

Transport for the South East Partnership Board Meeting

Agenda

Monday 27 October 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 (representing BLTB)	Cllr Paul Fuller Isle of Wight Council	Cllr Peter Osborne 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
Vince Lucas Business Representative (co-chair Business Advisory group)	Gary Nolan Strategic Engagement Lead Transport for London	Cllr Matt Boughton Leader Tonbridge & Malling Borough Council (jointly representing District and Borough Councils)
Mark Potter Deputy Chair South Downs National Park Authority (Representative from Protected Landscapes)	Richard Leonard Network Planning Director National Highways (on behalf of Richard Leonard)	

Apologies:

Cllr Sophie Cox, Leader Worthing Borough Council, District and Borough Rep
Daniel Ruiz, Business Representative

Item		Who
1	Welcome and Apologies	Cllr Keith Glazier
2	Minutes from last meeting (p5-p16)	Cllr Keith Glazier
3	Declarations of interest	Cllr Keith Glazier
4	Statements from the public	Cllr Keith Glazier
For Decision		
5	Transport Strategy (p17-p128)	Mark Valleley
6	TfSE Regional Travel Survey (p129-p166)	Joshua Jiao
7	State of the Region Report (p167-p202)	Sarah Valentine
8	Intermodal Rail Freight Interchange Study (p203-p277)	Mark Valleley
9	Report of the Audit and Governance Committee (p278-p279)	Cllr Joy Dennis
10	Finance Update (p280-p283)	Keir Wilkins
11	Responses to consultations (p284-p297)	Rupert Clubb
For Information		
12	Analytical Framework Update (p298-p300)	Sarah Valentine
13	Business Advisory Group (p301-302)	Daniel Ruiz / Vince Lucas
14	SIP Refresh Update (p303-p305)	Sarah Valentine
15	Delivery of the Strategic Investment Plan (p306-p309)	Sarah Valentine
16	Technical Programme Update (p310-p387)	Mark Valleley
17	Centre of Excellence update (p388-395)	Emily Bailey
18	Advisory Panel and Transport Forum (p396-398)	Geoff French
19	Communications and Stakeholder engagement (p399-p400)	James Boyes
20	AOB	Cllr Keith Glazier

Restricted – *The item below will be held in private, in accordance with Paragraph 3 of Part 1 of Schedule 12A of the Local Government Act 1972.*

21	Future Status of Transport for the South East	Rupert Clubb
22	Date of Next Meeting Monday 2 February 2026, 14:00-17:00, London	Cllr Keith Glazier

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
Joshua Jiao	Transport for the South East
Emily Bailey	Transport for the South East
James Boyes	Transport for the South East
Alexander Baldwin-Smith	Transport for London
David Stempfer	Surrey County Council
Chris Maddocks	Reading Borough Council
Hayley Chivers	Portsmouth City Council
Natalie Wigman	Hampshire County Council
Pete Boustred	Southampton City Council
Peter Duggan	DfT
Stewart Chandler	Isle of Wight Council
Denise Tate	Tonbridge & Malling Council
Stuart Kistruck	Network Rail
Darryl Hemmings	West Sussex County Council
Alex Pringle	SDNPA
Thomas Cornwell	National Highways
Laura Wells	Brighton and Hove City Council
Joseph Ratcliffe	Kent County Council
Mark Breakthwick	Medway Council

TfSE Partnership Board
21 July 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, 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 Borough Council (<i>representing BLTB</i>)	Cllr Paul Fuller Isle of Wight 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	Cllr Joy Dennis Cabinet Member for Highways and Transport West Sussex County Council	Geoff French CBE Chair Transport Forum
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>)
Tom Cornwell National Highways <i>On behalf of Richard Leonard</i>	Stuart Kistruck Network Rail	Tom Cornwell National Highways

Apologies:

- Cllr Osborne, Kent
- Cllr Peter Candlish, Portsmouth
- Cllr Eamonn Keogh, Southampton
- Dave Hooper, Network Rail
- Richard Leonard, National Highways
- Daniel Ruiz, Business Representative
- Mark Potter, South Downs National Park Authority
- Dan Taylor, DfT

Officers attended:

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

- Emily Bailey, Transport for the South East
- Elle Jewell, Transport for the South East
- James Gleave, Transport for the South East

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 Osborne, Cllr Candlish, Cllr David Keogh, Dave Hooper, Richard Leonard, Daniel Ruiz, Mark Potter and Dan Taylor. 1.3 Rupert Clubb (RC) noted that the DfT had sent their apologies, however, they have provided an update on the recent LLM / MRN announcement: <i>As most of you will have seen, the recent road scheme announcement identified a number of schemes within the MRN/LLM programme that have been cleared to go forwards and a number of other schemes in the programme which are under review. The DfT MRN/LLM team will be in contact to set out the process for this review, which will in part be seeking to understand whether the schemes remain priorities for the local authority concerned. Further detail on the process for the review will be communicated by the team in due course and I suggest that LAs work with TfSE in order to help present schemes most effectively within the review. The MRN / LLM team will be happy to brief TfSE and local partners on how this process will work once it is finalised.</i> <i>We encourage local partners to continue to work with TfSE on the delivery of this year's business plan, also taking into account the impact of Local Government Reform and wider devolution in your areas. We will share more information on future planning in due course once internal business planning has concluded, understanding the need for clarity as part of this.</i>	
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. Governance	
5.1 RC introduced the item and requested nominations for Chair of TfSE for 2025/26. Cllr Keith Glazier was proposed, seconded and there being no further nominations was elected. 5.2 Cllr Glazier sought nominations for Vice-Chair of TfSE for 2025/26. Cllr Simon Curry, Medway was proposed, seconded and there being no further nominations was elected. 5.3 Cllr Glazier sought nominations for Chair of the Transport Forum for 2025/26. Geoff French was proposed, seconded and there being no further nominations was elected. 5.4 Cllr Glazier sought nominations for the Chair of the Audit and Governance Committee for 2025/26. Cllr Joy Dennis was proposed, seconded and there being no further nominations was elected. 5.5 Cllr Dennis sought nominations for membership of the Audit and Governance Committee. The Partnership Board agreed to the following membership: • Cllr Joy Dennis – Chair • Cllr Trevor Muten • Cllr Matt Furniss • Daniel Ruiz • Vince Lucas • Geoff French 5.6 The Partnership Board agreed to co-opt for 2025/26: the Chair of the Transport Forum; Business Advisory Group Representatives Vince Lucas and Daniel Ruiz; Mark Potter nominated by the National Parks and other protected Landscapes; two people nominated by district and borough authorities; Richard Leonard representative for National Highways, Dave Hooper representative for Network Rail and Gary Nolan representative for Transport for London. 5.7 The nominations for the two people nominated by district and borough authorities were confirmed as Cllr Sophie Cox and Cllr Matt Boughton. 5.8 The Board agreed to allocate voting rights of one vote each for the two Business Advisory Group representatives, the Chair of the Transport Forum and the nominated representatives of the district and borough authorities and the protected landscape. 5.9 The recommendations were agreed by the Partnership Board. RECOMMENDATION: The constituent members of the Partnership Board are recommended to: (1) Nominate and elect a Chair and Vice-Chair for the period of one year;	

(2) Agree to co-opt the following roles for a period of one year to the Partnership Board: a. The Chair of the Transport Forum b. Two people nominated collectively to represent business. c. A person nominated by the National Parks and other protected landscape designations; d. Two people nominated by the district and borough authorities; and e. A representative from National Highways, Network Rail and Transport for London. (3) Allocate voting rights of one vote each for the two Business Advisory Group representatives, the Chair of the Transport Forum and the nominated representatives of the district and borough authorities and the protected landscapes; (4) Appoint for a period of one year the Chair for the Transport Forum; (5) Appoint a Chair and agree membership of the Audit and Governance Committee for a period of one year; and (6) Note the request for members to return completed register of interest forms.	
6. Annual Report 2024/25	
6.1 Keir Wilkins (KW) set out the Annual Report format which is following the same as last years. 6.2 KW highlighted that the Audit and Governance Committee asked us to capture the local transport funding in our region, the figures broadly remained the same as last year. 6.3 The recommendation was agreed by the Partnership Board. RECOMMENDATION: The members of the Partnership Board are recommended to sign off the Annual Report 2024/25 and agree to publish it on the Transport for the South East website.	
7. Business Plan 2025/26	
7.1 KW set out the TfSE Business Plan for 2025/26, noting that the final finance carry forward figures have been included. 7.2 Cllr Simon Curry (SC) noted that the TfSE Business Plan identifies all the issues and priorities correctly and praised the value of TfSE's Business Plan in setting local plans. 7.3 Cllr Trevor Muten (TM) asked in relation to the Analytical Framework work whether Local Authorities will have access to the data? In response to this KW confirmed that the intention is we will develop data and models centrally, and it will be shared through the Centre of Excellence and be accessible to all TfSE's constituent authorities, free of charge. 7.4 The recommendation was agreed by the Partnership Board. RECOMMENDATION:	

The members of the Partnership Board are recommended to approve the updates to the TfSE's Business Plan for 2025/26, following the end of year carry forward figures for 2024/25.	
8. Transport Strategy	
8.1 Mark Valleley (MV) presented to the Partnership Board the recent feedback following the public consultation exercise and the proposed changes to the Draft Final Transport Strategy and its associated Integrated Sustainability Appraisal. 8.2 MV noted the rationale for the refresh, the extensive engagement that has taken place and the 2050 vision which is supported by the three goals that reflect the three pillars of sustainable development. 8.3 MV discussed the public consultation exercise: • 12-week public consultation ran from 10 December 2024 – 7 March 2025 • Briefing meetings with key stakeholders on request were held • Eight 'Strategy roadshows' were carried out around the region in February 2025. 8.4 MV shared the analysis of responses to the consultation, which saw a total of 866 responses with 111 being from organisations and 755 from individuals. MV discussed the key themes raised in the responses from key stakeholders and individuals. 8.5 MV highlighted the drafting changes to the Final Draft Transport Strategy with a number of specific drafting requests received seeking clarification, additions or deletions. Minor amendments were also requested to two of the maps. 8.6 MV set out the next steps for the Transport Strategy: • Isle of Wight, Hampshire County Council and Kent County Council – seeking agreement to the final version – August/September 2025. • Final Transport Strategy – presenting to the Partnership Board – 27 October 2025. • Submission of the Transport Strategy to Government – October 2025. • Ongoing review of TfSE's technical work programme to focus on Mission delivery. 8.7 The Partnership Board members raised the following points: • Cllr Paul Fuller – Pleased to see the IoW ferries as a long-term priority whilst noting its also short too with the island being reliant on the ferries. • Cllr Joy Dennis – queried the definition of a 'just transition' decarbonisation. In response to this MV explained it's about ensuring the journey to decarbonisation is fair and equitable to everyone. • Cllr Simon Curry – conscious that change happens quickly with Lower Thames Crossing now happening, the impact to Medway and North Kent and the publication of the decarbonisation strategy.	

- Cllr John Ennis – asked whether EV charging is a short or a long-term priority. In response to this MV explained is both, with a specific workstream on this working to support our constituent authorities with EV charging.
- Cllr Lulu Bowerman – in relation to the IoW ferries recently met with MP Caroline Dinenage in relation to water taxis – would make sense to link in with the IoW.
- Cllr Trevor Muten – raised the average age of respondents to the consultation and asked if any lessons learnt had been undertaken to engage with those under 25? In response to this MV confirmed that effort went into securing responses from younger people and we will continue to look at this for future consultations, as securing responses from younger people is a wider issue across local government.
- Vince Lucas – raised the bottlenecks around Kent in relation to Lower Thames Crossing – ensuring that schemes are not forgotten and needing to have solutions ready to go so that work is not disadvantaged by Lower Thames Crossing.
- Cllr Sophie Cox – welcomed the inclusion and integration mission.

8.8 RC thanked James Gleave for the work put into the creation of the Transport Strategy.

8.9 The recommendations were agreed by the Partnership Board.

RECOMMENDATIONS:

The members of the Partnership Board are recommended to:

- (1) Note the outcomes of the public consultation, as set out in the Consultation Report; and
- (2) Agree the proposed changes to the Transport Strategy and Integrated Sustainability Appraisal to reflect the feedback received in response to the public consultation.

9. Centre of Excellence Work Plan for 2025/26

9.1 Emily Bailey (EB) presented to the Partnership Board noting the progress made in developing and delivering the Centre of Excellence to date and to agree the work plan for 2025/26 and the eight priority support packages identified.

9.2 EB highlighted that the Centre of Excellence has celebrated its one year anniversary, the annual report highlights key statistics with over 290 users now signed up.

9.3 EB shared the eight priority support packages identified:

- AI in Transport Planning
- Modelling and forecasting
- Awareness of emerging technologies
- Network review, design and planning
- Understanding of national plans and policy
- Improving sustainability and delivering net zero
- Prioritisation of transport schemes
- Impacts of devolution and LGR on buses

9.4 The Partnership Board members raised the following points:

- Cllr Sophie Cox – Useful for District and Boroughs to be included in the webinar on network design and planning. EB confirmed they will be invited.
- Cllr Matt Furniss – asked in relation to measurable outcomes. In response to this EB confirmed that the capability scores can be shown across the skills not just compared to last year and measures what they want to see as an increase.
How are we not overlapping with our work and is there a reason for not allocating 50% of the budget?
In response to this EB confirmed that we work closely and sharing resources with organisations like the Bus Centre of Excellence. TfSE's Centre of Excellence will fill gaps in their work and deliver support that is specific to the South East. Not allocating funding allows us to have a contingency in case any new priority measures emerge, or we want to deepen work in a certain area, based on the feedback of Local Authorities.
- Cllr Trevor Muten – welcome the modelling forecasting and AI. In relation to transport planning and data sharing is this part of the focus to capture as good as data as possible?
In response to this EB explained data sharing is through the region, all using the same source – something for us to keep under review. Active travel, on a regional scale does this include pedestrians?
In response to this EB explained that the regional travel survey diary includes active travel, working with active travel England too to access the Centre of Excellence.
- Cllr Simon Curry – Bus forum in September will we discuss the work we do and scaling up / franchising?
In response to this EB confirmed that operators are invited which allows them the opportunity to comment, they were also invited to the enhanced partnerships forum too last year.
- Cllr Lulu Bowerman – thank you from the Hampshire officer team. Asked if Partnership Board members could have a session / training on a specific subject. EB confirmed we will explore this.
- Cllr Paul Fuller – Delivery is so important and enhancing our LTA capacity have we had any thoughts on this?
In response to this EB explained that all LTA were interviewed alongside a survey in April. Responses are being explored through the steering group.

9.5 The recommendations were agreed by the Partnership Board

RECOMMENDATIONS:

The members of the Partnership Board are recommended to:

- (1) Note the progress made in developing and delivering the Centre of Excellence to date as set out in the Centre of Excellence Annual Report 2024/25; and
- (2) Agree the Centre of Excellence Work Plan for 2025/26 and the eight priority support packages identified.

10. Strategic Investment Plan Refresh

10.1 Sarah Valentine (SV) presented to the Partnership Board advising on the methodology that is being proposed to update the Strategic Investment Plan. 10.2 SV provided an overview of the rationale for the refresh noting the changes since the first strategic investment plan. 10.3 SV highlighted the proposed targeted stakeholder engagement that would take place, noting that following the success of the transport strategy refresh Partnership Board Task and Finish group, it was proposed to set up a similar Member led group to provide strategic direction to the refreshed SIP. 10.4 SV explained the methodology and timeline to Partnership Board members, noting that it will begin in July 2025, and due to be complete May 2026 due to this being a light touch refresh. 10.5 The Partnership Board members raised the following points: • Cllr Trevor Muten raised a question regarding the proposal for a light touch ISA In response to this SV explained that at an outline proposal stage it is difficult to assess the exact impact a scheme may have, as for example, the exact habitat or environment impacted may not be known. Therefore, whilst it is good practice to undertake and ISA it will be light touch. Any individual schemes within the SIP that are subsequently taken forward will require their own assessment as they are developed. • Cllr Matt Furniss – queried the cost of the refresh In response to this SV explained the SIP (and the area studies that provided the underpinning evidence) cost around £2m. We now have a more developed Analytical Framework and increased capability in house, which we will use where we can, however we will still need support through our technical call off contract . 10.6 The recommendation was agreed by the Partnership Board. RECOMMENDATION: The members of the Partnership Board are recommended to consider and approve the methodology and plan for the periodic update of the SIP.	
11. Communications and Engagement Plan 2025/26	
11.1 KW provided an overview of the 2025/26 Communication and Engagement Plan for TfSE. 11.2 KW highlighted two key areas for communications and engagement this year. The first is articulating South East's unique identity and needs which are separate from London, making the case for investment, as the voice for strategic transport in the region. The second being the changes to devolution and LGR, and the need to engage with the new mayoral authorities, and all stakeholders, telling them the story of TfSE and how we can support them.	

11.3 The recommendation was agreed by the Partnership Board. RECOMMENDATIONS: The members of the Partnership Board are recommended to consider and approve the Communications and Engagement Plan 2025/26.	
12. Audit and Governance Committee Update	
12.1 Cllr Joy Dennis (JD) highlighted the recent meeting of the Committee who discussed the proposed workplans for the Centre of Excellence. The Committee also reviewed the Annual Report and provided feedback, changes were requested which have been updated. 12.2 JD highlighted the feedback given on the finance position for TfSE, a number of comments were made, the committee wanted to assure the partnership board that they will be monitoring this carefully. The committee made some serious points on the confidence ratings. 12.3 JD explained a healthy discussion took place on the risk register, with feedback around the devolution risk and the effects on TfSE and its role, these have been reflected in the risk register presented to the partnership board. 12.4 The recommendation was agreed by the Partnership Board. 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.	
13. Financial Update	
13.1 KW set out the financial position, noting the final carry forward figures for 2024/25. 13.4 The recommendations were agreed by the Partnership Board. RECOMMENDATIONS: The Members of the Partnership Board are recommended to: (1) Note the final budget for 2025/26, following the final carry forward figure for 2024/25; and (2) Not the financial update to the end of Quarter 1 for 2025/26.	
14. Responses to Consultations	
14.1 RC provided an overview of the five consultation responses we have responded to. 14.4 The recommendations were agreed by the Partnership Board. RECOMMENDATION: The members of the Partnership Board are recommended to: (1) Agree the draft Letter of Support for Kent Sussex Connect; (2) Agree the draft response to East Sussex Coast and Marshlink Strategic Study's request for comment;	

(3) Agree the draft response to Department for Transport Consultation “A Railway Fit for Britain’s Future” (4) Agree the draft response to the call for evidence from the Chartered Institute of Highways and Transportation concerning the challenges being faced with the roll out of Electric Vehicle Charging Infrastructure; and (5) Agree the draft response to the consultation from East Sussex County Council on both their Freight Strategy and Rail Strategy.	
15. Business Advisory Group	
15.1 Vince Lucas (VL) explained that the BAG recently met on 18 June, where the group heard updates on the work TfSE have been undertaking. The BAG then had the opportunity to share their opportunities and challenges being faced by business and the impact on transport. 15.2 VL highlighted the key areas of work that the BAG has undertaken: • Case study on hydrogen buses • Supporting the refresh economic study for the western rail link to Heathrow • Looking at the economics of IoW ferry 15.3 VL provided an overview of the first BAG summit which took place on Wednesday 9 July. The summit was attended by 50 various stakeholders and partnership board members along with industry experts. The summit sought views on tackling three key challenges that were identified by the BAG: • Rural transport • Energy availability • Access to International Connectivity 15.4 The Partnership Board members raised the following points: • Cllr Matt Boughton – curious about the initial output from the summit – a clear identity across the south east. Asked how much enthusiasm from business to help with the strategic work and in terms of making the case? In response to this VL explained that business enthusiasm is there and that the South East has a lot unique characteristics, in particular that we are the UK’s international gateway and we can grow the UK’s economy, by investing in the South East. • Cllr Paul Fuller – How and what engagement is there with the IoW ferries? In response to this VL confirmed that co-chair Daniel Ruiz is handling this directly. • Cllr Joy Dennis – attended the event, saw business representatives enjoying themselves networking and the discussion. The need for a voice came through clearly. • Cllr Simon Curry – For future events could we consider changing venue around the region. VL confirmed that we would explore this. • Cllr Matt Furniss – asked if the attendees of the summit could be shared. VL noted the challenges due to data protection legislation but said we would share what we were able to with Surrey.	

15.5 The recommendation was agreed by the Partnership Board.	
RECOMMENDATION: The members of the Partnership Board are recommended to review and comment on the recent work of the Business Advisory Group.	
16. Advisory Panel and Transport Forum Update	
16.1 Geoff French (GF) provided an overview of the recent meetings of the Advisory Panel and Transport Forum.	
16.2 The recommendation was agreed by the Partnership Board.	
RECOMMENDATION: The members of the Partnership Board are recommended to note the recent work of the Transport Forum and Advisory Panel.	
17. Delivery of the Strategic Investment Plan	
17.1 The paper was taken as read.	
17.2 The recommendation was agreed by the Partnership Board.	
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.	
18. Analytical Framework	
18.1 The paper was taken as read.	
18.2 The recommendation was agreed by the Partnership Board.	
RECOMMENDATION: The members of the Partnership Board are recommended to comment on the progress with the development on analytical framework.	
19. Technical Programme Progress Update	
19.1 The paper was taken as read.	
19.2 The recommendations were agreed by the Partnership Board.	
RECOMMENDATIONS: The members of the Partnership Board are recommended to: (1) Comment on the progress with the work to implement the Electric Vehicle Charging Infrastructure Strategy; (2) Comment on the progress with the Freight, Logistics, and Gateways Strategy (3) Comment on the progress with the work on rail; (4) Comment on the progress with the work on active travel; (5) Comment on the progress with the work on future mobility; and (6) Comment on the progress with the work on decarbonisation.	

20. Communications and Stakeholder Engagement update	
20.1 The paper was taken as read.	
20.2 The recommendation was agreed by the Partnership Board	
RECOMMENDATION: The members of the Partnership Board are recommended to comment on the comms and engagement activity that has been undertaken since the last Board meeting.	
21. AOB	
21.1 No matters were raised.	
22. Date of Next Meeting	
19.1 KG noted that the next meeting will take place Monday October 27 th 14:00-17:00, ICE London.	

Report to: Partnership Board –Transport for the South East

Date of meeting: 27 October 2025

By: Chief Officer, Transport for the South East

Title of report: Transport Strategy Refresh

Purpose of report: To agree the final version of the Transport Strategy for the South East

RECOMMENDATIONS:

The Members of the Partnership Board are recommended to:

- (1) Note the outcomes of the approval processes pursued by the Isle of Wight Council, Kent County Council, Portsmouth City Council, Hampshire County Council to agree the transport strategy, and;**
 - (2) Agree the final version of the transport strategy and integrated sustainability appraisal**
-

1. Introduction

1.1 On 21 July 2025, a draft final version of the Transport Strategy for the South East and its accompanying integrated sustainability appraisal were presented to the Partnership Board. Members of the Board agreed to a number of proposed changes presented at that meeting. Following that meeting, the Isle of Wight Council, Kent County Council, Portsmouth City Council and Hampshire County Council have each sought the formal agreement of their authorities before giving final approval to the transport strategy and its supporting integrated sustainability appraisal. The purpose of this report is to seek approval for the final version of the transport strategy and integrated sustainability appraisal.

2. Constituent authority approvals

2.1 As set out in the report to the Board in July 2025, the comments received from the constituent authorities that submitted responses during the consultation period were incorporated into the final version of the strategy, as appropriate. In addition, the Isle of Wight Council, Kent County Council, Portsmouth City Council and Hampshire County Council wished to give their authority's approval to the final version of the strategy.

2.2 On 12 August 2025, the Isle of Wight Council's Economy, Regeneration, Transport and Infrastructure Committee approved the strategy. On 9 September 2025, a copy of the strategy was presented to a meeting of Kent County Council's Environment and Transport Cabinet Committee who agreed that a recommendation be made to the Leader to endorse the strategy. However, at the time of dispatching this report, the Leader of Kent County Council is still to take the decision and once taken it will still need to follow the call in protocol for scrutiny. On 18 September 2025, the Cabinet Member for Transport at Portsmouth City Council agreed the strategy. The Strategy was agreed by the Hampshire County Council's Cabinet on 23 September 2025 and by their full County Council on 2 October 2025.

Therefore, three of these four constituent authorities have approved the final version of the Strategy. A verbal update will be given at the meeting on the status of Kent County Council's decision-making process for adopting TfSE's Transport Strategy.

3. Amendments to the draft final transport strategy

3.1 Following the Board meeting in July, the strategy document has been intensively proof-read which has identified the need for additional minor corrections to be made. The minor corrections that have been made do not alter its substance, intent, or overall conclusions in any material respect. They have been reviewed and approved by the Lead Officer and the Chair of the Board.

3.2 A final version of the transport strategy document is contained in Appendix 1 and the Members of the Partnership Board are recommended to agree this. The strategy is accompanied by an integrated sustainability appraisal that was agreed at the Partnership Board meeting in July 2025. No further changes have been made to this following that meeting. A high-level summary of the transport strategy has also been produced for use during communication and engagement activities.

3.3 Members should note that agreement to the strategy does not place an obligation on individual authorities, who will develop their LTPs to reflect local circumstances. However, it does set out the collective regional ambition to allow the South East to maximise sustainable growth and GVA additionality and will form our Region's transport advice to the Secretary of State.

4. Next steps

4.1 Should the Partnership Board agree the transport strategy, the intention is to submit it to central government. Further information about the publicity campaign plan for the autumn period to support the strategy's finalisation is set out in the Communications Item.

4.2 Preliminary internal work has been undertaken to explore how TfSE's future technical work programme could be realigned to more closely support the delivery of the five missions set out in the Transport Strategy. The outcomes of this work will be used to help inform the development of next year's Business Plan.

5. Conclusions and recommendations

5.1 Following the Partnership Board meeting in July 2025, four of TfSE's constituent authorities have been through a process to agree the final version of the TfSE Transport Strategy for the South East. As part of the process of producing the final published version of the strategy, a number of minor corrections have been made that have not affected its substance, intent, or overall conclusions in any material respect. The Partnership Board are therefore recommended to agree the transport strategy and integrated sustainability appraisal, prior to its submission to government.

RUPERT CLUBB

Chief Officer

Transport for the South East

Contact Officer: Mark Valleley

Tel. No. 07720 -040787

Email: mark.valleley@transportforthesoutheast.org.uk

Transport Strategy 2025



Foreword



**Cllr Keith Glazier
OBE**

Chair, TfSE
Leader, East Sussex
County Council

We know that transport is integral to how we live, work, develop and enjoy the place we live in. It has never been more important to create a South East where transport enables and empowers local people. That's why I am proud to present this new Transport Strategy for the South East.

This strategy sets out our partnership's shared vision for the South East, which lays out how a better integrated and more sustainable transport network across our region can deliver a higher quality of life for everyone who lives, works, has a business, or visits the South East.

The world has changed since we adopted the first Transport Strategy in 2020. The COVID-19 pandemic legacy has shaped how we work and travel in ways we could have never foreseen. Businesses have had to adjust to new trading arrangements with international markets, especially through our major international ports and airports.

Government policy has changed significantly. A variety of national transport strategies and documents have been published on everything from rail to buses and active travel. There have also been announcements in other related policy areas such as planning, climate change, and economic development.

The publication of *UK Infrastructure: A 10 Year Strategy* establishes a new framework for the delivery of nationally significant infrastructure projects and commits to speeding up delivery. Our strategy complements this approach by identifying the priority outcomes we are seeking to achieve.

We welcome the development of the Integrated National Transport Strategy, which seeks to bring coherence across transport modes and regions. Our own strategy will support and complement this national framework by ensuring the South East's priorities are clearly articulated and grounded in strong evidence.

Transport for the South East (TfSE) itself has grown as an organisation during this time. We have developed a Strategic Investment Plan (SIP), setting out our priorities for transport infrastructure investment, as well as strategies on Future Mobility, Electric Vehicle Charging Infrastructure and Active Travel. We have developed our in-house analytical expertise and launched our Centre of Excellence to build the capability of our local transport authorities.

Throughout all of this, one thing has remained constant – the need for continued, sustainable investment in the South East's transport infrastructure and services in order to improve people's lives, support businesses and tackle climate change through our 2050 vision.

Foreword

We have co-created this strategy with our partners based around the delivery of five missions which will best address the key challenges the region faces and have the biggest impact.

These missions are:

- ▶ Improving **strategic connectivity** between our major urban areas and with international gateways, especially by public transport, which is crucial for economic growth.
- ▶ Improving the **resilience** of the transport network, so that it offers reliable journeys and can respond to current and future risks to its operation.
- ▶ Tackling the **inclusion and integration** challenges facing our communities, such as transport-related social exclusion and providing a joined-up transport network to enhance connectivity and improve people's lives.
- ▶ **Decarbonising** our surface transport network, which is essential if we are to meet our climate change goals.
- ▶ Achieving **sustainable growth** through planned housing and employment growth which has sustainable transport at its heart.

We are under no illusions as to the scale of the change that is needed to achieve these missions. We need to think big and deliver at pace. This requires new thinking, the identification of new funding sources and the sharing of best practice to unlock the delivery challenges ahead.

We will work with national and local government and our key partners, to deliver our missions as we strive towards achieving the economic, social and environmental goals embodied in our 2050 vision.

The English Devolution and Community Empowerment Bill poses both challenges and opportunities to the delivery of this strategy, especially considering that two areas in the South East - Sussex and Brighton and Hampshire and the Solent - are part of the Devolution Priority Programme. This strategy provides a basis on which TfSE can work together with partners, including new strategic authorities and councils to deliver on shared priorities.

This strategy has been shaped through extensive consultation, including engagement with socially excluded groups, over 1,500 public survey responses, and detailed input from our Transport Forum, expert working groups, and local leaders. We are grateful to everyone who contributed their time and insights. Your feedback has been invaluable in helping us refine our approach and ensure this strategy meets the region's needs.

If we get this right, the prize is huge – emitting less carbon, creating more sustainable and healthy communities, growing businesses, and increased prosperity across the region.

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Executive Summary



Introduction

This Transport Strategy for South East England, developed by Transport for the South East (TfSE), presents an ambitious vision for the region as a global leader in sustainable prosperity and quality of life.

With its vital economy, rich heritage, and proximity to London and mainland Europe, the South East plays a key role in connecting Britain to the world. This strategy seeks to enhance the region's strategic connectivity, resilience, integration, decarbonisation, and sustainable growth.

TfSE, as the Sub-national Transport Body for the South East, unites 16 local transport authorities and partners to deliver a cohesive, evidence-based approach to transport.

Established in 2017, TfSE's mission is to grow the South East's economy through a safe, sustainable, and integrated transport system that enhances residents' quality of life and protects the environment. TfSE's governance and regional expertise allows it to advocate effectively for the South East, aligning transport initiatives with local and national priorities.

Since the first Transport Strategy in 2020, the context has evolved significantly. National and local policy changes, intensified decarbonisation efforts, post-Brexit trade dynamics, and shifts in travel behaviour due to the pandemic all present new challenges. Additionally, TfSE's expanded evidence base has provided critical insights into the region's transport needs, informing this strategy's updated priorities.

Key regional challenges underscore the case for action. Rising congestion, carbon emissions, transport-related social exclusion, and housing affordability issues demand a targeted, mission-driven approach. This refreshed strategy outlines coherent "missions" that provide a route map to achieve the region's vision, delivering significant value to the South East's economy and quality of life.

This strategy focuses on areas needing urgent action, where TfSE is uniquely positioned to drive change. Recognising financial constraints, TfSE's approach emphasises practical, achievable solutions, aiming to maximise the impact of available resources. Developed through rigorous evidence gathering and stakeholder engagement, this strategy presents a framework for action to meet the region's most pressing transport challenges.

In addition to the strategy, an Integrated Sustainability Appraisal and Habitats Regulations Assessment Screening Statement have been prepared to assess the strategy's impact on sustainability goals, including biodiversity, health, and access equity.

Vision and Goals

Our vision is for the South East to offer the highest quality of life for all and be a global leader in achieving sustainable, net zero carbon growth.

To achieve this, we will develop a resilient, reliable, and inclusive transport network that enables seamless journeys and empowers residents, businesses, and visitors to make sustainable choices.

We will deliver this vision by driving strategic investment and forging partnerships that deliver sustainable transport, integrated services, digital connectivity, clean energy, and environmental enhancement.

Our vision is supported by three goals that mirror the three pillars of sustainable development:

Economic Goal

Improve productivity and attract investment to grow our economy in a way that is sustainable, inclusive, and resilient.

Social Goal

Improve health, safety, wellbeing, quality of life, and access to opportunities for everyone.

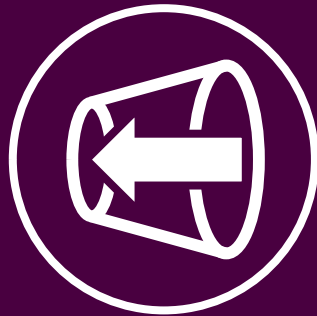
Environmental Goal

Protect and enhance the South East's unique natural and historic environment, while supporting a just transition to net zero.

Our strategy is built on **six principles** that guide us toward our vision and goals. These principles have been applied across many aspects of this strategy and help us stay focused on delivering the best possible outcomes for the South East. These principles are outlined on the following page.

Vision and Validate

Instead of planning based on current travel trends, this approach envisions a desired future and creates the transport system to achieve it, focusing on long-term sustainability and resilience.



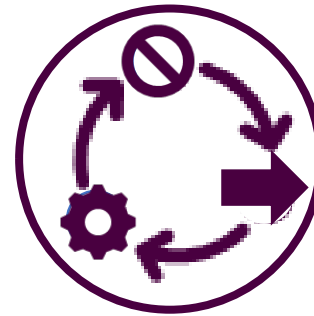
User Hierarchy

By prioritising pedestrians, cyclists, and public transport over cars, this principle promotes safer, more sustainable urban environments by designing infrastructure to reflect these priorities.



Triple Access Planning

This principle expands accessibility by considering not only physical transport but also digital and social factors, ensuring a more inclusive and connected transport system.



Avoid – Shift – Improve

A strategy to reduce transport carbon emissions by avoiding unnecessary travel, shifting to lower-carbon transport modes, and improving the efficiency of remaining high-carbon modes.

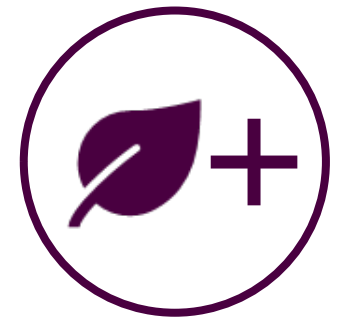
Movement and Place

Roads and streets are designed not only for efficient transport but also to enhance the surrounding areas, balancing the needs of movement with creating vibrant, liveable spaces.



Environmental Net Gain

New transport developments should leave the environment better off than before by enhancing biodiversity, using sustainable design, and integrating green solutions into infrastructure projects.



Missions

TfSE has prioritised five missions to drive progress towards its vision. Each mission serves as a clear call to action, emphasising tangible outcomes, setting direction, and aligning with national and local priorities.

The missions have been carefully chosen to address key areas where the South East risks lagging behind without decisive action, focusing on issues where TfSE can play a strategic, impactful role. Each mission follows a structured route map that clarifies the path forward. These route maps contain:

- ▶ **Mission Statement:** Outlining the core aim and urgency for each mission.
- ▶ **Desired Outcomes:** Defining tangible targets to measure success.
- ▶ **Context:** Outlining why each mission is important to the South East and has been selected for this strategy.
- ▶ **Short and Long Term Priorities:** Highlighting key interventions to achieve the desired results, including schemes from the SIP.
- ▶ **Supporting Context:** Providing detailed challenges, theories of change, and cross-references to SIP indicators for monitoring and evaluation.

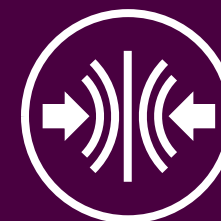
This approach ensures that each mission is robust and adaptable to different scenarios, enabling TfSE and its partners to respond effectively to emerging needs while driving meaningful progress across the region's most pressing transport challenges.

The missions are



**Strategic
Connectivity**

Resilience



**Inclusion and
Integration**

Decarbonisation



**Sustainable
Growth**

Strategic Connectivity Mission



Mission Statement

This mission aims to boost connectivity in the South East by enhancing strategic regional corridors to ensure all communities and businesses have access to high-quality, convenient and resilient transport links and key services, for people and goods.

Success will mean that key towns, cities, and international gateways are as accessible by public transport as they are by car, with rail freight becoming as competitive as long-distance road freight.

Outcomes

The core goal is to increase the modal share of both passenger and freight journeys using sustainable travel options on strategic corridors connecting the South East's major economic centres and international gateways.

Achieving this modal shift will reduce congestion, improve air quality, enhance safety, and support economic growth, particularly in rural and coastal areas. Strengthened demand for public transport will place bus and rail services on a more sustainable financial footing, while making rail and bus travel as convenient and competitive as car journeys.

Short Term Priorities

The immediate focus is on improving the existing network to better serve both passengers and freight by:

- ▶ Enhancing incentives for long-distance public transport by optimising fares, ticketing, and on-board amenities.
- ▶ Refining timetables to support fast-growing markets like leisure travel and rescheduling maintenance to reduce disruption.
- ▶ Reinstating international rail services from Ebbsfleet and/or Ashford to relieve capacity at St Pancras.
- ▶ Providing adequate rail capacity and connectivity to support growth at Gatwick and Southampton airports.
- ▶ Safeguarding critical areas and aligning planning policies to enable future improvements.

Long Term Priorities

In the longer term, efforts will focus on major upgrades and expansions to address bottlenecks and improve connectivity by:

- ▶ Upgrading the South coast's highway and rail corridors between Brighton and Southampton to strengthen economic ties between the region's two largest built-up areas.
- ▶ Reducing journey times between London and "left-behind" coastal communities
- ▶ Enhancing ferry access to islands, including the Isle of Wight.
- ▶ Strengthening freight corridors from Southampton and Channel Ports to the Midlands and North.
- ▶ Developing new rail connections to international gateways, including links to Heathrow and Gatwick.
- ▶ Reviewing regional rail connectivity to leverage opportunities presented by the opening of Old Oak Common and HS2.



Mission Statement

This mission focuses on safeguarding and enhancing the resilience of the South East's transport network to ensure reliable and smooth journeys for all users.

Success will mean a transport system that has the capacity and agility to manage, absorb, and recover from major disruptions quickly – including disruption arising from associated power and digital networks.

Outcomes

The primary goal is to reduce the effects of disruption across the strategic transport network – from extreme weather, planned works, or infrastructure failure – including on roads, railways, and critical assets such as bridges. Reliable and predictable journeys are essential for user confidence and economic productivity. A resilient network reduces the risk of failure, lowers long-term costs, and ensures essential services and goods keep flowing, even during periods of disruption.

A resilient network that is well-maintained reduces long-term costs for both users and the government. By focusing on resilience, resources can be reallocated to further network improvements, fostering economic growth and creating a cost-effective system for all stakeholders.

Short Term Priorities

Immediate efforts will strengthen the current network's resilience against both planned and unplanned disruptions by:

- ▶ Evaluating the economic impact of road disruptions and seeking sustainable funding to enhance maintenance.
- ▶ Establishing a long-term funding pipeline for infrastructure renewals.
- ▶ Strategically planning for future risks – including climate, land use, and technology – to ensure the network can anticipate and adapt to potential threats.
- ▶ Advocating for consistent funding for critical maintenance and preventative projects.
- ▶ Coordinating with utility providers on roadworks planning to complete essential maintenance with minimal disruption.

Long Term Priorities

In the longer term, efforts will focus on major upgrades and expansions to address bottlenecks and improve connectivity by:

- ▶ Reducing bottlenecks in key areas like Croydon and Woking to improve service reliability on major rail corridors.
- ▶ Developing secondary corridors, such as the Uckfield – Lewes line, to offer alternative routes and ensure continuous connectivity.
- ▶ Implementing the Kent Bifurcation Strategy – including improving Operation Brock and Operation Stack to relieve pressure on existing Thames crossings and strengthen strategic connectivity and resilience between Channel ports and the M25.
- ▶ Addressing pinch points on highways to improve flow for all users, including buses, and making key infrastructure more resilient to future risks.

Inclusion and Integration Mission



Mission Statement

This mission aims to create an inclusive, affordable, and integrated transport network across the South East, providing safe, secure, and seamless door-to-door connectivity for everyone.

Success will mean that all residents can travel affordably, comfortably, and confidently, with high satisfaction across diverse user groups.

Outcomes

The mission's core goal is a transport system that is accessible, equitable, and responsive to the needs of all residents – particularly those most at risk of exclusion. Key outcomes include:

- ▶ Reduced Transport Related Social Exclusion, especially in rural and coastal areas.
- ▶ Higher satisfaction across all user groups, with a focus on accessibility and comfort.
- ▶ A network that is inclusive and safe for people with mobility and sensory needs.
- ▶ Improved safety and personal security, including progress toward "Vision Zero".
- ▶ Better public health, enabled by increased active travel and cleaner air.
- ▶ Reduced severance and improved public realm, supporting liveable neighbourhoods.
- ▶ A lower proportion of household income spent on housing and transport.

