.

National Highways (36) and Network Rail (31) lead the next the step for nearly a third of interventions when put together.

The remainder are led by TfSE (10) and Sustrans (6).

Next Steps

Building on the findings of this work the next stage of Delivery Action Plan development will:

- Devise and implement a methodology for prioritising TfSE resource investment to support progression of SIP interventions,
- Develop a capital investment pipeline in preparation for government and other funding sources being released; and
- Capture the outputs of these two pieces of work in a revised version of this Delivery Action Plan.

Appendix A Intervention descriptions

Ref. code	Intervention name	Description
A1	Solent Connectivity Strategic Study	Delivering recommendations to increase the frequency of running services through Southampton Central, connecting multiple local routes from Totton, Fareham, Netley etc. This will improve rail connectivity into Southampton, reducing wait times and the effective journey times of rail users.
A2	Botley Line Double Tracking	Double tracking of the Botley Line between Eastleigh and Fareham. This will facilitate an increase in passenger and freight service frequency and reliability.
A3	Netley Line Signalling and Rail Service Enhancements	Signalling improvements on the Netley Line between Southampton and Fareham. This will increase capacity for passenger and freight services.
A4	Fareham Loop / Platform	Conversion of the current bay platform at Fareham, Platform 2, into a through platform. This will provide a passing opportunity to free up capacity at the station and improve timetable flexibility and resilience.
A5	Portsmouth Station Platforms	Additional platform capacity for trains terminating at Portsmouth. Portsmouth City Council's preferred solution is to reopen the disused Platform 2 at Portsmouth Harbour station; the alternative is to provide an additional low-level platform at Portsmouth and Southsea station. This will increase rail capacity in the city and improve timetable flexibility and resilience in Portsmouth.
A6	South West Main Line - Totton Level Crossing Removal	Removal of the level crossing at Totton by delivering either a road underpass or a flyover. This will allow road traffic to cross the railway, alleviate a congestion pinch-point and enable increased capacity through Totton for passenger and future freight growth.
A7	Southampton Central Station Upgrade and Timetabling	Three options for Southampton Central will be explored: the conversion of bay platform 5 to a through platform, the addition of a platform 0, or an additional bay platform(s) to the south east of the station. This will facilitate an increase in passenger and freight service frequency.
A8	Eastleigh Station Platform Flexibility	Signalling alterations at Eastleigh station to allow platform 1 to operate as a bi-directional platform, where at present it can only be accessed in the Up direction This will be key to enabling additional rail services and improved reliability through the area.
A9	Waterside Branch Line Reopening	The introduction of passenger services on the Fawley Branch Line Services up to a new station located in Hythe Town. This will connect communities and new development sites in Marchwood, Hythe and Fawley to the rail network and allow these communities to access the economic hub of Southampton Central via rail where this is currently not an option.
A10	West of England Service Enhancements	Service frequency enhancements between Salisbury and Yeovil Junction. This will support local trips between adjacent centres on the line to be made by rail and reduce the need to travel using private car.
A11	Additional Rail Freight Paths to Southampton	A programme of works such as strategic passing loops and timetable optimisation to realise the Network Rail Freight Strategy Vision. This will increase freight capacity to accommodate the anticipated growth in container traffic at the Port of Southampton.
B1	Southampton Central Station - Woolston Crossing	Construction of a new rail tunnel between Southampton Central and Woolston crossing the River Itchen. This will provide additional capacity and reduce journey times between Southampton and Portsmouth.
B2	New Southampton Central Station	Improvements to Southampton Central station, including additional platform capacity and an enhanced public realm. This will better facilitate interchange at Southampton Central and enable delivery of the South Hampshire Rail (Core) Package.
B3	New City Centre Station	A new railway station in Southampton city centre. This will provide better access to the rail network from central Southampton and the West Quay development and complement the South Hampshire Rail (Enhanced) Package, particularly the Woolston Crossing.
B4	South West Main Line - Mount Pleasant Level Crossing Removal	Removal of the Mount Pleasant level crossing between St Denys and Southampton Central. This will reduce the risk of accidents at the level crossing and increase the safety and reliability of the South West Main Line.
B5	Cosham Station Mobility Hub	A mobility hub at Cosham station. This will provide interchange between private car, public transport, active travel and other transport modes to improve end-to-end journey quality.
B6	Eastleigh to Romsey Line - Electrification	Electrification of the Eastleigh to Romsey Line. This will support the decarbonisation of the rail network and improve its cohesion.
B7	Havant Rail Freight Hub	A rail freight hub at Havant. This will support efficient rail freight operations.
B8	Fratton Rail Freight Hub	A rail freight hub at Fratton. This will support efficient rail freight operations.

Ref. code	Intervention name	Description
B9	Southampton Container Port Rail Freight Access and Loading Upgrades	Upgrades to rail freight access and loading at Southampton Existing Automotive Port, including extending the loading area and junction improvements. This will increase capacity for freight services on the South West Main Line.
B10	Southampton Automotive Port Rail Freight Access and Loading Upgrades	Upgrades to rail freight access and loading at Southampton Container Port, including extending the loading area and junction improvements. This will increase capacity for freight services on the South West Main Line.
C1	Southampton Mass Transit	Transformational enhancements to Mass Rapid Transit, connecting centres within Southampton and adjacent hubs in the Solent by increasing service frequencies, extending operating hours and delivering timetable integration, together with segregated infrastructure where appropriate. This will reduce journey times and wait times for public transport in the Solent.
C2	South East Hampshire Rapid Transit Future Phases	Transformational enhancements to Bus Rapid Transit, connecting Portsmouth with its travel to work area by increasing service frequencies, extending operating hours and delivering timetable integration, together with segregated infrastructure where appropriate. This will reduce journey times and wait times for public transport in South East Hampshire.
C3	New Southampton to Fawley Waterside Ferry Service	The introduction of a new ferry service between Fawley and Southampton. This will support new developments in Fawley and provide a fast, reliable and sustainable connection to the city.
C4	Southampton Cruise Terminal Access for Mass Transit	Consideration of options for extending Mass Rapid Transit and/or rail to serve Southampton Cruise Terminal, including by working with cruise lines. This will improve connectivity to the terminal via sustainable modes during cruise departure days.
C5	M271 Junction 1 Strategic Mobility Hub	The development of a Strategic Mobility Hub at M271 Junction 1, including rail, park and ride, bus services and active travel options. This will provide opportunities for efficient multi-modal journeys between the M27 and Southampton city centre.
C6	M27 Junction 5 / Southampton Airport Strategic Mobility Hub	The development of a Strategic Mobility Hub at M27 Junction 5, including the airport, rail, park and ride, bus service and active travel options. This will provide opportunities for efficient multi-modal journeys between the M3/M27 and Southampton city centre.
C7	M27 Junction 7/8 Strategic Mobility Hub	The development of a Strategic Mobility Hub at M27 Junction 7/8, including rail, park and ride, bus services and active travel options. This will provide opportunities for efficient multi-modal journeys between the M3/M27 and Southampton city centre.
C8	M27 Junction 9 Strategic Mobility Hub	The development of a Strategic Mobility Hub at M27 Junction 9, including rail, park and ride, bus services and active travel options. This will provide opportunities for efficient multi-modal journeys between the M3/M27 and Southampton city centre.
C9	Tipner Transport Hub (M275 Junction 1)	The development of a Transport Hub at Tipner, including park and ride, bus services and active travel options. This will provide opportunities for efficient multi-modal journeys, at the same time facilitating major regeneration opportunities in the city.
C10	Southsea Transport Hub	Enhanced coastal defence works; improvements to the public realm; and measures to encourage modal shift to public transport and active travel in the Southsea area. This will deliver reduced private car trips, better local air quality and greater resilience for the local area and its economy.
C11	Improved Gosport - Portsmouth and Portsmouth - Hayling Island Ferries	Enhancement of ferry services between both Gosport – Portsmouth and Hayling – Portsmouth. This will provide faster, more frequent and reliable services for residents accessing Portsea Island.
D1	Isle of Wight Mass Transit System	Intra- and inter-urban bus-based Mass Rapid Transport enhancements across the Isle of Wight, along with bus priority measures where appropriate. This will provide faster, more frequent and reliable services between centres, supported by segregated active travel corridors.
D1a	Bus Mass Transit - Newport to Yarmouth	Intra- and inter-urban bus-based Mass Rapid Transport, along with bus priority measures. This will integrate connectivity onto ferry services to the mainland.
D1b	Bus Mass Transit - Newport to Ryde	Intra- and inter-urban bus-based Mass Rapid Transport, along with bus priority measures. This will integrate connectivity onto ferry services to the mainland.
D1c	Bus Mass Transit - Newport to Cowes	Intra- and inter-urban bus-based Mass Rapid Transport, along with bus priority measures. This will integrate connectivity onto ferry services to the mainland.
D1d	Isle of Wight Railway Service Enhancements	Rail service enhancements on the Island Line, including extended operating hours and increased frequency of service. This will reduce wait times and improve service reliability between the island and the mainland.