Infrastructure Priorities

Delivering these outcomes will require targeted infrastructure upgrades, with priorities including:

- ▶ Designing infrastructure using inclusive design principles that cater to socially excluded groups, enhancing accessibility for those with disabilities and limited mobility through improved lighting, wayfinding, and public spaces.
- ▶ Improving connectivity in areas at risk of social exclusion, focusing on North and East Kent and coastal East Sussex to ensure that residents have reliable access to key services.
- ▶ Upgrading interchanges and step-free access at transport hubs, facilitating smooth connections and enhancing comfort with better signage, seating, and safe, comfortable waiting environments.

Fares, Ticketing, and Service Priorities

Interventions to improve affordability and accessibility include:

- ▶ Delivering affordable fares and concessions for low-income residents, students, the elderly, and other vulnerable groups.
- ▶ Improving fares and ticketing by simplifying journeys and lowering costs with a unified ticketing structure across modal and institutional boundaries.
- ▶ Delivering socially necessary transport services (potentially demand responsive) to connect isolated communities with essential services.
- ▶ Delivering Bus Service Improvement Plans (BSIPs) and exploring models like franchising to meet community needs.
- ▶ Enhancing connectivity to islands and peninsulas, particularly the Solent and Medway areas.

Decarbonisation Mission



Mission Statement

This mission supports the South East's transition to net zero by 2050 by enabling the shift to cleaner transport, promoting sustainable travel choices, and adopting new technologies that reduce emissions and improve quality of life in a way that is affordable, fair, and accessible to all.

Outcomes

The goal of this mission is to help the South East make meaningful progress toward decarbonising transport, in line with national policy and public expectations. This includes ensuring the vast majority of surface transport trips made across the South East are net zero emission by 2050, while not exceeding our carbon budgets for surface transport by the same date.

Another key goal in achieving the transition to cleaner transport is making services affordable, fair, and accessible, ensuring no communities are left behind.

Key outcomes include:

- ▶ A complete shift to zero-emission vehicles, supported by national and local targets.
- ▶ Increased use of sustainable modes like walking, cycling, bus, and rail, especially for short and medium-length trips.
- ▶ Decarbonisation of freight, including mode shift to rail and adoption of clean fuels and logistics.
- ▶ Reduced reliance on fossil fuels, with transport emissions aligning with the region's carbon budget.
- ▶ A fair and affordable transition that benefits all communities and supports green jobs and investment.

Short Term Priorities

We will accelerate the transition to low-carbon transport by:

- ▶ Rolling out EV charging infrastructure to support rapid EV adoption.
- ▶ Supporting uptake and recycling of cleaner vehicles and batteries.
- ▶ Making public transport more affordable and appealing, especially buses.
- ▶ Helping operators transition to zero-emission fleets.
- ▶ Expanding walking, wheeling, and cycling routes.
- ▶ Promoting liveable neighbourhoods that reduce car dependency.
- ▶ Addressing affordability barriers to low-emission transport.

Long Term Priorities

We will solidify the transition to a zero-emission system by:

- ▶ Decarbonising rail through electrification and clean fuel technologies.
- ▶ Developing new rail and mass transit schemes to support modal shift.
- ▶ Ensuring power networks are clean, resilient, and ready for transport electrification.
- ▶ Reducing embodied carbon in transport infrastructure.
- ▶ Exploring fair, future-ready approaches to road user charging.
- ▶ Supporting alternative fuels for sectors harder to electrify, such as aviation and freight.

Sustainable Growth Mission



Mission Statement

This mission aims to champion transport interventions that unlock investment, enable sustainable growth, and create healthy, vibrant, well-connected communities in the South East.

Outcomes

The mission's core objective is to support sustainable population and economic growth by ensuring that transport infrastructure aligns with major developments, particularly in public transport and active travel.

The desired outcomes include:

- ▶ Provision of high-quality public transport and active travel networks to support major developments.
- ▶ Improved access to key services and employment within a 30-minute journey by sustainable modes.
- ▶ Increased number of new homes located close to frequent, reliable public transport, reducing levels of car dependence.
- ▶ Integration of urban design features that promote physical activity, public health, and inclusive access.
- ▶ Creation of vibrant, well-connected communities with maintained access for those who need to drive.

Integrated Land Use Priorities

Achieving sustainable growth requires integrated land use and transport planning, alongside effective funding mechanisms by:

- ▶ Focusing development in areas with planned or existing transport links, including new towns, urban extensions, regenerated brownfield sites, and mixed-use communities.
- ▶ Aligning housing and transport planning by coordinating efforts across authorities.

Transport Intervention Priorities

The mission also prioritises essential transport projects to support sustainable growth by:

- ▶ Expanding concessionary fare schemes to make public transport more affordable.
- ▶ Developing mass transit and Bus Rapid Transit systems in major centres.
- ▶ Upgrading suburban rail services, particularly in the Solent and Sussex Coast.
- ▶ Embedding walking and cycling infrastructure into new developments and local plans.

Enablers

Achieving these goals requires sustainable funding sources and regulatory support, including:

- ▶ Using funding tools like value capture and road user charging to forward-fund transport projects.
- ▶ Implementing fair demand management tools, such as workplace parking levies or clean air zones.
- ▶ Strengthening local planning capacity to ensure timely, effective decisions.
- ▶ Aligning with emerging planning reforms to support environmental net gain alongside growth.

Delivery

TfSE is committed to turning its ambitious vision for the South East into action, building on the foundation provided by its Strategic Investment Plan (SIP) and Delivery Action Plan.

TfSE is committed to keeping its strategy relevant and effective. Following this refreshed strategy, the SIP will be updated to align with the new missions. TfSE also plans to refresh the Transport Strategy every five years, ensuring its approach remains adaptable to evolving challenges and opportunities.

TfSE recognises the successful delivery of this strategy relies on collaboration across various stakeholders. TfSE will therefore drive policy prioritisation, stakeholder engagement, scheme development, and advocacy, while supporting local partners to build capacity in preparation for evolving governance structures, including the formation of strategic authorities.

Local transport authorities will also play a crucial role, especially in delivering highway and public transport projects, while national infrastructure managers (Network Rail and National Highways) will lead major interventions on the railway and strategic road network. Private sector entities, including bus and rail operators, are also essential partners in delivering services and innovations.

Delivering meaningful change requires overcoming significant challenges, including financial constraints, fragmented resources, and increasing demand for public services. TfSE and its partners must embrace innovative solutions such as "beneficiary pays" models, greater devolution, and rail reform to secure sustainable funding. Where demand management tools are proposed, TfSE will work with partners to ensure these are fair and proportionate. Collaboration across all levels of government, transport operators, and the private sector is essential to achieve the region's goals.

TfSE will support its partners with tools such as scheme development funding, the Centre of Excellence, and its enhanced Analytical Framework, which underpins all major decisions from decarbonisation to freight planning. Regular updates to the Delivery Action Plan and the biennial State of the Region Report will ensure its strategies remain adaptable and focused on delivering tangible benefits.

Through this approach, TfSE is working to create a resilient, inclusive, and sustainable transport network – unlocking economic growth, enhancing accessibility, and tackling climate change for the benefit of the South East and its communities.





Introduction

This is the Transport Strategy for South East England, prepared by Transport for the South East (TfSE), the region's Sub-national Transport Body.

This first chapter of the strategy outlines the context in which this strategy has been developed.

The South East of England is Britain's gateway to the world. Its dynamic economy, scenic landscapes, rich cultural heritage, and proximity to London and mainland Europe make it one of the most prosperous and desirable regions for living, working, and visiting in Britain.

This strategy outlines a vision for the South East to be recognised globally for achieving sustainable prosperity and the highest quality of life. It builds on the previous strategy that was published in 2020 and is underpinned by over seven years' extensive technical work.

Its mission-driven approach sets a route map for achieving this vision through improving strategic connectivity, strengthening resilience, enhancing integration, decarbonising the transport system, and unlocking sustainable growth.

Our role

TfSE brings together 16 local transport authorities, as well as representatives from district and borough councils, protected landscapes, business representatives, National Highways, Network Rail and Transport for London, harnessing a wide range of local and regional expertise.

Established in 2017, TfSE's mission is to grow the South East's economy by delivering a safe, sustainable, and integrated transport system.

This system aims to boost productivity and competitiveness, enhance the quality of life for residents, and protect the region's natural and built environment. TfSE aspires to transform the quality of door-to-door journeys for residents, businesses, and visitors across the South East.

As a strategic body, TfSE plays a crucial role in adding value by ensuring that funding and strategic decisions about transport in the South East are informed by local knowledge and priorities.

Its comprehensive governance structure, combining political leadership, technical expertise, and stakeholder engagement, ensures that TfSE is well-placed to deliver for the region. This structure enables it to speak with one voice on behalf of the region, making a compelling case for investment.

TfSE members and partners



Our Region



7.8m
Residents
(2022)



3.8m
Jobs (2022)



£230bn
GVA per annum



2 National
Parks

7 National
Landscapes

Key to map

1. Reading
2. Wokingham
3. Windsor and Maidenhead
4. Bracknell Forest
5. Southampton
6. Portsmouth

- Key port
- International rail stations
- Key airport



18%

UK freight tonnage served
by South East ports,
excluding London (2023)



13m

Ferry passengers
(2023)



18m

Channel tunnel
passengers (2023)



381
Rail stations



327
Miles of
motorway



40m

Gatwick Airport
passengers (2023)

Changing context of the South East

Since its adoption in 2020, TfSE's first Transport Strategy has provided an ambitious vision for the region's future. However, since its publication, the context within which the strategy operates has changed. These changes broadly fall into three groups.

1 The first group relates to changes in national and local policies

There have been major shifts in national and local policies that affect transport. New policies such as the [Transport Decarbonisation Plan](#), the [Bus Back Better Strategy](#), and the [Williams-Shapps Plan for Rail](#) have introduced new priorities and objectives that need to be integrated into the strategy. More recently, the government has outlined [six missions](#) for the country, underpinned by [five strategic priorities](#) for the Secretary of State for Transport, which place significant emphasis on rail reform, sustainable economic growth, and transforming local transport. Significant reforms to the planning system and devolution are also being prioritised.

The urgency of decarbonising the transport sector has intensified, with both national and local governments placing increased emphasis on reducing carbon emissions. [While UK greenhouse gas emissions have halved since 1990, transport emissions have only declined 15%](#). This strategy therefore seeks to support the South East's the transition to net zero.

The ongoing legacy of new trading arrangements between the UK and EU, particularly its effects on freight movements through the region's ports and airports, has introduced new challenges that were not fully anticipated in the 2020 strategy. For example, in 2023 [trade through the Port of Dover was around 20% lower](#) compared to 2019 (UK wide, the comparable figure showed a 10% reduction). This strategy addresses these economic shifts and ensures the region can adapt to new trade patterns.

At the local level, **many authorities have adopted new Local Transport Plans and Local Plans**, some of which introduce new goals and infrastructure needs that should be reflected in this strategy. The strategy supports stronger alignment with these local policies, enhancing collaboration across the South East.

2

The second group relates to changes in travel behaviour, resulting from the pandemic

The COVID-19 pandemic has had profound and lasting impacts on travel behaviour and transport demand.

Remote working, changes in commuting patterns, and shifts in the use of public transport versus private vehicles all demand a reassessment of the strategy's assumptions and priorities. Despite some recovery, some train operators in the South East are carrying [30% fewer passengers](#) today than before the pandemic. These post-pandemic realities must be fully considered to ensure the strategy is future-proof.

The financial health of the bus and rail industries has deteriorated since 2020.

In 2022/23, the UK rail industry collected [30% less revenue](#) than in 2018/19, despite rising costs and inflation. Less money through fares, made worse by the pandemic and rising costs of running services, have led to cuts in services, leaving many communities with fewer public transport options.

Financial and capacity constraints in government funding have been made worse as inflation has put further pressure on public finances. With construction inflation reportedly [exceeding 10%](#) in 2022, it has become much harder for governments at all levels to invest in their priorities.

The structure of regional and local government is also changing, with a clear policy for increasing devolution across the South East. These changes present an opportunity to strengthen local leadership and align transport more closely with housing, energy, and growth priorities across the region.

3

The final group lies in the progress made since the publication of the first strategy

TfSE has significantly strengthened its evidence base. TfSE has conducted extensive research, analysis, and engagement with key stakeholders across the region to develop area studies, thematic studies and a Strategic Investment Plan. This strategy draws on insights from this technical programme of work that were not developed at the time of the original strategy's publication, enabling us to take a more informed and targeted approach to addressing the region's transport challenges. The strategy is also informed by the work of specialist working groups and studies, including an insightful commission into socially excluded groups, which highlighted important priorities that have been captured in the Transport Strategy.

The region has made progress in some areas, but in others, it has regressed. While we acknowledge that there has been significant progress in certain areas of the region – for example, efforts to improve air quality by promoting clean air zones and rolling out cleaner vehicles have yielded positive results – new or intensified challenges have emerged. For example, the region's reliance on private cars has remained high. This continued reliance on cars makes it more challenging to reduce carbon emissions and congestion.

Case for action

The case for a refreshed Transport Strategy is clear.

While some aspects of our transport system have seen improvement since 2020, such as air quality in specific areas, many critical challenges have worsened, and new uncertainties have arisen. A proactive and flexible strategy must tackle these challenges head-on.

To secure future funding and government support for transport services and infrastructure, **we need to present a clear narrative for intervention**. This case must connect the region's current challenges, such as congestion and high carbon emissions, with the solutions we propose and the outcomes we aim to achieve. By addressing these problems, we can unlock the region's substantial potential in housing, employment, and economic growth.

In this strategy, we present coherent “missions” that provide route-maps for delivering the vision. They also show how TfSE's vision and goals are aligned with national objectives and ensure the South East delivers for the whole country – as a critical economic engine for the UK, a key player in international trade, and an area of substantial housing and job growth.

Ultimately, our case for change is grounded on authoritative evidence, presented in our Need for Intervention Report, along with the belief that solving today's transport challenges will unlock tomorrow's opportunities. By investing to deliver a modern and sustainable transport network, we can reduce emissions, ease congestion, and create a region that is economically resilient, environmentally sustainable, and a magnet for investment and innovation.

An overview of what TfSE considers to be the region's key transport challenges is presented on the following page.

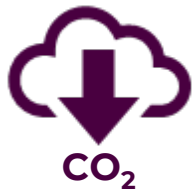


Productivity

UK productivity has flatlined – productivity per hour worked grew just 5% between 2010-20 – half the rate seen in Germany and the USA.

International trade

Trade volumes through Dover are down around 20% since the UK left the EU, and **Eurostar no longer serves** Ebbsfleet and Ashford.



Decarbonisation

Transport accounts for 40% of carbon emissions in the South East (2022) – by far the largest contributor across all industries.

Climate resilience

There were more than **4 times** as many delays to rail services in the South due to extreme heat in 2018 than in the 2000s.



Housing affordability

The **house price to earnings ratio is over 10:1** in the South East – higher than any other region outside London.



Equitable prosperity

The **Gross Value Added (GVA) per capita** of less well-connected areas **is less than half** that of other areas and over **80% of Hastings' residents** are at risk of **Transport Related Social Exclusion**.

East-West connectivity

The average speed of passenger rail services on most East-West corridors is under **40mph** – compared to **60mph** on most London corridors.



Highway congestion

The M25 carries over 220,000 vehicles a day – making it the busiest and one of the most congested roads in Europe.



Funding and delivery

Construction inflation exceeded 10% in 2022, and local authorities have severe **financial constraints** making it hard to deliver capital projects.



Technology

We do not have the luxury of time to rely on less mature technologies to solve these problems – some behaviour change is needed.

Focus of this strategy

This strategy focuses on areas where urgent action is most needed and where TfSE can make a difference.

While the 2020 Strategy laid the groundwork, this updated strategy focuses on specific priorities that have emerged from the region's changing context and where TfSE is well placed to help the region achieve its vision and goals.

We have structured this strategy around a set of missions, which are carefully designed to target the areas where we believe the most urgent action is required. Whether it's improving public transport, addressing the environmental impact of road traffic, or supporting the decarbonisation of our transport network, these missions focus on delivering real, measurable change where it matters most.

These missions also recognise the importance of fairness and affordability, ensuring that the benefits of transport investment are shared equitably.

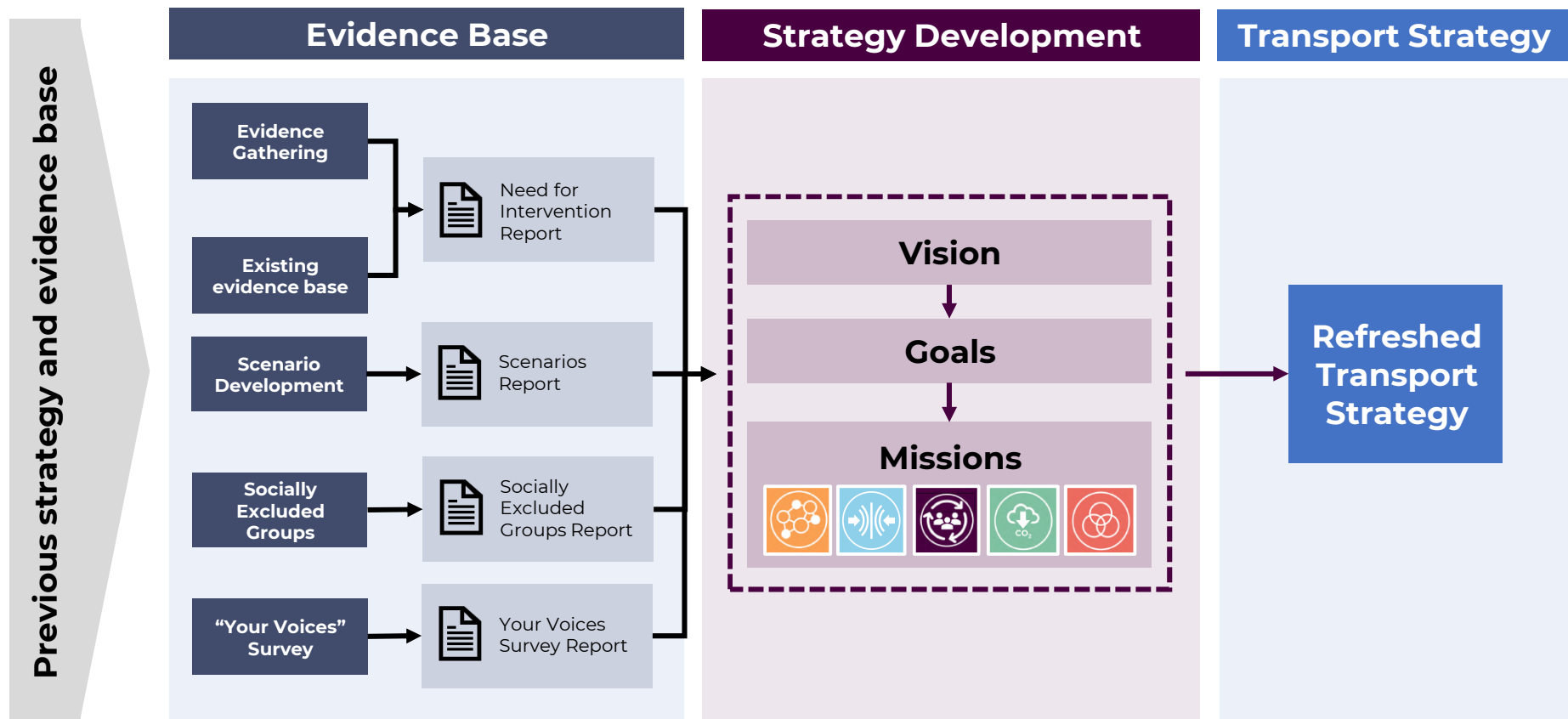
Furthermore, this strategy places a stronger emphasis on delivery. While we recognise that the financial and operational capacity of the public sector is constrained, and additional government funding is uncertain, we are committed to driving bold action to achieve our vision.

This strategy provides a high-level framework for shaping the future of transport in the South East. It sets out the long-term vision, priorities and principles that will guide investment and policy decisions over the coming decades. While it does not list specific schemes for delivery, these are developed through our SIP and a suite of supporting strategies, such as the Rail Strategy and thematic studies on freight, decarbonisation, and rural mobility.

Together, these documents form a cohesive programme of evidence-based planning. This strategy informs those more detailed plans, and in turn is kept relevant through updates to them. As we move forward, we will refresh the SIP to align with the new missions and priorities set out here. In doing so, we will remain focused on identifying practical, achievable solutions that deliver real-world benefits, even within a constrained financial environment.

How this strategy was prepared

This Transport Strategy was developed through a structured process of evidence gathering, scenario planning, and stakeholder engagement, including input from socially excluded groups. The evidence base informed a clear vision, goals, and defined missions, resulting in a strategy that addresses the region's key challenges.



The evidence base reports will be published alongside this strategy and can be accessed at www.transportforthesoutheast.org.uk.

Integrated Sustainability Appraisal

An Integrated Sustainability Appraisal and Habitats Regulation Assessment Screening Statement were prepared alongside the 2020 Transport Strategy and have also been prepared for this Transport Strategy.

The appraisal examines the potential impacts this strategy could have on a range of sustainability objectives, including economic, social, and environmental aspects. These include, but are not limited to biodiversity, habitats, carbon, the historic environment, health, and equality of access to opportunities.

An Integrated Sustainability Appraisal was also undertaken for each of the five Area Studies and covers the schemes that contributed to the Strategic Investment Plan (SIP). A summary of the appraisal was published alongside the SIP and is accessible [here](#).

All the interventions outlined in this strategy will undergo the appropriate level of assessment (including environmental, equalities, and habitats regulations assessment) as and when schemes come forward. The same applies to Local Transport Plans in the South East as and when these are prepared.

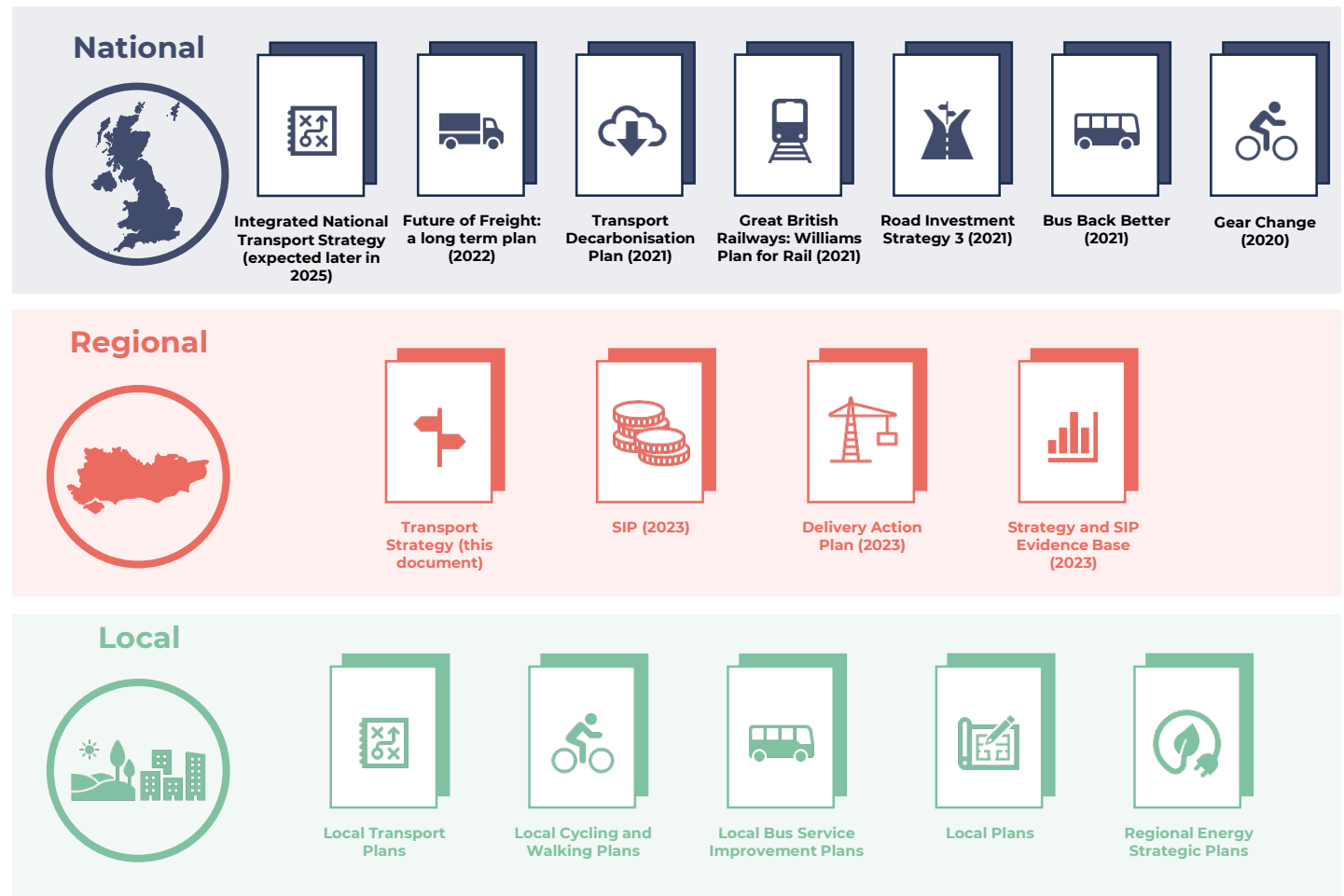


Relationship to other strategies and plans

This strategy has been designed to complement and build on national, regional, and local policies and strategies.

This diagram shows the relationship between TfSE and policies and strategies that will affect how each mission is delivered.

At the same time, this strategy seeks to influence the direction of these national, regional and local strategies as many of them will be critical in ensuring the vision set out in this strategy will be achieved.





Introduction

This chapter outlines our ambitious vision for 2050 and the goals that underpin it, setting the foundation for a thriving South East that balances economic growth, social wellbeing, and environmental stewardship.

Our **vision** is to create a region that not only leads the way in sustainable, net zero carbon growth but also offers its residents, businesses, and visitors the highest quality of life. This vision is supported by three **goals**, which address the pillars of sustainable development: fostering a competitive economy, improving social outcomes, and safeguarding the region's natural and historic environment. Together, these goals ensure that growth in the South East is inclusive, resilient, and sustainable.

To guide us in delivering this vision and achieving these goals, we have adopted six core **cross-cutting principles** that reflect our commitment to forward-looking, evidence-based, and inclusive planning. These principles are rooted in best practice and have been tailored to the needs of the South East to ensure every initiative we pursue contributes meaningfully to a prosperous and sustainable future.



2050 Vision and Goals

Our vision is for the South East to offer the highest quality of life for all and be a global leader in achieving sustainable, net zero carbon growth.

To achieve this, we will develop a resilient, reliable, and inclusive transport network that enables seamless journeys and empowers residents, businesses, and visitors to make sustainable choices.

We will deliver this vision by driving strategic investment and forging partnerships that deliver sustainable transport, integrated services, digital connectivity, clean energy, and environmental enhancement.

Our vision is supported by three goals that reflect the three pillars of sustainable development.

Economic Goal

Improve productivity and attract investment to grow our economy in a way that is sustainable, inclusive, and resilient.

Social Goal

Improve health, safety, wellbeing, quality of life, and access to opportunities for everyone.

Environmental Goal

Protect and enhance the South East's unique natural and historic environment, while supporting a just transition to net zero.

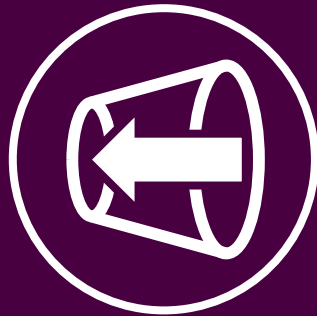
Cross-cutting Principles

Our strategy is built on six core principles that guide us toward our vision and goals. These principles have been applied across many aspects of this strategy and help us stay focused on delivering the best possible outcomes for the South East.

- 1 By adopting a **Vision and Validate** mindset, we have taken a forward-looking approach to our strategy, setting a clear vision for the future and validating all initiatives against our goals. This ensures that our actions drive meaningful progress toward our ambitions.
- 2 Through **Triple Access Planning**, we have expanded our understanding of accessibility by considering not only physical transport but also digital and social factors, making the transport network more inclusive and connected.
- 3 By applying the **User Hierarchy** set out in the [Manual for Streets](#), in most environments we have prioritised the most vulnerable road users, i.e. pedestrians and cyclists – as well as more sustainable modes of transport, or public transport – over private cars, and, in doing so, we promote safer, more sustainable outcomes.
- 4 The **Avoid-Shift-Improve** framework has guided our decarbonisation strategy by encouraging us to focus on reducing emissions by avoiding unnecessary trips, shifting to lower-carbon transport options, and improving the efficiency of remaining modes of transport.
- 5 In our first strategy we introduced the **Movement and Place** framework, which states that roads and streets should serve more than just transport needs. Our approach balances efficient movement with creating vibrant, liveable spaces that enhance the quality of life.
- 6 Last but not least, and guided by our Integrated Sustainability Appraisal, we have embedded **Environmental Net Gain** into our thinking. We aim for every new transport project to leave the environment better off, enhancing biodiversity, using sustainable design, and integrating green solutions throughout.

Vision and Validate

Instead of planning based on current travel trends, this approach envisions a desired future and creates the transport system to achieve it, focusing on long-term sustainability and resilience.



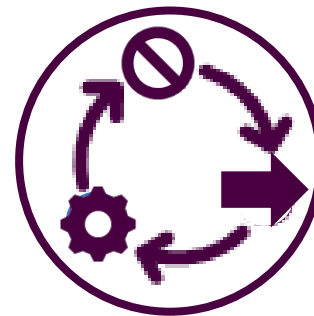
User Hierarchy

By prioritising pedestrians, cyclists, and public transport over cars, this principle promotes safer, more sustainable urban environments by designing infrastructure to reflect these priorities.



Triple Access Planning

This principle expands accessibility by considering not only physical transport but also digital and social factors, ensuring a more inclusive and connected transport system.



Avoid – Shift – Improve

A strategy to reduce transport carbon emissions by avoiding unnecessary travel, shifting to lower-carbon transport modes, and improving the efficiency of remaining high-carbon modes.

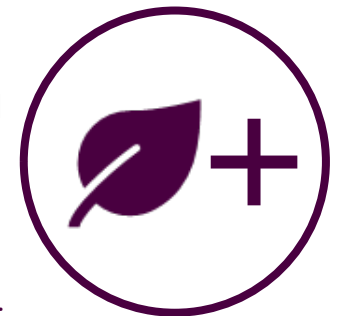
Movement and Place

Roads and streets are designed not only for efficient transport but also to enhance the surrounding areas, balancing the needs of movement with creating vibrant, liveable spaces.



Environmental Net Gain

New transport developments should leave the environment better off than before by enhancing biodiversity, using sustainable design, and integrating green solutions into infrastructure projects.



Part 3

Missions



Introduction

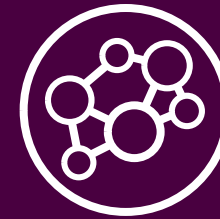
This chapter outlines the five key missions that TfSE will prioritise to achieve its vision. Each mission presents a clear call to action, focusing on delivering tangible outcomes while providing direction and a sense of urgency.

They were chosen because they represent the key challenges identified in the Need for Intervention Report, where we believe concerted action is needed to get the region “back on track” and realise its full potential. They also focus on topics where we believe a regional authority such as TfSE is well placed to make a material contribution in delivering them at a strategic level.

They are carefully aligned with both national and local priorities, ensuring a cohesive approach that resonates across all levels of government. Additionally, they are designed to inspire and encourage collaboration among partners, fostering a shared commitment to delivering meaningful progress.

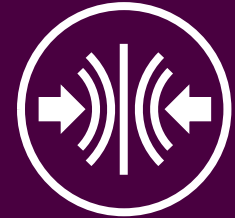
Further details about the context of each mission and the proposed interventions included in each mission are outlined in **Appendix A**.

The missions are



**Strategic
Connectivity**

Resilience



**Inclusion and
Integration**

Decarbonisation



**Sustainable
Growth**

Route Maps

The five missions have been developed and presented using a route map approach. The key components of these are presented in the strategy as follows:

- ▶ **Mission statement:** which sets out a clear call to action, focusing on delivering tangible outcomes while providing direction and a sense of urgency.
- ▶ **Desired outputs and outcomes:** which define a set of tangible outputs required to achieve key outcomes.
- ▶ **Shorter-term and longer-term priorities:** which identify the key interventions (schemes and policies) required to deliver desired outputs and outcomes, referencing schemes in the SIP. These are also presented on a map.

Supporting this, **Appendix A** presents further detail:

- ▶ **Context:** which provides further detail and evidence articulating the challenge and need for intervention.
- ▶ **Theory of change:** summarises how the context and challenges have informed the intervention priorities, outputs, outcomes and impacts.
- ▶ **Interventions:** a cross-reference for how the schemes and policies in the SIP align to achieving our five missions.
- ▶ **Indicators:** a cross-reference for how indicators identified in the SIP and State of Region Report have informed the delivery, monitoring and evaluation of achieving each of the five missions.

Route Map components



Appendix B presents TfSE's assessment of the impact of each mission's route map against a set of scenarios.

Strategic Connectivity

We will boost connectivity in the South East by enhancing strategic regional corridors to ensure all communities and businesses have access to high-quality, convenient and resilient transport links and key services, for people and goods.



We will know we have succeeded when:

- ▶ The connectivity of all the South East's strategic corridors – in terms of journey times and reliability – is comparable to those corridors that serve London.
- ▶ Our key towns, cities, and international gateways are as accessible by public transport as they are by car, and rail freight is as competitive as long-distance road freight.



Connectivity refers to the speed, frequency, and ease by which people and goods move between places. TfSE's focus is on strategic and regional connectivity, as local connectivity is led by our local authority partners.

TfSE has undertaken extensive research, including an [Economic Connectivity Review](#) and [Strategic Corridor Evidence Base](#). This research has shown that **many parts of the South East boast excellent rail connectivity** to London, particularly towns and cities served by High Speed 1 and mainline railways. However, while radial connectivity to London is generally good, **most orbital and East-West corridors**, such as the A27/A259 corridor in Sussex and Kent, **are poorly served**. Often, it is faster to travel from one part of the South coast to another via London or the M25 than directly along the South coast's highway or railway corridors.

These connectivity gaps prevent communities along the South coast from 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.

Furthermore, **communities that are comparatively less well-connected are less attractive to investors, visitors, and potential residents**. This is particularly the

case for **coastal, island, and peninsula communities**, which need to work harder to achieve the same socioeconomic outcomes as better connected places.

The region's international gateways also have connectivity gaps. Heathrow Airport has high public transport mode share for London journeys but very low beyond the capital. Some key ports are vulnerable to delays due to the current configuration of the highway network at multiple locations on the coast.

Similarly, **some freight corridors** (e.g. Southampton – Midlands/North, Kent Coast – Midlands/North) **have capacity** gauge, and gradient **constraints** that will need to be addressed to support growth and modal shift from highways to rail. Similar constraints exist on sections of the Strategic Road Network that serve nationally important freight corridors.

Addressing these connectivity challenges will require significant capital investment. It is recognised this will take time to deliver and may need to come from a wide range of sources, including direct beneficiaries.

Strategic Connectivity Outcomes

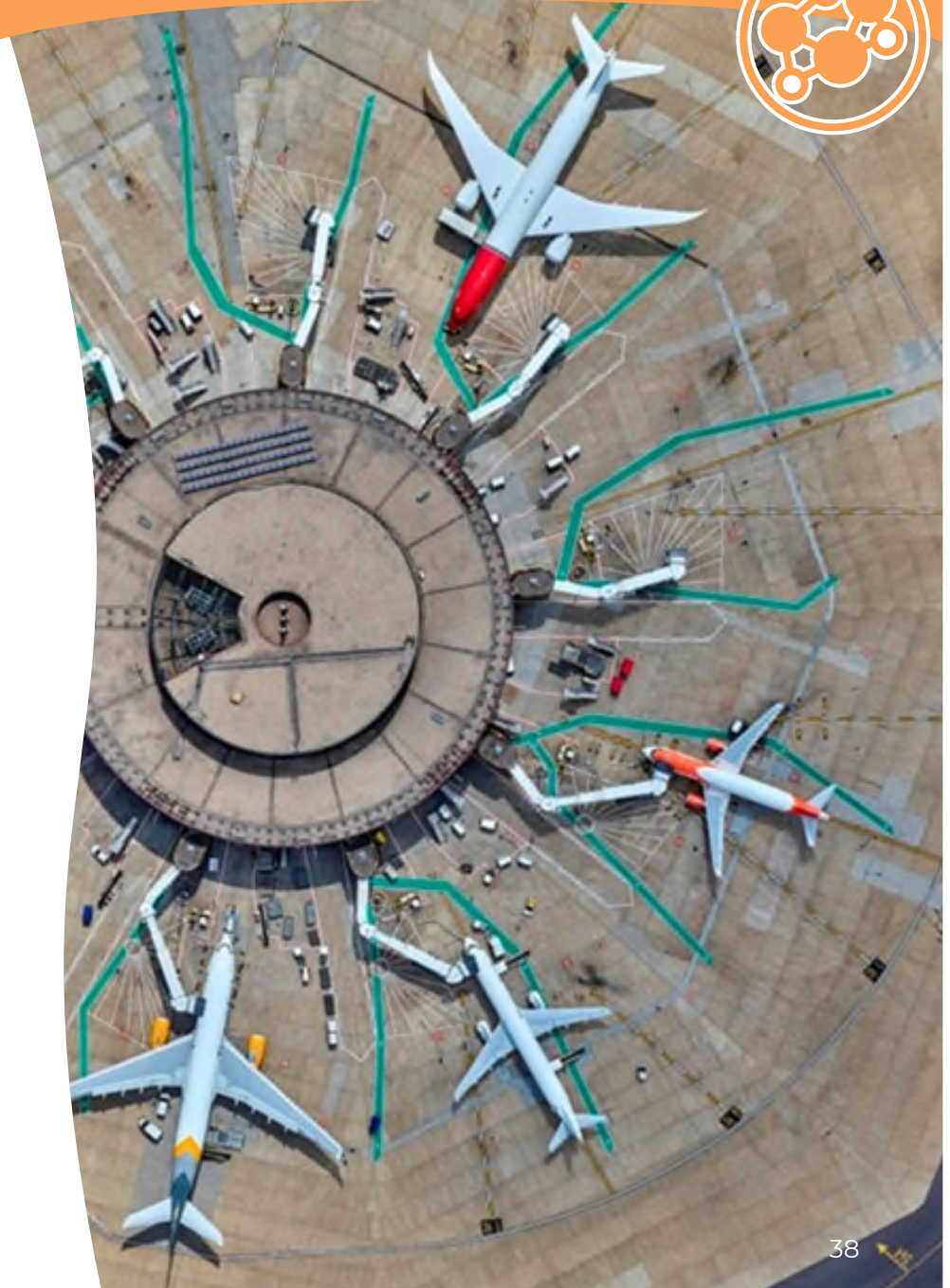


The key outcome of this mission is to **increase the modal share of both passenger and freight journeys using sustainable travel options on strategic corridors** between the South East's major economic centres and international gateways. This will enable the South East's population and economy to grow while minimising the adverse impacts of transport on society and the environment.

Achieving this modal shift will help **reduce congestion, improve air quality, reduce severance, improve safety,** and contribute to the overall **satisfaction of transport users**. In turn, it should **strengthen public transport demand and revenues**, placing the bus and rail industries on a more sustainable financial footing.

This mission also seeks to **improve inclusive access to employment and services** – especially in rural and coastal communities – by ensuring strategic corridors enable flexible, affordable, and frequent services that match the needs of today's travel patterns.

To achieve these outcomes, sustainable travel options – particularly railways at a pan-regional level – need to deliver journeys that are comparable in speed, convenience, affordability and comfort to car journeys. Additionally, the economics of rail freight need to become more attractive to industry compared to highway freight.



Short Term Priorities



TfSE's SIP outlines the schemes that we have prioritised for the South East. In this strategy we highlight those schemes that have the potential to make the greatest contribution to achieving the Strategic Connectivity mission. Our immediate focus will be on improving the existing network to better serve passengers and freight and supporting public transport's recovery from the pandemic. Key initiatives include:

- 1 Enhancing incentives for long-distance public transport** use by better optimising fares, offering more flexible ticketing options, and enhancing the on-board experience (e.g. luggage space, catering, personal safety, information).
- 2 Refining timetables to better serve faster-growing markets** such as leisure travel. This could involve re-evaluating the timing of planned road and rail works to take advantage of quieter periods during the working week.
- 3 Delivering or initiating well-developed schemes that enhance road and rail connectivity.** Notable examples include improving junctions on strategic highways corridors and known rail bottlenecks, such as at Croydon, which should release capacity for longer-distance rail services serving the TfSE area.
- 4 Reinstating international rail services** from Ebbsfleet and/or Ashford, recognising the challenges posed by changes in the UK-EU relationship but also noting capacity constraints at St Pancras, which could make Ebbsfleet a more attractive option for current and future operators.
- 5 Providing adequate rail capacity and connectivity to support growth at Gatwick and Southampton airports,** both of which generally have the necessary infrastructure to achieve service enhancements.
- 6 Planning for longer-term initiatives** by safeguarding critical areas and aligning planning policies across all levels of government.



In the medium to longer term, the focus shifts to more substantial upgrades and network expansions to address major bottlenecks and connectivity issues. Again, details of each intervention are documented in the SIP. Key initiatives include:

- 1 Upgrading the region's key coastal corridor to match the standards of other strategic corridors**, particularly between Brighton and Southampton. This includes faster regional rail services and longer-term improvements to the A27 and A259 corridors in Sussex (e.g. at Chichester, Worthing, Lancing and Lewes), bringing them closer to the standard of the A34 and speed of the current Cross Country rail route. These upgrades should be implemented in stages, possibly involving tunnelled solutions, while also enhancing the natural and built environment along the route.
- 2 Improving journey times between London/M25 and coastal communities** like Hastings and North Kent, which face significantly longer travel times to London compared to nearby areas like Brighton and Ashford. This puts them at a structural disadvantage in terms of accessibility and opportunities.
- 3 Improving access to islands and peninsulas**, notably through boosting Isle of Wight ferry services.
- 4 Strengthening strategic freight corridors**, such as the Southampton–Midlands/North and Channel Ports–Midlands/North routes, as well as the highways serving these areas. Expanding the use of HS1 and the Channel Tunnel for rail freight may be an option, depending on how technology, logistics, and cross-Channel trade evolve.
- 5 Developing new rail connections to international gateways**, including direct rail access to Heathrow Airport from the South and West, and rail infrastructure investment near Redhill to enable direct Gatwick-Kent services.
- 6 Reviewing regional rail connectivity when Old Oak Common and HS2 open**, potentially making it faster and more convenient to connect the Midlands and North to the South East via Old Oak Common or Heathrow Airport. This may offer opportunities to rethink the regional passenger rail map.

Key Priorities





Opportunities to enhance cross-regional connectivity through Heathrow and London

Strategic connectivity goes beyond the boundaries of the TfSE area, playing a crucial role in linking the South East to the rest of the UK and the world. Often, it's the connections at these boundary points that offer the greatest potential.

This is particularly evident at Heathrow and Old Oak Common. By the mid-2030s, Old Oak Common is set to become one of the most connected hubs in the country, with high-speed, high-frequency rail links reaching the North via HS2, the West via the Great Western Mainline (and potentially the Chiltern Main Line), London via the Elizabeth Line (with potential London Overground extensions), and direct links to the UK's busiest airport—Heathrow.

The proposed Heathrow Southern Rail scheme, which would connect the South West Main Line to Heathrow, presents a range of exciting possibilities for enhancing strategic rail connectivity.

These include:

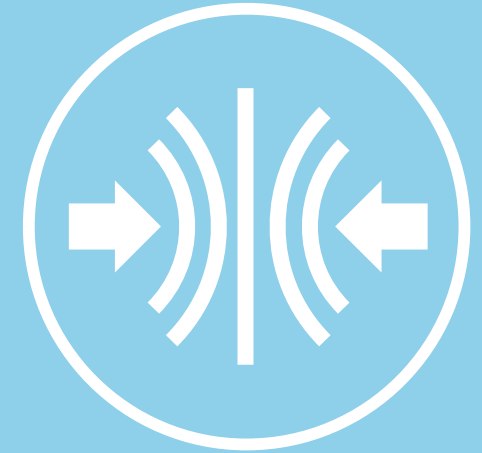
- ▶ Direct Heathrow rail connections to Woking, Basingstoke, Guildford, and potentially towards Southampton, Portsmouth, Gatwick, and Brighton.
- ▶ Long-distance rail connections from Paddington and Old Oak Common to the Solent area and the West.
- ▶ A reimagined regional rail network, allowing many in the South East to use Old Oak Common as a high-speed gateway to the Midlands and the North.
- ▶ Opportunities for modal shift, potentially reducing reliance on the M25 for journeys between Surrey, West London, the Inner Thames Valley, and potentially the Chilterns and North West London.

Realising these opportunities would require alignment across multiple agencies, but the benefits would significantly strengthen the case for investing in improved infrastructure between London and the South East, as well as the longer-term development of Heathrow Airport.



Resilience

We will safeguard the South East's connectivity and work to maintain and enhance the reliability and resilience of our transport systems for future generations. We will do this by anticipating risks, taking preventative measures, enhancing recovery and adapting in the face of uncertain future risks.



We will know we have succeeded when:

- ▶ The transport network delivers comfortable, reliable journeys between key towns, cities, and international gateways.
- ▶ The transport network has the capacity and agility to manage, absorb, and recover from major disruptions quickly, including disruption arising from associated power and digital networks.
- ▶ The risk of major failures occurring on the transport network is reduced.



The resilience of the South East's transport network is vital to the region's economic, social, and environmental well-being.

The closure of key infrastructure – such as a road, railway, or bridge – can have far-reaching consequences, disrupting access to jobs, education, and services, while severely impacting freight and trade. For example, the failure of a coastal route or bridge due to extreme weather or erosion could isolate communities, increase congestion on alternative routes, and escalate economic losses. Such disruptions also erode public confidence in the system and may shift users away from sustainable travel options.

The South East's transport network faces mounting risks from climate change, severe weather, congestion, and high levels of use. Critical corridors, like the London-Brighton route, rely heavily on single highways and railways, making them particularly vulnerable to disruption. Ports like Dover and the Channel Tunnel compound this pressure, as congestion and trade frictions often spill onto regional road networks, affecting local communities and key routes.

A significant portion of the network, built in the 19th and 20th centuries, requires urgent maintenance and renewal. However, funding constraints have led to growing backlogs, leaving the network increasingly exposed. For instance, weather-related delays on the railways have doubled in the past decade, according to Network Rail. Addressing these vulnerabilities demands integrating resilience into infrastructure planning, ensuring it can adapt to future risks like rising sea levels, extreme weather, technological advancements, and socioeconomic changes.

Building resilience will also require a collaborative approach. Strong partnerships with local authorities, national agencies, digital network providers, and utility providers are essential to managing immediate operational challenges and developing long-term strategies for water, power, and digital infrastructure. TfSE can play a key role in advocating for resilient infrastructure investment and supporting partners in planning for diverse future risks.



The key outcome of this mission is to reduce the effects of disruption on the strategic transport network from a variety of current and future risks, including extreme weather, deteriorating infrastructure, and planned maintenance.

In particular, we aim to **avoid the loss or prolonged closure of critical transport assets** – such as roads, railways, and bridges – due to risks like flooding, coastal erosion, subsidence, or extreme temperatures. The closure or failure of such assets can have far-reaching consequences, such as isolating communities, damaging local economies, diverting freight onto unsuitable routes, and increasing congestion and emissions elsewhere. Some infrastructure in the South East is already operating at or near capacity, and its vulnerability risks being exacerbated by climate change, and a deteriorating condition of transport infrastructure.

Reliable journeys are critical to user confidence and business productivity, and reducing delays will enhance the overall performance for both passengers and freight customers. Ensuring more predictable and reliable journey times will also support economic productivity, as businesses and individuals rely on consistent travel and delivery schedules.

Another key outcome is to reduce disruption for all users of the transport network during planned engineering works and maintenance. While such activities are essential for safety and performance, they can cause avoidable disruption if not effectively planned and communicated. Providing suitable alternative routes and travel options, both during planned works and unexpected incidents, will play a vital role in achieving this outcome.

Ultimately, a well-maintained and resilient network is not just a transport benefit – it also **protects public services, economic performance, and community cohesion.** Preventative works can reduce the risks associated with infrastructure failure, including disrupted journeys, costly emergency repairs, and damage to property and vehicles.



The immediate priority is to strengthen the resilience of the existing transport network, ensuring it can better withstand both planned and unplanned disruptions. This includes addressing current maintenance backlogs, improving traffic management, and making the network more reliable. Key initiatives include:

- 1 Assessing the economic, social, and environmental impact of major network disruptions,** such as the closure of roads, railways, or key structures, and use this evidence to build the case for targeted investment in resilience.
- 2 Securing long-term and consistent funding for a pipeline of infrastructure renewals and upgrades,** reducing the risk of asset failure and avoiding costly emergency repairs. This will also reduce the cost of emergency repairs and vehicle damage and include adjacent systems to transport such as drainage, power, and digital infrastructure.
- 3 Developing a strategic understanding of future risks,** including climate change, changing land use, and technological dependencies, to ensure today's decisions are robust under a range of future scenarios. Taking a strategic approach to resilience will ensure that the transport network can anticipate and adapt to the risks to its resilience in the future.
- 4 Making the case for, and securing, more and consistent funding for maintenance and enhancements,** such as infrastructure adaptation, coastal erosion, and delivering nature-based solutions. Securing funding for urgent repairs and preventative maintenance will ensure the network remains safe and operational, reduce the risk of infrastructure failures, and minimise disruptions from unplanned events.
- 5 Encouraging more joined-up actions with utilities operators and satellite navigation providers on roadworks planning and general traffic management.** We can learn from best practice approaches from across the region, such as lane rental schemes, and work with navigation companies to ensure vehicles are directed on appropriate routes, both during roadworks and normal operations. This will ensure essential maintenance works are completed efficiently and with minimal disruption to users. It will also ensure the right vehicles are directed to the right roads, minimising impact on roadside communities, ensuring rural roads are not adversely affected.



In the medium and long term, the focus shifts to making more substantial upgrades that will increase the overall resilience of the network and build strategic resilience capacity. This involves expanding capacity at critical points and implementing strategic projects that reduce the impact of disruption. Key initiatives include:

- 1 Addressing major bottlenecks on the region's busiest corridors**, including in the Croydon and Woking areas, to improve the reliability of services on the region's busiest railways.
- 2 Expanding and strengthening secondary and alternative corridors**, such as the Uckfield – Lewes Railway reinstatement, Canterbury Rail Chord, and A22 and A24 corridor packages, to provide potential diversionary options when primary routes are closed or constrained.
- 3 Improving Operation Brock and Operation Stack in Kent** by implementing alternative solutions to maintain traffic flow during cross-Channel disruptions, reducing congestion and delays on key routes for both passengers and freight.
- 4 Delivering the Kent Bifurcation Strategy** to relieve pressure on existing Thames crossings and strengthen strategic connectivity and resilience between the Channel ports and M25.
- 5 Tackling pinch points on highways for the benefit of all road users, including bus services.** This can be achieved through upgrading junctions and providing additional lanes for bus services and other sustainable travel options. It will ensure critical points more resilient to future risks, such as climate change, while exploring placemaking opportunities.
- 6 Coordinating with other infrastructure sectors** (e.g. utilities, digital, energy) to ensure interdependencies are understood and resilience is built in across systems. This includes working with them to plan for future requirements and risks. For example, ensuring the region's power networks have sufficient capacity and resilience to support the roll-out of electric vehicles.

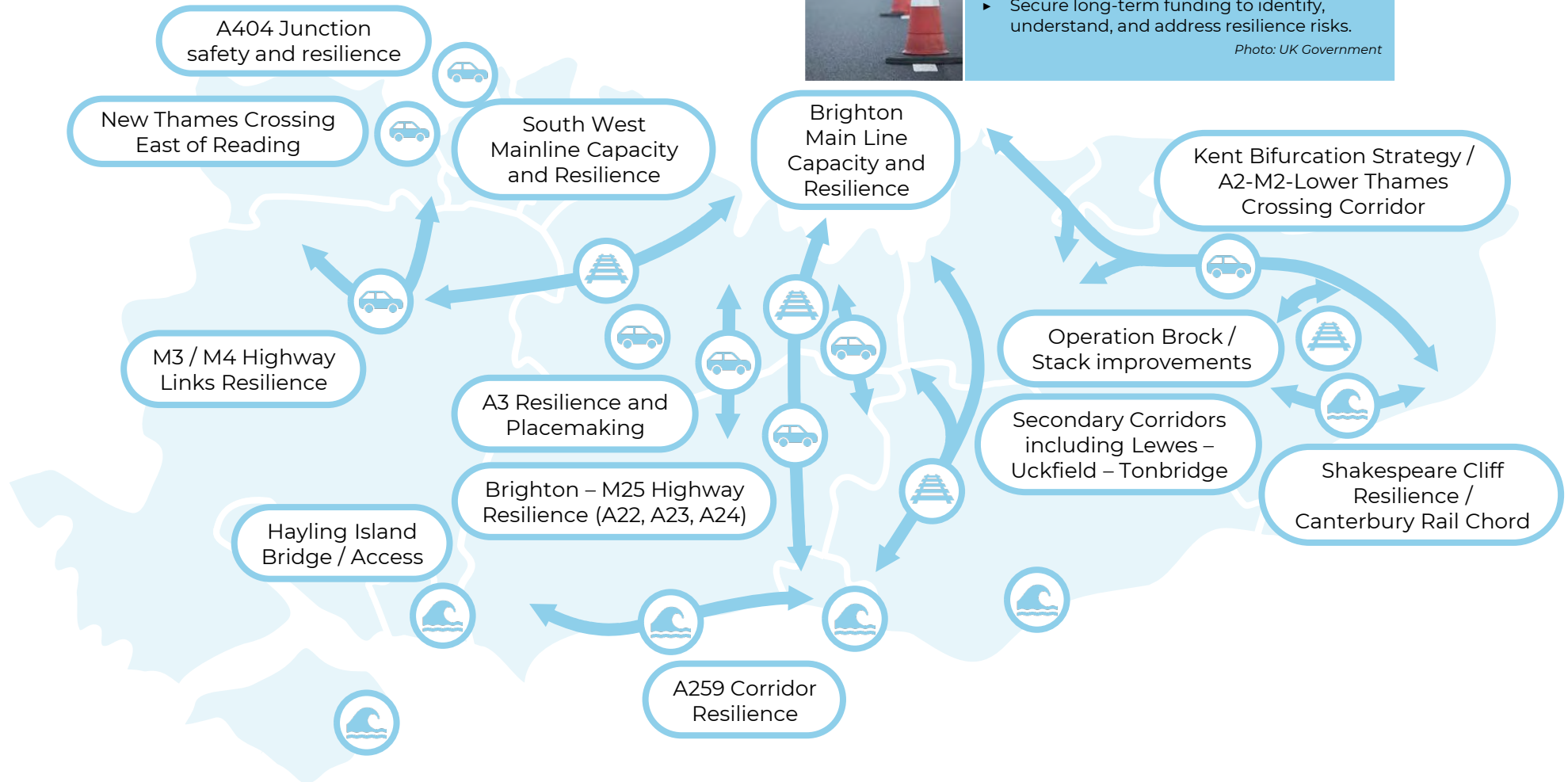
Resilience Priorities



Region-wide Maintenance Priorities

- ▶ Reduce the maintenance backlog and improve roadworks management.
- ▶ Secure long-term funding to identify, understand, and address resilience risks.

Photo: UK Government



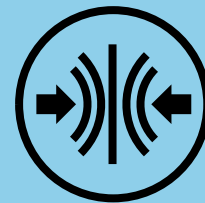
Highway



Railway



Coastal erosion/flooding risk



Delivering the Kent Bifurcation Strategy

Kent's strategic position between London and continental Europe has always made it vital to the resilience of the UK. This position has seen Kent secure investment in major schemes, recognising the benefits to local growth and communities, and the national economy.

As the shortest crossing point across the English Channel, Dover is home to the world's busiest Roll-On Roll-Off port, placing it at the forefront of recent challenges such as Brexit and the COVID-19 pandemic. Even in more stable times, the county's transport networks face regular strain from adverse weather events, industrial action, and major events – all of which have the potential to disrupt ferry crossings and lead to traffic management issues. Nearby, the UK's only fixed link to continental Europe, the Channel Tunnel, with its terminal at Cheriton (Folkestone) can also be affected by these issues.

To strengthen resilience, authorities in Kent and Medway have established the Kent Bifurcation Strategy. This long-term vision aims to reduce the burden on the M20 between Dover, the Channel Tunnel, and the M25, by utilising an upgraded M2/A2 corridor linked to a new Thames crossing. This is supported by improved connections between the M2/A2 and M20 corridors, and improvements in protocols to manage high traffic volumes during disruptions, such as Dover Traffic Assessment Project, Operation Brock, and Operation Stack. In the long term, the aim is to reduce the need for

these protocols and/or develop an off-highway solution.

Key enhancements are needed to fully realise Kent's potential as a resilient transport hub. These include:

- ▶ Upgrades to the M2/A2 corridor, with targeted junction improvements to enhance safety and ease congestion, including improved connecting links to the M20 corridor to enable traffic to switch between the two strategic routes.
- ▶ Dynamic traffic management capabilities to better distribute traffic between the M2/A2 and M20.
- ▶ The recently approved Lower Thames Crossing to provide a step change in capacity and a resilient alternative to the over-capacity Dartford Crossing.
- ▶ Increased lorry holding capacity to handle incidents and adapt to evolving EU customs controls, including the European Travel Information and Authorisation System (ETIAS) and Entry-Exit Scheme.
- ▶ Enhanced rail freight options on the HS1 and domestic rail network to utilise the substantial safeguarded capacity of the Channel Tunnel, diverting freight from the road network.

TfSE's SIP includes these initiatives (and more) to build a resilient Kent, ensuring seamless UK-European connectivity into the future.



Inclusion and Integration

We will create an inclusive and integrated transport network in the South East that enables affordable, safe, seamless, door-to-door connectivity for all users – including those currently underserved by the transport system.



We will know we have succeeded when:

- ▶ Everyone can affordably travel where they need to go when they need to go.
- ▶ Customer satisfaction with all aspects of the transport network is high across every section of society.

Inclusion and Integration Context



Creating an inclusive and integrated transport network should be a fundamental part of planning and decision-making. However, TfSE's engagement with socially excluded groups has revealed that many communities across the region still face barriers to access, putting them at further risk of exclusion.

Although some progress has been made, parts of the South East's transport system remain physically and socially inaccessible and lack integration between services.

This results in varied customer experiences, particularly around fares, information, and ticketing systems – issues that impact all users but are felt more acutely by certain groups. Young people, for example, have highlighted difficulties in using direct bus services between smaller towns and rural areas, making it challenging for them to access opportunities. These issues are particularly problematic where services cross local and sub-national government boundaries.

Disabled people face additional challenges. Those with mobility needs encounter physical barriers in stations and on vehicles, while people with visual or cognitive impairments often struggle with inadequate navigation and information systems. There is also a recognised need for better staff training to support diverse needs, and for safety measures that address personal safety concerns, particularly in the evening.

Affordability is another key issue, as the cost of transport can disproportionately affect those on lower incomes or with additional travel needs, such as frequent medical appointments.

While concessionary travel schemes provide some support, many are inconsistently applied across the region. Given the constraints on public finances and the

commercial pressures facing operators, this strategy advocates for planners and operators to explore ways to increase public transport patronage along existing corridors, creating favourable conditions for more affordable fares.

Communities with poor connectivity and accessibility are particularly at risk of what is known as “**Transport Related Social Exclusion**” (TRSE) – a concept studied in detail by [Transport for the North](#), whose work has highlighted several areas in South East England that are at greater risk of TRSE than most of the North of England.

Additionally, **the rapid advancement of transport technologies**, such as vehicle electrification and digitisation, **could exacerbate inequalities if their benefits are not distributed equitably**. Therefore, it is essential that decision-makers consider equity and inclusion impacts when implementing interventions to achieve the other missions, ensuring that the transition to a modern transport network benefits all.

TfSE is also engaging with the Rural Mobility Centre of Excellence, led by Transport East, to better understand the unique needs of rural communities across the South East. Guidance from the Centre – including resources available at www.transporteast.gov.uk/rural-transport – is helping inform our approach to tackling transport-related social exclusion in less connected areas.

Inclusion and Integration Outcomes



The key outcome of this mission is a transport system that is fair, inclusive, and responsive to the needs of all residents – particularly those currently at greatest risk of exclusion. This includes people on low incomes, older residents, disabled users, young people, and rural communities. Specific outcomes include:

- ▶ **Reduced TRSE**, which particularly affects coastal and rural areas, through improving the accessibility of transport services and the connectivity they deliver, particularly to parts of the South East at risk of exclusion.
- ▶ **Increased customer satisfaction** across all user groups, ensuring that everyone can access and use the transport network confidently and comfortably.
- ▶ **A transport network that is accessible and safe** for people with specific mobility and sensory needs.
- ▶ **Improved safety across the transport network**, aiming for a “Vision Zero” for killed and seriously injured incidents, as well as improvements in personal safety. This will be achieved through better infrastructure design, enhanced safety measures, and targeted initiatives that prioritise the safety of all users, especially vulnerable road users.
- ▶ **Improvements in public health and wellbeing** by enabling more journeys by active travel, promoting liveable neighbourhoods, and delivering improvements to air quality.
- ▶ **Reduced severance and improvements to the public realm**, creating more cohesive communities where residents can move safely and comfortably through shared spaces. This includes addressing barriers like busy roads and railway lines that can divide communities and hinder access to services.
- ▶ **Reduced real-term percentage of household income spent on housing and transport costs**, ensuring that residents have access to affordable housing and mobility options, making the region more equitable.

Infrastructure Priorities



The outcomes will be achieved through a combination of physical infrastructure upgrades, enhanced safety measures, and the reduction of barriers that limit access to transport and services. Physical infrastructure interventions include:

1

Designing inclusive infrastructure with and for socially excluded groups using inclusive design principles, improved lighting, signage, and wayfinding, enhancing connectivity to areas at risk of TRSE, including North and East Kent, the East Sussex coastline, and coastal communities in the Solent. Many of these interventions are cited in the Strategic Connectivity mission.

2

Upgrading interchange facilities and implementing step-free access at stations and public transport hubs to provide seamless connections between different modes of transport and support the “first-mile-last-mile” elements of journeys. Enhancements such as better signage, increased seating, and protected waiting areas will make switching between services more comfortable and convenient for all users.





Fares and ticketing interventions include:

- 1 Providing socially necessary public transport services**, such as demand-responsive transport, rural bus services, ferries to islands, and other options that connect isolated communities to the broader network. These services will ensure that all residents, regardless of where they live, have access to essential services and opportunities.
- 2 Expanding concessionary fares and capping schemes to improve affordability** for people on low incomes, young people, and those not currently well served by existing offers. This will help reduce transport-related financial burdens and increase the use of public transport.
- 3 Implementing integrated fares and ticketing systems** that allow passengers to travel across local government boundaries by multiple modes of transport using a single ticket or fare structure. This will simplify journeys, reduce costs for passengers, and make the transport system easier to use.

Service interventions include:

- 4 Delivering Bus Service Improvement Plans** and supporting locally appropriate models such as franchising or municipal operators, especially where commercial services are unviable.
- 5 Enhancing inclusive access to islands and peninsulas**, such as the Solent and Medway, through integrated ferry and bus services and better access to information. This will support social and economic inclusion for coastal and peninsula communities.



Key Priorities



Region-wide Fares/Ticketing Priorities

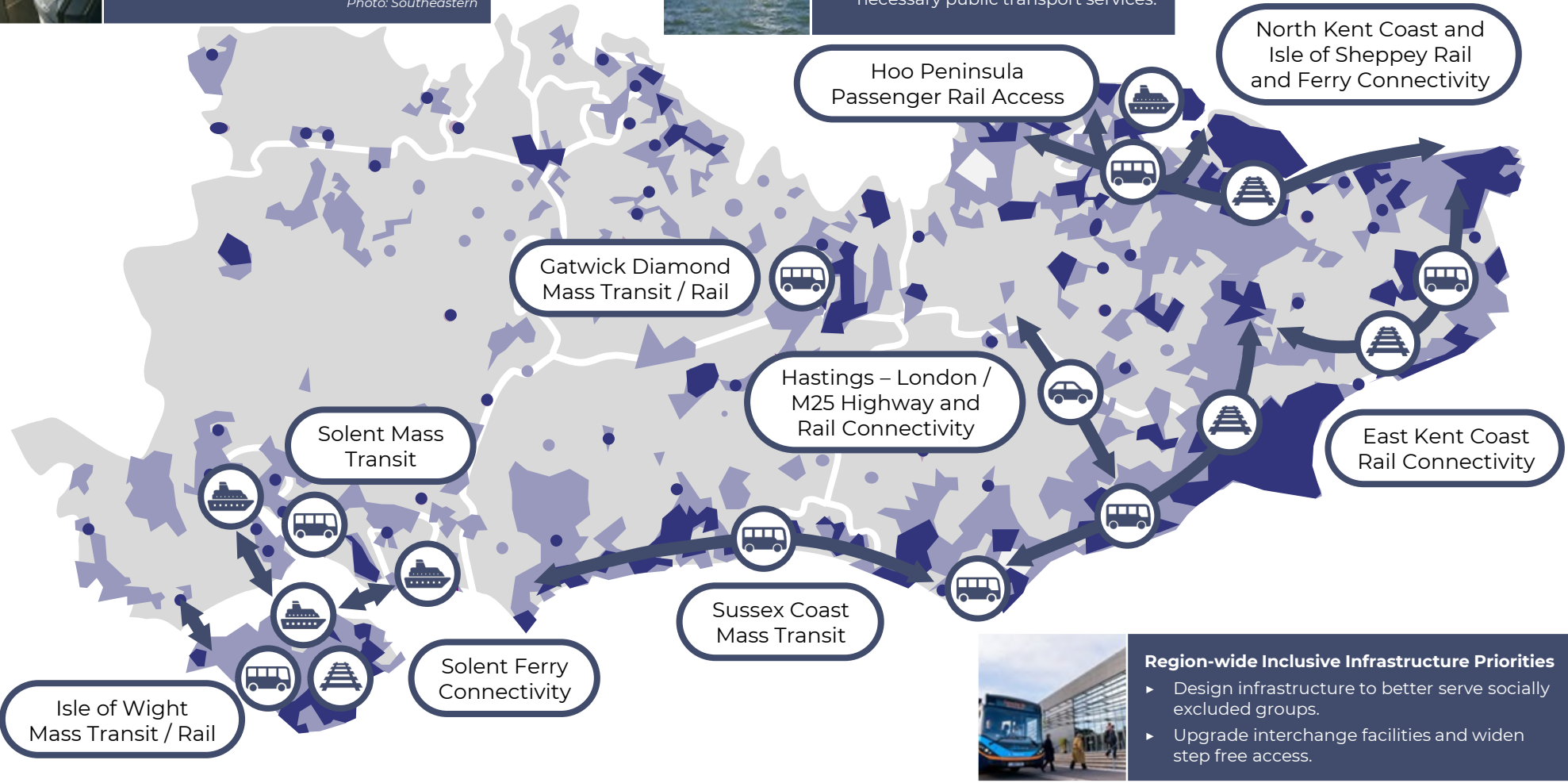
- ▶ Offer affordable fares and concessions.
- ▶ Implement integrated fares and ticketing systems.

Photo: Southeastern



Region-wide Service Priorities

- ▶ Deliver BSIPs and leverage new bus service delivery models.
- ▶ Provide and enhance socially necessary public transport services.



Region-wide Inclusive Infrastructure Priorities

- ▶ Design infrastructure to better serve socially excluded groups.
- ▶ Upgrade interchange facilities and widen step free access.

Medium risk of TRSE

Higher risk of TRSE

Railway

Highway

Mass transit

Ferry



Inclusion and Integration on the Isle of Wight

The Isle of Wight faces unique transport challenges due to its geographical isolation, with ferry services acting as a critical lifeline to the mainland. In recent years, partnerships between the Isle of Wight Council, ferry operators, and community organisations have led to initiatives aimed at making these connections more accessible, integrated, and affordable.

Local residents benefit from discounted ferry fares, making regular travel for work, education, and healthcare more affordable. Ferry operators have also invested in accessible facilities, including step-free access and trained staff, ensuring that travellers with mobility challenges can travel with greater ease.

Efforts to improve transport integration have included aligning bus schedules with ferry timetables and introducing integrated ticketing, allowing passengers to purchase a single ticket covering both ferry and local bus travel. These measures support seamless journeys across the island and encourage the use of public transport. There has also been investment in improving interchange facilities, including the Ryde Transport Hub, which was funded by the South East Hampshire Rapid Transit project.

Further initiatives go beyond traditional transport interventions and focus on supporting residents' broader needs. Medical travel subsidies help islanders access essential healthcare on the mainland, and flexible freight services ensure local businesses can move goods efficiently.

These efforts have increased access to employment, education, and healthcare, while also boosting local tourism. Thanks to these efforts, bus use is markedly higher on the island compared to many more densely populated areas in the South East. The Isle of Wight's approach therefore serves as a model of inclusive transport, illustrating how tailored and integrated transport solutions can enhance the quality of life for isolated communities.



Decarbonisation

We will support the South East's transition to net zero by 2050 by enabling the shift to cleaner transport, promoting sustainable travel choices, and adopting new technologies that reduce emissions and improve the environment and quality of life.



We will know we have succeeded when:

- ▶ The South East makes meaningful progress towards decarbonising transport, in line with national policy and public expectations.
- ▶ All surface transport trips made across the South East are net zero emission by 2050 (at the latest).
- ▶ We have not exceeded our carbon budgets for surface transport by 2050.
- ▶ The transition to cleaner transport is affordable, fair, and accessible – ensuring no communities are left behind.



The government, TfSE, and all local authorities in the South East are committed to achieving net zero transport emissions by 2050.

The ambition is not merely about reaching a final destination but involves adhering to a carbon "budget" and a carefully managed trajectory. These steps are vital to ensure that our total emissions are limited throughout the journey to net zero, in line with the global commitments to keep climate change within manageable limits. To reflect this ambition, TfSE's [policy statement on decarbonisation](#) was updated and published in 2023 and TfSE has developed a Carbon Assessment Playbook and electric vehicle forecast studies for the region.

As a leader in global decarbonisation, the UK has made significant progress in reducing emissions, particularly in the energy sector. 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 charges – including Scandinavian countries, the Low Countries, and France. This disparity highlights the scale of the challenge ahead for decarbonising our transport systems.

Moreover, there are additional pressures where growth risks undermining decarbonisation efforts, particularly in aviation. For example, both [Heathrow](#) and [Gatwick](#) airports have ambitious plans to increase passenger numbers to a combined 200 million passengers per annum, which represents a 60% increase from current levels. Without significant changes, such growth could reverse the progress made in reducing emissions across other sectors.

Therefore, it is clear that the South East's transport system is not decarbonising quickly enough, while the threat of climate change is becoming increasingly urgent. We also must stay within the envelope set for total carbon emissions up to this point to ensure we stick to the carbon budgets agreed at multiple international conferences.

We recognise that we cannot rely solely on the market and technology to meet our targets, but clearly new technology will play a big role. We also recognise the need for ancillary industries – especially energy and, to a lesser extent, construction – to decarbonise in tandem with transport to achieve our goal.

Decarbonisation Outcomes



The key outcome of this mission is to achieve net zero carbon emissions by transitioning to zero-emission vehicles and energy, increasing the use of sustainable travel modes, and reducing the overall reliance on fossil fuel journeys – in a way that is affordable and fair for all residents and businesses.

By 2050, we aim for 100% of new private vehicles to be zero-emission, with intermediate targets of 35% by 2030 and 80% by 2040. Similarly, all buses will need to be zero-emission by 2035, and rail services decarbonised by 2050. Some local authorities in the South East want to move faster than the milestones set at a national level.

Part of this shift will include **promoting active travel for short journeys** and **increasing the mode share of both bus and rail for longer journeys**. This is especially important in the shorter term as it will help limit our emissions while most cars are still powered by fossil fuels.

Freight transport must also play its part in achieving decarbonisation. Through increased rail freight use, optimised logistics, and adapting clean technology and fuels, we will contribute to overall emission reductions in this critical sector. This will also help to ease pressure on the region's roads while supporting sustainable economic growth.

Decarbonising transport also presents opportunities to **attract investment and support green jobs in the South East**. These benefits will be realised as part of a balanced and affordable transition that works for residents and businesses alike.



Short Term Priorities



The immediate priority is to accelerate the transition towards a low-carbon transport network. Through improving provision for public transport and low carbon technologies, and encouraging a shift to low carbon forms of transport by:

- 1 Supporting the roll out of EV charging infrastructure** on strategic networks and in local areas to support the rapid adoption of electric vehicles. This will ensure that private vehicles and freight operations have easy access to charging, reducing range anxiety.
- 2 Supporting the transition to cleaner vehicles** by working with manufacturers and fleet operators to increase the uptake of zero-emission options where it is feasible.
- 3 Supporting the renewal and recycling of low emission vehicles and batteries** by developing processes for recycling electric vehicle batteries and repurposing components to minimise the impact of low emission vehicle adoption.
- 4 Improving bus services** by working with local authorities and bus operators to make bus services more affordable, reliable, and customer-focused to encourage a shift from car use to public transport.
- 5 Supporting local bus, freight, and ferry operators** to transition to zero-emission vehicle fleets by providing financial and technical assistance to help replace diesel-powered buses with electric or hydrogen alternatives.
- 6 Developing local and regional active travel infrastructure** by expanding walking, wheeling and cycling routes, making it safer and easier for people to choose active travel modes for short trips. This includes supporting schemes identified in the Regional Active Travel Strategy and Local Cycling and Walking Infrastructure Plans.
- 7 Supporting sustainable neighbourhood planning** with liveable neighbourhood principles to ensure that residents can meet most of their daily needs within a short walk or cycle from home. This will reduce the need for longer car journeys and making communities more self-sufficient.
- 8 Identifying and addressing potential affordability barriers** to low-emission transport, particularly for lower-income households and small businesses.

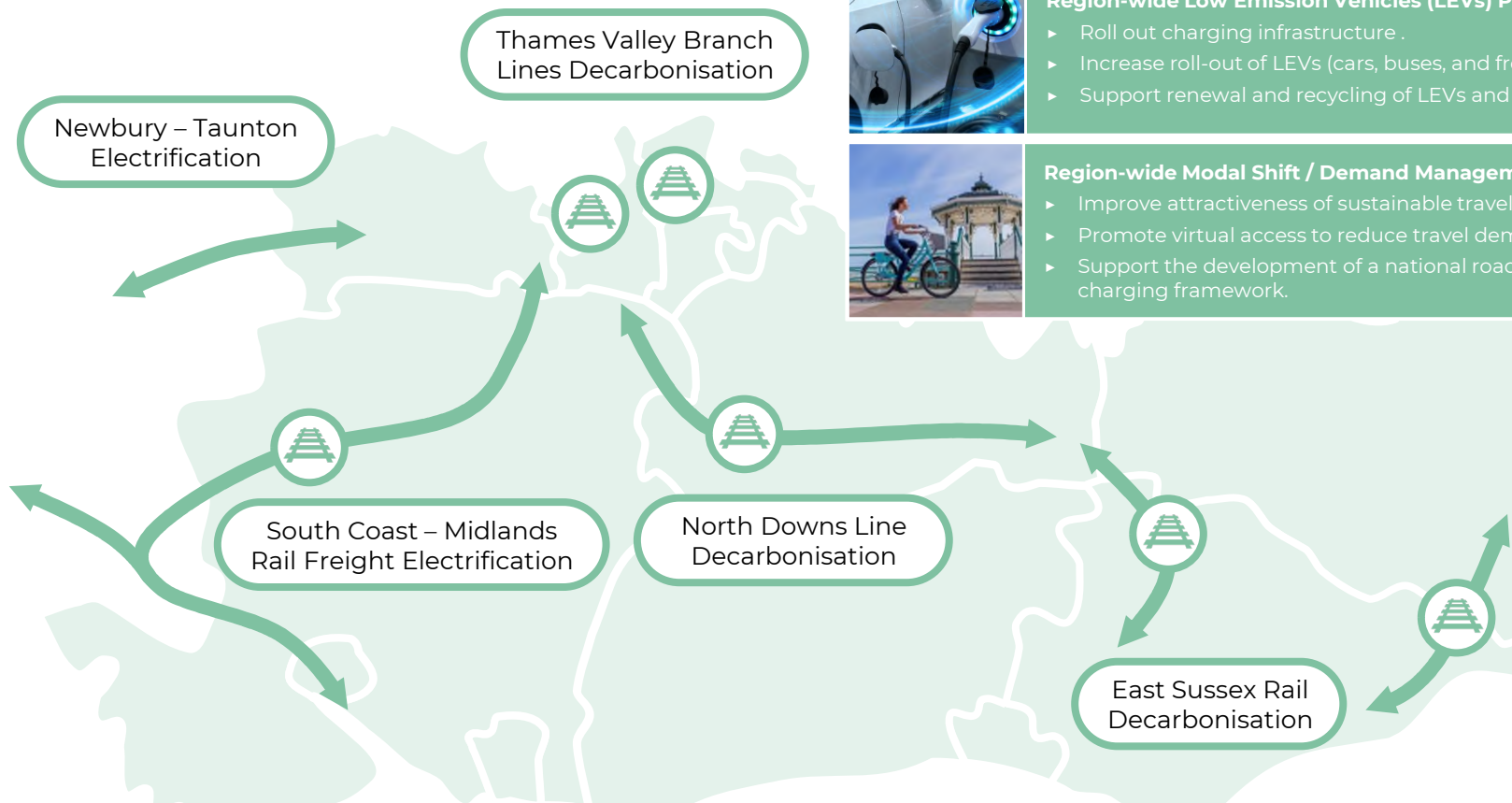
Long Term Priorities



In the longer term, the focus shifts towards transformative infrastructure projects and policy reforms that will accelerate momentum towards a zero-emission transport system. Key actions include:

- 1 Decarbonising the railways** through battery trains and rail electrification, ensuring that all rail services are powered by zero-emission energy sources.
- 2 Developing new rail schemes** to support mode shift for passengers and freight, ensuring that rail becomes the preferred choice for long-distance travel and freight movement.
- 3 Implementing mass transit schemes**, including Bus Rapid Transit, potentially Light Rail, and high-frequency urban rail services to improve public transport accessibility and reduce the need for private vehicle use in densely populated areas.
- 4 Supporting the greening of the grid to ensure low emission vehicles are powered by clean energy sources**, aligning the transition to zero-emission vehicles with the decarbonisation of the electricity grid. This will ensure that the shift to electric vehicles leads to real reductions in emissions.
- 5 Supporting partners in reducing the embodied carbon of new infrastructure** by encouraging the use of sustainable materials and construction methods. This will lower the lifecycle carbon footprint of infrastructure projects, ensuring decarbonisation extends to the construction and maintenance of transport development.
- 6 Exploring future national approaches to road user charging**, ensuring any new models are fair, proportionate, and support sustainable travel choices.
- 7 Ensure the region's power networks have sufficient capacity and resilience** to support the roll-out of electric vehicles, expansion of the rail network, and development – noting that power is one of the key constraints preventing significant expansion of passenger rail services.
- 8 Advancing research and delivery of alternative fuels** by supporting innovation in hydrogen, biofuels, and other alternative energy sources for transport. This will be critical for decarbonising sectors that are harder to electrify, such as aviation and freight.

Decarbonisation Priorities



Thames Valley Branch Lines Decarbonisation

Newbury – Taunton Electrification

South Coast – Midlands Rail Freight Electrification

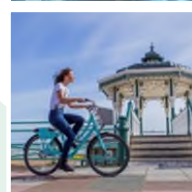
North Downs Line Decarbonisation

East Sussex Rail Decarbonisation



Region-wide Low Emission Vehicles (LEVs) Priorities

- ▶ Roll out charging infrastructure .
- ▶ Increase roll-out of LEVs (cars, buses, and freight vehicles).
- ▶ Support renewal and recycling of LEVs and batteries.



Region-wide Modal Shift / Demand Management Priorities

- ▶ Improve attractiveness of sustainable travel options.
- ▶ Promote virtual access to reduce travel demand.
- ▶ Support the development of a national road user charging framework.



Region-wide Ferry Decarbonisation

- ▶ Support the transition of ferry operations from fossil fuels to low carbon fuels, including inland waterways.



Region-wide Power Priorities

- ▶ Ensure the region's power networks are decarbonised and have the capacity and resilience to support the rail network, roll-out of electric vehicles, and development.

Photo: Mervyn Rands, Creative Commons



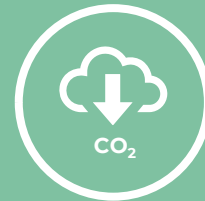
Region-wide Beyond Transport

- ▶ Support decarbonised energy.
- ▶ Support initiatives to tackle embodied carbon.

Photo: Rampion Offshore Wind



Rail decarbonisation interventions are shown in this map – other rail and public transport interventions that promote modal shift are highlighted in Strategic Connectivity and Sustainable Growth missions



A three-pronged approach to decarbonisation

Our decarbonisation strategy is built around the Avoid-Shift-Improve framework, guiding us to reduce emissions through a balanced, pragmatic approach.

- **Avoid:** This element aims to reduce the need for unsustainable travel. While it's not about restricting long-distance journeys altogether, we recognise the environmental benefits of limiting certain trips until they can be fully decarbonised. With the growth of virtual tools, avoiding unnecessary journeys has never been more feasible.
- **Shift:** This focuses on moving travel demand to more sustainable modes. Our research shows that a small fraction of journeys – just 7% – make up half of a person's annual transport emissions. Shifting these trips to electrified or low-carbon alternatives could have a big impact. For example, when HSI opened, Eurostar captured 80% of the London-Paris travel market, replacing one of Europe's busiest air routes. Local Plans provide further examples of this approach by ensuring developments have public transport and active travel connectivity.

- **Improve:** While not all modes of transport can be fully decarbonised today, advances in technology continue to make a difference. Sectors like aviation, maritime, and freight face greater decarbonisation challenges, yet modern aircraft are now four times more energy-efficient than early jet models. Research and development, along with future technologies such as carbon capture and offsetting, are essential for achieving true decarbonisation across all transport modes. Improvements can also be cascaded through existing fossil fuel powered fleets by prioritising higher efficiency engines.