Ref. code	Intervention name	Description
D1e	Isle of Wight Railway Extensions or Mass Transit alternative - Shanklin to Ventnor	Extension of the Island Line from Shanklin to Ventnor, or the consideration of a mass transit alternative. This will promote increased economic activity on the island and expand the visitor economy, contributing to local economic growth.
D1f	Isle of Wight Railway Extensions or Mass Transit alternative - Shanklin to Newport	A reinstated rail connection between the Island Line and the largest town on the island, or the consideration of a mass transit alternative. This will provide new rail journey opportunities for communities situated along the line and between Shanklin and Newport.
D2	Isle of Wight Ferry Service Enhancements	Enhancement of ferry services to/from the Isle of Wight, including Southampton – Cowes and Ryde – Portsmouth. This will reduce wait times and improve service reliability between the island and the mainland.
D2a	Operating Hours and Frequency Enhancements	Extension of service hours into the early morning and late evening for existing ferry services to/from the Isle of Wight, including Southampton – Cowes and Ryde – Portsmouth. This will increase the number of services between the island and the mainland, enabling access to the morning and late night offers of Southampton and Portsmouth.
D2b	New Summer Route - Ryde to Southampton	The introduction of a new ferry service between Ryde and Southampton over the summer months. This will provide a boost to the island's visitor economy and enable travellers to access their final destination(s) via localised, sustainable modes.
E1	Southampton Area Active Travel (including LCWIPs)	Inter-urban cycling enhancements across Southampton, including by utilising the National Cycle Network. This will improve access to points of interest via segregated active travel.
E2	South East Hampshire Area Active Travel (including LCWIPs)	Inter-urban cycling enhancements across South East Hampshire, including by utilising the National Cycle Network. This will improve access to points of interest via segregated active travel.
E3	Active Travel Bridge Extension	Delivery of either a new cantilevered bridge or widening of the existing bridge. This will facilitate access for people walking, wheeling or scooting along the A2030 (one of few ways to travel onto/off Portsea Island, via a narrow carriageway) and allow the route to meet minimum standards of comfort and safety.
E4	Portsmouth Eastern Road East-West Bridge	The introduction of an additional bridge across the Eastern Road. This will safely link the paths on both sides of the bridge, as there are currently few crossing points across the busy A2030 for those walking, wheeling or scooting, etc.
E5	Southampton City Centre Placemaking	Placemaking measures in Southampton city centre. This will encourage the take-up of walking and cycling and improve perceptions of the urban realm.
E6	Isle of Wight Active Travel Enhancements	Active travel enhancements on the Isle of Wight. This will provide active travel infrastructure and encourage the take-up of walking and cycling, reducing the need for private car for short trips.
E6a	Active Travel Enhancements - Newport to Yarmouth	Active travel enhancements between Newport and Yarmouth. This will encourage the take-up of walking and cycling, reducing the need for private car for short trips.
E6b	Active Travel Enhancements - Newport to Ryde	Active travel enhancements between Newport and Ryde. This will encourage the take-up of walking and cycling, reducing the need for private car for short trips.
E6c	Active Travel Enhancements - Newport to Cowes	Active travel enhancements between Newport and Cowes. This will encourage the take-up of walking and cycling, reducing the need for private car for short trips.
F1	West Coastway Strategic Study	Delivery of recommendations from the West Coastway Strategy Study, including increased service frequencies and timetable optimisation for local and strategic movements between Southampton, Havant, Chichester and Brighton. This will reduce wait times and the effective journey times of rail users.
F2	West Worthing Level Crossing Removal	Removal of the West Worthing level crossing. This will improve safety and reliability for new and existing rail users along the West Coastway Line.
G1	Shoreham Strategic Mobility Hub	The development of a Strategic Mobility Hub at Shoreham, including rail, park and ride, bus services and active travel options. This will provide opportunities for efficient multi-modal journeys between the A27 and Brighton & Hove, Shoreham and Worthing.
G2	A27/A23 Patcham Interchange Strategic Mobility Hub	The development of a Strategic Mobility Hub at Patcham, including park and ride, bus services and active travel options. This will provide opportunities for efficient multi-modal journeys between the A27, the A23 and Brighton & Hove.
G3	Falmer Strategic Mobility Hub	The development of a Strategic Mobility Hub at Falmer, including rail, park and ride, bus services and active travel options. This will provide opportunities for efficient multi-modal journeys between the A27 and Brighton & Hove, Lewes and Eastbourne.

Ref. code	Intervention name	Description
G4	Eastbourne/Polegate Strategic Mobility Hub	The development of a Strategic Mobility Hub at Polegate, including rail, park and ride, bus services and active travel options. This will provide opportunities for efficient multi-modal journeys between the A27 and Brighton & Hove and Eastbourne.
G5	Sussex Coast Mass Rapid Transit	Mass Rapid Transit enhancements connecting hubs along the Sussex coast by increasing service frequencies, extending operating hours and delivering timetable integration, together with segregated infrastructure where appropriate. This will improve journey times and reliability for public transport on the Sussex coast.
G6	Eastbourne/Wealden Mass Rapid Transit	Inter-urban bus enhancements, including bus priority measures where appropriate. This will provide faster, more frequent and reliable bus services between Eastbourne, Polegate and rural communities in South Wealden.
G7	Hastings/Bexhill Mass Rapid Transit	Intra- and inter-urban bus enhancements along the eastern section of the A259, including bus priority measures where appropriate. This will provide faster, more frequent and reliable bus services between Hastings, Bexhill, Eastbourne and adjacent centres.
G8	A27 Falmer – Polegate Bus Stop and Layby Improvements	Inter-urban bus enhancements along the A27, including bus priority measures. This will provide faster, more frequent and reliable bus services between Falmer, Polegate and other rural communities along the corridor without hindering other traffic movements.
H1	Sussex Coast Active Travel Enhancements (including LCWIPs)	Inter-urban cycling enhancements along the Sussex coast, including by utilising the National Cycle Network. This will improve access to points of interest via segregated active travel.
I1	M27 Junction 8 (RIS2)	Improvements to the Windhover Roundabout. This will increase capacity at M27 Junction 8.
I2	A31 Ringwood Strategic Traffic (RIS2)	Widening of the A31 at Ringwood to three lanes. This will provide more capacity for local traffic movements through the area.
I3	A27 Arundel Bypass (RIS2)	Replacement of the existing single carriageway road with a dual carriageway A27 Arundel Bypass. This will link together the two existing dual carriageway sections of the road, improving the flow of traffic.
I4	A27 Worthing and Lancing Improvement (RIS2)	Improvements to the A27 between Worthing and Lancing. This will increase capacity and improve the flow of traffic.
I5	A27 East of Lewes Package (RIS2)	Improvements to the A27 between Lewes and Eastbourne, focusing on Lewes to Polegate. This will increase capacity and improve the flow of traffic.
I6	Southampton Access (M27 Junction 2 and Junction 3) (RIS3 Pipeline)	Improvements to M27 Junctions 2 and 3. This will increase capacity and improve the flow of traffic, with each junction being looked at separately.
I7	A27 Lewes - Polegate (RIS3 Pipeline)	Improvements to the A27 between Lewes and Eastbourne, including to junctions approaching Eastbourne, as well as dualling the road south of the Polegate Roundabout and delivering new active travel infrastructure. This will reduce congestion through the area and encourage increased active travel.
I8	A27 Chichester Improvements (RIS3 Pipeline)	Upgrades to the A27 Chichester Bypass in West Sussex. This will increase safety for all road users, reduce congestion and improve connectivity.
I9	A326 Capacity Enhancements (LLM)	Enhancements to the capacity of the A326. This will ensure reliable access is maintained for both existing and forecast levels of traffic associated with significant development proposals in the area.
I10	West Quay Realignment (LLM)	Realignment of West Quay Road to segregate through traffic using the 'Inner Ring Road' from access-only traffic to the city centre. This will reduce conflicts between road users and improve journey times for through traffic.
I11	Portsmouth City Centre Road (LLM)	Measures to address issues around traffic accessing the city from the M275. This will release land for development and regeneration and support the use of all modes, including bus and active travel.
I12	Northam Rail Bridge Replacement and Enhancement (MRN)	Removal of a major bottleneck caused by the single lane of Northam Rail Bridge between two sections of dual carriageway on the A3024. This will increase capacity, reduce journey times and improve network resilience for private cars, goods vehicles and buses.
I13	New Bridge from Horsea to Tipner	A new bridge between Tipner and Horsea serving pedestrians, cyclists and bus users. This will improve journey times for existing users and attract new pedestrians and cyclists, thus increasing physical activity.
I14	A259 Bognor Regis to Littlehampton Enhancement (MRN)	Major upgrades to junctions along the A259 and major renewal to a road bridge over the River Arun. This will help maintain network resilience and thereby improve journey time reliability, particularly for commuters.

Ref. code	Intervention name	Description
I15	A259 South Coast Road Corridor - Eastbourne to Brighton (MRN)	Measures to enhance access to public transport through the BSIP programme and to enable people to cycle or walk, alongside localised road and junction capacity improvements. This will encourage modal shift whilst resolving issues facing all road users.
I16	A259 Chichester to Bognor Regis Enhancement (MRN Pipeline)	Upgrades to junctions along the A259. This will build on previous schemes to address capacity issues on the A259 and maintain network resilience between Chichester and Bognor Regis.
I17	A259 (King's Road) Seafront Highway Structures Renewal Programme (MRN)	Essential reconstruction of key highway structures (c.1880), including 'arches' and retaining walls supporting the upper seafront promenade along the A259 in Brighton. This will support network resilience and safety for road users.
I18	A29 Realignment including combined Cycleway and Footway	Improvements to the A29, including realignment options to accommodate active travel corridors. This will increase the safety and attractiveness of cycling, encouraging take-up and facilitating a reduction in short-distance car trips.
I19	M27/M271 Smart Motorway(s)	Smart motorway interventions along the M27 and M271. This will increase capacity and reduce congestion in particularly busy areas.
I20	A27 Tangmere Junction Enhancements	Improvements to the A27 Tangmere Junction. This will increase the safety of all road users and safeguard journey time reliability.
I21	A27 Fontwell Junction Enhancements	Improvements to the A27 Fontwell Junction. This will increase the safety of all road users and safeguard journey time reliability.
I22	A27 Worthing (Long Term Solution)	Improvements to the A27 Worthing Junction. A number of tunnel options have been considered to deconflict strategic and local traffic. This will increase the safety of all road users and safeguard journey time reliability.
I23	A27 Hangleton Junction Enhancements	Improvements to the A27 Hangleton Junction. This will increase the safety of all road users and safeguard journey time reliability.
I24	A27 Devils Dyke Junction Enhancements	Improvements to the A27 Devils Dyke Junction. This will increase the safety of all road users and safeguard journey time reliability.
I25	A27 Falmer Junction Enhancements	Improvements to the A27 Falmer Junction. This will increase the safety of all road users and safeguard journey time reliability.
I26	A27 Hollingbury Junction Enhancements	Improvements to the A27 Hollingbury Junction. This will increase the safety of all road users and safeguard journey time reliability.
J1	Croydon Area Remodelling Scheme	Improvements in the Croydon area, constituting the largest and most complex part of the Brighton Main Line upgrade proposals. This will increase the capacity of the railway through this area and improve its wider reliability.
J2	Brighton Main Line - 100mph Operation	Infrastructure and signalling enhancements to enable 100mph operation on the Brighton Main Line. This will reduce journey times between Brighton and London.
J3	Brighton Station Additional Platform	Construction of an additional platform at Brighton station. This will increase capacity and improve the reliability of services to/from the station.
J4	Reigate Station Upgrade	A new 12-car turn back platform at Reigate station. This will increase capacity and provide more reliable services to/from the station, including connectivity to Thameslink destinations in London and beyond.
J5	Arun Valley Line - Faster Services	Increased line speeds on the Arun Valley Line. This will reduce journey times between Littlehampton, Arundel, Horsham, Crawley and Gatwick.
J6	East Coastway Line - Faster Services	Increased line speeds on the East Coastway Line. This will reduce journey times between Brighton, Lewes, Eastbourne and Hastings.
J7	Brighton Main Line - Reinstate Cross Country Services	Reinstate direct Cross Country Services between Brighton, London and the Midlands. This will reduce journey times for long-distance travellers and support inbound domestic tourism.
J8	New Station to the North East of Horsham	A new station on the Arun Valley Line between Littlehaven and Ifield. This will provide rail connectivity to new development sites in the area and reduce journey times.
J9	Newhaven Port Capacity and Rail Freight Interchange Upgrades	Upgrades to rail infrastructure in and around Newhaven Port. This will increase rail freight capacity and support more rail freight movements to/from the port.
J10	Uckfield Branch Line - Hurst Green to Uckfield Electrification	Electrification of the railway from Uckfield to Hurst Green via Edenbridge. This will support the decarbonisation of the rail network and improve its cohesion.