Across the South East, we are already seeing this framework in action. Projects like the electrification of buses and rail in the Thames Valley, the Sussex hydrogen initiative on the South coast, and the decarbonisation of Isle of Wight ferries illustrate how the region is embracing all aspects of Avoid-Shift-Improve. Together, these efforts set a strong foundation for the South East to become a leader in sustainable transport.



Photo: Network Rail

Sustainable Growth

We will champion transport interventions that unlock investment opportunities, enable sustainable growth, and create healthy, vibrant, and well-connected communities.



We will know we have succeeded when:

- ▶ Population growth and economic development in the South East is underpinned by sustainable transport and infrastructure.
- ▶ The South East has created well-connected, liveable communities with easy access to key services and employment opportunities.



The Sustainable Growth mission aims to deliver prosperity without harming the welfare of future generations. It supports the government's first mission, to “kick start economic growth”.

One of the key challenges this mission seeks to address is the affordability of housing in the South East. Significant investment in housing stock will be needed to address this. Additionally, many of the South East's leading industries have ambitions to grow, but are constrained by the availability of well-connected sites.

The government has committed to reinstating housing targets, aiming to build 1.5 million homes in England over the next five years, with a significant contribution expected from the South East. In the current planning system, only through close collaborative working are major developments realised.

Transport can unlock growth in jobs and housing by providing access to development sites while minimising environmental and social impacts on existing residents and businesses. Well-planned developments can enhance the region's transport systems by increasing public transport patronage and revenues.

Sustainable growth can unlock third-party investment in transport options, such as new railway stations and active travel facilities.

Transport can also enhance places. By moving heavy traffic away from urban centres, and by making the urban realm more attractive to pedestrians and cyclists, transport can boost the quality of the environment to attract investment back to commercial centres while improving health and welfare outcomes.





The key outcome of this mission is that any major development is supported by improvements to transport infrastructure and services, especially for sustainable transport.

It is also important that transport is seen as an enabler to sustainable growth, and not a blocker. To achieve this, we aim to significantly increase the proportion of residents and jobs close to high-quality public transport and active travel networks, promoting sustainable travel choices.

Specifically, this mission seeks to promote better integrated land use and transport planning, by:

- ▶ **Ensuring all major developments** (e.g. 3,000 dwellings; an expansion of more than 20%; considerable growth coming from multiple, closely located smaller sites; or a major generator of demand e.g. a new hospital or stadium) **have high-quality public transport services** (two to four services per hour) **and high-quality active travel infrastructure.**
- ▶ **Increasing the percentage of the population and jobs within a 1,500-metre radius of a public transport access point offering a metro-level service frequency** of at least four services per hour.
- ▶ **Ensuring a higher percentage of the population can reach all key services by sustainable transport modes within a 30-minute travel time**, whether by public transport, walking, or cycling. This includes access to healthcare, education, shopping, and leisure facilities.
- ▶ Promoting the development of well-connected new and growing places by **aligning housing and employment growth with high-quality public transport and active travel corridors**, as well as good highway access. This will support the creation of vibrant, sustainable communities where residents and businesses can thrive.
- ▶ **Promoting liveable neighbourhood and Healthy Streets** planning principles to increase the attractiveness of active travel in urban areas.
- ▶ **Increasing the percentage of new dwellings within ten minutes of metro-level public transport services** and high-quality active travel routes to ensure new developments are located in places that offer residents a wide range of sustainable travel options.

This mission also recognises the importance of designing places that promote public health through walkability and active travel, while ensuring access is maintained for those who rely on driving.



TfSE has long advocated for better integrated transport and land use planning. Achieving sustainable growth and creating well-connected communities requires a holistic set of interventions that focus on integrating land use and transport planning, delivering high-quality transit services, and enablers including sustainable funding mechanisms and demand management measures. Key integrated land-use planning interventions include:

1

Delivering new and well-connected communities by focusing development in areas with existing or planned transport infrastructure.

This includes major new towns and extensions at locations such as Ebbsfleet, Basingstoke, and Mid Sussex, as well as the development of appropriately located mixed-use communities that are relatively dense and aligned with public transport corridors.

Priority should also be given to the regeneration of greyfield and brownfield sites (where these have reasonable transport access) to make efficient use of land and minimise the environmental impact of any new development.

2

Integrating land use and transport planning to locate new developments where high-quality sustainable transport is viable – including active travel links that support public health and reduce the need to travel by car where possible.

Collaborating across planning authorities and standing ready (in the longer term) for possible governance changes, such as the formation of combined authorities, which will enable more effective coordination of housing, transport, and economic planning.



Key transport interventions include:

1 Expanding public transport concessionary fares schemes to make sustainable travel options more accessible and affordable.

Initiatives like the £3 bus fare cap will encourage greater use of public transport, particularly for shorter journeys, helping reduce congestion.

2 Developing mass transit systems in major population centres, such as Solent, Sussex coast, North Kent, Gatwick Diamond, Blackwater Valley, and Thames Valley – alongside delivering BSIP across the region.

TfSE has undertaken benchmarking studies that show many places in the South East have the scale and density to support sustainable, high-quality, mass transit systems. In the shorter term, these will likely take the form of Bus Rapid Transit systems providing a frequency of four to six services per hour – although in the longer term higher capacity options such as trams could be viable. These systems will improve access to jobs and services, reduce congestion, and support sustainable travel in high-density areas.

3 Delivering a high-quality, high-frequency suburban passenger rail service in the Solent area and along the Sussex coast.

This will provide a reliable alternative to road travel and improve connectivity between suburban areas and major employment centres, supporting economic growth while reducing congestion and emissions. Upgrading the suburban rail network will enhance accessibility, increase passenger capacity, and offer a competitive and sustainable option for regional travel.

4 Embedding high-quality, well connected active travel infrastructure into the design of new communities to support healthier lifestyles and reduce car use, especially for short trips. This includes delivering Local Cycling and Walking Infrastructure Plans (LCWIPs) as well as TfSE's Regional Active Travel Strategy and Plan (RATSAP) across the region.



Key enablers include:

1 Establishing local and national funding mechanisms to forward-fund transport projects that unlock planned growth.

This includes enhanced value capture mechanisms, where the uplift in property values from new infrastructure investments is used to fund transport improvements, as well as national schemes such as road user charging to provide sustainable revenue streams for long-term investment.

2 Implementing local demand management and environmental measures, such as workplace parking levies, congestion charges, clean air zones, and local tolls on new major highways.

These measures will help manage traffic demand, improve air quality, and generate revenue that can be reinvested in public transport and active travel infrastructure. They should be designed to support sustainable travel choices without disadvantaging those who rely on driving for essential journeys.

3 Boosting regional and local planning capacity and capability to ensure local authorities have the means to deliver sustainable development.

Alongside delivering better planning outcomes, this will also ensure local authorities deliver timely planning policies and decisions for the benefits of promoters, residents, and stakeholders.

4 Ensuring development delivers for people and the environment.

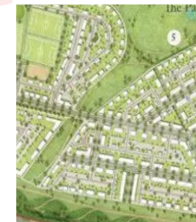
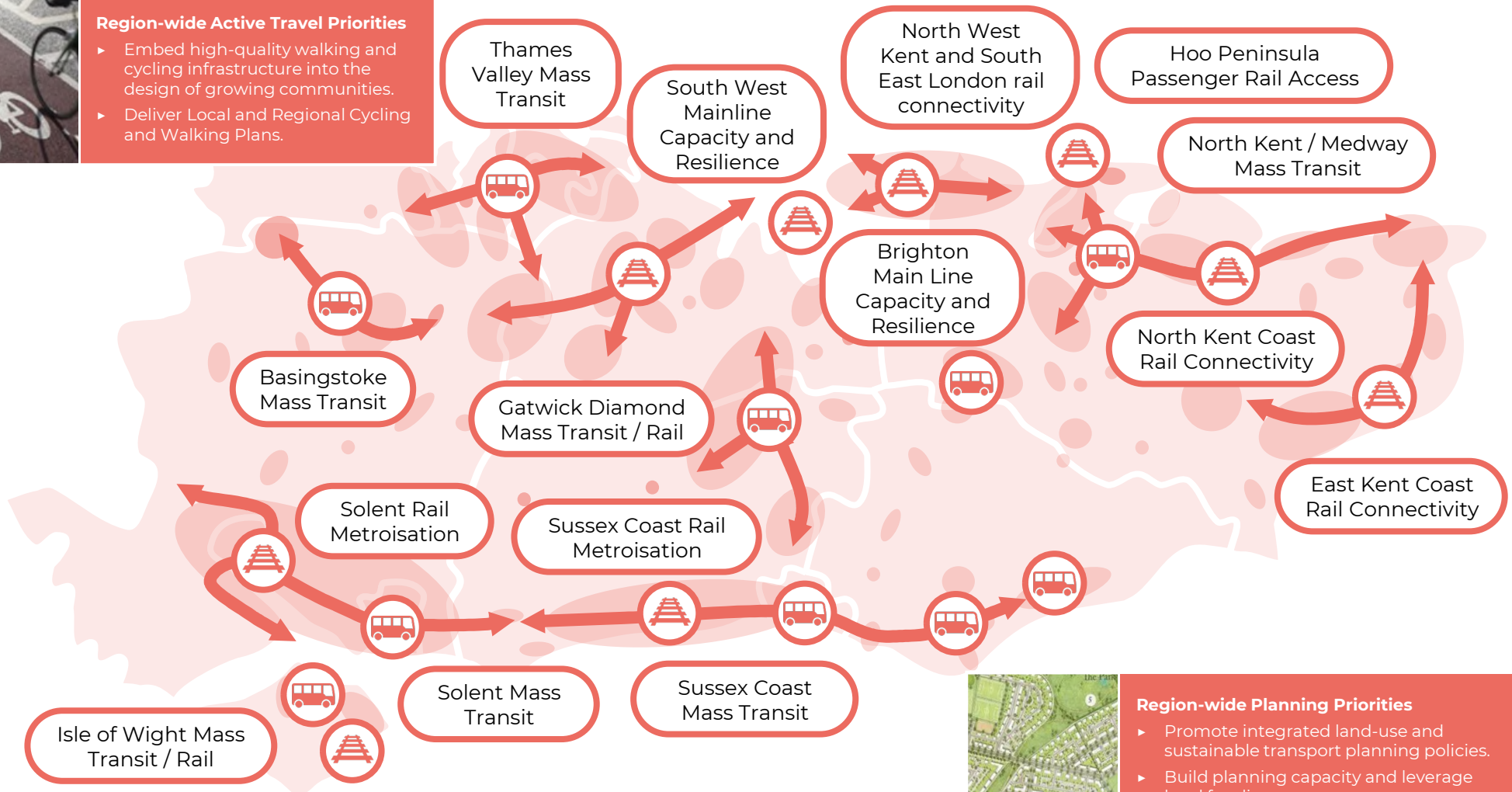
The government's reforms to the planning system, such as the Planning and Infrastructure Bill, is another key opportunity to support responsible transport delivery. TfSE will work with partners to explore how future infrastructure projects can align with the objective of these reforms, balancing economic and housing growth with supporting biodiversity and environmental net gain.

Key Priorities



Region-wide Active Travel Priorities

- ▶ Embed high-quality walking and cycling infrastructure into the design of growing communities.
- ▶ Deliver Local and Regional Cycling and Walking Plans.



Region-wide Planning Priorities

- ▶ Promote integrated land-use and sustainable transport planning policies.
- ▶ Build planning capacity and leverage local funding measures.

Photo: South East Faversham

Highway 

Railway 

Mass Transit 

Growth area 



Best practice in sustainable development

Many places in the South East have demonstrated how well-planned development, supported by strategic transport investments, can drive sustainable outcomes. While not all projects achieve their full potential, several notable examples showcase best practices in urban and transport planning. For example, the Movement and Place Framework exemplifies best practice in integrating public health, transport, and public realm improvements. By recognising transport's role in placemaking, this framework promotes safer, people-centred environments. Similarly, by prioritising vulnerable road users and sustainable transport modes, especially in dense urban areas, the User Hierarchy supports sustainable travel choices and safer streets.

Examples of sustainable development projects that align with these principles include:

- **Crawley and Horsham:** Leveraging growth to expand the successful Fastway Bus Rapid Transit system and establish a new Thameslink-served rail station.
- **Ashford:** Concentrating development around one of the region's best-connected hubs, while safeguarding the surrounding landscapes and natural resources.

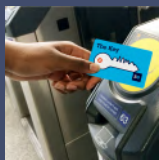
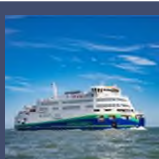
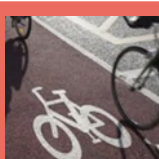
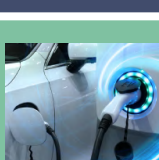
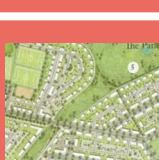
- **Southampton and Portsmouth:** Densifying brownfield sites near transport hubs is set to enable doubled rail service frequencies for local services between Southampton and Portsmouth, while improved Bus Rapid Transit services will support regeneration around Gosport and Portsmouth, enhancing connectivity across the Solent.
- **Reading Green Park:** Combining medium density business and residential growth with a new rail station and high-quality active travel corridors to reduce reliance on the car.
- **Andover:** Providing new residents with free bus tickets to enable them to explore the local public transport system and avoid relying too much on the car.

Although the planning landscape is evolving with a focus on housing affordability, these projects demonstrate that the South East has effective tools to drive sustainable growth. Such developments not only support sustainable travel but also create opportunities to unlock funding, ensuring that both housing and transport needs are met in a balanced, sustainable way.



Global Policy Interventions

The following pan-regional interventions have been identified in this strategy, which cut across multiple missions. Delivering these interventions will require action at all levels of government and industry – from national to local.

	Region-wide Service Priorities ▶ Improve incentives to make sustainable travel choices. ▶ Refine timetables to support faster growing rail markets – including regional services.		Region-wide Modal Shift and Demand Management ▶ Improve attractiveness and raise awareness of sustainable travel options through behaviour change campaigns. ▶ Promote virtual access to reduce travel demand. ▶ Explore the development of an equitable and practical national road user charging framework.
	Region-wide Maintenance Priorities ▶ Reduce the maintenance backlog and improve roadworks management. ▶ Secure long-term funding to identify, understand, and address resilience risks.		Region-wide Ferry Decarbonisation Priorities ▶ Support the transition of ferry operations from fossil fuels to low carbon fuels, including inland waterways.
	Region-wide Inclusive Infrastructure Priorities ▶ Design infrastructure to better serve groups at risk of social isolation. ▶ Upgrade interchange facilities and improve levels of step free access.		Region-wide Power Priorities ▶ Ensure the region's power networks are decarbonised and have the capacity and resilience to support the rail network, roll-out of electric vehicles, and development.
	Region-wide Fares/Ticketing Priorities ▶ Offer affordable fares and concessions. ▶ Implement integrated fares and ticketing systems.		Region-wide Beyond Transport Priorities ▶ Support decarbonised energy. ▶ Support initiatives to tackle embodied carbon.
	Region-wide Service Priorities ▶ Deliver BSIPs and leverage bus service delivery models. ▶ Provide and enhance socially necessary public transport services.		Region-wide Active Travel Priorities ▶ Embed high-quality walking and cycling infrastructure into the design of growing communities. ▶ Deliver Local and Regional Cycling and Walking Plans. ▶ Promote active travel as a means of improving public health and wellbeing.
	Region-wide Low Emission Vehicles (LEVs) ▶ Roll out charging infrastructure. ▶ Increase roll-out of LEVs. ▶ Support renewal and recycling of LEVs and batteries.		Region-wide Planning Priorities ▶ Promote integrated land-use and sustainable transport planning policies. ▶ Build planning capacity and leverage local funding measures. ▶ Support greater local and regional powers to deliver integrated transport, housing, and energy outcomes, building on new devolution deals across the South East.



Introduction

This chapter outlines how TfSE and its partners will transform the strategic vision into tangible results, ensuring the South East achieves its vision and goals.

This work builds on TfSE's significant achievements to date, including the SIP and Delivery Action Plan. These foundational documents have provided a clear framework for identifying and prioritising interventions and policies to achieve the vision and goals. The SIP sets out the necessary investments across the transport network, while the Delivery Action Plan provides a practical route map for bringing these interventions forward, ensuring alignment with local and national priorities.

In a context of financial constraints, fragmented resources, and increasing demand for public services, TfSE recognises the critical importance of collaboration. By working closely with central government, local authorities, transport operators, and industry groups, TfSE aims to unlock the full potential of the SIP and its associated interventions.

This chapter highlights TfSE's structured delivery framework, which includes strategic planning tools, funding mechanisms, and capacity-building initiatives. It also emphasises the importance of monitoring progress and adapting strategies to align with changing circumstances. TfSE's focus on evidence-based decision-making and strong partnerships ensures the region is well-equipped to overcome challenges and seize opportunities.

Ultimately, this chapter serves as a framework for turning strategy into action, detailing the roles and responsibilities of all stakeholders, as well as the tools and processes that will drive success. By leveraging these resources, TfSE is committed to building a transport network that delivers long-term economic, social, and environmental benefits for the South East.

Challenges and Opportunities

TfSE recognises that the resources and tools for delivering meaningful change are more constrained now than in 2020. While central government will remain a key player, success will also depend on active support and collaboration from regional and local authorities, as well as the private sector.

Severe financial pressures and rising demand for local public services have placed significant strain on authorities across the South East. Over the past decade, reductions in central government funding, declining revenues, along with increased costs and risks have further restricted the capacity to develop and implement large transport projects. Additionally, fragmented distribution of resources across different networks has led to siloed planning, making coordinated efforts more challenging. To address this, TfSE advocates for longer-term funding settlements to enable more effective planning.

To deliver the South East's Transport Strategy and SIP, TfSE and its constituent authorities must explore innovative funding solutions. This includes exploring options such as greater devolution, rail industry reform, and "beneficiary pays" models that create sustainable revenue streams. While promising, these approaches will require significant political effort and may encounter opposition, underscoring the need for a united and strategic approach.

Delivery must also reflect the need to make schemes affordable and accessible to all, ensuring that the benefits of investment are shared fairly across communities. TfSE will work with partners to understand the practical implications for local delivery capability and capacity and seek to support where gaps exist through its Centre of Excellence.

Devolution in the South East is now gathering pace, with areas such as Hampshire and the Solent and Sussex and Brighton identified as priorities for the next wave of devolved powers. Over time, **all areas across the South East may evolve into mayoral strategic authorities** with significant responsibilities for transport, planning, and economic development. This shift represents a major opportunity to **align regional and local priorities more effectively and deliver integrated outcomes.** TfSE stands ready to support its constituent authorities throughout this transition – helping to build capacity, strengthen partnerships, and ensure transport remains central to future devolution arrangements.

In the meantime, TfSE can play a crucial role in enhancing transport planning capacity across the region. This includes supporting the development of a Centre of Excellence, providing partners with access to its Analytical Framework, and offering resources to support early-stage scheme development. By fostering collaboration and building local capabilities, TfSE aims to empower the South East to deliver its ambitions.

TfSE's Approach to Delivery

Delivering this strategy requires a coordinated, strategic approach to planning, prioritisation, and progress monitoring. To achieve this, TfSE has established a clear framework for translating the strategy into actionable interventions and policies.

SIP and Policy Position Statements

The 2020 Transport Strategy provided the foundation for the SIP, which identifies the interventions and policies needed to achieve the Vision and Goals. Supporting this, TfSE has prepared Policy Position Statements that outline the global actions required to implement the SIP effectively.

Delivery Action Plan

This is a detailed route map for achieving the SIP, especially for schemes prioritised for progress within the next three years. It clarifies leadership responsibilities, resource requirements, and TfSE's role in supporting delivery. Updated annually through partner collaboration, this plan remains dynamic and aligned with regional priorities.

Analytical Framework

TfSE's Analytical Framework underpins the evidence base for all strategic decisions, from decarbonisation and electric vehicles to freight and economic assessments. It is not just a support tool for delivery partners, but a core component of TfSE's approach to strategy development, prioritisation, and monitoring. The framework will continue to evolve, ensuring decisions remain guided by robust, up-to-date data and analysis.

Prioritisation Framework

Recognising the complexity of delivering schemes through various funding streams, the Prioritisation Framework provides a structured methodology to rank SIP schemes against criteria such as strategic fit, deliverability, and impact. This ensures resources are directed where they will have the greatest benefit.

Support for Delivery Partners

TfSE works closely with partners to provide funding, resources, and technical tools for scheme development. Key initiatives include:

- ▶ **Scheme Development Funding:** Supporting the early stages of scheme development.
- ▶ **Centre of Excellence:** Building capacity and technical expertise across the region.

Monitoring, Reporting, and Refreshing

Progress is systematically tracked through annual updates to the Delivery Action Plan and reported in **TfSE's Annual Report**. The **State of the Region Report**, published biennially, provides a comprehensive overview of how the South East is performing on key economic, social, and environmental metrics. These insights ensure alignment with strategic aspirations and inform future updates to the Transport Strategy, SIP, and Delivery Action Plan.

Roles and Responsibilities

The delivery of this strategy will require the collective effort of TfSE and its partners. TfSE's delivery approach is based on a clear understanding of the roles and responsibilities of each. The list below outlines how different delivery activities contribute to the broader strategic outputs necessary for achieving the Transport Strategy's missions.

Government including Department for Transport (DfT)	Central Government, particularly the DfT, plays a critical role in enabling the delivery of TfSE's strategy by providing funding, shaping supportive policy, and enacting regulatory changes. These elements are essential for implementing interventions and achieving the strategic goals outlined in the SIP. The DfT's support ensures alignment between national transport objectives and the priorities for the South East, enabling the delivery of transformative projects.
Strategic Authorities	As the devolution landscape continues to develop, we expect strategic authorities, including mayoral combined county authorities, will play an increasing role in transport and spatial planning and delivery.
Local Transport Authorities (LTAs)	LTAs are key to implementing TfSE's strategy on the ground, as they manage local highways, public transport services, and active travel networks. They play a vital role in developing and delivering transport projects, such as highways improvements, bus interchanges, and active travel schemes. By aligning spatial and transport planning, LTAs ensure that local development is coordinated with regional transport priorities. TfSE supports LTAs by offering technical assistance, funding for early-stage scheme development, and access to its Centre of Excellence.
Local Planning Authorities (LPAs)	LPAs are instrumental in aligning spatial planning with TfSE's strategy. They develop Local Plans that integrate housing, employment, and transport priorities, ensuring that growth is supported by sustainable transport infrastructure. By embedding TfSE's vision into local policies, they help create well-connected communities that promote sustainable travel choices.

Roles and Responsibilities

National Highways	National Highways leads the delivery of improvements to the Strategic Road Network (SRN), which is critical to supporting regional connectivity and resilience. TfSE collaborates with National Highways to help shape the development of the Roads Investment Strategy, aligning investment with the strategic priorities of the South East. This partnership ensures that projects like junction upgrades and new road links address regional challenges such as congestion and freight movement.
Network Rail and Great British Railways	Network Rail currently manages rail infrastructure in the region, while GBR is set to take on strategic functions in the medium term. TfSE will collaborate closely with central government to align national rail priorities with regional needs, focusing on enhancing rail connectivity and reliability. TfSE works with these bodies to ensure that the rail network supports the South East's economic and environmental goals, including decarbonisation and improved access to international gateways.
Active Travel England and Sustrans	Active Travel England and Sustrans are essential partners in promoting sustainable travel through active travel infrastructure and public rights of way. They have worked with TfSE on the development of our Regional Active Travel Strategy and Action Plan that will help achieve the strategy's Decarbonisation and Inclusion and Integration missions. By integrating active travel into transport planning, they support the creation of healthier, more connected communities.
Transport operators and port and airport owners	Operators of public transport, ports, and airports contribute directly to the delivery of TfSE's strategy by providing essential services and infrastructure. These stakeholders are vital in enhancing strategic connectivity, transitioning to zero-emission fleets, and improving access to international gateways. TfSE liaises with operators through our Transport Forum and seeks to address the operational challenges they face through our ongoing thematic work programme.
Industry bodies and interest groups	Industry representatives and advocacy groups play a critical role in delivering TfSE's strategy by providing insights, expertise, and support for key initiatives. Their involvement helps to ensure that transport interventions align with broader economic, social, and environmental objectives. By engaging with these groups, TfSE fosters collaboration and builds the case for investment in transformative projects that benefit the South East.

TfSE's Role

The tables to the right and on the following slide outline the key actions TfSE must take out until 2030 to achieve our missions, and tackle known, cross-cutting delivery challenges.

These actions will evolve and become more focused as we progress delivery of the strategy.

TfSE is committed to keeping its strategy relevant and effective. Following this refreshed strategy, the SIP will be updated to align with the new missions. TfSE also plans to refresh the Transport Strategy every five years, ensuring its approach remains adaptable to evolving challenges and opportunities.

The delivery of this strategy will take the combined effort of TfSE and its partners.



Strategic Connectivity



To support the Strategic Connectivity mission, TfSE will:

- ▶ Continue to support the development of the business cases for schemes in our SIP.
- ▶ Deliver on the recommendations of our studies into intermodal transfer of freight from road to rail and warehousing supply in the TfSE area.
- ▶ Work with government and local partners to develop a coherent pipeline of infrastructure investment, so that infrastructure planning across transport and utilities is delivered in a joined-up manner.
- ▶ Work with National Highways and Great British Railways to help set priorities for road and rail network.
- ▶ Work with local authorities and Active Travel England to secure funding for investment that improves first-mile-last-mile connectivity to transport hubs and services by walking and cycling.
- ▶ Proactively work with government and our international gateways to identify, support, and deliver improvements to connectivity.
- ▶ Deliver the forthcoming South East Rail Strategy, which will support continued investment in the rail network.



Resilience



To support the Resilience mission, TfSE will:

- ▶ Work with our partners to identify the specific role that TfSE can best play in enhancing the resilience of the transport network.
- ▶ Develop an evidence base on key resilience risks affecting the strategic transport network across the South East, and quantify the impacts of these risks.
- ▶ Make the case to government for enhanced and consistent funding to improve the operational resilience and maintenance of strategic and local transport networks.
- ▶ With Network Rail, National Highways, government, and local authorities, identify opportunities for targeted investment in improving the operational resilience of the Strategic Road Network, and Major Road Network and key rail links.
- ▶ Work with Network Rail, National Highways, government, local authorities, and our environmental stakeholders to understand the potential for nature-based solutions (e.g. sustainable drainage systems) to improve the resilience of networks to extreme weather.



Inclusion and Integration



To support the Inclusion and Integration mission, TfSE will:

- ▶ Work with our partners to ensure that the impacts on Transport Related Social Exclusion TRSE be embedded in scheme development at an early stage, including as part of statutory impact assessments.
- ▶ Work through the Wider South East Rail Partnership and our Bus Forum to deliver best practice in catering for the needs of socially excluded groups in operations.
- ▶ Further develop our evidence base on social exclusion, specifically on the impacts of different intervention types in reducing social exclusion, including impacts on specific groups.
- ▶ Include methodologies that prioritise engagement with socially excluded groups in transport policy making and scheme development on the Centre of Excellence.
- ▶ Share best practice on the application of consistent approaches to integrated ticketing and fares as part of our Centre of Excellence.



Decarbonisation



To support the Decarbonisation mission, TfSE will:

- ▶ Work with other STBs to enhance the Carbon Assessment Playbook and further embed it in the local transport scheme assessment process.
- ▶ Continue work with the freight sector to identify and deliver initiatives to accelerate freight decarbonisation.
- ▶ Support the roll out of the Electric Vehicle Charging Infrastructure Visualiser Tool to help local authorities identify suitable locations for publicly available charging points.
- ▶ Continue to support the roll out of dedicated charging infrastructure to accelerate the electrification of commercial vehicle fleets.
- ▶ Commence a dedicated workstream on combined transport and energy investment opportunities across the South East, exploring infrastructure improvements and service models required to deliver radical decarbonisation of both sectors.
- ▶ Work with Network Rail on options to support the decarbonisation of the railway where diesel trains still operate.



Sustainable Growth



To support the Sustainable Growth mission, TfSE will:

- ▶ Work with local planning authorities, local transport authorities, and Homes England to identify and roll out opportunities for forward funding sustainable transport investment as a means of enabling sustainable growth.
- ▶ Through the Centre of Excellence, work with highway authorities to adopt more widely the 'Healthy Streets' approach across the South East.
- ▶ Horizon scanning for new transport technologies, providing advice on their potential impacts on transport and wider society, and recommend policy interventions needed.
- ▶ Provide case studies and access to data and analytical tools on successful integration of land use and transport planning, focussing on enabling sustainable travel, as part of the Centre of Excellence.

Delivery Challenges

To help address challenges in delivery, TfSE will:

- ▶ Develop a funding playbook for strategic transport infrastructure investment, to identify alternative funding sources for such investment based upon a beneficiary-pays principle.
- ▶ Work with government to advocate for increased, consistent funding to deliver the ambitions set out in this strategy and our SIP.
- ▶ Continue to develop the TfSE Analytical Framework and Centre of Excellence in response to delivery challenges identified by our partners.

Funding and Financing

Multiple sources of funding and financing are needed to deliver this strategy.

The table below outlines the key funding and financing options that will be called on to deliver this strategy. This builds on detailed work undertaken by TfSE in developing its SIP.

Public finance is likely to remain the key source of funding for highway and railway infrastructure in the future. Looking further ahead, to manage demand and invest in sustainable transport alternatives, new funding models will need to be pursued in future to secure finance to implement schemes.

This could include beneficiary pays models, such as road user charging schemes, as a means of both managing demand in a 'pay as you go' model or as part of a 'mobility as a service' package, as well as providing much needed funding for investing in sustainable transport alternatives.

Where demand management tools are proposed, TfSE will work with partners to ensure they are fair and proportionate.

TfSE will continue to identify and secure additional sources of funding to help deliver this strategy.



Funding

Money provided by users, investors, and/or government, which does not need to be reimbursed.

Sources

- ▶ Private sector
- ▶ Local government
- ▶ Regional government
- ▶ UK government

Dependencies/enablers

- ▶ Developer funding
- ▶ Levies (e.g. business)
- ▶ Charges (e.g. cordons)
- ▶ Commercial opportunities



Financing

Money provided by banks or other financiers with an expectation of a return on their investment.

Sources

- ▶ Banks
- ▶ Lenders
- ▶ Investors (UK and foreign)
- ▶ Public Loans Work Board

Dependencies/enablers

- ▶ Revenue (fares, tolls)
- ▶ Underwriting

Programme for Delivery

The 2023 SIP outlines how the interventions within it could be delivered. This will be refreshed to reflect this strategy.

An updated high-level programme illustrating the potential timelines for the interventions included in this strategy is provided in **Appendix C**. This will be further developed as part of the SIP refresh.

Monitoring and Evaluation

TfSE has established processes to oversee the development, delivery and benefits realisation arising from its strategy and SIP.

This includes monitoring a set of indicators, which are outlined in TfSE's SIP and State of the Region Report. The list below outlines how these indicators map to the five missions outlined in this strategy.



Indicators

Strategic Connectivity	Resilience	Integration and Inclusion	Decarbonisation	Sustainable Growth
► From the SIP				
► Improved journey times and reliability on the Strategic Road Network, Major Road Network and local roads. ► Improved operating performance on the railway network, measured by Public Performance Measure (PPM) and other available passenger and freight performance measures, where available. ► No transport schemes or interventions result in net degradation of the natural capital of the South East.	► Reduced delays on the highways network due to poor weather. ► Reduced number of days of severe disruption on the railway network due to poor weather. ► Metrics relating to reduced delay on road network suffering from road traffic collisions.	► Increase in the number of bus services offering 'Smart Ticketing' payment systems. ► Number of passengers using 'Smart Ticketing'. ► Number of passengers using shared transport. ► Reduction in NOx, SOx and particulate pollution levels in urban areas. ► A reduction in the indicators driving the indices of multiple deprivation in the South East, particularly in the most deprived areas in the South East region. ► Increase in the number of cross-modal interchanges and / or ticketing options in the South East. ► Reduction in the number of people killed and seriously injured by road and rail transport.	► Reduction in carbon emissions by transport. ► A net reduction in the number of miles undertaken per person each weekday. ► A reduction in the mode share of the private car (measured by passenger kilometres). ► Reduction in non-renewable energy consumed by transport.	► The percentage of new allocated sites in Local Plans supported by high frequency bus, mass transit or rail. ► Clear and quantified sustainable transport access and capacity for Local Plan allocated sites. ► Increase mode share of trips undertaken by foot and cycle. ► Increase number of bikeshare schemes in operation in the area. ► Increase in the length of segregated cycleways in the South East. ► Increase in the length of the National Cycle Network in the South East.
From the State of the Region Report				
► Rail and rail network reliability. ► Average speeds for road and rail between key East-West locations. ► One-hour public transport catchments to international gateways.	► Road and rail network reliability. ► Percentage change in delays on the Southern Rail network caused by weather events. ► Average delay on key freight links. ► Road collisions per billion vehicle miles.	► Accessibility scores in the TfSE geography. ► Transport Related Social Exclusion scores. ► Percentage of household income spent on transport. ► Inflation of public transport fares.	► Transport carbon emissions total/per capita. ► Percentage split of vehicles by fuel type. ► Electric or hybrid cars licensed. ► Number of EV charging points in the South East. ► Charging devices per 100,000 of population.	► Adult activity levels. ► Percentage of households with three or more cars. ► Rail and bus trips per person per year. ► Average distance of travel. ► Percentage of household income spent on transport.
► Mode share of trips per person per year in the South East.		► South East and UK GVA growth from 2020.		► Biodiversity net gain.

Appendix A

Mission Details



Strategic Connectivity Framework



Challenges	Interventions	Outputs	Outcomes	Impacts
▶ Most orbital and East-West corridors are poorly served, preventing communities from benefiting from agglomeration. ▶ Road congestion is too high on many strategic corridors. ▶ Economic growth and productivity has flatlined. ▶ Brexit is disproportionately impacting the TfSE area. ▶ People are not incentivised to travel sustainably. ▶ Railway industry finances are unsustainable. ▶ Rising costs are a barrier to delivering capital projects. ▶ Transport has an adverse impact on our health and our environment. ▶ The benefits of transport are not distributed equally, and many areas are at risk of Transport Related Social Exclusion.	▶ Region-wide Service Priorities. ▶ Hastings – London / M25 Highway and Rail Connectivity. ▶ South Coast Highway and Rail Connectivity. ▶ South Coast Ports – Midlands and North Freight Connectivity. ▶ Channel Ports – Midlands and North Rail Freight. ▶ Heathrow and Old Oak Common Rail Access. ▶ Gatwick Airport – Kent Rail Connectivity. ▶ Bakerloo Line Extension and Upgrade. ▶ Isle of Wight Ferry Connectivity. ▶ Reinstated International Rail Services.	▶ The connectivity of the South East's strategic corridors – in terms of journey times and reliability – is comparable to those corridors that serve London. ▶ The South East's key towns, cities, and international gateways are as accessible by bus and rail as they are by car, and rail freight is as competitive as road freight.	▶ Increased modal share of both passenger and freight journeys using sustainable travel options on strategic corridors. ▶ Reduced congestion, improved air quality, reduced severance, and improved safety. ▶ Higher customer satisfaction of transport users. ▶ Higher public transport demand and revenues. ▶ Extended access to employment opportunities as well as commercial and public services.	▶ The UK's productivity is boosted by sustainable economic growth. ▶ The South East is better placed to compete in the global marketplace. ▶ There is more funding to invest in public and transport services, thanks to Improved transport industry and government revenues. ▶ The South East has a better environment for human health and nature, contributing to increased quality of life for its residents. ▶ The South East has better and more equitable socio-economic outcomes, particularly for areas at risk of being "left behind".

Strategic Connectivity Interventions



Interventions in this strategy	Interventions included in the 2023 SIP with scheme references	
Region-wide Service Priorities	▶ Global Policy Statement (Public transport fares)	
Hastings – London / M25 Highway and Rail Connectivity	▶ A21 Safety Enhancements (X4) ▶ A21 Kippings Cross to Lamberhurst (X25) ▶ Flimwell and Hurst Green Bypasses (X25)	▶ HS 1 / Marsh Link – Hastings, Bexhill and Eastbourne Upgrade (T2) ▶ South Eastern Main Line Capacity Enhancements (S4)
South Coast Highway and Rail Connectivity	▶ A27 Arundel Bypass (I3) ▶ A27 Worthing and Lancing Improvement (I4) ▶ A27 Lewes – Polegate (I7) ▶ A27 Chichester Improvements (I8) ▶ A27 Tangmere Junction (I20) ▶ A27 Fontwell Junction (I21) ▶ A27 Worthing Long Term Solution (I22) ▶ A27 Hangleton Junction (I23)	▶ A27 Devils Dyke Junction (I24) ▶ A27 Falmer Junction (I25) ▶ A27 Hollingbury Junction (I26) ▶ Southampton Central Station – Woolston Crossing (B1) ▶ South West Main Line – Mount Pleasant Level Crossing Removal (B4) ▶ Fareham Loop/Platform (A4) ▶ West Worthing Level Crossing Removal (F2)
South Coast Ports – Midlands and North Freight Connectivity	▶ Additional Rail Freight Paths to Southampton (A11) ▶ B7 Havant Rail Freight Hub (B7) ▶ B8 Fratton Rail Freight Hub (B8) ▶ B9 Southampton Container Port Rail Freight Access and Loading Upgrades (B9) ▶ Southampton Automotive Port Rail Freight Access and Loading Upgrades (B10) ▶ Newhaven Port Capacity and Rail Freight Interchange Upgrades (J9)	▶ Eastleigh to Romsey Line Electrification (B6) ▶ Reading to Basingstoke Enhancements (O3) ▶ Theale Strategic Rail Freight Terminal (O18) ▶ West of England Main Line Electrification from Basingstoke to Salisbury (O19) ▶ M3 Junction 9 (R1) ▶ M3 Junction 9 - Junction 14 Smart Motorway (R2) ▶ A34 Junction and Safety Enhancements (R12) ▶ A326 Capacity Enhancements (LLM) (I9)
Channel Ports – Midlands and North Rail Freight	▶ Rail Freight Gauge Clearance Enhancements (S17)	
Heathrow and Old Oak Common Rail Access	▶ Western Rail Link to Heathrow (O1)	▶ Southern Access to Heathrow (O2)
Gatwick – Kent/Surrey Rail Connectivity	▶ Gatwick – Kent Rail Service Enhancements (S22) ▶ Gatwick – Surrey Rail Service Enhancements (NEW)	▶ Redhill Aerodrome Chord (J11)
Bakerloo Line Extension and Upgrade	▶ Bakerloo Line Extension (S3)	▶ Bakerloo Line upgrade (NEW)
Isle of Wight Ferry Connectivity	▶ Isle of Wight Ferry Service Enhancements (D2)	▶ Operating Hours and Frequency Enhancements (D2a) ▶ New Summer Route - Ryde to Southampton (D2b)
Reinstated International Rail Services	▶ NEW	

Resilience Framework



Challenges	Interventions	Outputs	Outcomes	Impacts
▶ The South East relies on infrastructure susceptible to weather events. ▶ Maintenance and renewals should be part of “business as usual”, but funding constraints are limiting infrastructure managers’ ability to quickly clear maintenance backlogs ▶ Climate change is expected to drive higher summer temperatures and more severe weather events. ▶ We are seeing the effects of worsening weather today. ▶ The region’s resilience is compromised by congested highways and railways. ▶ Some corridors, like the London-Brighton corridor, rely heavily on single highways and railways.	▶ Region-wide Maintenance Priorities. ▶ Operation Brock / Stack Improvements. ▶ Kent Bifurcation Strategy / A2-M2-Lower Thames Crossing Corridor. ▶ Brighton Main Line Capacity and Resilience. ▶ South West Mainline Resilience. ▶ Shakespeare Cliff / Canterbury Rail Chord. ▶ Secondary Corridors including Lewes – Uckfield – Tonbridge. ▶ Brighton – London / M25 resilience (A22, A23, A24). ▶ M3 / M4 Highway Links Resilience. ▶ A259 Corridor Resilience. ▶ A3 Resilience and Placemaking. ▶ Haying Island Bridge / Access.	▶ The transport network is well-maintained and delivers reliable journeys between major economic hubs and international gateways. ▶ The transport network has the capacity and agility to manage, absorb, and recover from major disruptions quickly, and when the risk of major failures occurring is reduced.	▶ Reduced disruptions from external events, such as adverse weather, technical failures, or infrastructure breakdowns. ▶ Reduced disruption to all users of the transport network from planned engineering works and maintenance. ▶ Increased customer satisfaction due to improved reliability of transport services and networks. ▶ Reduced cost of transport to users and, in the long term, government.	▶ The South East is seen to have a reliable and resilient transport system, which in turn unlocks investment opportunities and contributes to wider prosperity and sustainable economic growth. ▶ The quality of life of the South East’s residents, visitors, and businesses is enhanced through having a more reliable and resilient transport system.

Resilience Interventions



Interventions in this strategy	Interventions included in the 2023 SIP with scheme references	
Region-wide Maintenance Priorities	▶ NEW	
Operation Brock / Stack Improvements	▶ Digital Operations Stack and Brock (X8) ▶ A20 Enhancements for Operations Stack and Brock (X9)	▶ Kent Lorry Parks Long Term Solution (X10)
Kent Bifurcation Strategy / A2-M2-Lower Thames Crossing Corridor	▶ Lower Thames Crossing (Y1) ▶ A2 Brenley Corner Enhancements (X2) ▶ A2 Dover Access (X3) ▶ A2 Canterbury Junctions Enhancements (X12)	▶ M2 Junction 4 – Junction 7 Smart Motorway (X13) ▶ M20 Junction 6 Sandling Enhancements (X14) ▶ M20 Junction 3 - Junction 5 Smart Motorway (X15) ▶ A228 Medway Valley Enhancements (X22)
Brighton Main Line Capacity and Resilience	▶ Croydon Area Remodelling Scheme (J1) ▶ Brighton Main Line - 100mph Operation (J2)	▶ Brighton Station Additional Platform (J3)
South West Mainline Capacity and Resilience	▶ South West Main Line / Portsmouth Direct Line – Woking Area Capacity Enhancement (O12)	▶ South West Main Line – Digital Signalling (O17)
Shakespeare Cliff / Canterbury Rail Chord	▶ Canterbury Rail Chord (S14)	▶ New Station – Canterbury Interchange (S15)
Secondary Corridors including Lewes – Uckfield – Tonbridge	▶ Uckfield - Lewes Wealden Line Reopening - Traction and Capacity Enhancements (K1) ▶ Uckfield - Lewes Wealden Line Reopening - Reconfiguration at Lewes (K2)	▶ Spa Valley Line Modern Operations Reopening – Eridge to Tunbridge Wells West to Tunbridge Wells (K3) ▶ Uckfield Branch Line – Hurst Green to Uckfield Electrification (J10)
Brighton – London / M25 highway resilience (A22, A23, A24)	▶ A22 N Corridor (Tandridge) – South Godstone to East Grinstead Enhancements (N1) ▶ A22 Corridor Package (N3a) ▶ A22 Corridor - Hailsham to Uckfield (N3b) ▶ A22 Uckfield Bypass Dualling (N18)	▶ A23 Carriageway Improvements - Gatwick to Crawley (N7) ▶ A23 Hickstead and Bolney Junction Enhancements (N14) ▶ A24 / A243 Knoll Roundabout and M25 Junction 9a (N2) ▶ A24 Dorking Bypass (N11) ▶ A24 Horsham to Washington Junction (N12) ▶ A24 Corridor Improvements Horsham to Dorking (N13)
M3 / M4 Highway Links Resilience	▶ A339 Newbury to Basingstoke Enhancements (R14)	▶ A322 and A329(M) Smart Corridor (R13)
A259 Corridor Resilience	▶ A259 Bognor Regis to Littlehampton Enhancement (I14) ▶ A259 South Coast Road Corridor – Eastbourne to Brighton (I15)	▶ A259 Chichester to Bognor Regis Enhancement (I16) ▶ A259 (King's Road) Seafront Highway Structures Renewal Programme (I17)
A3 Resilience and Placemaking	▶ A3 Guildford Long Term Solution (R11)	
Hayling Island Bridge / Access	▶ Hayling Island Bridge Renewal (NEW)	▶ Improved Portsmouth – Hayling Island Ferries (C11)
Thames Valley Highways	▶ A404 Bisham Junction (R3)	▶ New Thames Crossing East of Reading (LLM) (R6)

Integration and Inclusion Framework



Challenges	Interventions	Outputs	Outcomes	Impacts
▶ The South East's transport networks are not equally accessible to all sections of society, putting many groups and communities at risk of exclusion. ▶ Many parts of the South East's transport system lack physical integration. ▶ Many parts of the transport network have varied customer experiences – and some sections of society face particular issues. ▶ The affordability of public transport services and car access is a concern. ▶ There is a risk that some groups could be left behind if the benefits of technology are not equally distributed.	▶ Region-wide Inclusive Infrastructure Priorities. ▶ Region-wide Fares/Ticketing Priorities. ▶ Region-wide Service Priorities. ▶ Solent Ferry Connectivity. ▶ Solent Mass Transit. ▶ Isle of Wight Mass Transit / Rail. ▶ Gatwick Diamond Mass Transit / Rail. ▶ Hastings – London / M25 Highway and Rail Connectivity. ▶ Sussex Coast Mass Transit. ▶ North Kent Coast and Isle of Sheppey Rail and Ferry Connectivity (including Hoo Peninsula Passenger Rail Access). ▶ East Kent Coast Rail Connectivity.	▶ Transport Related Social Exclusion is reduced. ▶ Customer satisfaction is consistently high across all user groups. ▶ The vast majority of rail stations and public transport hubs are step-free. ▶ The South East is close to or has achieved “Target Zero” for killed and seriously injured incidents. ▶ More residents and visitors are engaged in physical activity. ▶ Fewer people are exposed to poor air quality. ▶ Fewer people are affected by severance i.e. transport blocking personal mobility.	▶ Everyone can affordably travel where they need to go, when they need to go. ▶ Customer satisfaction with all aspects of the transport network is high across all sections of society.	▶ The South East has a transport system that is affordable, accessible, equitable, and supportive of the well-being of all residents, regardless of their age, ability, or socio-economic status.

Integration and Inclusion Interventions



Interventions in this strategy	Interventions included in the 2023 SIP with scheme references	
Region-wide Inclusive Infrastructure Priorities	▶ Global policy Statement (Integration)	
Region-wide Fares/Ticketing Priorities	▶ Global Policy Statement (Public Transport Fares)	▶ Global Policy Statement (Integration)
Region-wide Service Priorities	▶ Global Policy Statement (Public Transport Fares)	▶ Global Policy Statement (Integration)
Solent Ferry Connectivity	▶ Improved Gosport – Portsmouth and Portsmouth – Hayling Island Ferries (C11) ▶ Ferry operating Hours and Frequency Enhancements (D2a) ▶ New Summer Route – Ryde to Southampton (D2b)	▶ Ferry Crossings – New Sheerness to Hoo Peninsula Service (V19) ▶ Ferry Crossings - Sheerness to Chatham / Medway City Estate / Strood Enhancements (V20)
Solent Mass Transit	▶ South East Hampshire Rapid Transit Future Phases (C2)	▶ Improved Gosport – Portsmouth and Portsmouth – Hayling Island Ferries (C11)
Isle of Wight Mass Transit / Rail	▶ Isle of Wight Mass Transit and Connections (D1 & D2)	
Gatwick Diamond Mass Transit / Rail	▶ London – Sussex Coast Mass Transit (L)	▶ New Station to the North East of Horsham (J8)
Hastings – London / M25 Highway and Rail Connectivity	▶ A21 Safety Enhancements (X4) ▶ A21 Kippings Cross to Lamberhurst (X25) ▶ Flimwell and Hurst Green Bypasses (X25)	▶ HS 1 / Marsh Link – Hastings, Bexhill and Eastbourne Upgrade (T2)
Sussex Coast Mass Transit	▶ Sussex Coast Mass Rapid Transit (G5) ▶ Eastbourne / Polegate Strategic Mobility Hub (G4)	▶ Eastbourne / Wealden Mass Rapid Transit (G6) ▶ Hastings / Bexhill Mass Rapid Transit (G7)
North Kent Coast and Isle of Sheppey Rail and Ferry Connectivity	▶ High Speed 1 – Link to Medway (U1) ▶ Medway/Swale ferry crossings (V19 and V20) ▶ Hoo Peninsula Passenger Rail Access (S7)	▶ North Kent Line – Service Enhancements (S9) ▶ Chatham Main Line - Line Speed Enhancements (S10)
East Kent Coast Rail Connectivity	▶ High Speed East – Dollands Moor Connection (T1)	▶ South Eastern Main Line Capacity Enhancements (S4)

Decarbonisation Framework



Challenges	Interventions	Outputs	Outcomes	Impacts
▶ The government, TfSE, and all local authorities in the South East are committed to achieving net zero transport emissions by 2050. ▶ The UK's transport system is still significantly behind many of its peers (e.g. low levels of rail electrification). ▶ There are additional pressures where growth risks undermining decarbonisation efforts. ▶ The impacts of climate change are already apparent, and the South East is not decarbonising fast enough. ▶ People are not incentivised to travel sustainably. ▶ Decarbonising longer distance trips is particularly challenging. ▶ We do not have the luxury of time to rely on less mature technologies.	▶ Region-wide Low Emission Vehicles (LEVs) Priorities. ▶ Region-wide Power Priorities. ▶ Region-wide Beyond Transport Priorities. ▶ Region-wide Modal Shift / Demand Management Priorities. ▶ Region-wide Ferry Decarbonisation Priorities. ▶ Rail Electrification and Decarbonisation.	▶ Surface transport has transitioned from fossil fuels to net zero traction by 2050. ▶ Active travel modes have a higher mode share for short journeys compared to today. ▶ Public transport mode share for longer journeys compared to today. ▶ The South East is recognised as a leader in decarbonising transport.	▶ All surface transport trips made across the South East are net zero emission by 2050 (at the latest). ▶ The South East does not exceed its carbon budgets for surface transport by 2050. ▶ The South East is seen as a world leader in decarbonising transport.	▶ The UK meets its legal domestic and international commitments to global efforts to reduce climate emissions, with a view to mitigating the existential and global impacts of climate change. ▶ The South East attracts more external investment in decarbonisation. ▶ The South East creates more high-quality jobs in decarbonisation industries.

Decarbonisation Interventions



Interventions in this strategy	Interventions included in the 2023 SIP with scheme references	
▶ Region-wide Low Emission Vehicles (LEVs) Priorities	▶ Global Policy Statement (Decarbonisation)	
▶ Region-wide Power Priorities		
▶ Region-wide Beyond Transport Priorities		
▶ Region-wide Modal Shift / Demand Management Priorities	▶ Global Policy Statement (Road User Charging)	▶ Global Policy Statement (Virtual Access)
▶ Region-wide Ferry Decarbonisation Priorities	▶ NEW	
▶ Rail Electrification and Decarbonisation	▶ Eastleigh/Southampton to Salisbury – Electrification (B6) ▶ Reading to Basingstoke Enhancements (O3) ▶ West of England Main Line – Electrification from Basingstoke to Salisbury (O19) ▶ Thames Valley Branch Line Decarbonisation (NEW)	▶ Uckfield Branch Line – Hurst Green to Uckfield Electrification (J10) ▶ HS1 / Marsh Link – Hastings, Bexhill and Eastbourne Upgrade (T2) ▶ North Downs Line – Decarbonisation (O4) ▶ Newbury – Taunton electrification (NEW)

Other interventions relating to modal shift through improving active travel and public transport options are captured in other missions.

Sustainable Growth Framework



Challenges	Interventions	Outputs	Outcomes	Impacts
Challenges ▶ Housing has become unaffordable for too many people in London and the South East – with significant implications for the wider economy and society. ▶ The new government has committed to reinstating housing targets. Opportunities ▶ Transport can unlock growth in jobs and housing by providing access to development sites. ▶ Development can unlock third party investment in transport infrastructure and services. ▶ Transport investment can enhance places (e.g. by addressing severance and promoting more sustainable transport options).	▶ Region-wide Planning Priorities. ▶ Region-wide Active Travel Priorities. ▶ Solent Mass Transit. ▶ Solent Rail Metroisation. ▶ Isle of Wight Mass Transit / Rail. ▶ Brighton Main Line Capacity and Resilience. ▶ Gatwick Diamond Mass Transit / Rail. ▶ Sussex Coast Mass Transit. ▶ Sussex Coast Rail Metroisation. ▶ North Kent Coast / Medway Mass Transit. ▶ North Kent Coast Rail Connectivity. ▶ North West Kent / South East London Rail Connectivity. ▶ Hoo Peninsula Passenger Rail Access. ▶ East Kent Coast Rail Connectivity. ▶ South West Mainline Capacity and Resilience. ▶ Thames Valley Mass Transit. ▶ Basingstoke Mass Transit.	▶ All major developments (i.e. 3,000 dwellings or an expansion of more than 20%, or a major generator/ attractor of demand e.g. hospital, stadia) have high quality public transport services (2-4 services per hour) and high-quality active travel infrastructure (as defined by Active Travel England) ▶ More residents and jobs are within a 1,500-metre radius of a public transport access point. ▶ More residents can access key services within a 30-minute travel time.	▶ Population growth and economic development in the South East is underpinned by sustainable transport and infrastructure, ▶ The South East has created well-connected communities with easy access to key services and employment opportunities.	▶ The South East is seen as an outstanding place to live, work, and visit – thanks to its balanced development and economic opportunities. ▶ Residents are no longer forced by transport and/or housing costs to live far from their work, family, or social networks.

Sustainable Growth Interventions



Interventions in this strategy	Interventions included in the 2023 SIP with scheme references	
Region-wide Planning Priorities	► Global Policy Statement (Integration)	
Region-wide Active Travel Priorities	► All Active Travel Packages in the SIP (E, H, M, W)	► Global Policy Statement (New Mobility)
Solent Mass Transit	► Southampton Mass Transit (C1) ► South East Hampshire Rapid Transit Future Phases (C2) ► New Southampton to Fawley Waterside Ferry Service (C3) ► Southampton Cruise Terminal Access for Mass Transit (C4) ► M271 Junction 1 Strategic Mobility Hub (C5) ► M27 Junction 5 / S'oton Airport Strategic Mobility Hub (C6)	► M27 Junction 7 / 8 Strategic Mobility Hub (C7) ► M27 Junction 9 Strategic Mobility Hub (C8) ► Tipner Transport Hub (M275 Junction 1) (C9) ► Southsea Transport Hub (C10) ► Improved Gosport – Portsmouth and Portsmouth – Hayling Island Ferries (C11)
Solent Rail Metroisation	► Botley Line Double Tracking (A2) ► Netley Line Signalling and Rail Service Enhancements (A3) ► Fareham Loop / Platform (A4) ► Portsmouth Station Platforms (A5) ► South West Main Line – Totton Level Crossing Removal (A6) ► Southampton Central Station Upgrade and Timetabling (A7) ► Eastleigh Station Platform Flexibility (A8)	► Southampton – Woolston Crossing (B1) ► New Southampton Central Station (B2) ► New City Centre Station (B3) ► South West Main Line – Mount Pleasant Level Crossing Removal (B4) ► Cosham Station Mobility Hub (B5) ► Waterside Branch Line – Reopening (A9)
Isle of Wight Mass Transit / Rail	► Isle of Wight Mass Transit and Connections (D1 & D2)	
Brighton Main Line Capacity and Resilience	► Croydon Area Remodelling Scheme (J1) ► Brighton Main Line - 100mph Operation (J2)	► Brighton Station Additional Platform (J3)
Gatwick Diamond Mass Transit / Rail	► London – Sussex Coast Mass Transit (L)	► New Station to the North East of Horsham (J8)
Sussex Coast Mass Transit	► Shoreham Strategic Mobility Hub (G1) ► A27 / A23 Patcham Interchange Strategic Mobility Hub (G2) ► Falmer Strategic Mobility Hub (G3) ► Eastbourne / Polegate Strategic Mobility Hub (G4)	► Sussex Coast Mass Rapid Transit (G5) ► Eastbourne / Wealden Mass Rapid Transit (G6) ► Hastings / Bexhill Mass Rapid Transit (G7) ► A27 Falmer – Polegate improvements (G8)
Sussex Coast Rail Metroisation	► West Coastway Strategic Study (F1)	► West Worthing Level Crossing Removal (F2)
North Kent Coast / Medway Mass Transit	► Kent, Medway and East Sussex Mass Transit (V)	
North Kent Coast Rail Connectivity	► High Speed 1 - Link to Medway (via Chatham) (U1) ► New Strood Rail Interchange (S16)	► St Pancras International Domestic High Speed Platform Capacity (S1) ► North Kent Line - Service Enhancements (S9) ► Chatham Main Line - Line Speed Enhancements (S10)
North West Kent and South East London Rail Connectivity	► Dartford Station Remodelling / Relocation (S13) ► Crossrail - Extension from Abbey Wood to Dartford / Ebbsfleet (S18)	► Ebbsfleet International connections (S21 and S22) ► HS1 / Waterloo Connection Chord - Ebbsfleet Southern Rail Access (S19)
Hoo Peninsula Passenger Rail Access	► North Kent Line / Hundred of Hoo Railway - Rail Chord (S7)	
East Kent Coast Rail Connectivity	► High Speed East - Dollands Moor Connection (T1) ► High Speed 1 / Marsh Link - Hastings, Bexhill and Eastbourne Upgrade (T2)	► Otterpool Park / Westenhanger Station Platform Extensions and Station Upgrade (S11)
South West Mainline Capacity and Resilience	► South West Main Line / Portsmouth Direct Line - Woking Area Capacity Enhancement (O12) ► South West Main Line - Digital Signalling (O17)	► South West Main Line / Basingstoke Branch Line - Basingstoke Enhancement Scheme (O13)
Thames Valley Mass Transit	► Bracknell / Wokingham Bus Enhancements (P3) ► Slough / Windsor / Maidenhead Area Bus Enhancements (P7) ► A4 Reading - Maidenhead - Slough - London Heathrow Airport Mass Rapid Transit (P12)	► Newbury / Thatcham Bus Enhancements (P8) ► Reading Mass Rapid Transit (P9) ► A329 / B3408 Reading - Bracknell / Wokingham Mass Rapid Transit (P13)
Basingstoke Mass Transit	► Basingstoke Mass Rapid Transit (P1)	► Blackwater Valley Mass Rapid Transit (P2)



Scenario Development

Overview

As part of the strategy refresh, TfSE undertook a **scenario planning exercise** to ensure the strategy remains resilient and adaptable to future uncertainties. This exercise included a series of workshops with stakeholders, designed to assess key changes since the previous strategy and refine TfSE's vision, goals, and missions.

The purpose of scenario planning was to explore **how different future scenarios could influence the strategy's success**. By developing plausible futures rather than idealised targets, this process helped TfSE identify potential challenges and opportunities for its missions, and ensure the strategy remains relevant and robust in the face of diverse outcomes. The scenarios provided insights into external factors, such as economic growth, policy shifts, energy costs, and public attitudes, that may affect transport and travel patterns in the South East.

Between April and May 2024, stakeholders participated in workshops to create **four distinct scenarios** based on two main axes: levels of government intervention and economic growth. Each scenario explored different potential futures. These are presented in the following slide.

The Scenarios

Make Do and Mend

A big state fixes things and makes best use of limited resources

Planned Prosperity

A big state drives economic growth through investment in public projects

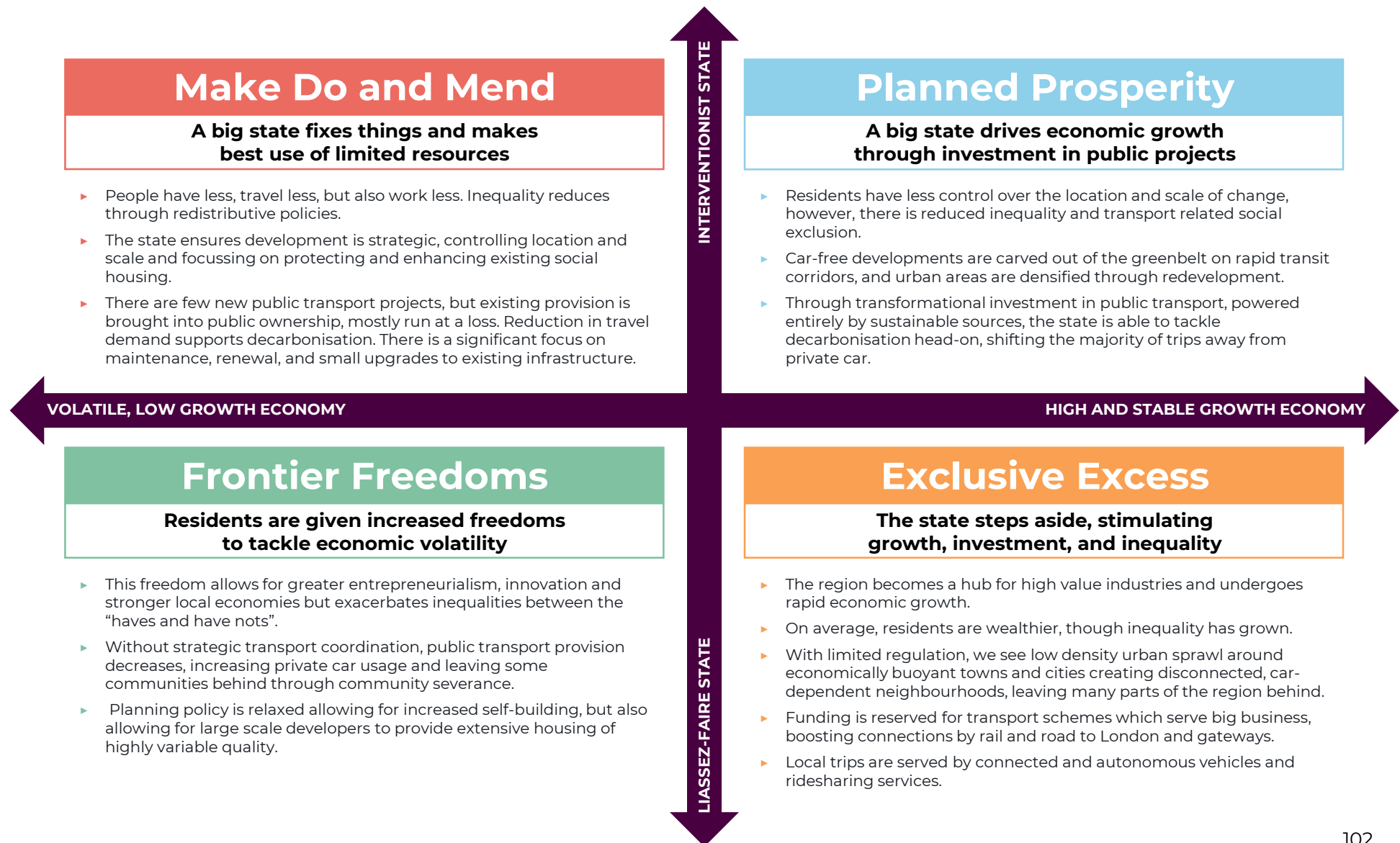
Exclusive Excess

The state steps aside, stimulating growth, investment, and inequality

Frontier Freedoms

Residents are given increased freedoms to tackle economic volatility

Scenarios Description



Scenarios Assessment

Approach

Following the development of the scenarios, a workshop was held to assess the resilience of TfSE's planned route map across various future scenarios. Using a scenario planning and route map tool (based on a model by the Scottish Government), the project team qualitatively evaluated the impact of TfSE's policies against four scenarios, comparing each scenario to a "business as usual" baseline and a "no intervention" scenario.

Each scenario was assessed qualitatively and modelled using the South East Economy and Land Use Model (SEELUM) – the model that was also used to develop the 2020 strategy and the 2023 Strategic Investment Plan (SIP).

The primary aim was to determine if the planned policy measures would help achieve TfSE's missions more effectively than maintaining the current approach or doing nothing.

Each mission was broken down into key indicators representing TfSE's desired outcomes. Workshop participants assessed how each indicator would change under different scenarios (with ratings from "significantly improve" to "significantly worse") and whether the planned policies would positively affect these outcomes. For each mission, a red/amber/green rating was assigned based on the average indicator scores, giving a quick indication of potential challenges in meeting TfSE's goals.

Results

The results shown in the table below provide insight into the viability of the route map under different futures, highlighting areas of uncertainty and where consensus could not be fully reached.

	Business as Usual	Make Do And Mend		Frontier Freedoms		Planned Prosperity		Exclusive Access	
		No Intervention	With Policy Route Map	No Intervention	With Policy Route Map	No Intervention	With Policy Route Map	No Intervention	With Policy Route Map
Strategic Connectivity									
Resilience									
Inclusion and Integration									
Decarbonisation									
Sustainable Communities									
Key									
	Impossible to achieve		Unlikely to achieve		Challenging to achieve				
	Possible to achieve		Likely to achieve						

Scenarios Reflections

Findings

The scenario testing exercise highlighted the inherent value of having a clear route map, even without specific changes. The route map itself provides strategic direction, focusing planning and efforts toward common goals, and is expected to influence delivery across all scenarios.

While the exercise assumes full delivery of route map, participants acknowledged the likelihood of adjustments over time as the strategy evolves. Additionally, it became clear that improving planning and delivery processes is just as crucial as funding. Simply increasing funding without addressing systemic delivery issues would likely lead to diminishing returns.

Reflections

The exercise also revealed that the different approaches embedded within each route map affected their effectiveness in various scenarios. For instance, the Sustainable Communities route map, being principles-based, was less impactful because it primarily guides external stakeholders rather than directly driving action.

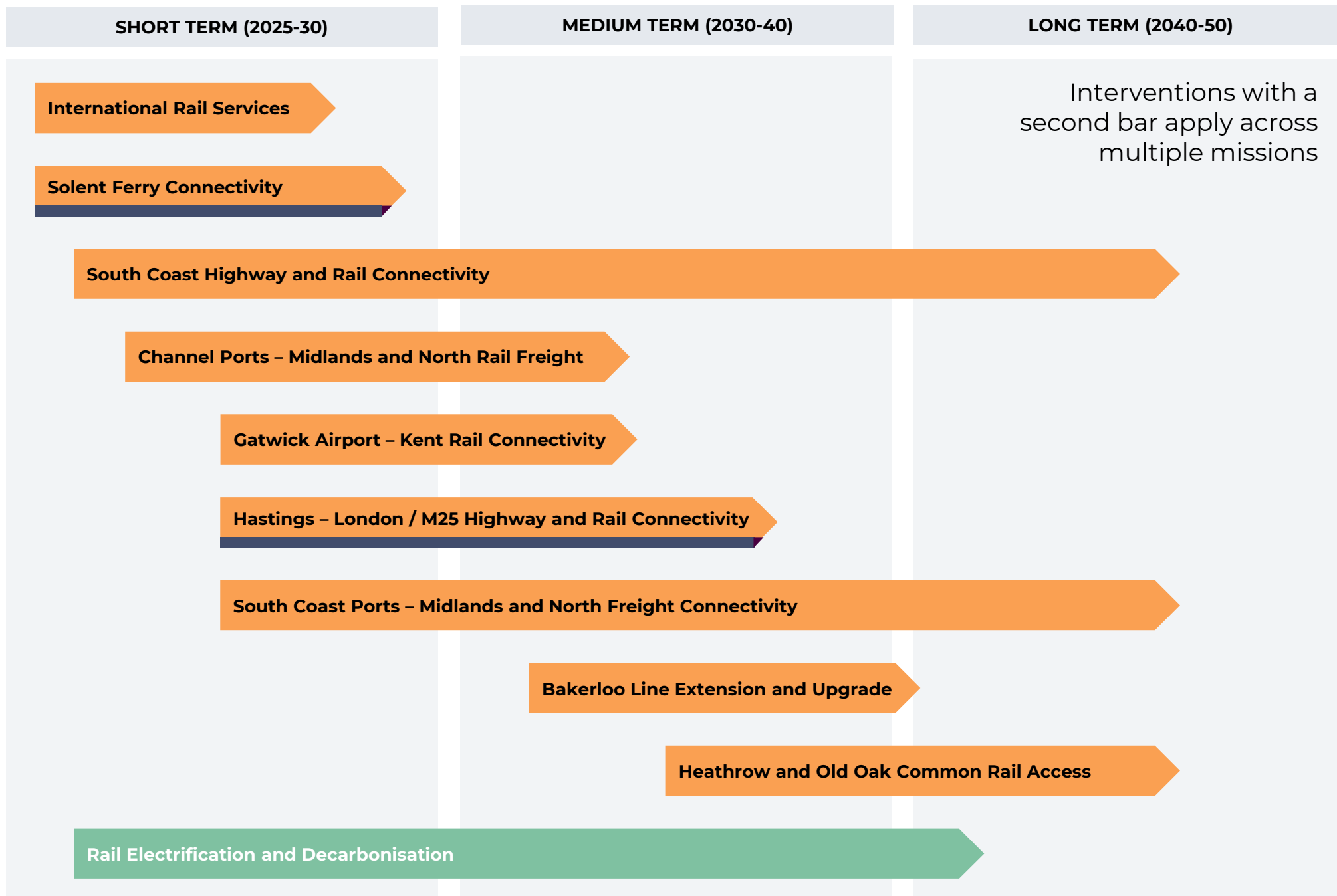
Conclusions for the strategy

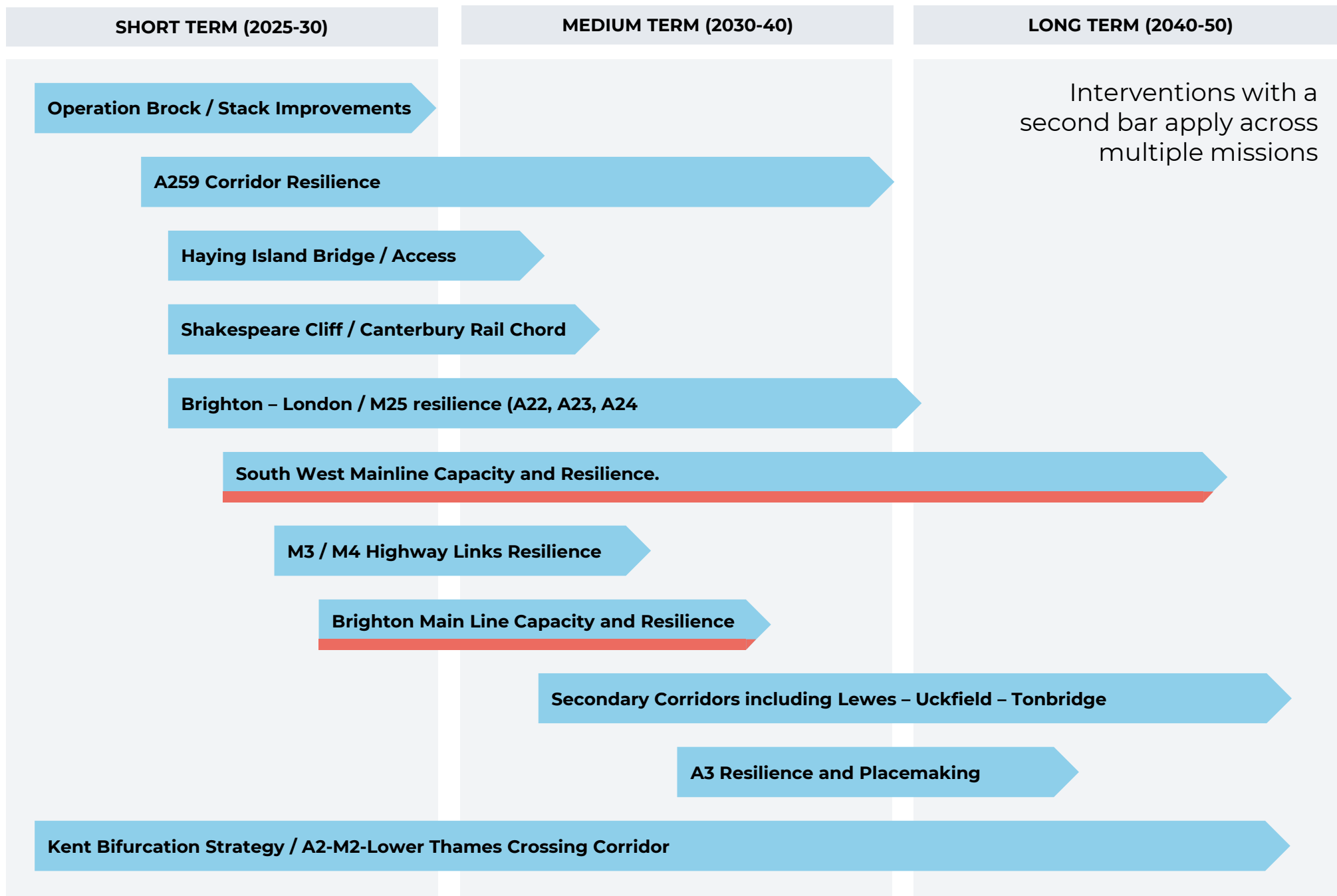
Overall, the exercise demonstrates that TfSE's strategic approach is likely to yield more positive outcomes for each mission compared to a "no intervention" or "business as usual" approach. As such, no changes to the missions or route maps are proposed based on this exercise.

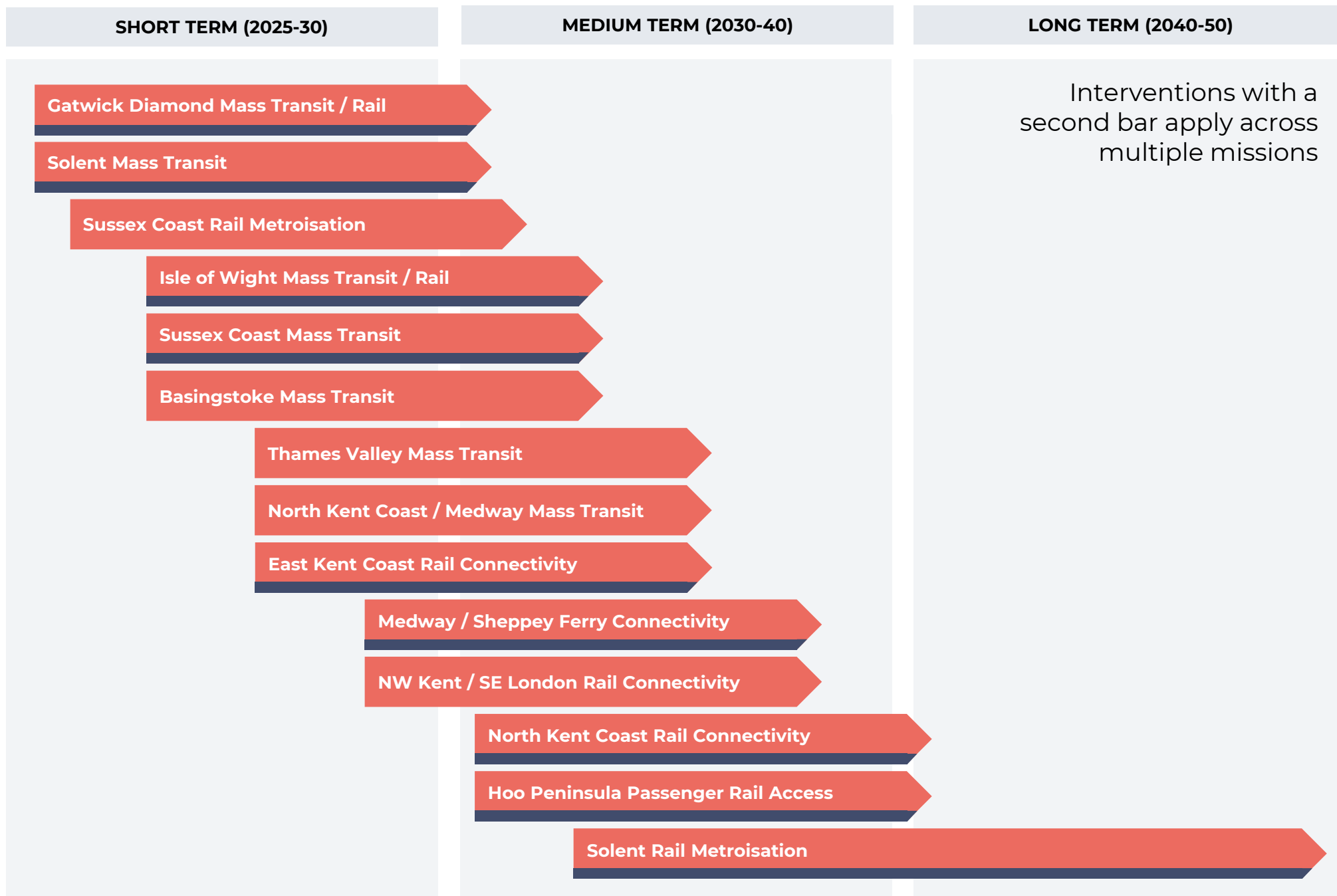
Further information

More details can be found in the accompanying **Scenarios Report**, which can be found at www.transportforthesoutheast.org.uk.













Transport for the South East
County Hall
St Anne's Crescent
Lewes
BN7 1UE



tfse@eastsussex.gov.uk



tfse.org.uk



TRANSPORT FOR THE **South East**



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Report to: Partnership Board –Transport for the South East

Date of meeting: 27 October 2025

By: Chief Officer, Transport for the South East

Title of report: TfSE's Regional Travel Survey

Purpose of report: To provide an update with the Regional Travel Survey

RECOMMENDATION:

The members of the Partnership Board are recommended to comment on the Regional Travel Survey and endorse the proposed next steps.

1. Introduction

1.1 Transport for the South East (TfSE) commissioned a Regional Travel Survey (RTS) in October 2024 to improve understanding of travel behaviour across the region and to support future transport planning. The survey was designed to capture trip frequency by travel mode and purpose, as well as to record the origins and destinations of randomly selected trips. It also sought to identify changes in commuting and leisure trips following the pandemic and to examine how travel patterns vary by key sociodemographic factors such as age, income, and car ownership.

1.2 This report provides a high-level summary of the approaches, key findings from the survey and next steps. More detailed analysis can be found in the final report in Appendix 1.

2. Approach

2.1 Data collection took place in two phases. The first phase was an online survey carried out in November 2024, which achieved approximately 6,400 responses through the YouGov panel. This provided a fast and cost-effective way to reach a large cross-section of the population.

2.2 The second phase, a targeted “top up” intercept survey, was undertaken in May 2025 at selected locations across the region. This added around 400 responses to improve representation in LTAs and demographic groups that were under-sampled in the online survey, such as younger adults, students, and some socioeconomic categories.

3. Key Findings

3.1 Findings show that leisure is the most common trip purpose in the region, followed by shopping. Commuting comes next, with over half of respondents commuting three or more times per week, although one third report commuting less than before the

pandemic. Car remains the dominant mode, accounting for 35-76% of trips depending on the LTA, with walking taking second place. Convenience, cost, and journey time are the top factors influencing mode choice.

3.2 Car ownership varies significantly by location, with urban centres such as Brighton & Hove, Reading, and Southampton reporting over 30% of households without a car. EV adoption is steadily increasing, with around 5% of cars being electric and a further 9-10% hybrids. Most trips are short, typically under 10 miles for shopping, leisure, and personal business, highlighting the importance of local connectivity and active travel infrastructure.

3.3 Overall, the RTS represents a step change for regional planning, enabling more robust evidence for local plans, model rebasing, and validation of big data sources such as mobile phone data. It provides TfSE with a strong evidence base to inform strategic investment planning, the rail strategy and EV charging infrastructure, as well as supporting the development of a bespoke TfSE forecasting suite. Its value lies not only in the data itself, but in its ability to rapidly generate actionable insights at both regional and LTA levels.

4. Next Steps

4.1 TfSE will share the data and interactive dashboard with LTAs via the Regional Centre of Excellence. A launch session is planned for early November, subject to Board approval. We are also exploring opportunities to collaborate with universities and external partners to generate further insights and validate our transport analyses.

4.2 The data has already been incorporated into several TfSE internal workstreams, including the SIP refresh, rail strategy, and State of the Region report. We will encourage LTAs to use the data to support their technical work, such as local plans, transport strategies, and modelling. Individual training and support can be provided on request.

4.3 Given the valuable insights provided by the survey and the economies of scale achieved, we plan to conduct the survey every two years, subject to budget availability, to ensure trends and changes in the region are effectively monitored.

5. Conclusions and recommendations

5.1 The Partnership Board is recommended to provide comments on the project and approve the proposed next steps.

RUPERT CLUBB

Chief Officer

Transport for the South East

Contact Officer: Joshua Jiao

Email: joshua.jiao@transportforthesoutheast.org.uk



Regional Travel Survey Analytical Report

September 2025
24777101

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1. Introduction



1.1 Survey purpose, scope and methodology

Steer, along with YouGov and Perspective Research, undertook the design, collection and delivery of a Regional Travel Survey (RTS) for Transport for the South East (TfSE). The survey data can be used for strategic planning and modelling purposes by TfSE and Local Transport Authorities (LTAs).

This section presents the survey purpose, sample scope, methodology, overview of responses and comparisons to Census data.

Survey purpose

The purpose of the survey was to generate improved regional insights from a focused sample of residents as an alternate and enhanced source of information to that provided by National Travel Survey (NTS).

The survey was therefore designed to capture insights on household travel patterns and behaviours across all sixteen LTAs in the region.

This included how, when and where residents are making trips across the region. In addition, the survey captures changes to household travel patterns following the pandemic.

Sample scope

The objectives of the sample were twofold:

1. To be as representative as possible of residents across the entire at the total level.
2. To be comprised of a sufficient numbers of residents from each LTA, thus enabling meaningful analysis at the LTA level where necessary.

A target sample of ~6,500 responses was therefore set across the sixteen LTAs in the TfSE region. This sample offered best value for money whilst providing sufficient coverage at the LTA level.

Sample minimums were set for LTAs at 100 responses to ensure that each LTA was sufficiently represented. The LTA target samples were determined so as to be proportionate to the LTA's population (Census 2021).

1.1 Survey purpose, scope and methodology

Methodology

Survey design

Working collaboratively with TfSE, a questionnaire was developed, and as an adaptation of the NTS questionnaire, broadly covering the following areas:

- Socio-economic indicators (e.g. age, gender, household size, income, education level, social class, ethnicity).
- Trip diaries including origin and destinations (i.e. location postcodes), trip purpose, modes used and time/day of travel
- Household car ownership
- Additional questions such as why chosen a particular mode, changes in commute frequency pre and post pandemic.