Ref. code	Intervention name	Description
J11	Redhill Aerodrome Chord	A new chord connecting the Brighton Main Line and the Redhill Tonbridge Line through Redhill Aerodrome. This will facilitate through services from Gatwick Airport to locations in Kent and Medway, reducing journey times to the airport.
K1	Uckfield - Lewes Wealden Line Reopening - Traction and Capacity Enhancements	Infrastructure improvements to enable the re-opening of the Wealden Line between Uckfield and Lewes. This will provide rail connectivity to residents between Uckfield and Lewes, reducing local car-based emissions by introducing a sustainable alternative.
K2	Uckfield - Lewes Wealden Line Reopening - Reconfiguration at Lewes	Reconfiguration of Lewes station to allow services on the Wealden Line to continue on the East Coastway Line to/from Brighton. This will improve rail connectivity for residents along the Wealden Line, increasing access to employment, leisure and other opportunities in Brighton.
K3	Spa Valley Line Modern Operations Reopening - Eridge to Tunbridge Wells West to Tunbridge Wells	Conversion of the Spa Valley Line between Eridge and Tunbridge Wells to modern operations. This will create an alternative rail route between Brighton and London and complement improvements to the Wealden Line.
L1	Fastway Extension: Crawley - Horsham	Extension of the Fastway bus network to the west from Crawley to Horsham, including bus priority infrastructure where appropriate. This will improve journey times and reliability for public transport by increasing service frequencies, extending operating hours and delivering timetable integration.
L2	Fastway Extension: Crawley - East Grinstead	Extension of the Fastway bus network to the east from Crawley to East Grinstead, including bus priority infrastructure where appropriate. This will improve journey times and reliability for public transport by increasing service frequencies, extending operating hours and delivering timetable integration.
L3	Fastway Extension: Haywards Heath - Burgess Hill	Extension of the Fastway bus network to the south from Crawley to Haywards Heath and Burgess Hill, including bus priority infrastructure where appropriate. This will improve journey times and reliability for public transport by increasing service frequencies, extending operating hours and delivering timetable integration.
L4	Fastway Extension: Crawley - Redhill	Extension of the Fastway bus network to the north from Crawley to Redhill, including bus priority infrastructure where appropriate. This will improve journey times and reliability for public transport by increasing service frequencies, extending operating hours and delivering timetable integration.
L5	A22 Corridor Rural Bus Service Enhancements	Inter-urban bus enhancements along the A22, including bus priority measures where appropriate. This will increase bus service frequencies, reduce journey times and improve reliability for residents between East Grinstead and nearby centres.
L6	A23 Corridor Rural Bus Service Enhancements	Inter-urban bus enhancements along the A23, including bus priority measures where appropriate. This will increase bus service frequencies, reduce journey times and improve reliability for residents between Crawley, Gatwick and nearby centres.
L7	A24 Corridor Rural Bus Service Enhancements	Inter-urban bus enhancements along the A24, including bus priority measures where appropriate. This will increase bus service frequencies, reduce journey times and improve reliability for residents between Dorking, Horsham and nearby centres.
L8	A26 Corridor Lewes - Royal Tunbridge Wells Rural Bus Service Enhancements	Inter-urban bus enhancements along the A26 between Lewes and Royal Tunbridge Wells, including bus priority measures where appropriate. This will increase bus service frequencies, reduce journey times and improve reliability for residents between Lewes, Uckfield, Royal Tunbridge Wells and nearby centres.
L9	A26 Corridor Newhaven Area Rural Bus Service Enhancements	Inter-urban bus enhancements along the A26 through the Newhaven area, including bus priority measures where appropriate. This will increase bus service frequencies, reduce journey times and improve reliability for residents between Newhaven, Lewes and nearby centres.
L10	A272 Corridor Rural Bus Service Enhancements	Inter-urban bus enhancements along the A272, including bus priority measures where appropriate. This will increase bus service frequencies, reduce journey times and improve reliability for residents between Haywards Heath, Billingshurst, Petersfield and nearby centres.
L11	A264 Corridor Rural Bus Service Enhancements	Inter-urban bus enhancements along the A264, including bus priority measures where appropriate. This will increase bus service frequencies, reduce journey times and improve reliability for residents between Horsham, Crawley, Royal Tunbridge Wells and nearby centres.
L12	A29 Corridor Rural Bus Service Enhancements	Inter-urban bus enhancements along the A29, including bus priority measures where appropriate. This will increase bus service frequencies, reduce journey times and improve reliability for residents between Arundel, Billingshurst, Horsham and nearby centres.
L13	A283 Corridor Rural Bus Service Enhancements	Inter-urban bus enhancements along the A283, including bus priority measures where appropriate. This will increase bus service frequencies, reduce journey times and improve reliability for residents between Pulborough, Petsworth and nearby centres.
L14	A281 Corridor Rural Bus Service Enhancements	Inter-urban bus enhancements along the A281, including bus priority measures where appropriate. This will increase bus service frequencies, reduce journey times and improve reliability for residents between Guildford, Horsham and nearby centres.

Ref. code	Intervention name	Description
L15	Three Bridges Strategic Mobility Hub	Development of a Strategic Mobility Hub at Three Bridges, including rail, Fastway bus services, rural bus services and active travel options. This will provide opportunities for efficient multi-modal journeys between Three Bridges and the surrounding area.
M1	Burgess Hill/Haywards Heath Local Active Travel Infrastructure	Urban walking and cycling enhancements in and around Burgess Hill and Haywards Heath. This will connect points of interest and transport hubs, facilitating local active travel movements and providing safer, faster and more accessible segregated trips.
M2	East Grinstead Local Active Travel Infrastructure	Urban walking and cycling enhancements in and around East Grinstead. This will integrate with existing infrastructure, facilitating local active travel movements and providing safer, faster and more accessible segregated trips.
M3	Eastbourne/Hailsham Local Active Travel Infrastructure	Urban walking and cycling enhancements in and around Eastbourne and Hailsham and other centres. This will integrate with existing infrastructure, facilitating local active travel movements and providing safer, faster and more accessible segregated trips.
M4	Gatwick/Crawley Local Active Travel Infrastructure	Urban walking and cycling enhancements in and around Gatwick and Crawley. This will integrate with existing infrastructure, facilitating local active travel movements and providing safer, faster and more accessible segregated trips.
M5	Horsham Local Active Travel Infrastructure	Urban walking and cycling enhancements in and around Horsham. This will integrate with existing infrastructure, facilitating local active travel movements and providing safer, faster and more accessible segregated trips.
M6	Lewes/Newhaven Local Active Travel Infrastructure	Urban walking and cycling enhancements in and around Lewes, Newhaven and their environs. This will integrate with existing infrastructure, facilitating local active travel movements and providing safer, faster and more accessible segregated trips.
M7	Reigate/Redhill Local Active Travel Infrastructure	Urban walking and cycling enhancements in and around Reigate and Redhill. This will integrate with existing infrastructure, facilitating local active travel movements and providing safer, faster and more accessible segregated trips.
M8	East Sussex Inter-urban Active Travel Infrastructure	Inter-urban walking and cycling enhancements across East Sussex, utilising and enhancing the National Cycle Network. This will connect points of interest and provide safer, faster and more accessible segregated cycle infrastructure. This will encourage active travel and help to diversify residents' travel options.
M9	Surrey Inter-urban Active Travel Infrastructure	Inter-urban walking and cycling enhancements across Surrey, utilising and enhancing the National Cycle Network. This will connect points of interest and provide safer, faster and more accessible segregated cycle infrastructure. This will encourage active travel and help to diversify residents' travel options.
M10	West Sussex Inter-urban Active Travel Infrastructure	Inter-urban walking and cycling enhancements across West Sussex, utilising and enhancing the National Cycle Network. This will connect points of interest and provide safer, faster and more accessible segregated cycle infrastructure. This will encourage active travel and help to diversify residents' travel options.
M11	New London - Brighton National Cycle Network Corridor	A new inter-urban cycling corridor between Brighton and London, utilising parts of the "Avenue Verte" and enhancing the National Cycle Network. This will connect points of interest and provide safer, faster and more accessible segregated cycle infrastructure. This will encourage cycling and help to diversify residents' travel options.
M12	New Crawley - Chichester National Cycle Network Corridor	A new inter-urban cycling corridor between Crawley and Chichester, enhancing the National Cycle Network. This will connect points of interest and provide safer, faster and more accessible segregated cycle infrastructure. This will encourage cycling and help to diversify residents' travel options.
M13	London - Paris New "Avenue Verte"	A new inter-urban cycling corridor between London and Paris, utilising and enhancing the existing "Avenue Verte" and the National Cycle Network. This will connect points of interest and provide safer, faster and more accessible segregated cycle infrastructure. This will encourage cycling and increase tourism and leisure opportunities along the route.
N1	A22 N Corridor (Tandridge) - South Godstone to East Grinstead Enhancements (LLM Pipeline)	Improvements to the A22 north corridor (Tandridge) between South Godstone and East Grinstead. This will resolve existing congestion issues, support access to new developments and provide new active travel infrastructure.
N2	A24/A243 Knoll Roundabout and M25 Junction 9a (MRN Pipeline)	Improvements to the A24/A243 between the Knoll Roundabout and M25 Junction 9A. This will resolve existing congestion issues, distribute traffic, support access to new developments and provide new active travel infrastructure.
N3a	A22 Corridor Package	Improvements to the A22 Polegate/Stone Cross/Hailsham junction. This will increase the safety of all road users and safeguard journey time reliability.
N3b	A22 Corridor - Hailsham to Uckfield (MRN Pipeline)	Improvements to the A22 between Hailsham and Uckfield. This will resolve existing congestion issues, distribute traffic, support access to new developments and provide new active travel infrastructure.

Ref. code	Intervention name	Description
N4	A2270/A2101 Corridor Movement and Access Package (MRN Pipeline)	Improvements to the corridors south of the Willingdon Roundabout (A2270/A2101). This will resolve existing congestion issues, distribute traffic, support access to new developments and provide new active travel infrastructure.
N5	M23 Junction 8a New Junction and Link Road - Redhill	A new M23 Junction 8a and link road to Redhill (and Reigate). This will provide a safer alternative access point to the strategic road network. The current access point for Redhill is M25 Junction 8 via a level crossing.
N6	M23 Junction 9 Enhancements - Gatwick	Capacity enhancements to M23 Junction 9. This will maintain reliable access and accommodate planned growth at Gatwick Airport.
N7	A23 Carriageway Improvements - Gatwick to Crawley	Online improvements to the A23 between Gatwick and Crawley. This will increase road safety and improve journey time reliability through the area.
N8	A264 Horsham - Pease Pottage Carriageway Enhancements	Online improvements to the A264 between Horsham and Pease Pottage. This will increase road safety and improve journey time reliability through the area.
N9	A264 Crawley - East Grinstead Dualling and Active Travel Infrastructure	Online dualling of the A264 between Crawley and East Grinstead, including new segregated walking and cycling infrastructure. This will accommodate growth in the area and help to encourage the take-up of active modes.
N10	Crawley Western Link Road and Active Travel Infrastructure	A new western link road in Crawley, including new bus, walking and cycling infrastructure. This will accommodate growth to the north and west of Crawley, improve local connectivity to Gatwick Airport and help to encourage the take-up of active and sustainable modes.
N11	A24 Dorking Bypass	Online dualling of the A24 Dorking Bypass. This will accommodate growth, increase road safety and improve journey time reliability.
N12	A24 Horsham to Washington Junction Improvements	A new roundabout on the A24 Capel Bypass between Horsham and Washington. This will reduce conflicts between strategic and local movements, accommodate growth, increase road safety and improve journey time reliability.
N13	A24 Corridor Improvements Horsham to Dorking (LLM Pipeline)	Improvements to the A24 Capel Bypass between Dorking and Horsham. This will reduce conflicts between strategic and local movements, accommodate growth, increase road safety and improve journey time reliability.
N14	A23 Hickstead and Bolney Junction Enhancements	Improvements to the A23 Junction at Hickstead and Bolney. This will increase connectivity and accommodate planned growth around Burgess Hill.
N15	A23/A27 Patcham Interchange Junction Enhancements	Enhancements to interchange between the A23/A27 at Patcham. This will reduce conflicts between strategic and local movements, accommodate growth, increase road safety and improve journey time reliability.
N16	A26 Lewes - Newhaven Realignment and Junction Enhancements	Realignment and junction enhancements on the A26 between Lewes and Newhaven. This will reduce conflicts between strategic and local movements, accommodate growth, increase road safety and improve journey time reliability.
N17	A26 Lewes - Uckfield Enhancements	Online improvements to the A26 between Lewes and Uckfield. This will reduce conflicts between strategic and local movements, accommodate growth, increase road safety and improve journey time reliability.
N18	A22 Uckfield Bypass Dualling	Online dualling of the A22 Uckfield Bypass. This will increase road safety and improve journey time reliability through the area.
N19	A22 Smart Road Trial Proposition Study	Trial and implementation of a series of "smart road" interventions on the A22. This will reduce conflicts between strategic and local movements, accommodate growth, increase road safety and improve journey time reliability.
O1	Western Rail Link to Heathrow	A new direct rail link from the Great Western Main Line (between Iver and Langley) to Heathrow Airport. This will enable direct connectivity and reduce journey times to Heathrow Airport from key locations, including Bristol, Swindon, Oxford and Reading.
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. This will help to resolve the long-term problem of rail inaccessibility to Heathrow Airport from the south, particularly from Surrey and South West London.
O3	Reading to Basingstoke Enhancements	Electrification of the Reading to Basingstoke Line. This will support the decarbonisation of the rail network and enable sustainable rail freight movements along the corridor.
O4	North Downs Line - Decarbonisation	Electrification of the unelectrified sections of the North Downs line. This will support the decarbonisation of the rail network and enable sustainable rail freight movements along the corridor.

Ref. code	Intervention name	Description
O5	North Downs Line - Level Crossing Removals	Level crossing removals on the North Downs Line. This will reduce journey times for rail services along the line and increase safety for all road users.
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. This will increase rail service frequencies which will increase capacity, helping to attract more local residents onto the railway.
O7	Guildford Station Redevelopment	Redevelopment of Guildford station. This will provide easier interchange between the North Downs Line and the Portsmouth Direct Line.
O8	New Station Guildford West (Park Barn)	A new station in Guildford West (Park Barn). This will improve access to the rail network for local residents, particularly commuters to/from London.
O9	New Station Guildford East (Merrow)	A new station in Guildford East (Merrow). This will improve access to the rail network for local residents, particularly commuters to/from London.
O10	Redhill Station Track Capacity Improvement	Improvements at Redhill station. This will increase track capacity and provide easier interchange between the North Downs Line, the Brighton Main Line and the Redhill – Tonbridge Line.
O11	Dorking Deepdene Station Upgrade	An improved pedestrian link between Dorking Deepdene and Dorking stations. This will provide easier interchange between the North Downs Line and the Mole Valley Line.
O12	South West Main Line / Portsmouth Direct Line - Woking Area Capacity Enhancement	Grade separation of the Portsmouth Direct Line and the South West Main Line at Woking rail junction on approach to Woking station. This will reduce Portsmouth / Guildford – London journey times and increase capacity on the South West Main Line.
O13	South West Main Line / Basingstoke Branch Line - Basingstoke Enhancement Scheme	Installation of the bi-directional Basingstoke Regulation Loop around the back of platform 5. This will relocate all freight movements from the station, increasing capacity on the South West Main Line whilst helping to provide for freight growth.
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. This will reduce journey times between Portsmouth, Southampton and other national centres and support inbound tourism.
O15	Portsmouth Direct Line - Line Speed Enhancements	Increased line speeds on the Portsmouth Direct Line. This will reduce journey times between Portsmouth and London.
O16	Portsmouth Direct Line - Buriton Tunnel Upgrade	Increased line speeds between Havant and Petersfield by upgrading the Buriton Tunnel. This will reduce journey times between Portsmouth and London.
O17	South West Main Line - Digital Signalling	Introduction of digital signalling on the South West Main Line. This will increase the capacity for (and safety of) rail passenger and freight movements.
O18	Theale Strategic Rail Freight Terminal	Development of a rail freight hub at Theale. This will support more efficient rail freight operations and contribute to business growth.
O19	West of England Main Line - Electrification from Basingstoke to Salisbury	Electrification of the West of England Line between Basingstoke and Salisbury. This will support the decarbonisation of the rail network and enable sustainable rail freight movements along the corridor.
O20	Reading to Waterloo Service Enhancements	Increased line speeds on the Reading to Waterloo Line. This will 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.
P1	Basingstoke Mass Rapid Transit	An integrated network of new bus-based rapid transit routes across Basingstoke. This will connect new and existing developments with the town centre and increase the attractiveness of public transport.
P2	Blackwater Valley Mass Rapid Transit	An integrated network of new bus-based rapid transit routes across the Blackwater Valley. This will connect major employment and population areas locally and facilitate improved strategic connectivity to major economic hubs, building on the successful "Gold Grid" initiative.
P3	Bracknell/Wokingham Bus Enhancements	Urban bus enhancements connecting centres within Bracknell, Wokingham and adjacent economic hubs, including bus priority infrastructure where appropriate. This will improve journey times and reliability for public transport by increasing service frequencies, extending operating hours and delivering timetable integration.