Trip diary information was focussed on a specific day of the week within the last seven days from the survey date. Different days of the week were randomly sampled for each respondent to ensure good representation of all day types. Where a respondent reported that they had not travelled on the day of week selected, a second day was offered so as to maximise the volume of data collected.

Data collection

A mixed approach of online and face to face survey has been adopted to complete the survey. Both methods used the same survey instrument.

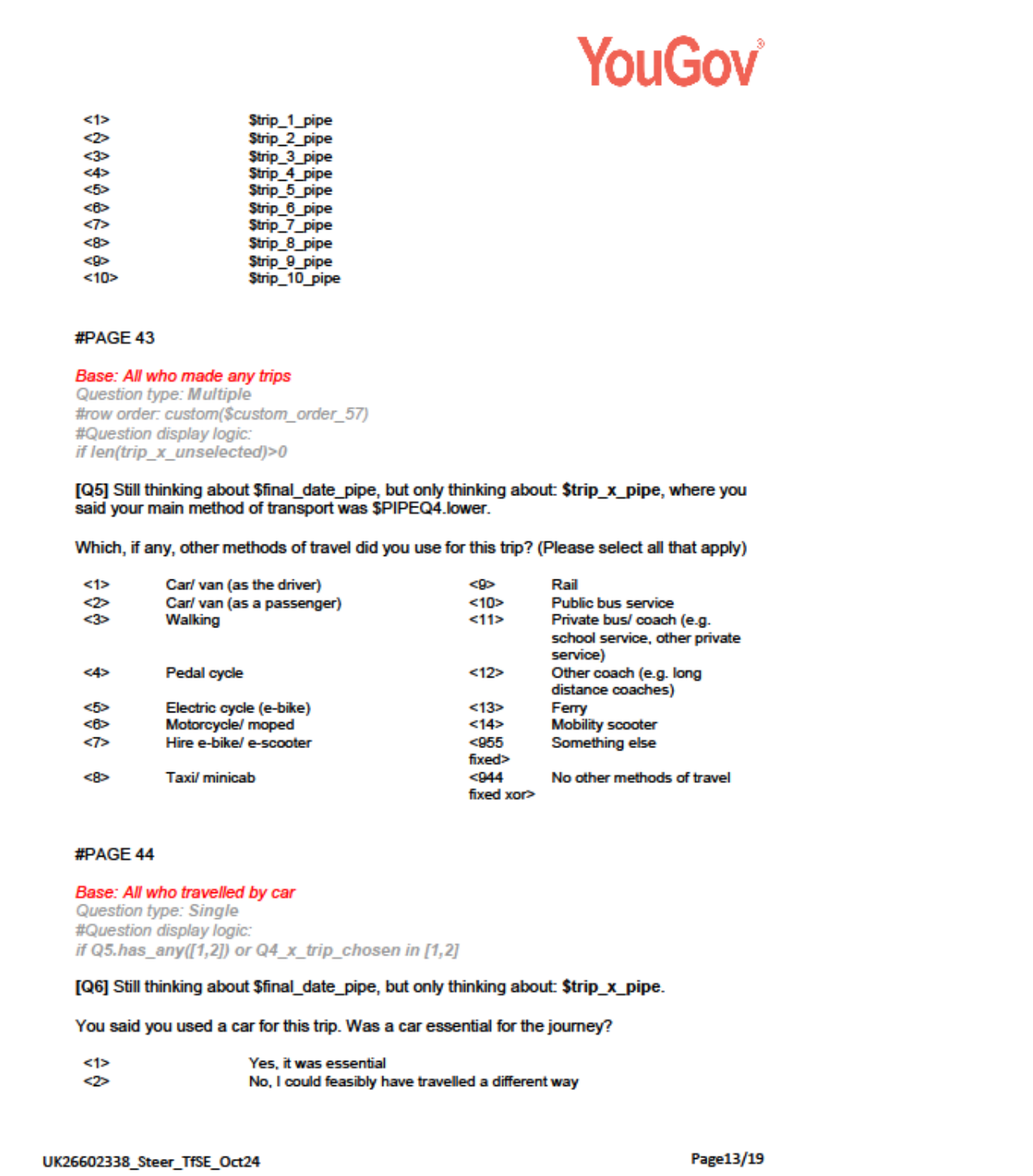
An initial **online survey** of circa 6,100 responses was undertaken in November 2024 usinguGov panel. This provided a fast and cost-effective means of generating a cross-sample.

After completion of the online survey and preliminary analysis of the demographic profiles, a **top-up intercept survey** was undertaken to improve the representativeness of the final sample. This targeted 400 responses at selected locations across the TfSE areaduring May 2025. This top-up data was merged with the YouGov panel data to create one consolidated dataset.

Data weighting

The raw data has been weighted at LTA level to be representative of the population size and different age groups. The data has not been weighted by other socio-economic parameters such as social grade and/or ethnicity. The weighted data has been used for the analysis of the survey, and comparisons to NTS.

Click on the below image to view the Survey Questionnaire.



1.2 Data cleaning approach and limitations

The survey collected extensive data on respondents’ resident and trip origin and destination postcodes and/or locations. Following review of the raw data, it was identified that there was incomplete information on trip destinations, distance, time and modes that required cleaning before the analysis could proceed.

Overview

A data frame was designed and developed that would allow for trip related insights to be generated. Prior to populating the frame, the data was subject to cleaning processes. At a high level this involved:

- Manual review of each row of data, supported by some AI tools such as Google AI and Copilot.
- Use of Python and GIS techniques to reshape raw data, improve data quality and remove invalid trips.

Approach

The detailed process of cleaning and validating the data used a six-step approach as set out below.

1. Origins and Destinations Mapping

Origins: Origins were generally provided as home postcodes. These postcodes were cleaned (capitalised and trimmed of extra spaces) to avoid formatting inconsistencies. Postcodes were then mapped in a tiered sequence to ensure incomplete data is not entirely removed: **Full postcode, Postcode sector, Postcode district**

If a postcode could not be matched to Gov.UK postcode data automatically, a manual review was conducted to check for typographical errors or deactivated postcodes.

Destinations: Destination data were categorised through a manual review process into the following types (Table 1.1):

Table 1.1: Destination categorisation

Type	Survey response
Postcode	Postcode (full or partial)
Manual	Detailed destination information (no postcode)
Settlement	Generic information (town, area name)
Can’t plot	Unclear or missing

Mapping of destination data to postcodes then followed a structured approach:

- Clean postcode data: processed similarly to origins including for manual destination types (looking up postcodes).
- Postcode-based destinations followed the same hierarchical matching process.
- ‘Settlements’ were matched to a settlement reference list containing coordinate data. (e.g. Brighton, Newport)
- Ambiguous destination entries (e.g. “home”, “church”, “park”) that were either undefined or overlooked in the initial categorisation underwent further manual review.

All origins and destinations were allocated to a TfSE district or marked as ‘Outside TfSE’.

2. Initial Trip Validation

Duplicate trips were identified by checking for matching destination, time, duration, mode, and case ID.

Flagged duplicates were manually reviewed and removed where necessary.

1.2 Data cleaning approach and limitations

3. Trip Structuring and Return Trips

Each trip was assigned a unique origin-destination (OD) coordinate pair.

For return trips:

- If a trip was marked as a return, the origin and destination of the previous trip were reversed.
- If the final trip in a sequence was marked as a return, the trip was configured to start from the last recorded destination and return to the original ‘home’ origin.

4. Route Calculation via ArcGIS

Trips with defined OD coordinates were processed in ArcGIS to generate an implied (calculated) trip time (in minutes), trip distance (in kilometres), and route used for each.

The “Route” analysis tool was used to calculate the shortest path (by time and distance) between OD pairs, based on the road network. The assumed mode of the trip for this analysis was driving.

5. Travel Time Calculation and Comparison

The calculated travel time and distance were linked to each trip record.

If the stated mode of the trip in the survey was car-based, the calculated travel time was used directly.

For other modes, travel time was estimated using the calculated distance and an average speed based on the declared mode (see Table 1.2 for assumed speeds by mode).

The difference between the stated and calculated travel times was then assessed and any outlier trips were flagged for further inspection.

The range for the difference between the stated and calculated travel times was set at min -50% and max 100%. Any trip outside this range was flagged as invalid. Absolute time threshold of 20 minutes difference was also applied to check for trip validity.

6. Trip Distance Calculation

A limit for maximum distance by mode was set (see Table 1.3), and any trip over the maximum limit was flagged as invalid or out of scope.

Table 1.2: Assumptions for average speed by mode

Mode	Speed (km/hr)
Walk	5
Cycle/e-scooters	16
Bus	30
Taxi	35
Ferry	40
Rail	45

Table 1.3: Assumptions for distance limits set by mode

Mode	Maximum distance (km)
Walk	20
Mobility scooters	50
Pedal cycle	250
Electric-cycle/ hire bikes/rental e-scooters	250
Car/van as a passenger	300
Car/van as a driver	300
Rail	300
Mopeds/ Motor cycles	300
Private bus/coach (e.g. school buses)	300
Public bus service	300
Other coach (e.g. long distance)	350
Ferry	350

1.2 Data cleaning approach and limitations

7. Final Trip Validation Criteria

A validation process was undertaken using the following checks to identify whether:

- The origin and/or destination were located within the TfSE area.
- Any trip had null values for calculated time or distance.
- The percentage difference between the stated and calculated travel time exceeded a predefined threshold (depending on destination type).
- The total travel time exceeded a set maximum duration.
- The trip distance surpassed mode-specific limits.

Limitations

The cleaned survey data comprises a mixture of specific survey responses, and an assessment of trip origins/destinations made from the data provided. This means that it is imperfect at best and includes both respondent biases and subjectivity from the cleaning process.

That said, the data collection and analysis process followed a recognised and industry standard approach. Further the underlying trips rates have been reviewed and compared to those contained in the National Travel Survey (see Section 2) as an additional level of validation. However, a degree of caution is required when using the data, particularly at the sub-regional level where sample sizes and data quality might vary.

Outputs

The following files accompany this report:

- (Unprocessed/Raw) Survey data (from YouGov)
- (Processed/Cleaned) Survey data
- Trip data (subset of the Survey data, with valid and invalid trips represented in separate rows)

1.3 Overview of survey responses

A total of 6,820 people responded to the survey across the TfSE area. Unweighted responses by LTA are shown in Table 1.5.

Initial online survey responses

Survey responses by key demographic groups have been summarised and reviewed to ensure they are sufficiently large. Sufficiently large in this context means they can reasonably be weighted up to reflect the population of the TfSE area. This has been undertaken considering the sample size by LTA.

Therefore, after completing the initial online survey, unweighted survey counts were compared against the 2021 Census for each LTA to check that respondents were sufficiently representative of the population.

This led to some target areas being identified for top-up intercept surveys. These were in cases where:

- There were too few responses for a particular socio-economic group.
- The socio-demographic characteristics of the respondent population materially differed from the LTA population (compared to Census 2021).

This ultimately resulted in the following categories and number of top-up intercept surveys (see Table 1.4) being undertaken in:

Brighton and Hove, Isle of Wight (IoW), Reading, Slough and Southampton.

Table 1.4: Intercept survey targets by type

User types	Number of survey responses
Students (and under 24s)	200
Under 34 years	50
C2DE social grade	100
Other employment status*	50

Deviation in ethnic group representation was identified during the planning of these intercept surveys. However, it was agreed that top-up surveys should focus on other socio-economic and demographic indicators given their likely correlation with race/ethnicity with regards to travel behaviour.

Considerations on sample representation

This programme of research was not designed to, nor expected to capture all respondent demographics proportionately from across the region. Rather it has been undertaken on a ‘best efforts’ basis, ensuring that key population groups are sufficiently represented.

As noted, some of the greatest variations are present in the ethnicity demographic. However, it is expected that factors affecting travel behaviour will be correlated with other measures such as social grade, car ownership, employment status, age, etc.

Table 1.5: Total responses by LTA

LTA	Responses
Bracknell Forest	247
Brighton and Hove	464
East Sussex	436
Hampshire	796
Isle of Wight	346
Kent	1010
Medway	339
Portsmouth	280
Reading	317
Slough	132
Southampton	442
Surrey	777
West Berkshire	201
West Sussex	534
Windsor and Maidenhead	166
Wokingham	333
Total	6,820

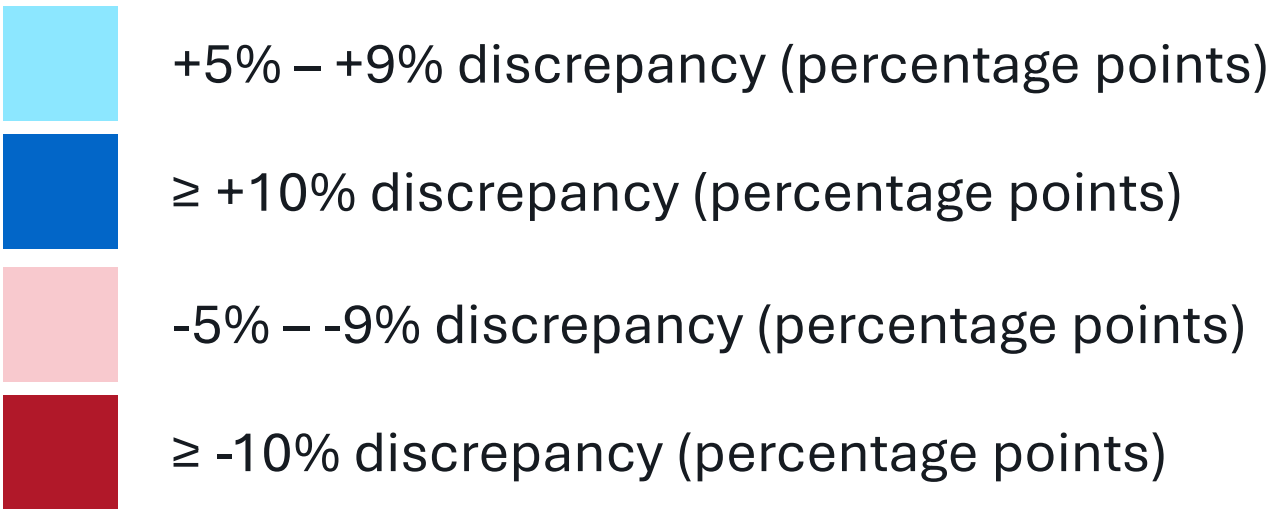
* Other employment status refers to those who are stay at home parents, unpaid caregivers, homemakers etc.

1.4 Comparison of unweighted survey respondents with Census 2021

The tables in this page and the following two pages (Table 1.6 to Table 1.12) show the difference (percentage points) in the demographic profile of the unweighted survey respondents compared to the 2021 census.

Data from Local Authorities has been aggregated to the LTA level.

Material discrepancies between the Census and the sample profile are highlighted. These are calculated as percentage point difference, labelled as %s.



Age and Gender

As shown in Table 1.6, older people are marginally over-represented whilst the younger population is under-represented in the sample as a whole.

Across age and gender categories, the majority of LTAs are within five percentage points of the Census, and all are within ten points with the exception of Males Age 55+ in Bracknell Forest which are over-represented in the sample.

Table 1.6: Survey responses vs Census 2021 – age and gender

LTA	Male 18-34	Male 35-54	Male 55+	Female 18-34	Female 35-54	Female 55+
Bracknell Forest	-6%	-4%	10%	-4%	-1%	5%
Brighton and Hove	-3%	-1%	0%	4%	0%	0%
East Sussex	-1%	-1%	-1%	-1%	1%	2%
Hampshire	-2%	0%	2%	-1%	0%	2%
Isle of Wight	-1%	-5%	3%	-2%	2%	4%
Kent	-2%	0%	2%	-2%	1%	2%
Medway	-6%	0%	1%	4%	1%	1%
Portsmouth	-1%	1%	1%	-5%	2%	2%
Reading	2%	-3%	-1%	4%	-1%	-1%
Slough	0%	-2%	4%	3%	-2%	-4%
Southampton	5%	-3%	-2%	-1%	0%	1%
Surrey	-4%	0%	3%	-2%	1%	2%
West Berkshire	-7%	2%	3%	0%	1%	1%
West Sussex	-2%	1%	1%	-1%	1%	1%
Windsor and Maidenhead	-3%	-1%	5%	-1%	-1%	2%
Wokingham	-6%	-3%	7%	-4%	0%	7%

1.4 Comparison of unweighted survey respondents with Census 2021

Demographic metrics

Disability

As shown in Table 1.7, people with disabilities are under-represented across all LTAs. There were however at least 10 disabled persons in each LTA. Given this was not a focus of the research this is a reasonable outcome.

Table 1.7: Survey vs Census 2021 - disability

LTA	Disability
Bracknell Forest	-8%
Brighton and Hove	-10%
East Sussex	-12%
Hampshire	-8%
Isle of Wight	-15%
Kent	-9%
Medway	-9%
Portsmouth	-4%
Reading	-6%
Slough	4%
Southampton	-8%
Surrey	-6%
West Berkshire	-9%
West Sussex	-7%
Windsor and Maidenhead	-7%
Wokingham	-6%

Ethnicity

People from minority ethnic groups, particularly Asian communities in Slough, were under-represented in the sample (Table 1.8). Comparable imbalances in representation were also identified across other demographic characteristics, including socio economic group and gender.

Table 1.8: Survey vs Census 2021 - ethnicity

LTA	Asian	Black	Mixed	White	Other
Bracknell Forest	-5%	-1%	-1%	5%	2%
Brighton and Hove	-1%	0%	-1%	5%	-2%
East Sussex	-1%	1%	1%	0%	0%
Hampshire	-1%	1%	0%	1%	-1%
Isle of Wight	-1%	0%	0%	0%	1%
Kent	-3%	-1%	0%	4%	-1%
Medway	-4%	-1%	0%	7%	-1%
Portsmouth	-5%	-1%	1%	7%	-1%
Reading	-10%	-4%	-2%	17%	-2%
Slough	-30%	2%	3%	25%	0%
Southampton	-2%	0%	6%	-2%	-1%
Surrey	-4%	-1%	-1%	7%	0%
West Berkshire	-3%	0%	-1%	4%	0%
West Sussex	-2%	-1%	1%	3%	-1%
Windsor and Maidenhead	-8%	-1%	0%	12%	-2%
Wokingham	-8%	-1%	-2%	11%	0%

Social Grade

People from the combined ABC1 social grade are over-represented compared to those from the C2DE equivalent by up to 17 percentage points. This was despite a targeted programme of intercepts to increase the C2DE group.

Table 1.9: Survey vs Census 2021 – social grade

LTA	ABC1
Bracknell Forest	10%
Brighton and Hove	4%
East Sussex	6%
Hampshire	6%
Isle of Wight	5%
Kent	11%
Medway	3%
Portsmouth	5%
Reading	17%
Slough	14%
Southampton	6%
Surrey	6%
West Berkshire	10%
West Sussex	7%
Windsor and Maidenhead	8%
Wokingham	7%

1.4 Comparison of unweighted survey respondents with Census 2021

Economic metrics

Household Car Ownership

As shown in Table 1.10, households (HHs) owning two or more cars were under-represented in the survey, with an over representation of one car households.

Table 1.10: Survey vs Census 2021 – HH cars

LTA	0	1	2	3 or more
Bracknell Forest	5%	22%	-18%	-9%
Brighton and Hove	8%	1%	-6%	-3%
East Sussex	0%	18%	-8%	-9%
Hampshire	-1%	18%	-8%	-9%
Isle of Wight	-1%	15%	-7%	-7%
Kent	-1%	16%	-8%	-7%
Medway	4%	14%	-9%	-9%
Portsmouth	-2%	15%	-10%	-3%
Reading	11%	1%	-8%	-4%
Slough	15%	1%	-9%	-7%
Southampton	7%	10%	-12%	-5%
Surrey	3%	15%	-9%	-9%
West Berkshire	4%	15%	-12%	-8%
West Sussex	4%	15%	-10%	-9%
Windsor and Maidenhead	5%	11%	-7%	-9%
Wokingham	1%	21%	-11%	-11%

Employment Status

Most employment groups were within five percentage points of the census, with retired people generally over-represented. Students are somewhat under-represented despite a programme of intercepts which targeted this group.

Table 1.11: Survey vs Census 2021 – employment

LTA	Employed	Unemployed	Student	Retired	Other
Bracknell Forest	-8%	0%	-3%	13%	-2%
Brighton and Hove	4%	-1%	1%	1%	-5%
East Sussex	2%	1%	-4%	4%	-3%
Hampshire	0%	0%	-3%	7%	-4%
Isle of Wight	-2%	0%	-3%	8%	-3%
Kent	3%	0%	-4%	5%	-4%
Medway	4%	2%	-5%	0%	-1%
Portsmouth	10%	2%	-9%	0%	-3%
Reading	-8%	-2%	11%	0%	-2%
Slough	-5%	5%	5%	1%	-6%
Southampton	1%	0%	4%	-3%	-2%
Surrey	4%	-1%	-4%	4%	-3%
West Berkshire	5%	-1%	-3%	2%	-4%
West Sussex	-1%	1%	-3%	5%	-2%
Windsor and Maidenhead	4%	0%	-6%	6%	-5%
Wokingham	-4%	0%	-5%	13%	-4%

Highest Qualifications

Those with no formal qualifications* are under-represented, and those with level 4+ are over-represented. This correlates somewhat with the under representation of C2DE grades across the research.

Table 1.12: Survey vs Census 2021 – qualification

LTA	None	Apprenticeship	Levels 1-3	Level 4+	Other
Bracknell Forest	-11%	-5%	-16%	13%	20%
Brighton and Hove	-10%	-3%	-10%	16%	7%
East Sussex	-12%	-4%	-13%	8%	20%
Hampshire	-12%	-4%	-16%	14%	18%
Isle of Wight	-12%	-6%	-14%	5%	27%
Kent	-14%	-4%	-17%	16%	19%
Medway	-11%	-5%	-9%	12%	13%
Portsmouth	-16%	-4%	-13%	23%	10%
Reading	-14%	-3%	-4%	12%	9%
Slough	-16%	-3%	-4%	11%	12%
Southampton	-14%	-4%	-5%	9%	14%
Surrey	-10%	-4%	-15%	11%	18%
West Berkshire	-13%	-5%	-13%	12%	18%
West Sussex	-12%	-4%	-16%	15%	18%
Windsor and Maidenhead	-10%	-3%	-14%	13%	13%
Wokingham	-8%	-4%	-15%	10%	18%

* Noting that the Census includes 16-18 years olds who were not included in this research.



2. Comparison with the National Travel Survey (NTS)



2.1 Introduction

The National Travel Survey (NTS) is an annual household survey in England that collects data on personal travel behaviour to inform government transport policy.

This section compares the findings from the NTS 2023 for the UK South East (SE) with the RTS for the TfSE area to help both provide confidence in the RTS data and support informed decision making when using one or both datasets.

Overview

Whilst the questionnaire for the RTS was developed to allow the survey data to be compared to the NTS data as far as is practical, some differences remain that limit the level of comparison that can be made.

In particular, differences in data collection methodology, approach to data weighting and some remaining discrepancies in definitions used. This means that a comparison of the two data sets is expected to exhibit differences.

It is recommended that the RTS is used to enhance and enrich insights from the NTS.

About the NTS

Data collection (pan England)

The NTS uses two primary methods to collect data from approximately 16,000 individuals across 7,000 households in England:

- a face-to-face (F2F) interview to gather personal and household information, and
- a 7-day self-completed travel diary for each household member to record their trips.

Households are selected at random as a representative and regionally stratified sample of addresses across England.

Weighting

Given the year-round data collection period and the the self-completion format of the survey, the NTS applies a composite weighting method. This accounts for the likelihood of household and individual selection, non-response and/or drop-off rates, before applying factors to match national population estimates for age, sex, and region.

The combined weights are then adjusted to ensure the survey sample accurately reflects the UK population at the regional level. NTA also weights trips by trip purposes.

Limitations

There are some key differences to be aware of when comparing the NTS with RTS data.

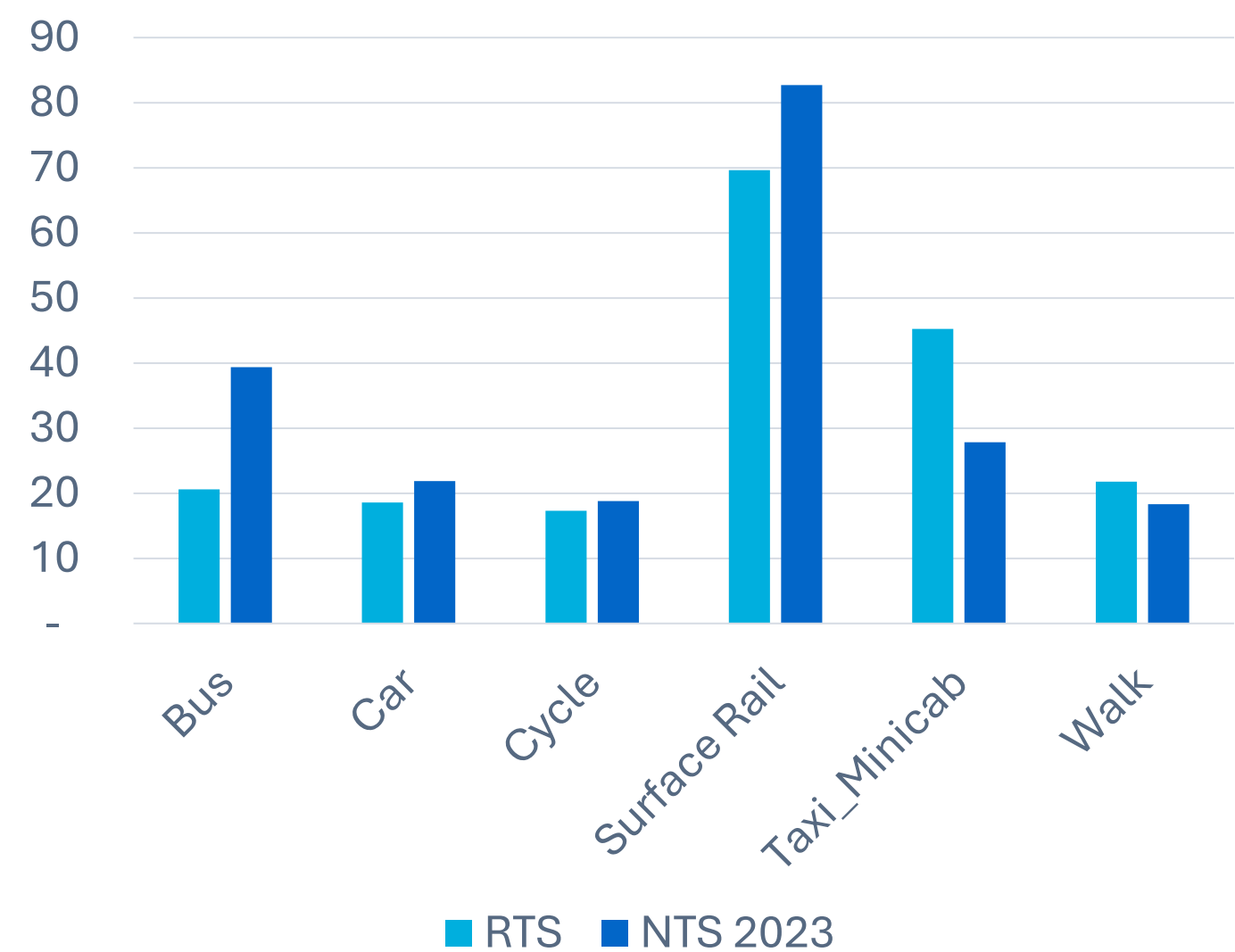
- **Temporal scope** – the NTS is for 2023 whereas the RTS data was collected in November 2024 and May 2025.
- **Sample size** – the RTS sampled 6,820 individuals. The total (UK wide) sample of the NTS is 7k households, implying a smaller underlying sample for the SE than RTS.
- **Geographic scope** – the two data sets do not represent the same geographic area. The NTS definition of the UK SE includes Buckinghamshire and Oxfordshire – all of which are not part of TfSE region.
- **Survey methodology** – the NTS respondents report trip diaries for a representative week as compared to the RTS which collected data for a representative day of a week. Whilst the RTS aimed to ensure data for all days of the week were appropriately collected from different respondents, a truly like for like comparison is not possible.
- **Weighting*** – the NTS weights the sample by age and gender at regional level. In comparison the RTS data is weighted by age only but at the more granular LTA level. Moreover, the NTS uses additional weights for trips by different trip purposes (e.g. commuting v/s leisure trips) which were not applied for the RTS.

*More information can be found on NTS weighting can be found [here](#).

2.2 Comparisons of the RTS to the NTS, by mode

Figures 2.1 to 2.6 across this page and the next present a comparison between the NTS 2023 for the South East and Regional Travel Survey of: average reported travel time in minutes, trip distance in miles and trip frequency. Each is shown by mode and purpose.

Figure 2.1: RTS vs the NTS 2023 – travel time & mode



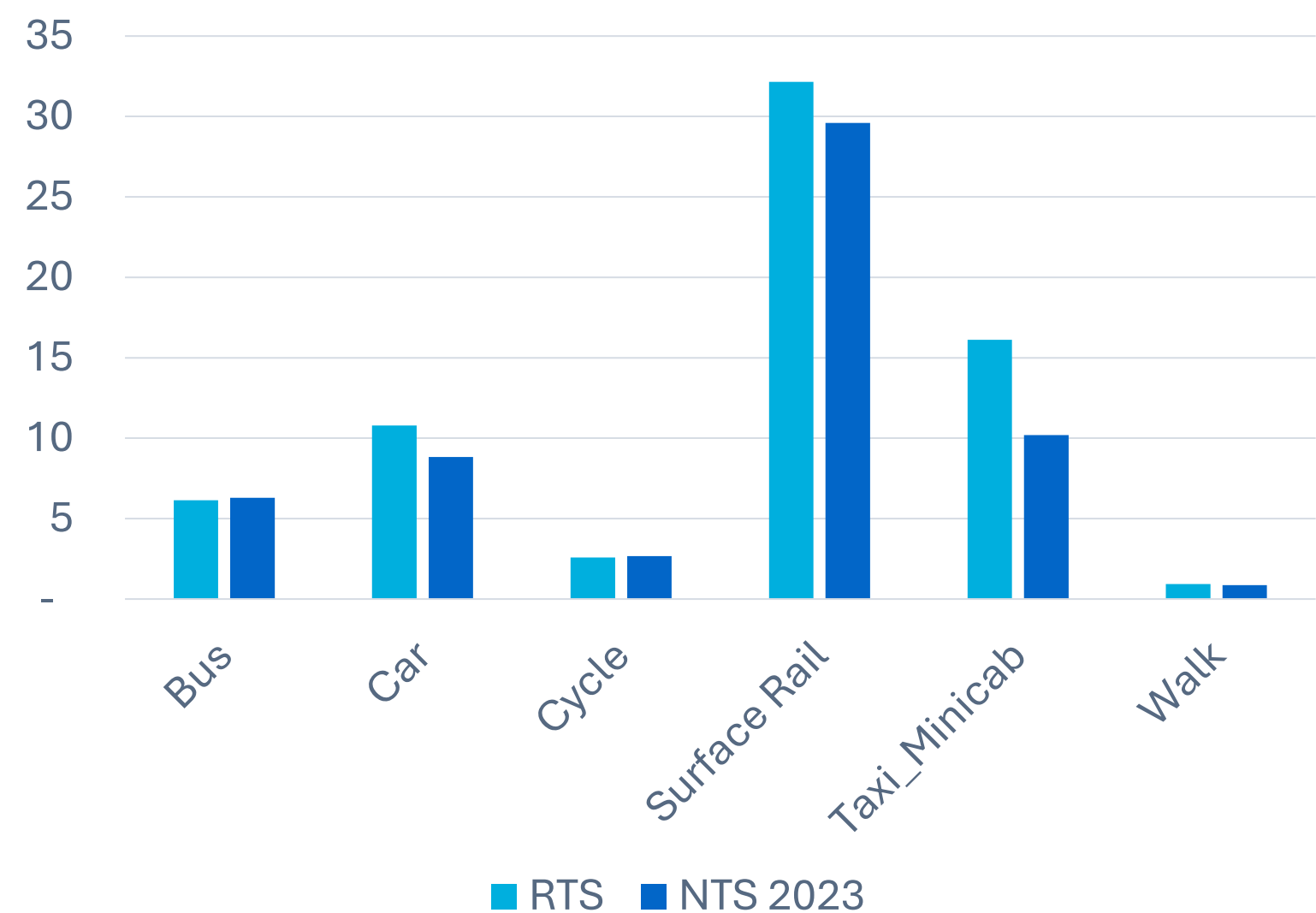
Averages by mode

As shown in Figures 2.1 to 2.3, average travel time, distance and trip frequency by mode are similar when comparing RTS and NTS.

There are however some finer discrepancies. For example:

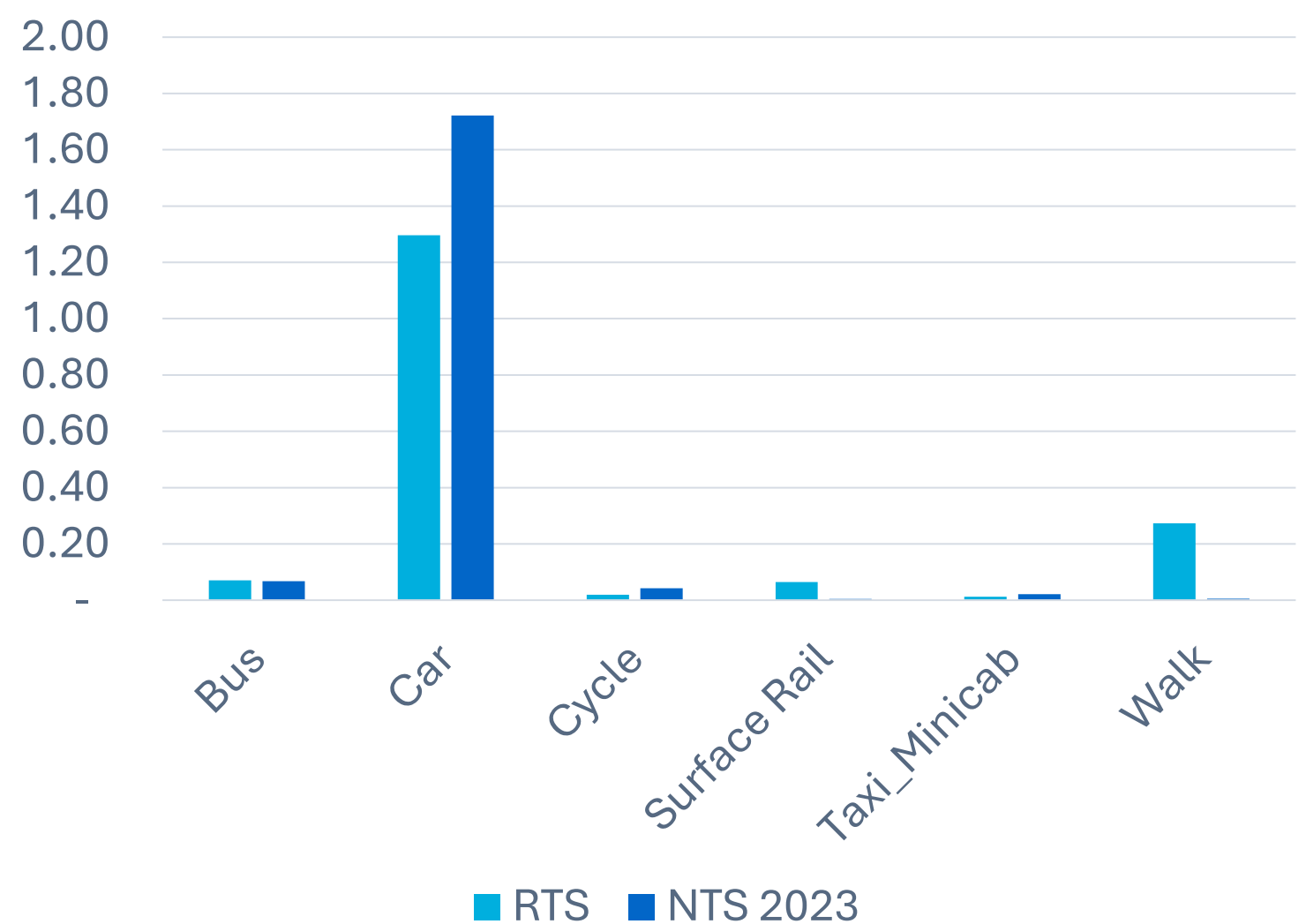
- Bus:** Respondents travel similar distances (Figure 2.2) by bus yet report that average trips are double the time (Figure 2.1) in the NTS compared to RTS (40 mins vs 20 mins).

Figure 2.2: RTS vs the NTS 2023 – distance & mode



- Taxi:** Trips are reported to be both 50% longer (Figure 2.1) and cover 50% more distance (Figure 2.2) in RTS.
- Rail:** Trips are reported to cover longer distances (Figure 2.2) , with a lower average travel time (Figure 2.1) in RTS.
- Trip frequencies** (i.e. trips/person/day) in Figure 2.3 are similar for bus, cycle and surface rail (<0.1 trips/person/day). However, reported car trip frequencies are higher in the NTS (1.7 trips/person/day, compared to 1.3). The walking trip rate is significantly higher in RTS.

Figure 2.3: RTS vs the NTS 2023 – frequency & mode



2.3 Comparisons of weighted RTS to the NTS 2023, for trip purpose data

Average travel time, travel distance and trip frequency by purpose

As shown in Figures 2.4 to 2.6, the travel times, travel distances and trip frequencies recorded are broadly similar for the RTS and NTS. The following are noted as exceptions. Contrasting the comparison of **travel times** for different trip purposes for the NTS and RTS presented in Figure 2.4 with **distances** in Figure 2.5 shows that:

- **Business trip travel times** are 33% higher for the NTS compared to RTS. The comparison of **travel distance** for the two surveys presented in Figure 2.5 is similar (greater for the NTS than RTS).
- The NTS **education trips** are significantly shorter than in both distance and travel time than those reported in RTS. This may be due to differences in how education trips are classified in the two surveys (accompanied vs unaccompanied trips).

Considering **trip frequency** (trips/person/day) as presented in Figure 2.6:

- Education and leisure trip frequencies are reported to be materially higher in the NTS than in RTS at 0.35 and 0.7 trips/person/day respectively.

It should be noted that the NTS assigns additional weights different trip purposes by importance which may have impacted the findings.