Ref. code	Intervention name	Description
P4	Elmbridge Bus Enhancements	Urban bus enhancements connecting centres within Elmbridge and adjacent economic hubs, including bus priority infrastructure where appropriate. This will improve journey times and reliability for public transport by increasing service frequencies, extending operating hours and delivering timetable integration.
P5	Epsom/Ewell Bus Enhancements	Urban bus enhancements connecting centres within Epsom, Ewell and adjacent economic hubs, including bus priority infrastructure where appropriate. This will improve journey times and reliability for public transport by increasing service frequencies, extending operating hours and delivering timetable integration.
P6	Guildford Sustainable Movement Corridor	Urban bus enhancements connecting centres within Guildford and adjacent economic hubs, including bus priority infrastructure where appropriate. This will improve journey times and reliability for public transport by increasing service frequencies, extending operating hours and delivering timetable integration.
P7	Slough/Windsor/Maidenhead Area Bus Enhancements	Urban bus enhancements connecting centres within Slough, Windsor, Maidenhead and adjacent economic hubs, including bus priority infrastructure where appropriate. This will improve journey times and reliability for public transport by increasing service frequencies, extending operating hours and delivering timetable integration.
P8	Newbury/Thatcham Bus Enhancements	Urban bus enhancements connecting centres within Newbury, Thatcham and adjacent economic hubs, including bus priority infrastructure where appropriate. This will improve journey times and reliability for public transport by increasing service frequencies, extending operating hours and delivering timetable integration.
P9	Reading Mass Rapid Transit	An integrated network of new bus-based rapid transit routes across Reading. This will connect major employment and population areas locally, building on the successful South Reading Mass Rapid Transit initiative.
P10	Spelthorne Bus Enhancements	Urban bus enhancements connecting centres within Spelthorne and adjacent economic hubs, including bus priority infrastructure where appropriate. This will improve journey times and reliability for public transport by increasing service frequencies, extending operating hours and delivering timetable integration.
P11	Woking Bus Enhancements	Urban bus enhancements connecting centres within Woking and adjacent economic hubs, including bus priority infrastructure where appropriate. This will improve journey times and reliability for public transport by increasing service frequencies, extending operating hours and delivering timetable integration.
P12	A4 Reading - Maidenhead - Slough - London Heathrow Airport Mass Rapid Transit	Inter-urban bus enhancements along the A4, including bus priority measures where appropriate. This will increase bus service frequencies, reduce journey times and improve reliability for residents between Maidenhead, Slough and Heathrow Airport.
P13	A329/B3408 Reading - Bracknell/Wokingham Mass Rapid Transit	Inter-urban bus enhancements along the A329/B3408, including bus priority measures where appropriate. This will increase bus service frequencies, reduce journey times and improve reliability for residents between Reading, Bracknell, Wokingham and nearby centres.
P14	Winchester Bus Enhancements	Urban bus enhancements connecting centres within Winchester and adjacent economic hubs, including bus priority infrastructure where appropriate. This will improve journey times and reliability for public transport by increasing service frequencies, extending operating hours and delivering timetable integration.
P15	Andover Bus Enhancements	Urban bus enhancements connecting centres within Andover and adjacent economic hubs, including bus priority infrastructure where appropriate. This will improve journey times and reliability for public transport by increasing service frequencies, extending operating hours and delivering timetable integration.
P16	Runnymede Bus Enhancements	Urban bus enhancements connecting centres within Runnymede and adjacent economic hubs, including bus priority infrastructure where appropriate. This will improve journey times and reliability for public transport by increasing service frequencies, extending operating hours and delivering timetable integration.
P17	London Heathrow Airport Bus Access Enhancements	Bus enhancements, including bus priority measures. This will enable frequent, reliable, express services to run along roads connecting Slough, Windsor, Spelthorne and Elmbridge to Heathrow Airport.
P18	Berkshire, Hampshire and Surrey Inter-urban Bus Enhancements	Inter-urban bus enhancements, including bus priority measures. This will enable frequent, reliable, express services to run along roads connecting major economic hubs, e.g. Guildford to the Blackwater Valley via the A31.

Ref. code	Intervention name	Description
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. This will connect points of interest and provide safer, faster and more accessible segregated cycle infrastructure. This will encourage cycling and help to diversify residents' travel options.
R1	M3 Junction 9 (RIS2)	Upgrades to the M3 Junction 9. This will facilitate better movement from the A34 to the M3, including key strategic freight movements, and help to accommodate future growth.
R2	M3 Junction 9 - Junction 14 Smart Motorway (SMP)	Smart motorway extension from M3 Junction 9 to M3 Junction 14. This will increase capacity and road safety and improve reliability along this section.
R3	A404 Bisham Junction (RIS3 Pipeline)	Upgrades to Bisham Roundabout junction. This will relieve existing congestion along the A404 corridor, improving reliability for strategic movements whilst providing additional capacity.
R4	A3/A247 Ripley South (RIS3 Pipeline)	Upgrades to Ripley South junction. This will relieve existing congestion along the A3, segregate strategic and local movements and provide additional capacity for access to new developments.
R5	A31 Farnham Corridor (LLM)	Upgrades to Hickley's Corner junction and Firgrove Hill, including a new underpass and roundabout. This will relieve existing congestion, segregate strategic and local movements and support active travel in the town centre.
R6	New Thames Crossing East of Reading (LLM)	A third bridge across the river Thames in Reading, including supporting infrastructure. This will relieve existing congestion in Reading town centre and provide additional capacity for access to new housing developments.
R7	A320 North Corridor (HIF)	Improvements to the A320 north of Woking. This will relieve existing congestion, improve journey time reliability for strategic movements, support active travel movements and provide additional capacity for access to new housing developments.
R8	M4 Junction 10 Safety Enhancements	Changes to M4 Junction 10 with the A329(M). This will support the increased safety of all road users.
R9	M3 Junction 7 and Junction 8 Safety and Capacity Enhancements	Changes to M3 Junction 7 at Basingstoke and M3 Junction 8 with the A303. This will support the increased safety of all road users and accommodate growth.
R10	A3 Guildford Local Traffic Segregation	Changes to the A3 through Guildford paired with improvements to local public transport provision. This will segregate strategic and local movements whilst encouraging the use of public transport.
R11	A3 Guildford Long Term Solution	Long-term solution to issues on the A3 in and around Guildford, potentially including at-grade or tunnelling options. This will improve journey time reliability and air quality along the A3 through Guildford whilst supporting strategic freight movements.
R12	A34 Junction and Safety Enhancements	Changes to A34 junctions between Winchester and Newbury. This will support the increased safety of all road users and improve journey time reliability for strategic freight movements.
R13	A322 and A329(M) Smart Corridor	Introduction of smart motorway interventions along the A322 and A329(M). This will support the more efficient use of existing capacity using real-time information.
R14	A339 Newbury to Basingstoke Safety Enhancements	Changes to the A339 between Basingstoke and Newbury. This will support the increased safety of all road users and improve journey time reliability for strategic freight movements.
R15	M4 Junction 3 to Junction 12 Smart Motorway (SMP)	Smart motorway extension from M4 Junction 3 to M4 Junction 12. This will increase capacity and road safety and improve reliability along this section.
S1	St Pancras International Domestic High Speed Platform Capacity	A new platform at St Pancras International station for domestic high speed rail services. This will support an increase in station capacity to provide more HS1 services between London, Medway and Kent.
S2	London Victoria Capacity Enhancements	Additional capability at London Victoria station, taking advantage of a major track renewal in CP8/9, as well as digital signalling on lines approaching the station from the South East in the longer-term. This will enable more services between London and Kent, Medway and East Sussex, reduce headways and improve journey time reliability.
S3	Bakerloo Line Extension	Extension of the Bakerloo Line from its current terminus at Elephant and Castle to Hayes via Lewisham. This will increase capacity for services between London and Kent, Medway and East Sussex.

Ref. code	Intervention name	Description
S4	South Eastern Main Line - Chislehurst to Tonbridge Capacity Enhancements	Improvements to the South Eastern Main Line between Chislehurst and Tonbridge, including signalling upgrades. This will facilitate increased capacity and service frequencies on the line.
S5	London Victoria to Shortlands Capacity Enhancements	Improvements to the South Eastern Main Line between London and Tonbridge. This will facilitate increased capacity and service frequencies on the line.
S6	Hoo Peninsula Passenger Rail Services (HIF)	A new station serving the Hoo Peninsula alongside other improvements to the existing Grain Branch Line. This will enable new passenger services connecting large-scale employment and housing developments.
S7	North Kent Line / Hundred of Hoo Railway - Rail Chord	A new rail chord at Hoo Junction. This will enable rail freight to circumnavigate London via Paddock Wood.
S8	Thameslink - Extension to Maidstone and Ashford	Extension of Thameslink services from Otford to Maidstone East and Ashford. This will improve onward connectivity for existing users and attract potential new users within rail catchments in Maidstone and Ashford.
S9	North Kent Line - Service Enhancements	Increased line speeds and signalling upgrades on the North Kent Line between Gravesend and Rochester. This will reduce journey times to London from North Kent.
S10	North Kent Line / Chatham Main Line - Line Speed Enhancements	Increased line speeds and signalling upgrades on the North Kent Line and the Chatham Main Line between Rochester and Margate. This will reduce journey times to London from Kent.
S11	Otterpool Park/Westenhanger Station Platform Extensions and Station Upgrade	An additional platform at Westenhanger station near Otterpool Park Garden Town. This will increase station capacity to accommodate new housing developments.
S12	Integrated Maidstone Stations	Improvements to the pedestrian link between Maidstone Barracks and Maidstone East. This will provide easier interchange between the Medway Valley Line and the Maidstone Line and contribute to an improved rail offer for Kent and Medway.
S13	Dartford Station Remodelling/Relocation	Re-modelling and re-location of Dartford station. This will increase station capacity and improve interchange and journey time reliability.
S14	Canterbury Interchange Rail Chord	A new rail chord between the Canterbury East and Canterbury West Lines. This will improve resilience and allow rail services to operate between Faversham and Ashford as well as Dover and Ashford via Canterbury East.
S15	New Station - Canterbury Interchange	A new parkway station located to the west of Canterbury and serving the Canterbury East and Canterbury West Lines. This will extend access to the rail network to more rural areas and provide effective interchange.
S16	New Strood Rail Interchange	Relocation of the existing station at Strood. This will provide interchange between two lines (the North Kent Line and the Medway Valley Line) and better integrate with Medway's local public transport network.
S17	Rail Freight Gauge Clearance Enhancements	Delivery of W12 gauge clearance between the Channel Tunnel and the West Coast Main Line via Maidstone and/or Tonbridge. This will support the growth of rail freight, contributing to decarbonisation and helping to realise the aspirations of the Network Rail Freight Strategy.
S18	Crossrail - Extension from Abbey Wood to Dartford/Ebbsfleet	Extension of Crossrail services from Abbey Wood to Dartford and Ebbsfleet International stations. This will increase service frequencies to London and provide a direct rail link to Heathrow Airport from Dartford and Ebbsfleet.
S19	High Speed 1 / Waterloo Connection Chord - Ebbsfleet Southern Rail Access	Construction of a new rail chord south of Ebbsfleet. This will enable direct access between High Speed 1 and local lines, unlocking new rail corridors such as Ebbsfleet to South East London.
S20	Ebbsfleet International (Northfleet Connection)	An improved pedestrian link between Ebbsfleet International and Northfleet stations. This will provide easier interchange between lines and contribute to an improved rail offer for Kent.
S21	Ebbsfleet International (Swanscombe Connection)	Construction of a new rail chord north of Ebbsfleet. This will enable direct access between High Speed 1 and the North Kent Line, reducing journey times between North Kent and London.
S22	Gatwick - Kent Service Enhancements	Enabling of direct rail services between Gatwick Airport and Kent. This will provide an alternative to private car for trips between Gatwick Airport and Kent and reduce journey times.
T1	High Speed East - Dollands Moor Connection	A new rail connection between High Speed 1 and the South Eastern Main Line at Dolland Moor. This will improve network resilience and provide increased service options (as proposed in the Kent Rail Strategy).

Ref. code	Intervention name	Description
T2	High Speed 1 / Marsh Link - Hastings, Bexhill and Eastbourne Upgrade	New high speed services to Hastings, Bexhill and Eastbourne via High Speed 1 / the Marshlink Line. This will markedly reduce journey times between these locations and London.
U1	High Speed 1 - Link to Medway (Chatham)	A new link from High Speed 1 at Ebbsfleet International station to Chatham station. This will improve regional connectivity to Medway and North Kent, with reduced journey times to/from London and a step-change capacity increase.
U2	High Speed 1 - Additional Services to West Coast Main Line	Implementation of direct services between High Speed 1 and the West Coast Main Line. This will enable direct services between the South East and the Midlands, markedly reducing journey times.
V1	Fastrack Extension - Swanscombe Peninsula	Extension of the Fastrack bus network in the Swanscombe Peninsula and adjacent hubs, including bus priority infrastructure where appropriate. This will improve journey times and reliability for public transport by increasing service frequencies, extending operating hours and delivering timetable integration.
V2	Fastrack Optimisation and Extension - Dartford - Northfleet - Ebbsfleet - Gravesend	Optimisation and extension of the Fastrack bus network in the North Kent area and adjacent hubs, including bus priority infrastructure where appropriate. This will improve journey times and reliability for public transport by increasing service frequencies, extending operating hours and delivering timetable integration.
V3	Fastrack Extension - Medway	Extension of the Fastrack bus network to Medway, including bus priority infrastructure where appropriate. This will improve journey times and reliability for public transport by increasing service frequencies, extending operating hours and delivering timetable integration.
V4	Medway Mass Transit	Mass Rapid Transit enhancements connecting centres in Medway with adjacent economic hubs, including segregated infrastructure where appropriate. This will improve journey times and reliability for public transport by increasing service frequencies, extending operating hours and delivering timetable integration.
V5	Medway Mass Transit - Extension to Hoo Peninsula	Mass Rapid Transit enhancements connecting centres in Medway to the Hoo Peninsula, including segregated infrastructure where appropriate. This will improve journey times and reliability for public transport by increasing service frequencies, extending operating hours and delivering timetable integration.
V6	Medway to Maidstone Bus Priority	Mass Rapid Transit enhancements connecting centres in Medway and Maidstone, including segregated infrastructure where appropriate. This will improve journey times and reliability for public transport by increasing service frequencies, extending operating hours and delivering timetable integration.
V7	Medway Mass Transit - Chatham to Medway City Estate New Bridge	Mass Rapid Transit enhancements connecting Medway to Medway City Estate via a new bridge, including segregated infrastructure where appropriate. This will improve journey times and reliability for public transport by increasing service frequencies, extending operating hours and delivering timetable integration.
V8	Medway Mass Transit - Chatham to Medway City Estate Water Taxi	Mass Rapid Transit enhancements connecting Medway to the Medway City Estate via a water taxi. This will improve journey times and reliability for public transport by increasing service frequencies, extending operating hours and delivering timetable integration.
V9	Maidstone Bus Enhancements	Urban bus enhancements within Maidstone and adjacent economic hubs, including bus priority infrastructure where appropriate. This will improve journey times and reliability for public transport by increasing service frequencies, extending operating hours and delivering timetable integration.
V10	Dover Bus Rapid Transit	Urban bus enhancements within Dover and adjacent economic hubs, including bus priority infrastructure where appropriate. This will improve journey times and reliability for public transport by increasing service frequencies, extending operating hours and delivering timetable integration.
V11	Sittingbourne Bus Enhancements	Urban bus enhancements within Sittingbourne and adjacent economic hubs, including bus priority infrastructure where appropriate. This will improve journey times and reliability for public transport by increasing service frequencies, extending operating hours and delivering timetable integration.
V12	Sevenoaks Bus Enhancements	Urban bus enhancements within Sevenoaks and adjacent economic hubs, including bus priority infrastructure where appropriate. This will improve journey times and reliability for public transport by increasing service frequencies, extending operating hours and delivering timetable integration.
V13	Thanet Bus Enhancements	Urban bus enhancements within Thanet and adjacent economic hubs, including bus priority infrastructure where appropriate. This will improve journey times and reliability for public transport by increasing service frequencies, extending operating hours and delivering timetable integration.
V14	Folkestone Bus Enhancements	Urban bus enhancements within Folkestone and adjacent economic hubs, including bus priority infrastructure where appropriate. This will improve journey times and reliability for public transport by increasing service frequencies, extending operating hours and delivering timetable integration.

Ref. code	Intervention name	Description
V15	Ashford Bus Enhancements	Urban bus enhancements within Ashford and adjacent economic hubs, including bus priority infrastructure where appropriate. This will improve journey times and reliability for public transport by increasing service frequencies, extending operating hours and delivering timetable integration.
V16	Royal Tunbridge Wells/Tonbridge Bus Enhancements	Urban bus enhancements within Royal Tunbridge Wells / Tonbridge and adjacent economic hubs, including bus priority infrastructure where appropriate. This will improve journey times and reliability for public transport by increasing service frequencies, extending operating hours and delivering timetable integration.
V17	Thames Gateway/Gravesham Bus Enhancements	Urban bus enhancements within the Thames Gateway / Gravesham and adjacent economic hubs, including bus priority infrastructure where appropriate. This will improve journey times and reliability for public transport by increasing service frequencies, extending operating hours and delivering timetable integration.
V18	Canterbury/Whitstable/Herne Bay Bus Enhancements	Inter-urban bus enhancements along the A290 and A291 between Canterbury / Whitstable / Herne Bay, including bus priority measures where appropriate. This will improve journey times and reliability for public transport by increasing service frequencies and extending operating hours.
V19	Ferry Crossings - New Sheerness to Hoo Peninsula Service	Introduction of a new ferry service between Sheerness and the Hoo Peninsula. This will support connectivity to new developments.
V20	Ferry Crossings - Sheerness to Chatham/Medway City Estate/Strood Enhancements	Enhancement of ferry services between Sheerness and Chatham / Medway City Estate / Strood. This will improve freight efficiency and contribute to business growth.
V21	Ferry Crossings - Gravesend to Tilbury Enhancements	Enhancement of ferry services across the Thames Estuary between Gravesend and Tilbury. This will improve freight efficiency and contribute to business growth.
V22	Inland Waterway Freight Enhancements	Introduction of Inland Waterway Freight corridors. This will enable sustainable freight movements into and around Medway and Maidstone.
W1	Medway Active Travel Enhancements	Urban walking and cycling enhancements in and around the Medway towns. This will facilitate local active travel movements and provide safer, faster and more accessible segregated trips.
W2	Medway Active Travel - Chatham to Medway City Estate River Crossing	A new river crossing for active travel between Chatham and the Medway City Estate, integrated with the rest of the Medway cycle network. This will facilitate local active travel movements and provide safer, faster and more accessible segregated trips.
W3	Kent Urban Active Travel Infrastructure	Urban walking and cycling enhancements across Kent. This will facilitate local active travel movements and provide safer, faster and more accessible segregated trips.
W4	Kent Inter-urban Active Travel Infrastructure	A series of Inter-urban walking and cycling enhancements across Medway and Kent, utilising and enhancing the National Cycle Network. This will facilitate strategic active travel movements (for example Ebbsfleet – Swanley – Sevenoaks – Oxted – Redhill) and provide safer, faster and more accessible segregated cycle infrastructure.
W5	Faversham - Canterbury - Ashford - Hastings National Cycle Network Enhancements	Enhancements to the inter-urban cycling route between Faversham and Hastings, utilising and enhancing the National Cycle Network. This will connect points of interest and provide safer, faster and more accessible segregated cycle infrastructure.
W6	Tonbridge - Maidstone National Cycle Network Enhancements	Enhancements to the inter-urban cycling route between Maidstone and Tonbridge (and onwards towards East Grinstead and Crawley), utilising and enhancing the National Cycle Network. This will connect points of interest and provide safer, faster and more accessible segregated cycle infrastructure.
W7	Sevenoaks - Maidstone - Sittingbourne National Cycle Network Enhancements	Enhancements to the inter-urban cycling route between Sevenoaks, Maidstone and Sittingbourne, utilising and enhancing the National Cycle Network. This will connect points of interest and provide safer, faster and more accessible segregated cycle infrastructure.
W8	Bromley - Sevenoaks - Royal Tunbridge Wells National Cycle Network Enhancements	Enhancements to the inter-urban cycling route between Bromley, Sevenoaks and Royal Tunbridge Wells, utilising and enhancing the National Cycle Network. This will connect points of interest and provide safer, faster and more accessible segregated cycle infrastructure.
W9	East Sussex Local Active Travel Infrastructure	Intra-urban walking and cycling enhancements across the East Sussex area, utilising and enhancing the National Cycle Network. This will facilitate local active travel movements and provide safer, faster and more accessible segregated cycle infrastructure.