Figure 2.4: RTS vs the NTS 2023 – travel time & purpose

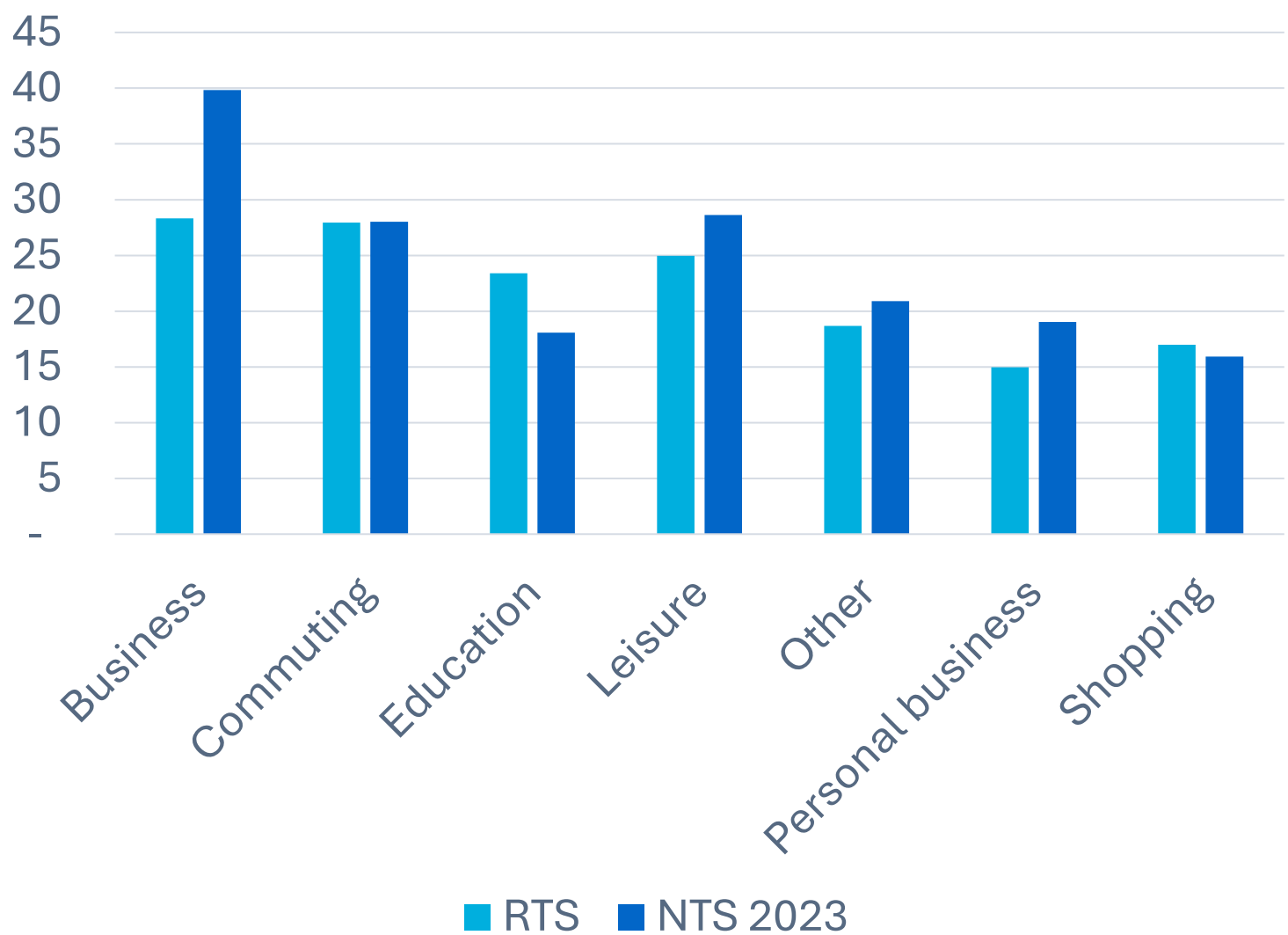


Figure 2.5: RTS vs the NTS 2023 – distance & purpose

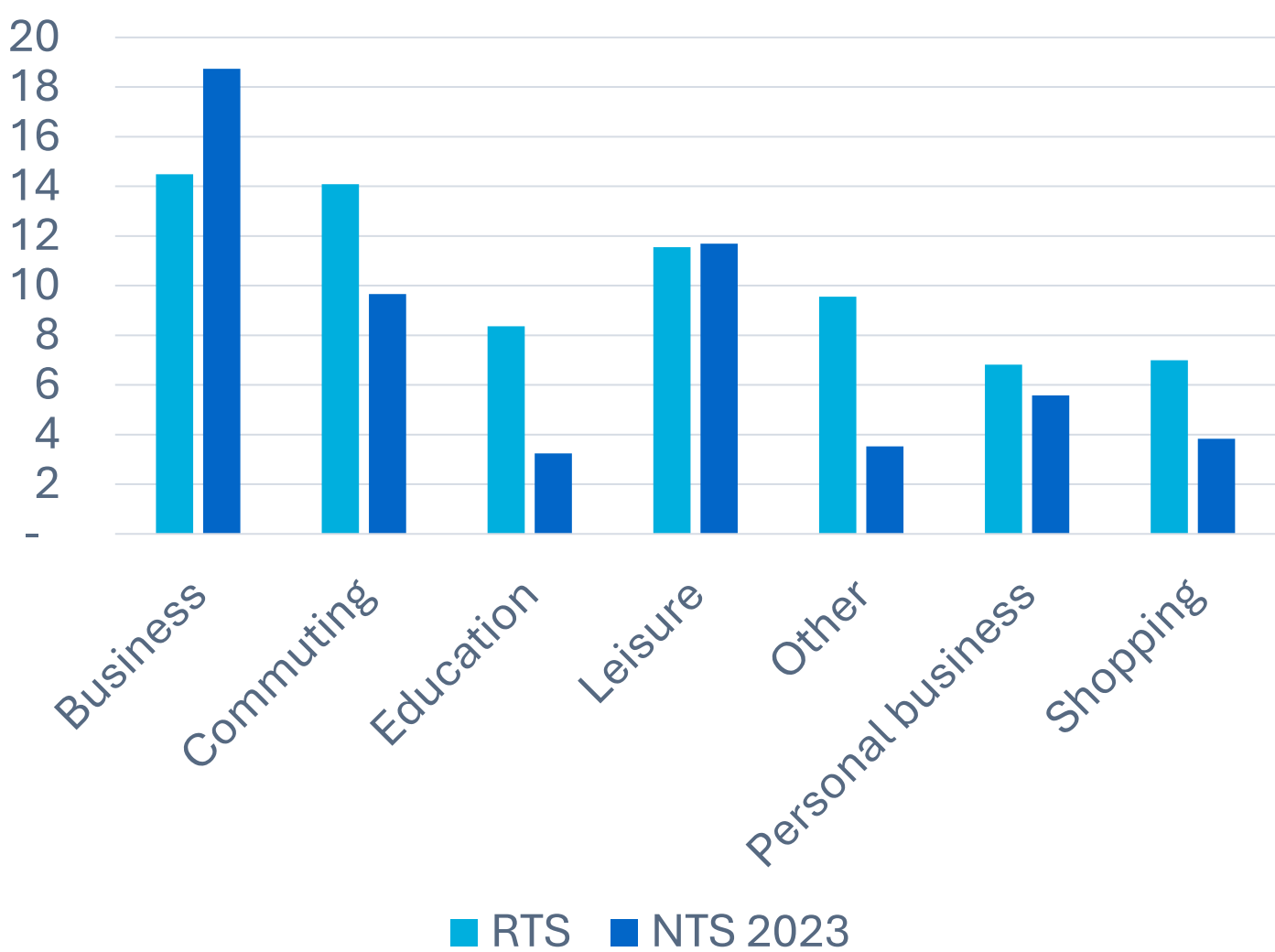
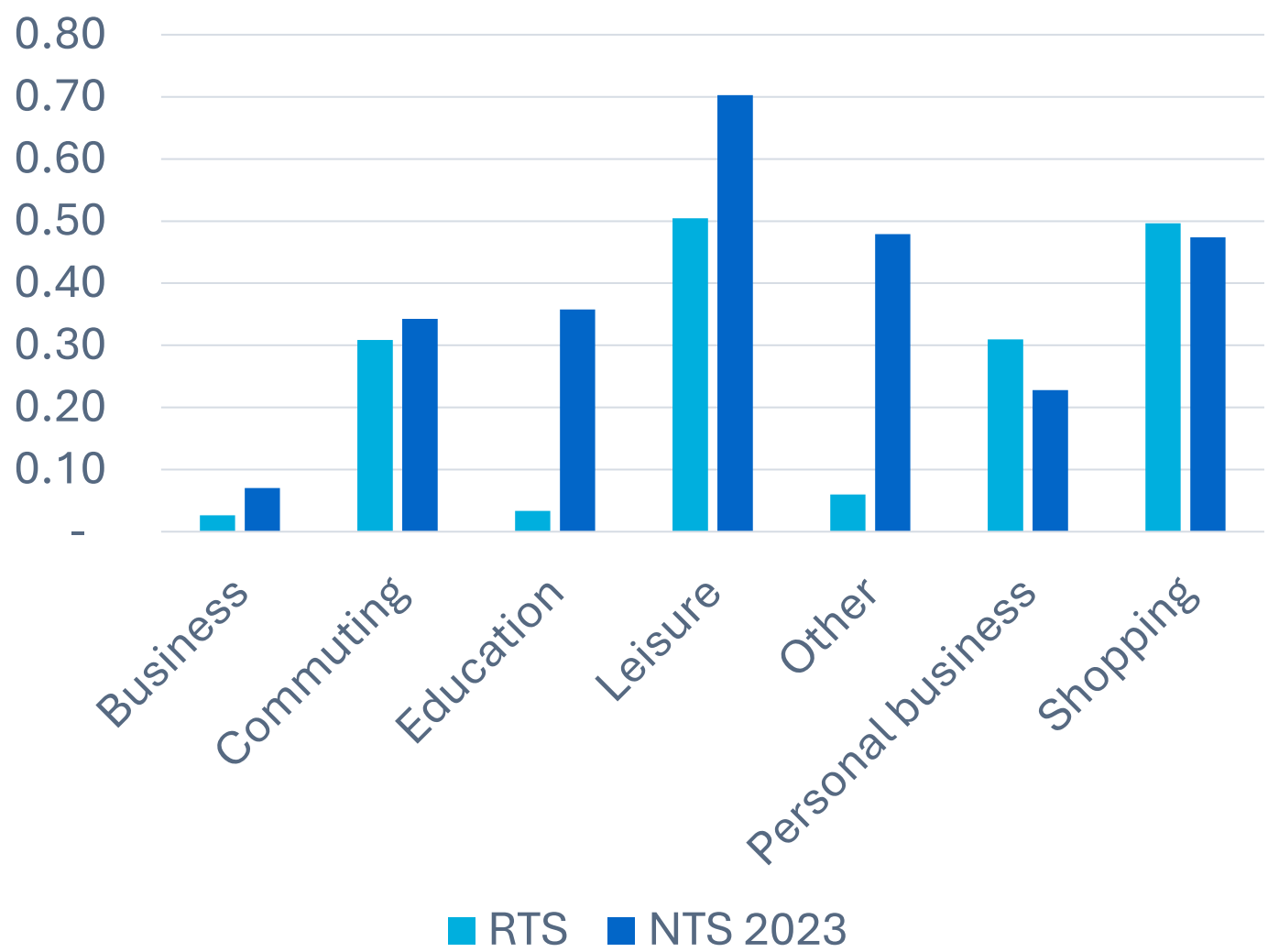


Figure 2.6: RTS vs the NTS 2023 – frequency & purpose



2.4 Conclusion of the comparison of the RTS to the NTS

Conclusion

The comparisons of key indicators by mode used (Figures 2.1 to 2.3) and trip purpose (Figures 2.4 to 2.6) between the NTS and RTS do not flag any concerning data discrepancies.

It should however be noted that the two datasets were not expected to yield identical results and statistics. Indeed, differences should be expected given that the NTS has:

- Comparatively **smaller sample sizes** at the regional and local level.
- A **different geographic coverage** than RTS – covering a wider South East area (including Buckinghamshire and Oxfordshire) than the TfSE area.
- **Different underlying composition of socio-demographic and economic characteristics**. This is given the differences between the NTS definition of the South East and the RTS sample which is comprised of responses from each LTA area.

The fact, therefore, that there is broad alignment in terms of the level of activity between the two datasets **provides confidence that the RTS can be relied on to provide greater local insight**.

Since the RTS has the larger underlying sample size (n=6,427) its usage is recommend to deliver local insights at the LTA and TfSE area level.

However, the RTS data should be used recognising the acknowledged limitations that are cited in this report. In particular: differences in the survey methodology between the NTS and RTS, and risks around using the RTS for very specific use cases where the sample size may be insufficiently small.

3. Survey Insights



3.1 Introduction

This sections presents some key findings from the survey analysis, using the ‘weighted*’ and ‘validated’ data.

A (PowerBI) Dashboard with additional analysis along with data filtering capabilities accompanies this report.

Overview

The data analysis focusses on understanding the travel behaviour across the different Local Transport Authorities (LTAs) in the TfSE region. A comparison of how travel behaviour varies based on demographic and socio-economic characteristics such as age, income, household size, employment status, education level, social group is also presented.

An analysis of why people choose different modes is presented that will help better understand their travel needs and support future network development.

The time and distance of trips made are analysed to support the planning of future transport services.

Origin and destination data has been analysed to understand the potential routes taken for different trips made by different modes such as cycling.

Approach

The results of the survey analysis for the following characteristics are presented for each LTA across the TfSE region. The analysis has been further disaggregated by socio-demographic characteristics of the respondents.



1. Travel patterns

Commute frequency; and changes in trip frequency post pandemic (more/same/less)



2. Car ownership

Car ownership rate; type of cars owned; and EV charging methods



3. Mode share

Mode share for all trips; mode share by trip purposes, time of travel e.g. rush hour and journey length; and reasons for choosing a mode



4. Trip rate and trip length distributions

Average trips per person per day by mode and purpose; and average miles travelled per person per day by mode and purpose.



5. Origin and destinations

Trip density and origins/destinations hotspots by mode

*Note that each chart shows the unweighted underlying sample size for completeness.

3.2 Travel patterns

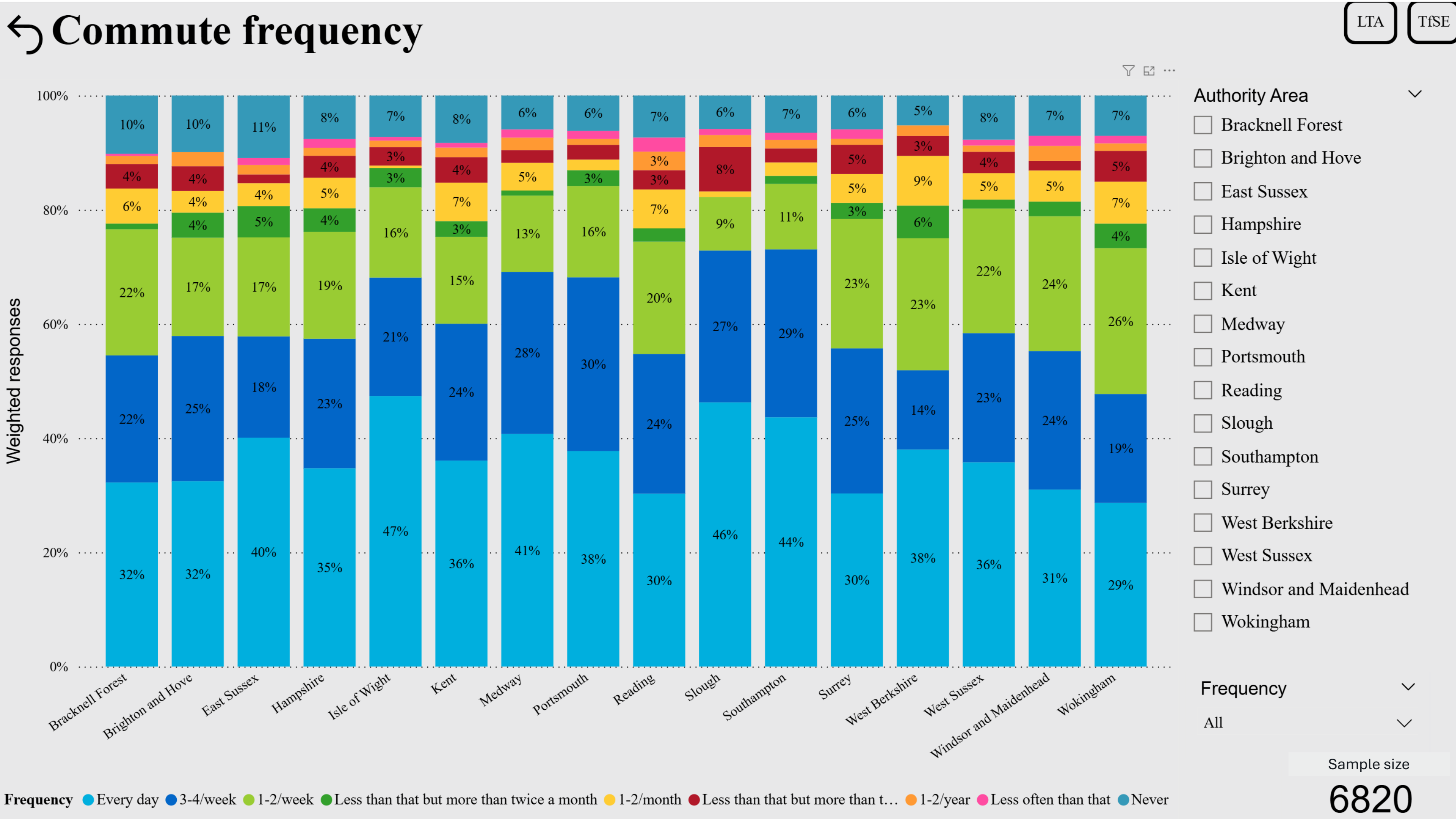
Commute frequency*

Figure 3.11 shows the frequency of commuting by LTA in terms of number of days per week, month or year.

- Across all LTAs, over 50% of respondents said they commute more than 3-4 times per week.
- Another 15-25% respondents commute 1-2 times per week.
- About 6-10% reported never commuting.
- The commute frequency varies across LTAs, with Isle of Wight having the greatest share of respondents who reported commuting daily (47%), and Wokingham the lowest (29%).

*this analysis is based on all responses, including people who are not-working/retired/students.

Figure 3.1: Commute frequency
How often, if at all, do you commute to your usual place of work instead of working from home?



3.2 Travel patterns

Changes in trip frequency after pandemic*

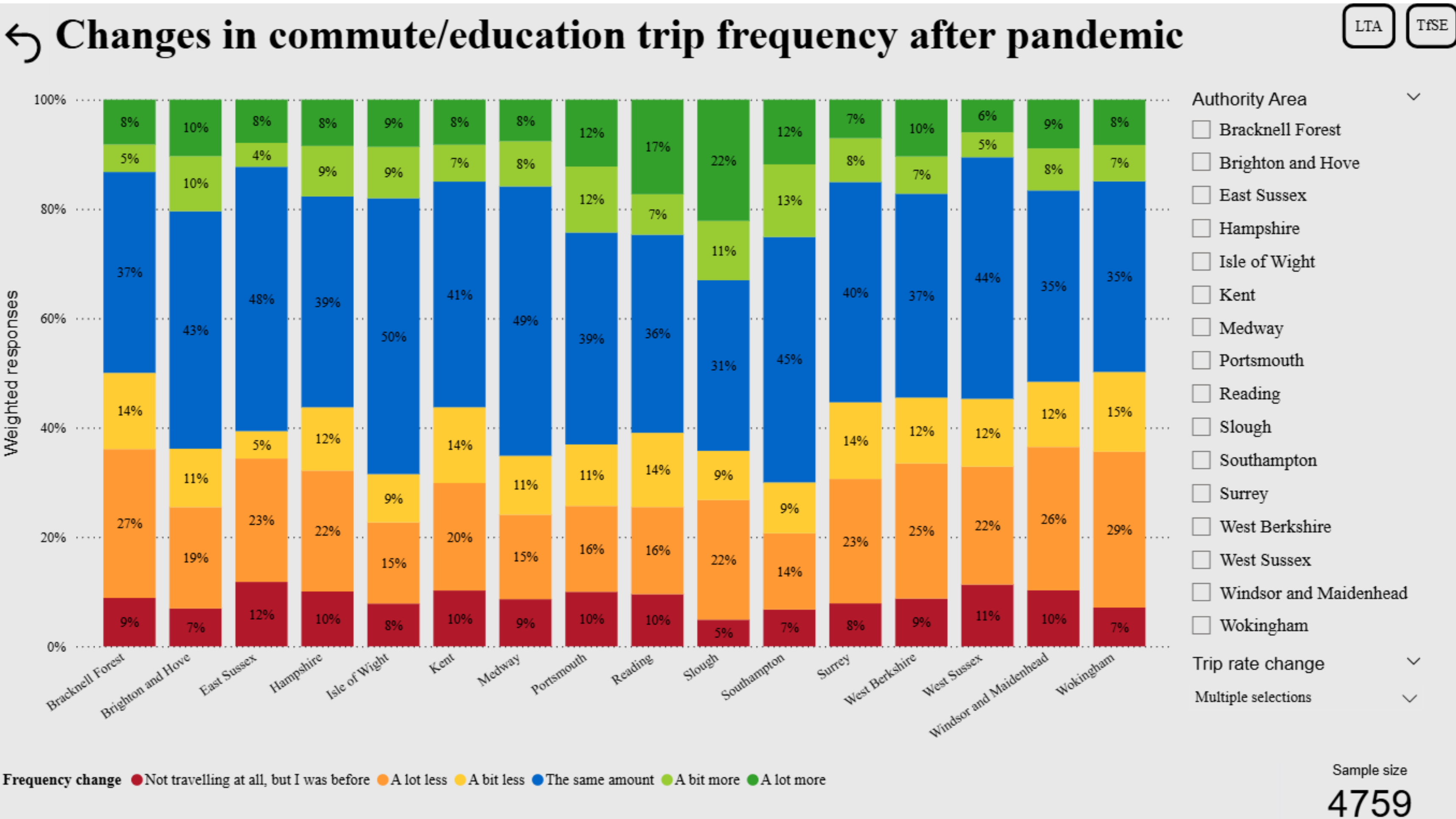
- As shown in Figure 3.2,
- About 40% of the respondents said they commute about the same as before the pandemic.
 - About 17% reported they commute more or lot more after the pandemic.
 - Remaining 40% have stopped travelling or are travelling less

This profile varies across the different LTAs and across trip purposes.

Changes in trip frequency after pandemic for different trip purposes are available in the Dashboard.

*this analysis is based on all responses, including people who are not-working/retired/students.

Figure 3.2: Trip frequency after pandemic
Comparing your travel now with that before the COVID-19 pandemic in 2020, please tell us whether you are travelling more, less or about the same for each of the following purposes: Commute/Education.



3.3 Car ownership

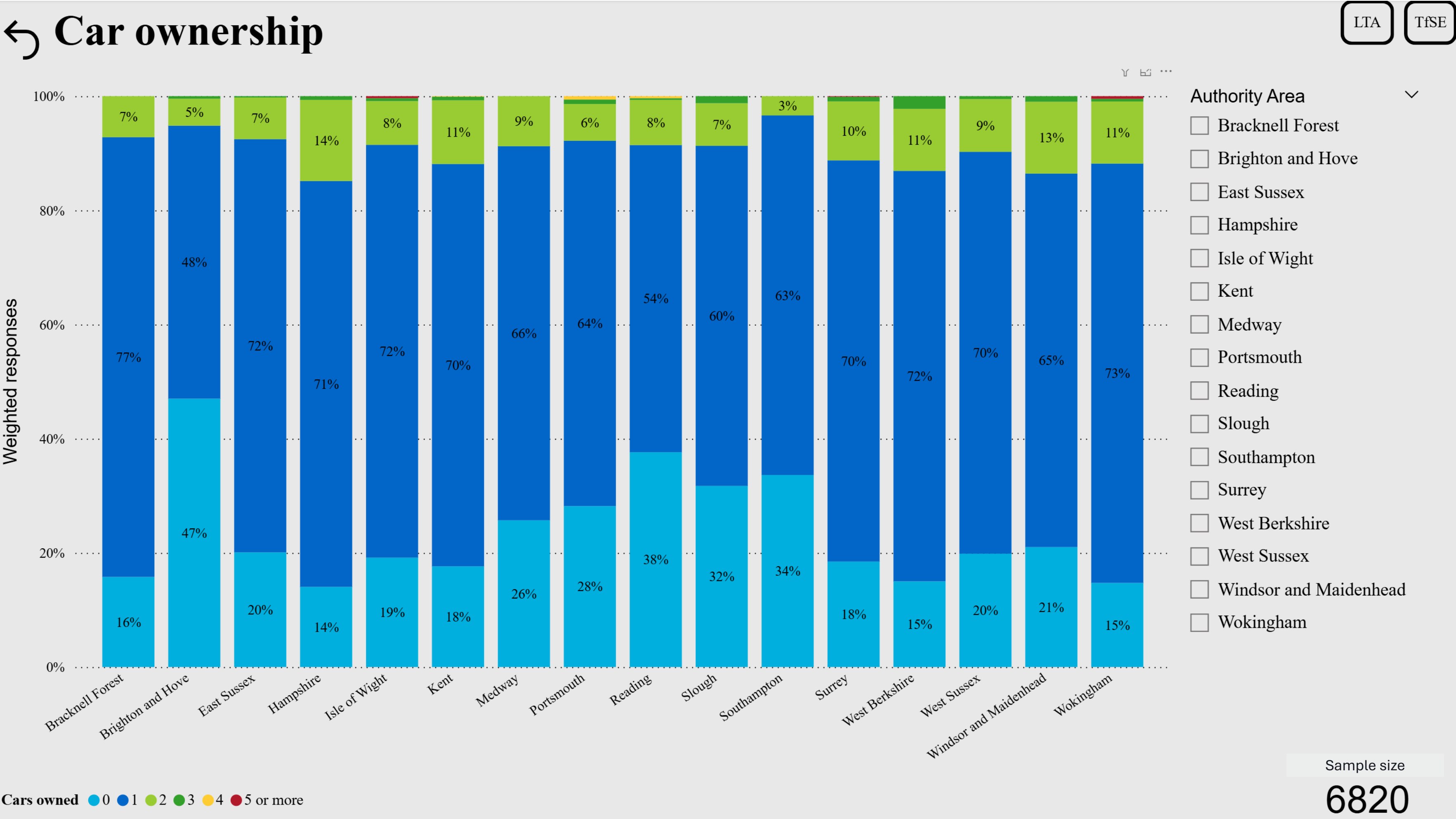
Car ownership

- As shown in Figure 3.3,
- Across all LTAs, about one-fifth of the population do not own a car either individually or jointly.
 - Car ownership is lowest in Brighton and Hove, Southampton, Reading, and Slough* where >30% respondents don't own a car.

Car ownership levels by demographic and socio-economic characteristics such as age, income, gender and social grade are available in the dashboard.

*To note, Slough has relatively low sample size of c.132.

Figure 3.3: Car ownership
How many cars/ vans, if any, do you personally own, either individually or jointly?

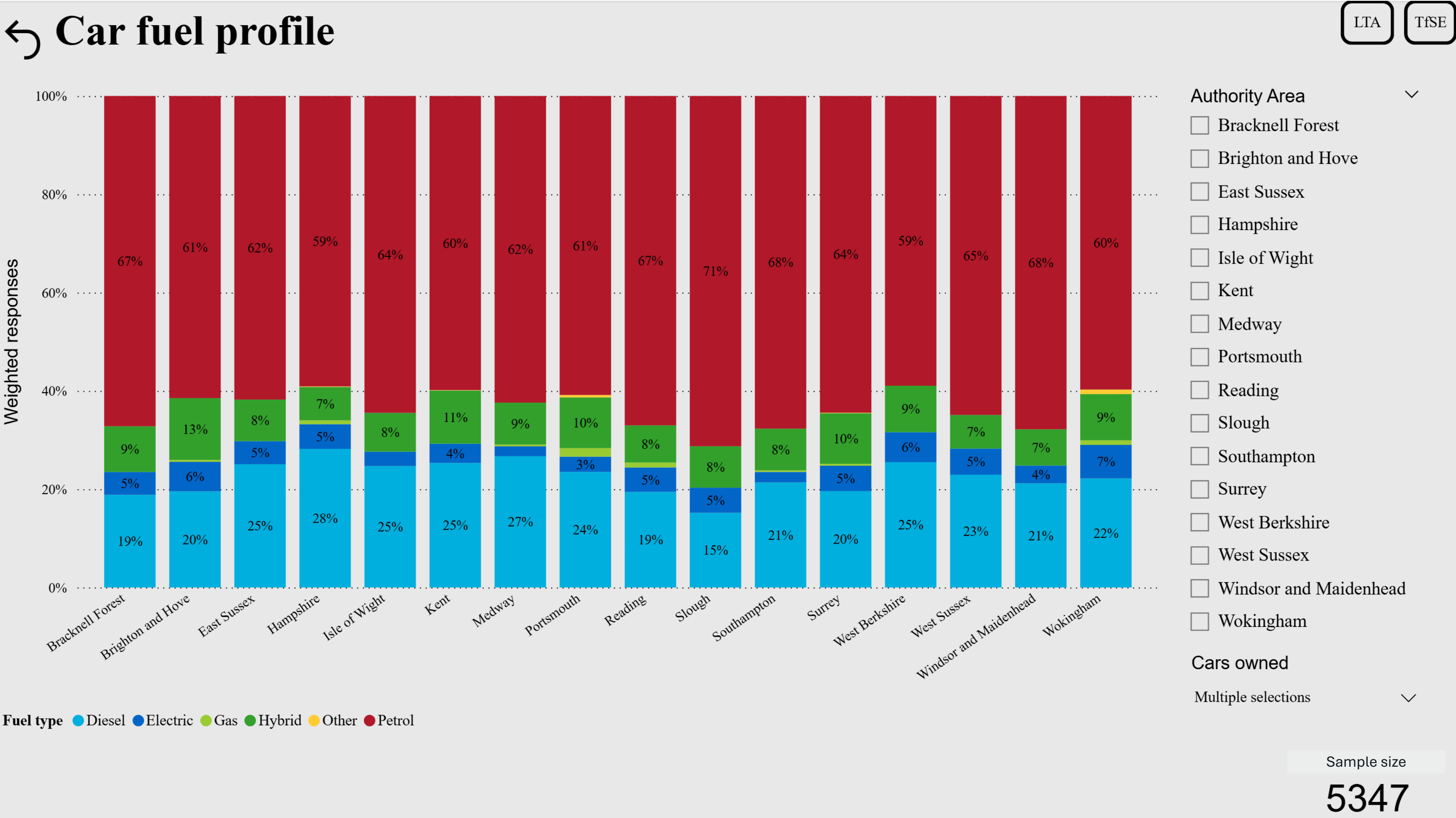


3.3 Car ownership

Car fuel profile

- As shown in Figure 3.4,
- Across all LTAs, EV accounts for on average 5% of cars owned by respondents, and about another 9-10% are hybrids.
 - Diesel and petrol cars account for the majority of vehicles owned at circa 25% and 60% respectively.
 - EV and hybrid car ownership is highest in Brighton and Hove, followed by Wokingham, West Berkshire, Surrey and Kent.

Figure 3.4: Car fuel profile
What type of engine is in the vehicle(s) you own, either solely or jointly with someone else?

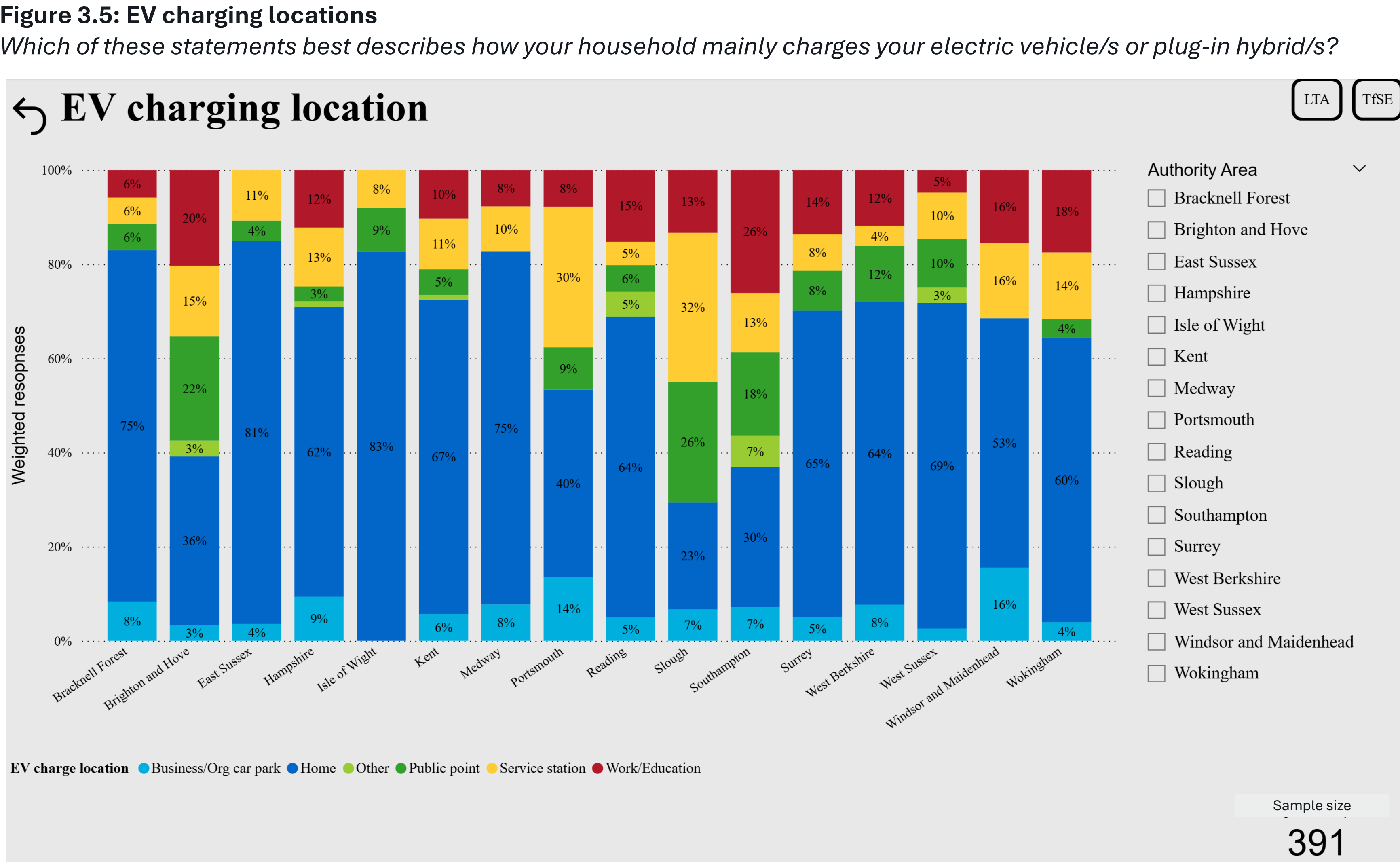


3.3 Car ownership

EV Charging location

- As shown in Figure 3.5,
- Home and/or a business/organisation car park is the most common location where EV owners and/or users choose to charge their vehicles the majority of the time
 - However, in LTAs such as Brighton and Hove (B&H), and Slough over 20% of the respondents charge at public locations. These LTAs also have the highest EV penetration, despite potentially lower access to off-street parking.

To note, the sample size for this chart at LTA level is very low, and therefore the findings should be treated with caution.



3.4 Mode share

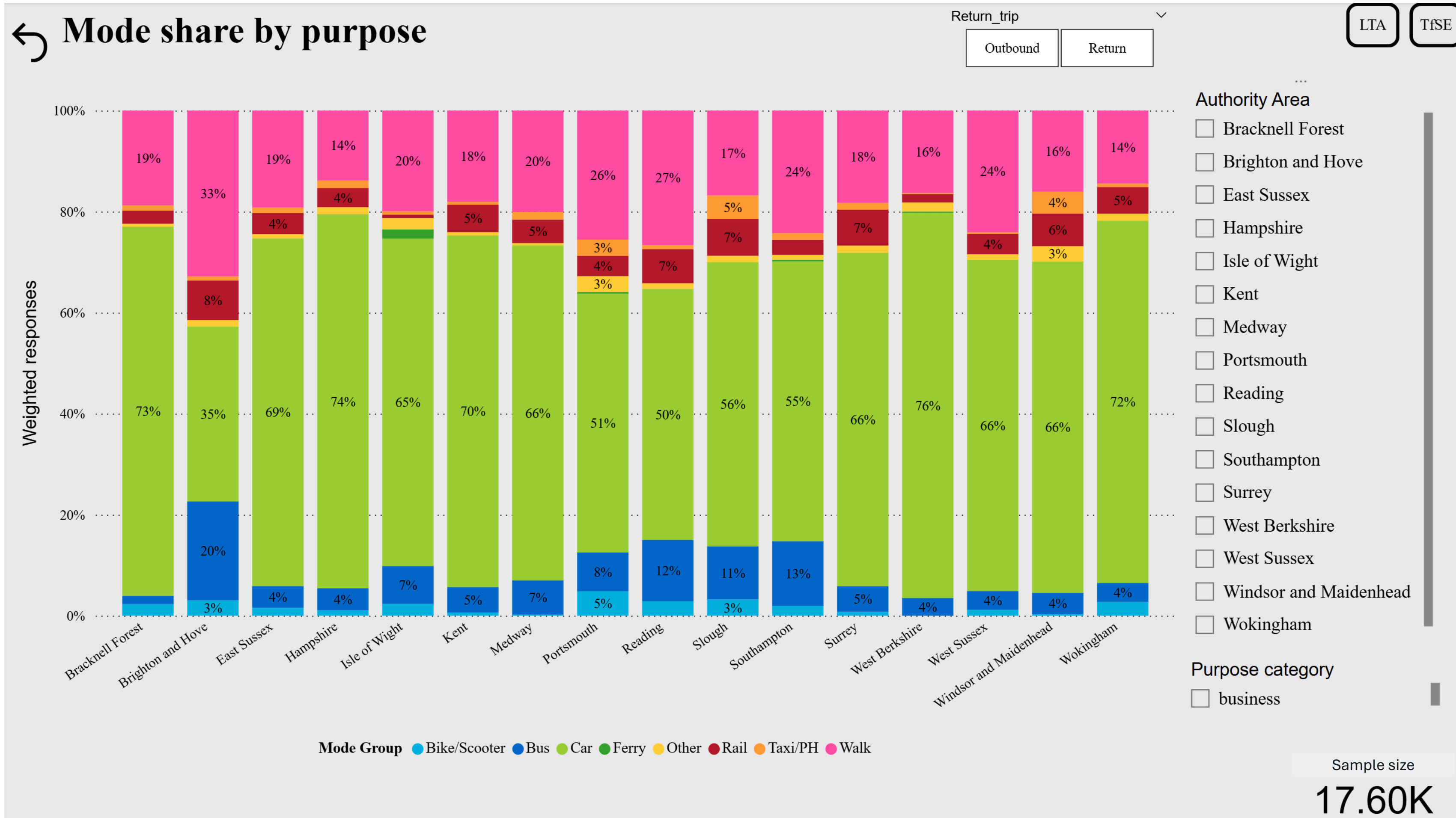
Mode share

As shown in Figure 3.6,

- Across all trip purposes and including return trips, car is the most common mode of travel across all LTAs at about 66%.
- Car mode share varies across LTAs, ranging from only 35% in Brighton and Hove to 76% of trips in West Berkshire. This is aligned with corresponding car ownership rates across the LTAs as shown in Figure 3.3.
- Walking is the second most common mode accounting for about 20% of trips made across all LTAs.

Mode share by different trip purposes such as business, commute, leisure etc. can be viewed in the dashboard.

Figure 3.6: Mode share by purpose
What was the main method of travel you took for each trip? This means the method you used for the longest distance.
What was the main reason for making this trip?



3.4 Mode share

Multi-modal trips

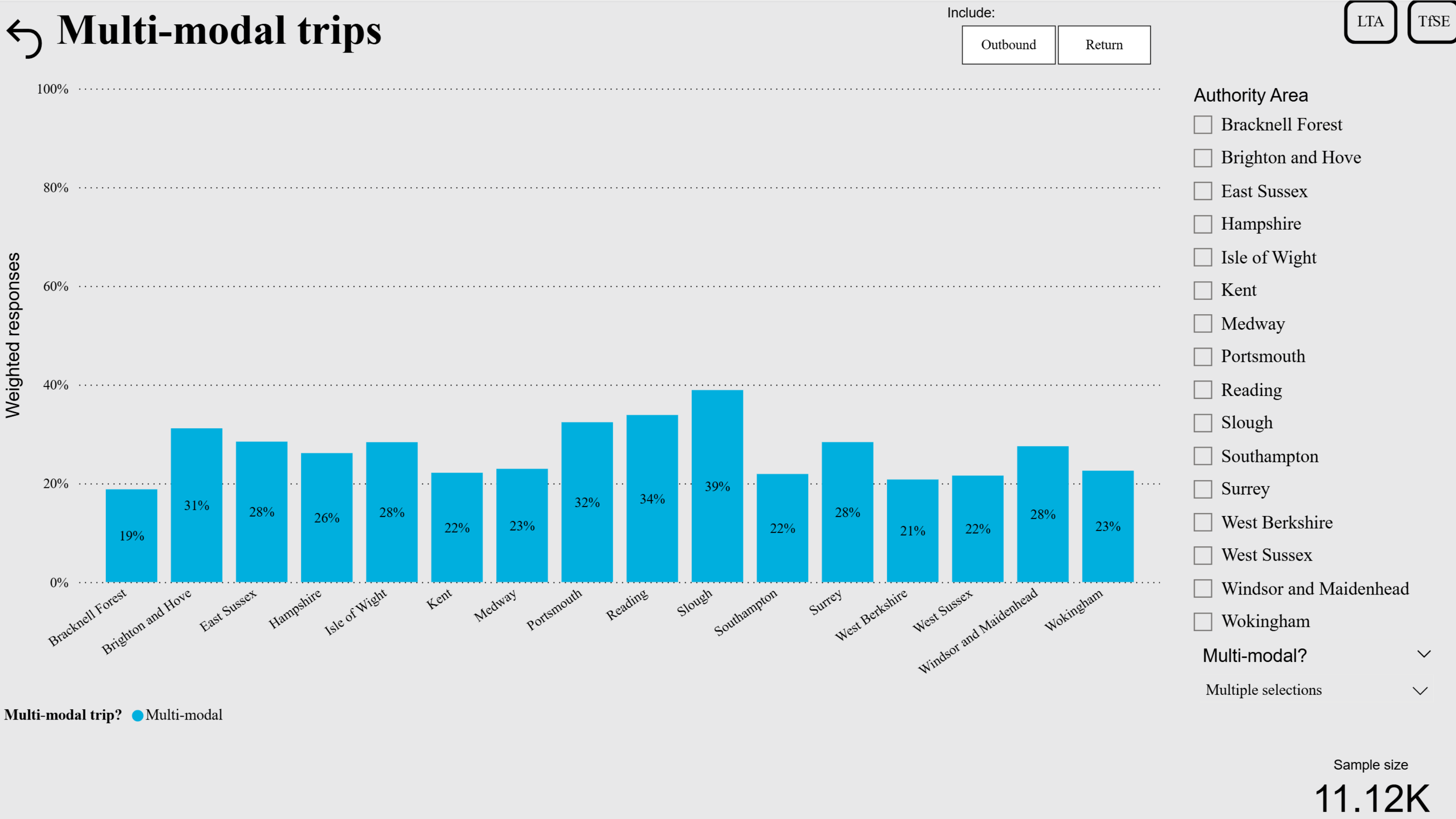
Figure 3.7 shows the proportion of trips that were multi-modal. A multi-modal trip in this context is a single trip that has a specific purpose and is made using more than one mode.