Ref. code	Intervention name	Description
W10	East Sussex Inter-urban Active Travel Infrastructure	Inter-urban walking and cycling enhancements across the East Sussex area, utilising and enhancing the National Cycle Network. This will facilitate strategic active travel movements and provide safer, faster and more accessible segregated cycle infrastructure.
W11	Royal Tunbridge Wells - Hastings National Cycle Network Enhancements	Enhancements to the inter-urban cycling route between Royal Tunbridge Wells and Hastings, utilising and enhancing the National Cycle Network. This will connect points of interest and provide safer, faster and more accessible segregated cycle infrastructure.
W12	Canterbury Placemaking and Demand Management Measures	Placemaking initiatives in and around Canterbury, complemented by demand management. This will increase the attractiveness of active modes and facilitate local active travel movements.
W13	Medway Placemaking and Demand Management Measures	Placemaking initiatives in and around Medway, complemented by demand management. This will increase the attractiveness of active modes and facilitate local active travel movements.
W14	Dover Placemaking and Demand Management Measures	Placemaking initiatives in and around Dover, complemented by demand management. This will increase the attractiveness of active modes and facilitate local active travel movements.
X1	M2 Junction 5 (RIS2)	Improvements to slip roads and enhancements to the junction approaches. This will increase capacity and reliability and lead to reduced journey times, including for strategic freight movements.
X2	A2 Brenley Corner Enhancements (RIS3 Pipeline)	Enhancements at Brenley Corner. This will increase reliability and lead to reduced journey times, particularly for strategic freight movements on the A2/M2 to/from Dover.
X3	A2 Dover Access (RIS3 Pipeline)	Enhancements on the approach to Dover from the A2. This will reduce queueing and enable the smooth flow of strategic freight movements to/from the port.
X4	A21 Safety Enhancements (RIS3 Pipeline, brought forward to RP2)	Safety improvements along the A21. This will overcome known safety issues, reduce conflict between strategic movements and local movements and support active travel.
X5	A229 Bluebell Hill Junction Upgrades (LLM)	Upgrade of Bluebell hill by remodelling the junctions at either end (A229/M2 J3 and A229/M20 J6) to ensure free flow traffic. This will build resilience to the strategic highway freight network.
X6	A28 Birchington, Acol and Westgate-on-Sea Relief Road (MRN)	A relief road, utilising the existing Shottendane Road which runs south of, and parallel to the A28. It will be widened and improved. This will provide an alternative route to the already congested A28 corridor and therefore relieve congestion on the existing corridor.
X7	A228 Colts Hill Strategic Link (MRN Pipeline)	Targeted improvements along the A228. This will ensure that the road becomes the main link between the A21, the M20 and Maidstone, replacing the A26 through Tonbridge and Hadlow for local movements.
X8	Digital Operations Stack and Brock	New smart traffic management systems. This will build greater resilience when there is disruption at the Port of Dover or the Eurotunnel, relieving Operations Stack and Brock.
X9	A20 Enhancements for Operations Stack & Brock	New smart traffic management systems. This will build greater resilience when there is disruption at the Port of Dover or the Eurotunnel, relieving Operations Stack and Brock by increasing capacity on the A20 for freight parking.
X10	Kent Lorry Parks (Long Term Solution)	New smart traffic management systems. This will build greater resilience when there is disruption at the Port of Dover or the Eurotunnel, relieving Operations Stack and Brock by considering long-term solutions.
X11	Dover Freight Diversification	Realise the strategic aspirations of the Port of Dover. This will increase the port's service offer and diversify its freight operations.
X12	A2 Canterbury Junctions Enhancements	Improvements at the A2 junctions serving Canterbury. This will build resilience by increasing capacity, leading to improved journey times, reliability and junction safety.
X13	M2 Junction 4 - Junction 7 Smart Motorway (SMP)	Smart motorway initiatives along the M2 between Junctions 4 and 7. This will build resilience by increasing capacity, supporting strategic freight movements.
X14	M20 Junction 6 Sandling Interchange Enhancements	Improvements to the M20 Junction 6, Sandling, with focus on supporting strategic freight movements to/from Dover. This will build resilience by increasing capacity, leading to improved journey times, reliability and junction safety.
X15	M20 Junction 3 - Junction 5 Smart Motorway	Smart motorway initiatives along the M20 between Junctions 3 and 5. This will build resilience by increasing capacity, supporting strategic freight movements.
X16	M25 Junction 1a Enhancements	Improvements to M25 Junction 1a, with focus on improving local connectivity for all modes in Dartford and supporting strategic freight movements via the Dartford Crossing. This will build resilience by increasing capacity, leading to improved journey times, reliability and junction safety.

Ref. code	Intervention name	Description
X17	M25 Junction 5 Enhancements	Improvements to M25 Junction 5. This will build resilience by increasing capacity, leading to improved journey times, reliability and junction safety.
X18	Herne Relief Road	A new relief road in Herne. This will build resilience by increasing capacity and improve connectivity between Thanet and the rest of the South East via the A299.
X19	Canterbury East Relief Road	A new relief road in Canterbury East. This will build resilience by increasing capacity and improve connectivity between Canterbury East and the strategic highway network.
X20	New Maidstone South East Relief Road	A new relief road in Maidstone South East. This will build resilience by increasing capacity and improve connectivity between Maidstone South East and the strategic highway network.
X21	A228 Hoo Peninsula Enhancements	Enhancements to the A228. This will build resilience by increasing capacity and support access to new developments on the Hoo Peninsula, supporting all modes including bus and active travel.
X22	A228 Medway Valley Enhancements	Enhancements to the A228. This will build resilience by increasing capacity and support access to new developments on the Medway Valley, supporting all modes including bus and active travel.
X23	Strood Riverside Highway Enhancement and Bus Lane	Enhancements to Strood Riverside. This will support access to new developments along the riverside, supporting all modes including bus and active travel.
X24	A259 Level Crossing Removals - East of Rye	Removal of the level crossings along the A259. This will improve railway line speeds, reduce conflicts between highway and railway flows and increase reliability, resilience and safety for all users.
X25	A21 Kippings Cross to Lamberhurst Dualling and Flimwell and Hurst Green Bypasses	A new A21 Bypass and dualling of the road between Kippings Cross and Lamberhurst. This will reduce conflicts between strategic and local movements and improve reliability and safety for all road users.
X26	Hastings and Bexhill Distributor Roads	Targeted enhancements on key highway corridors into Bexhill and Hastings from the A21 and A259. This will improve reliability and support the take-up of bus and active travel.
Y1	Lower Thames Crossing	A second highway crossing of the Thames Estuary alongside supporting infrastructure. This will relieve the existing Dartford Crossing to support strategic freight movements between Kent and the rest of the country.

Item 16 – SIP Delivery - Appendix 2

Table 1 - Development support schemes – 2023-24

Authority	Scheme	Support for	Level of Support	Status
Kent County Council	Fastrack Optimisation and Extension	Feasibility Study	£51,297	Complete,
Medway Council	New Strood Interchange	Pre-Feasibility Study	£20,000	Complete,
Portsmouth City Council	Cosham Station Mobility Hub	Strategic Outline Business Case	£30,000	Complete
Southampton City Council	West Quay Road Realignment	Strategic Outline Business Case	£100,000	Expected March 2025
Total			£201,297	

Table 2 - Development support scheme - 2024-25

Promoting Authority	SIP ref	SIP Scheme Name	Status	Support for:	Award
West Sussex County Council	I16	A259 Chichester to Bognor Regis Enhancement	Underway	SOBC	£100,000
Surrey County Council	N1	London to Sussex Coast Highways (A22 N Corridor (Tandridge) South Godstone to East Grinstead)	Scoping	Feasibility Study	£50,000
East Sussex County Council	N3b & N18	A22 North of Hailsham to Maresfield (MRN Pipeline) Corridor SOBC	Underway	SOBC	£50,000
Berkshire - Wokingham Borough Council	P7, P9, P12, P18, Q1	A4 Berkshire - Quality Bus Corridor and Active Travel Improvements	Underway	Feasibility Study	£75,000
Hampshire County Council	E2	South East Hampshire Area Active Travel	Underway	Feasibility Study	£50,000
Brighton & Hove City Council	A2 & A3	A27/A23 Patcham Interchange & Falmer Strategic Mobility Hub	Scoping	Feasibility Study	£50,000
Solent Authorities - NR	G2 & G3	A2 Botley Line Double Tracking & A3 Netley Line Signalling and Rail Service Enhancements	Reviewing Contract	SOBC	£50,000
Kent County Council	S22	Gatwick-Kent Service Enhancements	Scoping	SOBC	£25,000
				TOTAL	£450,000

Report to: Partnership Board –Transport for the South East

Date of meeting: 17 March 2025

By: Chief 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 2024/25 business plan

RECOMMENDATIONS:

The members of the Partnership Board are recommended to:

- 1) Comment on the progress with the ongoing implementation of the Centre of Excellence;
- 2) Comment on progress with the work to implement the Electric Vehicle Infrastructure Strategy;
- 3) Comment on the progress with the delivery of the Freight, Logistics and Gateways Strategy;
- 4) Comment on the progress work on rail; and
- 5) Comment on the progress with work on decarbonisation.

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. Centre of Excellence

2.1 Development of the TfSE Centre of Excellence began in September 2023, and it was formally launched in June 2024. The platform was codesigned with local authority officers across the region and offers a wide range of resources including webinars, events, training, resources, and case studies. To date, the site has 275 registered users which include local authority officers, universities, Department for Transport (DfT), national agencies, and professional institutes.

2.2 To ensure the site continues to meet users' needs and requirements, a capability survey will be issued in April 2025 to assess the region's capacity and capability requirements. The results will help identify areas for bespoke support to be

commissioned in 2025/26 and will also be compared to last year's baseline in order to understand the impact and value that the platform has contributed.

2.3 The proposed programme of support and results of the monitoring and evaluation will be presented to the Partnership Board at their meeting in July 2025.

3. Electric Vehicle Charging Infrastructure

3.1 As reported to the Partnership Board in January 2025, an initial pioneering piece of work has been completed which aimed to assess the impacts of the electrification of commercial vehicle fleets on a publicly available charge point provision. A follow-on project has recently commenced, which aims to develop a guidance framework for local transport authorities to support them with planning the roll out of EV charging infrastructure that will be more accessible to commercial fleet vehicles. This will include the development of case studies in Slough Borough Council and Brighton and Hove City Council areas. This work was started in December 2024 and is due to be completed in May 2025.

3.2 Work has also recently commenced on a 'state of the region' report that aims to establish the progress being made with the rollout of EV charging infrastructure across the TfSE area. The work will include engagement with Local Transport Authorities (LTAs) to identify the key issues and challenges being faced with the rollout of future EV charging infrastructure. This intelligence will then be used to help inform TfSE's future work in this area. This piece of work is due to be completed by May 2025. A further update on TfSE's work on EV Charging Infrastructure roll out will be presented at the next Partnership Board meeting in July 2025.

4. Freight, Logistics and Gateways Strategy

4.1 Work is continuing on improvements to the Alternative Freight Fuel Infrastructure (ALFFI) tool developed by Midlands Connect, which ranks and evaluates potential locations for public HGV alternative recharging sites. The use of additional local data will enable a GIS map to be produced to show where these potential HGV recharging sites could be located in the TfSE area. Once this work has been completed TfSE officers will be engaging with our local authority transport and planning officers to demonstrate the application of the tool to help identify potential sites.

4.2 Another meeting of the Wider South East Freight Forum, which covers the TfSE, England's Economic Heartland and Transport East areas was held on 6 March 2025. The main focus of the meeting was on the issues faced by freight and logistics operators when planning for freight infrastructure with presentations on the early findings from the TfSE Warehousing Provision and Intermodal Rail Freight studies. There were also updates on the amended National Planning Policy Framework and the completed outputs from the DfT HGV Parking Task and Finish Group, including a paper on HGV parking facility standards, and guidance for planning applications for both local authorities and freight and logistics operators. Some members of the Forum are also participating in a Data Sharing Working Group which will look at ways in which freight and logistics operators and local authorities can share their freight data. This will help both parties in the preparation of evidence in support of infrastructure developments and the allocation of land required to support the logistics sector.

4.3 The first Freight Awareness Programme working group has been held to help identify both the type of content and training that the programme should develop. The

first meeting will take place in March 2025 and will have representatives from local authorities across TfSE, England's Economic Heartland and Transport East areas, Logistics UK, the Road Haulage Association and Chartered Institute of Logistics and Transport. The first needs assessment phase of the work is due to be completed in April 2025. A further update on TfSE's work on freight and logistics will be presented to the Partnership Board at their meeting in March 2025.

5. Rail

5.1 Work continues on the Intermodal Rail Freight Study project covering the TfSE area. A workshop to introduce the project was held in February 2025 with local authority transport, planning and economic development officers, local freight and logistics operators, Network Rail and the Great British Railway Transition Team. Following this, individual meetings are now taking place with stakeholders to discuss their further involvement going forward. The project is due to be completed in April 2025.

5.2 Work on the TfSE Rail Strategy will commence in April 2025. This will aim to develop a stronger evidence base with which to advise the Secretary of State, Great British Railways and the Office for Road and Rail and its partner local authorities on the rail priorities for the TfSE area. A further update on the progress of the work on rail will be given to the Partnership Board Meeting in March 2025.

6. Joint work on decarbonisation

6.1 As reported to the Partnership Board in January 2024, the Carbon Assessment Playbook, jointly created by the seven STBs, enables the baseline carbon emissions and trajectories to net zero in each of the LTAs to be identified. Each LTA is then able to assess the carbon reduction potential of the proposed transport interventions included in their local transport plans. To help LTAs become more proficient in using the tool, a programme of 1-2-1 support is now underway to enable representatives from the LTAs to meet the consultant that developed the tool to ask any questions they may have about its use. This work will help identify potential enhancements to the tool to be undertaken in 2025-6, subject to the availability of funding. A further update on the progress of the development of the Carbon Assessment Playbook will be given at the Partnership Board Meeting in July 2025.

7. Financial considerations

7.1 The work on the Centre of Excellence, electric vehicle charging infrastructure, freight, rail and decarbonisation set out in this report is being funded from the DfT grant funding for 2024/25.

8. Conclusions and recommendations

8.1 Members of the Partnership Board are recommended to comment on 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 Partnership Board at their meeting in July 2025.

RUPERT CLUBB

Chief Officer

Transport for the South East

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Report to: Partnership Board –Transport for the South East

Date of meeting: 17 March 2025

By: Chief Officer, Transport for the South East

Title of report: Communications and Stakeholder Engagement update

Purpose of report: To update the Partnership Board on communications and stakeholder engagement activity

RECOMMENDATION:

The members of the Partnership Board are recommended to comment on the engagement and communication activity that has been undertaken since the last Partnership Board meeting.

1. Introduction

1.1 This paper provides an update on communications and engagement activity undertaken since the last Partnership Board meeting, including support provided to technical projects, stakeholder meetings, media activity and recent and upcoming events.

2. Recent communications and engagement activity

2.1 Transport for the South East (TfSE) continues to support the implementation of communication and engagement activity across our technical work programme and lead the communications work for the Wider South East Freight Forum, working with our Sub National Transport Body (STB) colleagues at Transport East (TE) and England's Economic Heartland (EEH).

2.2 Our plan to create and maintain a dialogue with the region's MPs continues. In January, we emailed all MPs about the Transport Strategy consultation and offered a face-to-face or virtual meeting with Chairman Councillor Glazier and Chief Officer Rupert Clubb. We have also requested meeting dates with MPs who have previously registered a desire to take up the meeting invitation.

2.3 We are delivering against the objectives set in the 2024/25 communications and engagement plan, with activity supported by web content, social media coverage, our monthly newsletter and podcast. Video content and infographics has helped to enhance our social media engagement, and we are also sharing content with our partners including National Highways as well as the Department for Transport (DfT).

3. Transport Strategy Refresh stakeholder engagement

3.1 Our support for the public consultation has continued over the New Year. In January we contacted all 16 constituent local authorities, districts and borough councils and sent them media packs to help promote the consultation, as well as the region's MPs as mentioned. The impact has been significant with over 100 new responses received in the week following the emails and a number of councils reposting our social media content on their own channels.

3.2 We have worked with the strategy team on a series of consultation public roadshows across the region. These have taken place in Southsea, Brighton, Southampton and Canterbury, with further events planned for Guildford, Wokingham, Ryde and Hastings. These events at libraries and council buildings have been promoted via press releases and social media activity. An indoor pop-up banner plus small business cards with a QR code directing people to the consultation online have been produced to support these events.

3.3 The public response has been fairly positive, with members of the public happy to engage with TfSE officers to discuss transport and the strategy proposals. The events have also given us the opportunity to meet a number of councillors including Cllr Candlish in Southsea and Cllr Muten in Brighton.

3.4 In addition to the public events, we have also had the opportunity to brief industry representatives about the strategy. Rupert Clubb and Mark Valleley met the Business Services Association and James Gleave presented an update about the consultation to CIHT members in January.

4. Events and speaker slots

4.1 Past events

- Members of the team attended the Future Transport Forum in Southampton, organised by Solent Transport. The event, themed around FTZs, provided us with the opportunity to promote the transport strategy consultation and engage with representatives from our constituent authorities, the DfT, universities, interest groups and consultants.
- We have supported the DfT with their programme of roadshows about the Integrated National Transport Strategy, sending out invites on their behalf and assisting with other arrangements. The event in Brighton on February 27th consists of a series of workshops with stakeholders on the DfT's strategy. This event provides the DfT with an opportunity to gain a regional perspective and hear views about transport from the region's representatives.
- James Gleave was interviewed by Portsmouth radio station Express FM in February, on their weekday evening 'Express This Week' show. James gave some background about the transport strategy and proposals, and explained how local people could take part in the consultation.

4.2 Future events/ speaker slots

- Interchange Conference 4 – 5 March 2025. Members of the team will staff a TfSE stand alongside representatives from the other STBs during the industry event in Manchester.

5. The TfSE Podcast

5.1 Recent podcast episodes have covered our neighbouring STB partner, Transport East, and the challenges and opportunities within their region; the accessibility of the transport sector; and scheme development. Future podcasts planned include devolution and local government reorganisation, Healthy Streets, and buses.

6. MP engagement and public affairs

6.1 We are looking to reschedule a small number of MP meetings which were cancelled or postponed at the end of last year. In February, Cllr Glazier and Rupert Clubb are due to meet Bracknell MP Peter Swallow and we have followed up on interest from a number of other MPs in the region.

7. Delivering against our Communications and Engagement Plan

7.1 We continue to keep our communications and engagement activities under review following the priorities and objectives outlined in the Communications and Engagement Plan for 2024/25.

7.2 We have exceeded our podcast listens target for 2024/25. We will continue to produce monthly podcasts and seek new and varied transport topics to cover that will be of interest to our audience in 2025. If board members have any ideas for topics, then please get in touch.

7.3 Further progress has been made towards increasing our reach on social media to 2000 followers. Since December, the number of followers has increased by 2% on Facebook and 9% on LinkedIn, while the number of page impressions on LinkedIn has grown by 357%.

7.4 The success of our 'Your Voices' campaign, including over 1,500 responses and promotion from MPs and local councils across the TfSE region, has inspired the communications plan for our draft Transport Strategy. This has resulted in over 600 responses with a fortnight of the consultation still to go.

8. Staff news

8.1 We are in the process of replacing our Public Relations and Communications Assistant, who leaves in March. We will be advertising for the role in the next few weeks, aiming to fill this post as soon as possible.

9. Recommendations

9.1 The Partnership Board are recommended to comment on the engagement and communication activity that has been undertaken since the last Partnership Board meeting.

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