For example, you may drop children off at school before carrying on to your place of work. If you would drop children off at school regardless of it being on your commute, these are two separate trips. Whereas if you stop to get a coffee on your way to work but would not stop to buy coffee if it wasn't on the way, this is a single trip ending at your place of work.

A significant proportion of trips were multi-modal across all LTAs ranging from 19% to up to 39% (including return trips).

Figure 3.7: Multi-modal trips

Still thinking about <chosen date of travel>, but only thinking about <trip x>, where you said your main method of transport was <selected mode>. Which, if any, other methods of travel did you use for this trip?



3.4 Mode share

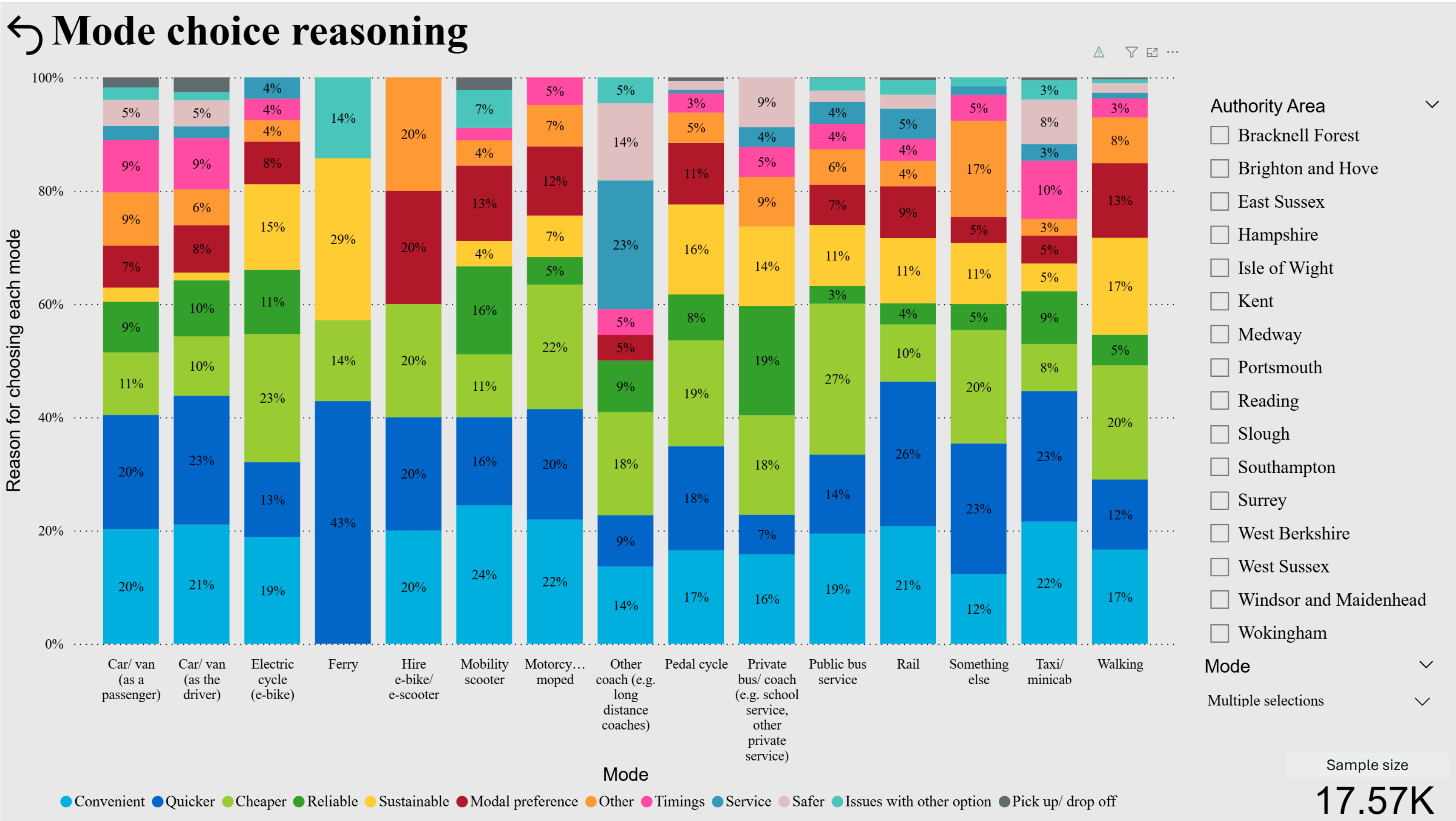
Reasons for choosing a mode

As shown in Figure 3.8 convenience, duration of travel and cost of travel are the top three reasons for choosing the main mode of travel.

- **Car, rail, taxi/minicab and motorcycle/moped** choice is dominated by **convenience and speed** (circa 40% in all cases).
- **Cycling, walking and bus** modes have a strong perception of offering **value for money** (cheap) with **sustainability** also a driver of choice.
- **Ferry** usage has a good **sustainability** perception (29%) but is otherwise dominated by **speed** (43%). 14% also reported having issues with other alternatives.
- **Safety** as a driver of choice was greatest for those using other coaches (14%), 9% on private buses/coaches and 8% taxi and minicabs.
- Underlying **modal preferences** (at circa 5-10% aside from micromobility at 20%) was reported to affect choice for most modes.

Figure 3.8: Reason for mode choice

You said you could have used another method of transport as your main method of travel but did not. Why did you use <selected mode> as your main method instead?



3.4 Mode share

Top reasons for choosing a mode

Key themes that emerged from the qualitative responses on reasons for the selection of preferred mode of travel are presented here.

Walking and Cycling

- **Health and Fitness:** The overwhelming reason for walking was for exercise and the associated health benefits, with many mentioning it helps them "keep fit" or "get steps in."
- **Short Distances:** Walking was the logical choice for short journeys where using a vehicle was deemed unnecessary.
- **Avoiding Inconvenience:** Some walkers cited a desire to avoid parking difficulties or noted that their destination was close by.
- **Exercise:** The primary motivation for cycling was to incorporate physical activity and exercise into their journey.

Rail

- **Efficiency and Convenience:** Respondents favoured the train for its speed compared to other public transport and for the convenience of station locations.
- **Avoiding Driving Hassles:** The train was chosen to bypass traffic congestion and eliminate the need to find parking, especially in busy urban areas.
- **Leisure and Social Travel:** Using the train allowed passengers the freedom to have alcoholic drinks without concerns about driving.

Public bus service

- **Cost Savings:** A significant number of users chose the bus due to having a free bus pass or to avoid the expense of parking.
- **Alternative to Driving:** The bus was a key alternative for those who couldn't drive, particularly after consuming alcohol.
- **Poor Weather:** The bus provided a reliable way to travel while sheltering from rain and cold.

Car/ van (as the driver or passenger)

- **Practicality for Errands:** The most common reason for driving was the need to carry heavy or bulky items, such as weekly shopping, tools, or other equipment.
- **Health and Mobility:** Many respondents cited health issues, disabilities, or mobility problems that make walking or using public transport difficult.
- **Convenience and Social Factors:** Many chose this mode because they were offered a lift by a friend, partner, or family member, making it the most convenient option.
- **Avoiding Bad Weather:** Car is preferred to stay dry and warm during poor weather conditions (noting the initial survey was undertaken during the month of November).

3.5 Trip rate and Trip Length Distributions

Figure 3.9: Average trips per person per day by trip purpose (includes return trips)
Calculated based on reported number of trips (in a day) for all trip purposes and divided by total sample size

Average trip rate

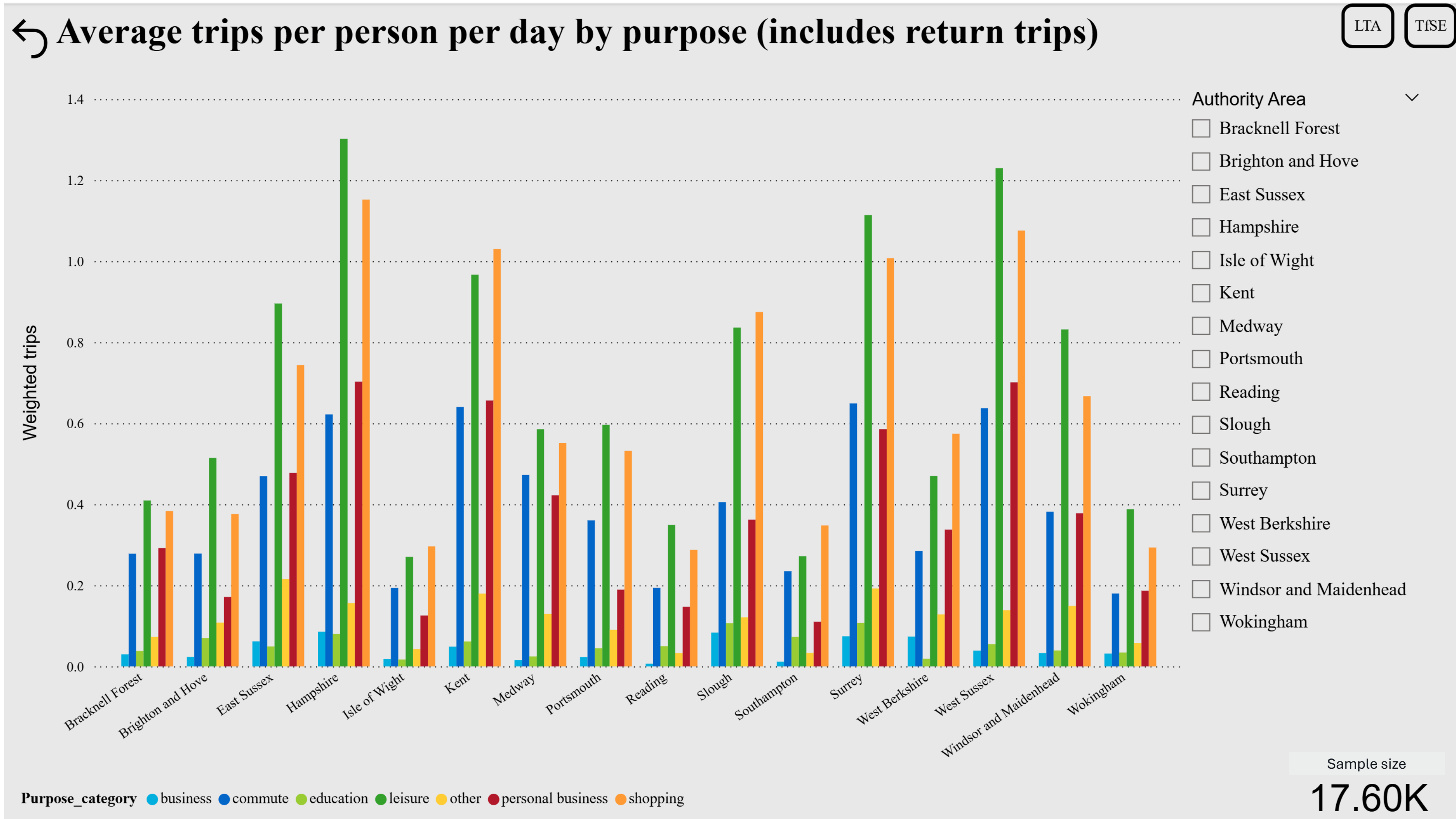
Figure 3.9 shows the average number of trips made per person per day for different trip purposes. For a particular LTA the average represents the weighted sample rate of trips (across all LTA respondents) in the underlying data.

Leisure and shopping are the two most frequent trip purposes across all LTAs.

The next most frequently made trip is commuting with commuting rates highest in Kent, Surrey, West Sussex and Hampshire.

There are some marked differences by LTA with there being three main comparator groups.

- **High trip rates:** Hampshire, Kent, Slough, Surrey, West Sussex, Windsor and Maidenhead
- **Medium trip rates:** Bracknell Forest, Brighton and Hove, East Sussex, Medway, Portsmouth, West Berkshire
- **Low trip rates:** Isle of Wight, Reading, Southampton, Wokingham



3.5 Trip rate and Trip Length Distributions

Figure 3.10: Average distance travelled per person per day by trip purpose
Calculated based on calculated distance for reported trip origin and destinations data (in a day) for all trip purposes and divided by total sample size

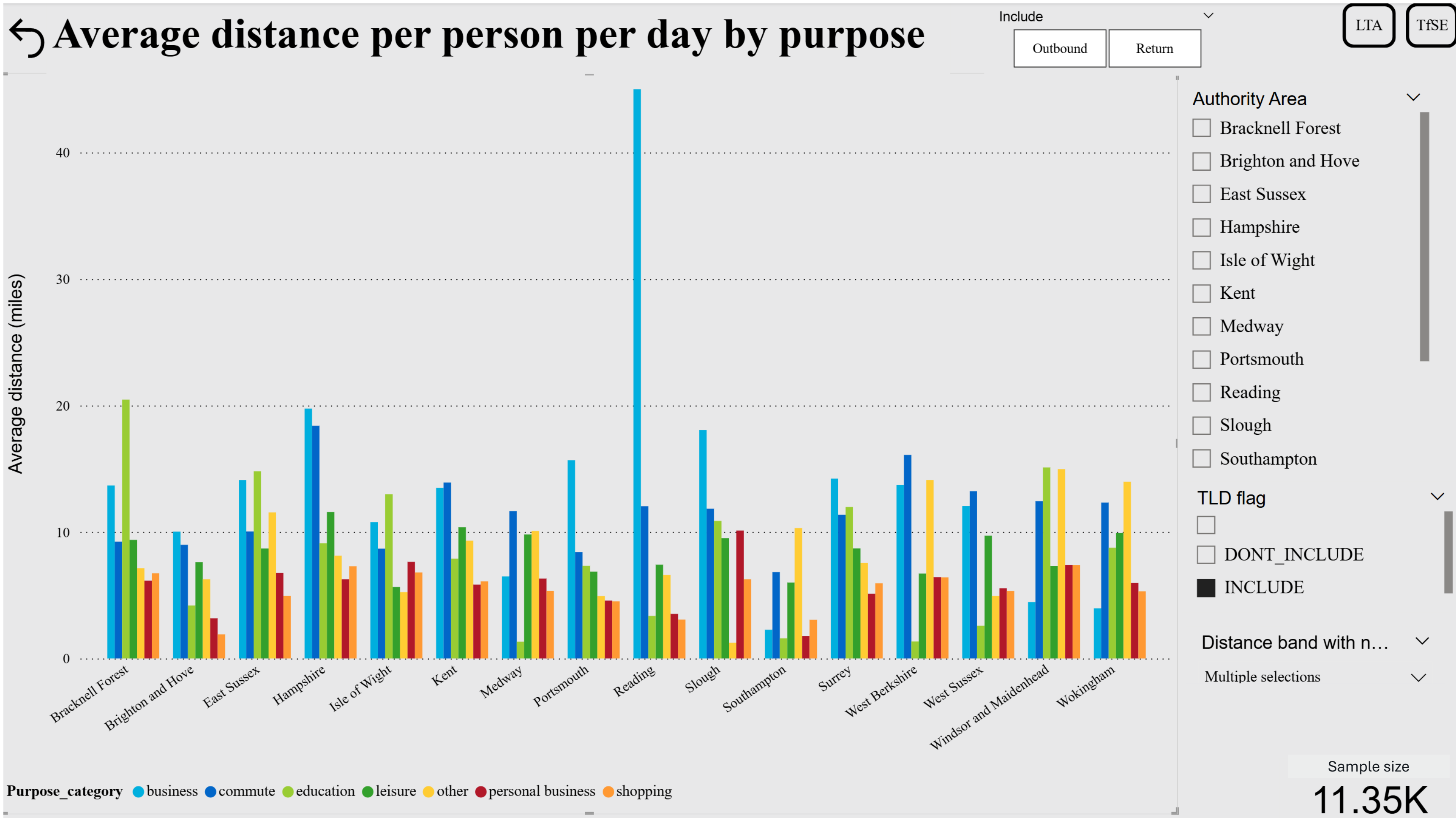
Average distance

Figure 3.10 presents the average distance travelled by trip purpose. Please note the sample size for business, education and other purposes for all LTAs are small.

As shown, respondents travel the farthest for business, commute and education purposes. On average, across all LTAs, this is in the range of 10-20 miles, excepting in Reading where respondents reported travelling more than 45miles for business purposes, however this is based on a small sample size.

Brighton and Hove reported the shortest trip distance across all purposes, which could be because of its urban nature. Also, there are differences in trip lengths across neighbouring LTAs such as Wokingham which is more urban and Bracknell Forest which is a mix of rural and urban.

The majority of shopping, leisure and personal business trips are less than 10 miles across all LTAs. This, combined with the trip rate data (see Figure 3.9 on page 29) suggests that the majority of trips in the TfSE area are less than 10 miles.



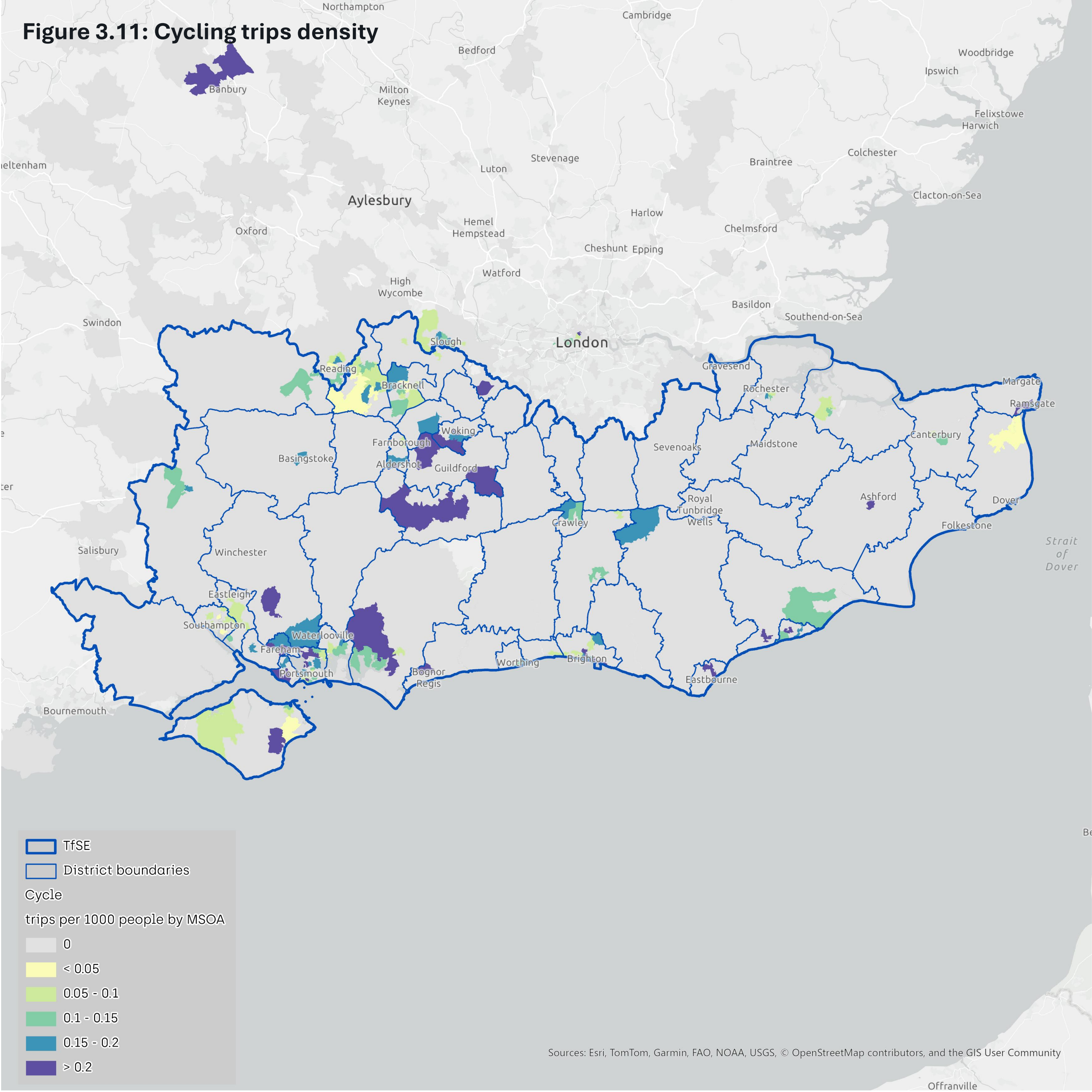
3.6 Origins and destinations

Cycling trips density

Figure 3.11 presents a sample based heat-map for cycling trips per 1000 population made across the region, using the weighted survey responses. The chart has been created using the trip origin and destinations data.

The darkest blue areas in the map have reported the highest density of cycling trips, while no trips were reported in the grey areas.

A similar analysis across all modes can be undertaken using the data and further disintegration at LTA level can be achieved. This map can be used to plan for cycling infrastructure and safety measures in the area.



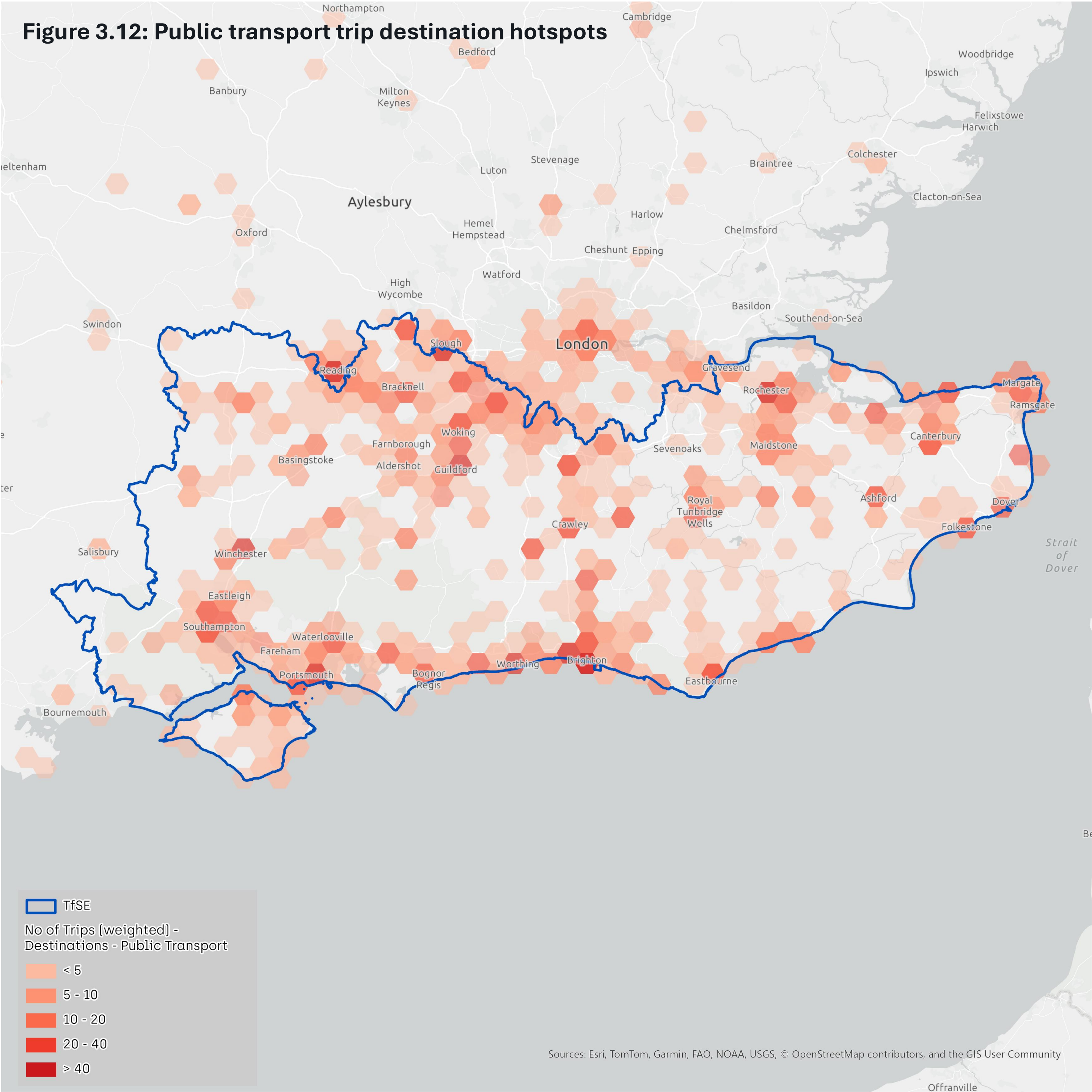
3.6 Origins and destinations

Public transport trip destination hotspots

Figure 3.12 presents another example of how the survey data (weighted) can be used to understand hotspots for trip origins or destinations for different modes.

The darkest orange/red hex cells are the most popular destinations for public transport trips across the region.

This data can help plan for future service improvements, and/or expansion.



4. Conclusions



4.1 Conclusion

The Regional Travel Survey has collected over 6,800 responses from residents across the TfSE area.

The data collected includes socio-economic and demographic data together with trip diary information for a single day including both weekend and weekdays.

These data provide a valuable source of insight that can enrich insights generated from the National Travel Survey. For comparison, in 2023 the NTS sampled circa 7,600 households across England. The implication being that the underlying sample of those residing in the TfSE area is far lower than the RTS sample of individuals (n=6,820) achieved.

Despite certain acknowledge data limitations, the RTS provides a step change in the quality and scope of information available for the TfSE area. Specifically:

- The RTS gathered a **larger sample** in the TfSE area than the NTS.
- The RTS sampling frame ensured that **all TfSE LTAs are represented** with a minimum response rate. Non TfSE areas (Greater London, Oxford, Buckinghamshire) are excluded.
- It is possible to **identify the changes in travel behaviour** that have occurred following the pandemic.
- The data includes **attitudinal insights** around choice of mode used.

Suggested data use cases

The underlying data is being made available alongside a Power BI dashboard. This allows the data to be used at both a granular level as well as to generate rapid regional insights such as understand travel patterns and drivers of mode choice at the local level.

In particular the data can be used:

1. To understand travel demand, particularly for developing local plans.
2. To validate other (non NTS) data sources, such as from mobile phone or Location Based Service (LBS) data which might be used in updates to transport models.
3. To understand travel catchments or functional travel areas in the context of devolution.
4. In the re-basing of transport models that use pre-pandemic data.
5. To gain an initial understanding of where particular transport policies might gain most traction. E.g. micro mobility or EV charging facilities.
6. To understand variations across the TfSE area and ways in which LTAs might exhibit similarities or differences in propensity to use and/or attitudes to different transport modes.
7. To support the move to creating a bespoke TfSE travel market synthesiser and forecasting suite from TfN's Common Analytical Framework. The travel market synthesizer will allow for the development of synthetic travel demand matrices.

Next steps

The data generated by the RTS can provide value to both TfSE and its LTA members. It is recommended the following activities as part of the development of a Common Analytical Framework, to share knowledge and exploit the data to its maximum potential are undertaken.

- Socialise the data and Power BI dashboard with key TfSE LTA personnel. Where necessary provide training to users of the data to empower usage. Noting that a Webinar has been organised to enable this.
- Acknowledge gaps and limitations in the data and where necessary undertake supplementary research. For example, where a particular demographic or geographic group might be considered too small to draw strong conclusions, and/or where a sub-population exhibits a particular behaviour that warrants a deeper dive.
- Consider data sharing or publishing of findings. Note that in the development of this research, TfSE area universities were interested in comparing the findings with their own travel surveys. Such collaboration could generate reciprocal data sharing arrangements.
- Use the data, in combination with other data sources to create or validate transport user personas for the region. The RTS could be blended with geo-demographic sources to deliver richer insights around behaviour.

Thank you

Please contact:

Susmita Das

Associate

Susmita.Das@Steergroup.com

Danielle Czauderna

Associate Director

Danielle.Czauderna@Steergroup.com

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Complex challenges.
Powerful solutions.

Report to: Partnership Board –Transport for the South East

Date of meeting: 27 October 2025

By: Chief Officer, Transport for the South East

Title of report: State of the Region Report

Purpose of report: To seek approval from the board to publish the 2025 edition of the “State of the Region” Report.

RECOMMENDATION:

The members of the Partnership Board are recommended to agree the 2025 State of the Region Report and agree to its publication on the TfSE website.

1. Background

1.1 In 2023 TfSE published its inaugural ‘State of the Region’ report. It was designed to provide an overview of how the region is changing through key indicators linked to our transport strategy, with the 2023 iteration of the report acting as a baseline. It was agreed that an updated report would be produced every two years.

1.2 The State of the Region report is not intended to be a means of directly measuring performance of the Transport Strategy and Strategic Investment Plan (SIP), at least not in the short term. The Strategic Investment Plan will take some time to be delivered and the metrics being examined can be influenced by many external factors. Hence, the State of the Region report should be seen as more of a holistic view of whether the TfSE region is headed in the ‘right direction’. Asking a crucial question: “Are the big-picture metrics of regional performance, linked to the aspirations of the Transport Strategy and Strategic Investment Plan, changing for the better, and at a sufficiently fast rate?”

1.3 The 2025 State of the Region report provides an up to date position with those big-picture metrics and offers a commentary on the changes and trends that have occurred since the 2023 baseline report.

2. 2025 State of the Region Report

2.1 In contrast to the 2023 inaugural report, which is a .pdf document on the TfSE website, the 2025 update has been produced using the ArcGIS story map software tool. This report is designed to be viewed online and provides the opportunity to explore the data and analysis within the report through interactive graphs and maps. The draft 2025 State of the Region report is available at [this link](#). A pdf version will however be made available on request for any users who are

unable to access the interactive version. This version is also provided for information on the content of the report at Appendix A.

2.2 The 2023 baseline required the use of consultants to prepare, however, as a result of the increased technical capability and capacity built within the TfSE Analysis Team, this update has been produced in house.

2.3 The 2025 update uses mostly the same metrics as the first iteration to enable monitoring of the changes in the region, however this has also been supplemented with data gathered through the recently completed regional travel survey. The report has also been structured to reflect the desired outcomes of the new missions within the refreshed transport strategy.

2.4 The key takeaways from the report are that in 2020 there was a sharp decrease in total carbon dioxide emissions from transport, a result of the Covid pandemic. In the years of recovery since, total carbon dioxide emissions from transport have not returned to the pre-Covid levels. There has been an increase in EV uptake in the TfSE region, and the amount of publicly available EV charging points has increased.

2.5 However, the report also reinforces the challenges faced by our region, highlighting the difficulties faced in rural areas accessing services using public transport and the reliance across the region for using car as a main mode of transport.

2.6 Insight gained from the 2025 State of the Region report highlights where increased focus is required and will be used to inform TfSE's forward work programme to ensure that supports delivery of the missions set out in the transport strategy.

2.7 The report will continue to be updated at two-year intervals to observe the long term changes in our region.

3. Conclusions and recommendation

3.1 The Partnership Board are recommended to approve the draft 2025 "State of the Region" report and agree for it to be made publicly available on the TfSE website.

RUPERT CLUBB

Chief Officer

Transport for the South East

Contact Officer: Craig Derrick

Email: craig.derrick@transportforthesoutheast.org.uk



(Print version) State of the Region 2025 Report

**** THIS IS A DRAFT DOCUMENT ****

TfSE Publisher

Draft

This is the second State of the Region report from Transport for the South East (TfSE). It has been designed to provide an overview of how the region is changing through key indicators linked to our Transport Strategy.

Each indicator is connected to one of our five Transport Strategy missions. These are:

- [Strategic Connectivity](#)
- [Resilience](#)
- [Inclusion and Integration](#)
- [Decarbonisation](#)
- [Sustainable Growth](#)

However, as these high-level measures are shaped by many wider factors, this report should not be taken on its own as a direct assessment of our progress in delivering the Transport Strategy or the Strategic Investment Plan (SIP). Instead, the metrics give a snapshot of how the South East is evolving across key aspects of the economy, society and

environment.

The findings in this report are based on a wide range of data sources, including open datasets, government and ONS releases, as well as information provided by Network Rail, Solent Transport, Transport for the North and Steer. We have also drawn on our own Regional Travel Survey. For all graphs and charts, you can view the data source by clicking on the icon

We plan to publish this report every two years to highlight key trends and developments shaping the region.

Transport for the South East (TfSE) have prepared this information using data available at the time of authorship. Any new information released since may alter the validity of the conclusions reached. TfSE does not accept any liability for any financial loss or damages incurred due to the use of any data in this report where the data is used without express permission from TfSE.

Our region

These initial indicators set the scene for the general economic state of the region. Please note throughout this report, some of the supporting evidence is aggregated on the census defined South East region level, which in addition to the TfSE local transport authorities (Bracknell Forest, Brighton and Hove, East Sussex, Hampshire, Isle of Wight, Kent, Medway, Portsmouth, Reading, Royal Borough of Windsor and Maidenhead, Slough, Southampton, Surrey, West Berkshire, West Sussex, Wokingham), also includes Buckinghamshire, Milton Keynes and Oxfordshire.



Figure 0.1: TfSE geography prepared by Steer for 2023 state of the region report



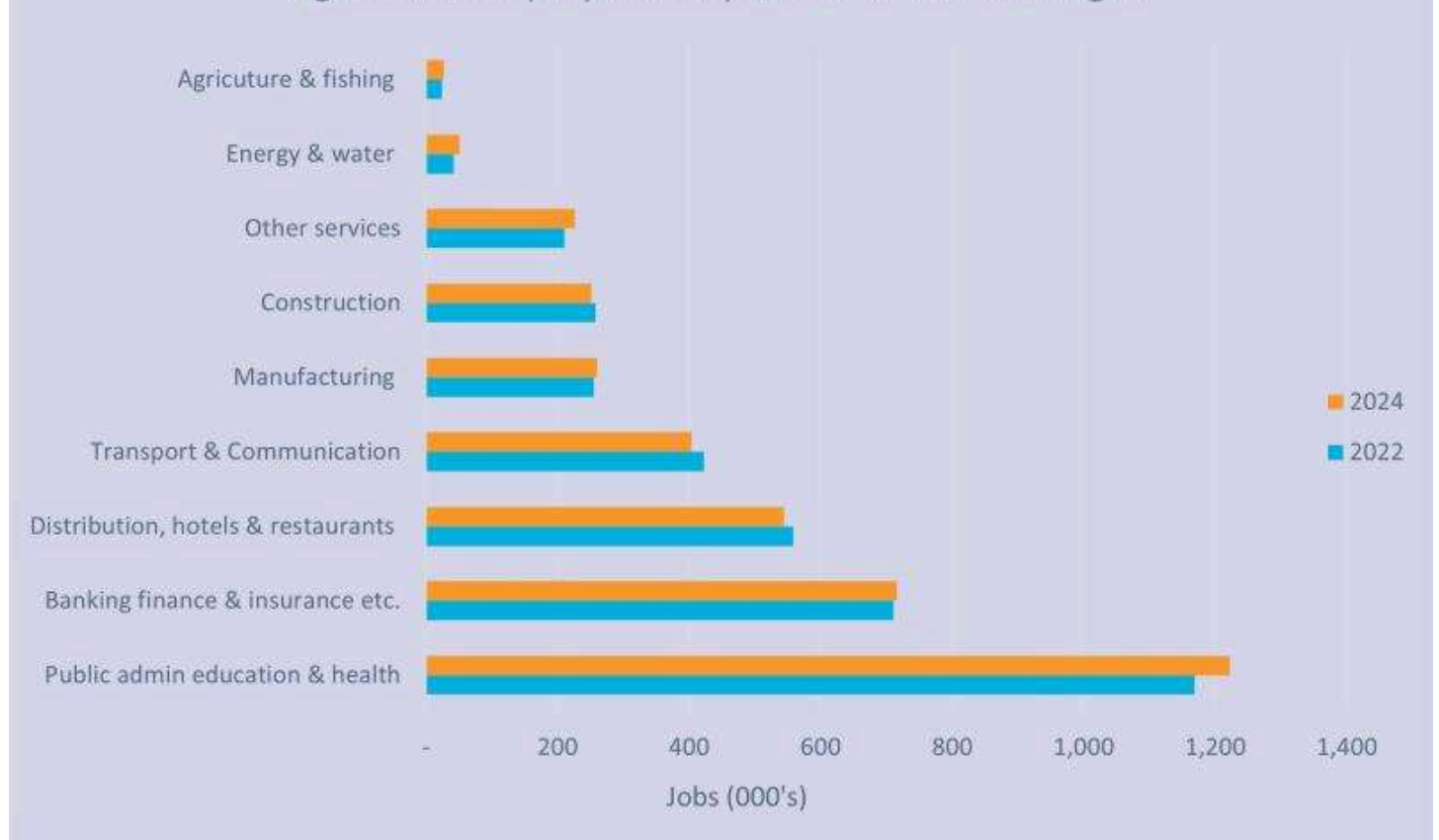
Productivity

Gross Value Added (GVA).

Figure 0.2 shows that although the TfSE region has seen an increase in GVA per head of population since the last report, the rate of increase has been lower than that seen across the UK as a whole.

The total GVA per head in our geography is still higher than the UK average (£37,501 in TfSE, £36,103 in UK). However, the difference in GVA generated within the TfSE area has decreased from 5.1% more productive than the UK as a whole in 2021 to only 3.9% more productive in 2023.

Figure 0.3: Employment by sector in the TfSE region



Employment

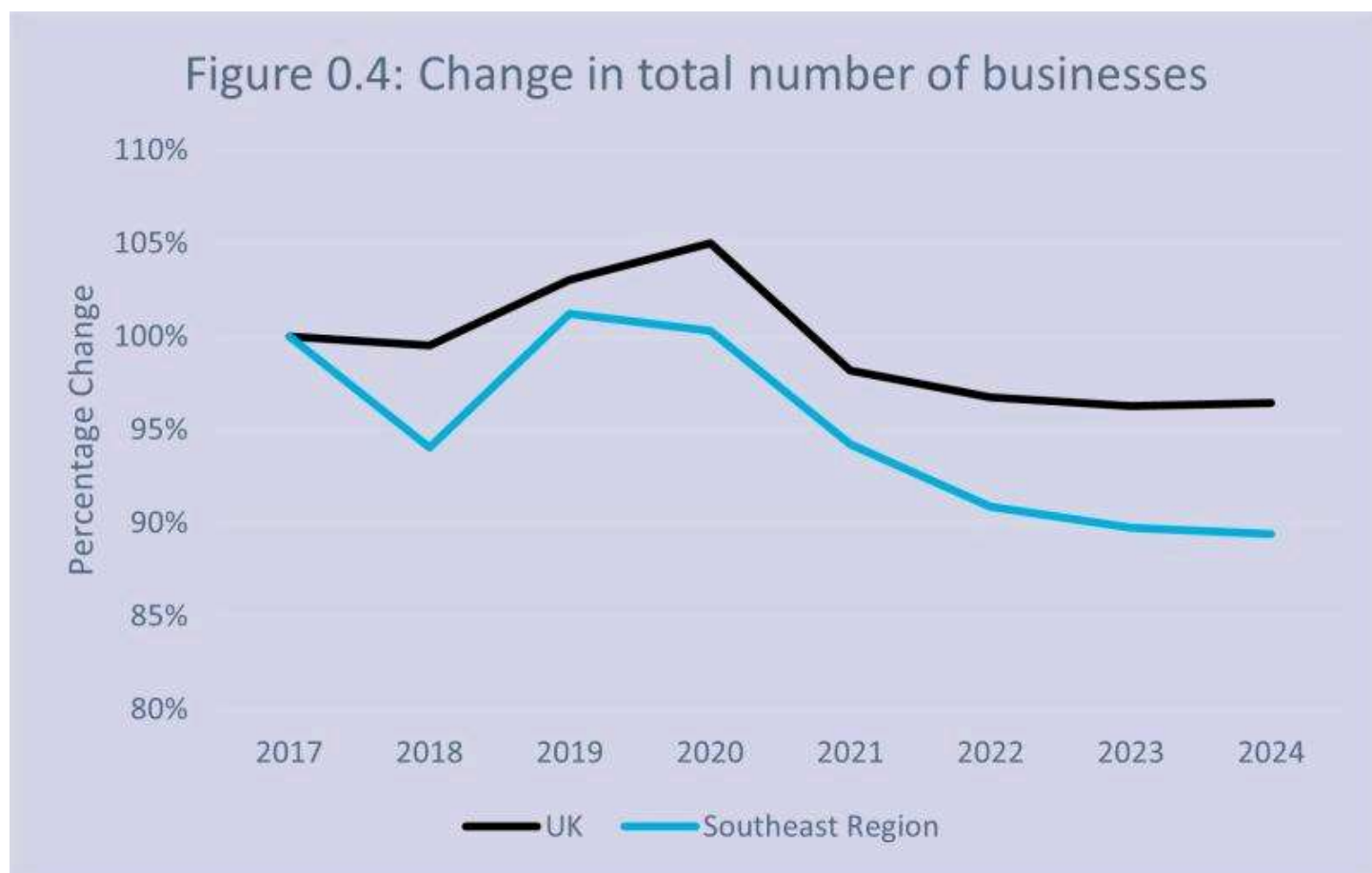
Jobs by sector

Figure 0.3 shows the change in employment by sector in the past two years in the TfSE geography. The number of people employed in each sector has remained relatively stable.

Jobs in agriculture & fishing, manufacturing, construction, and transport & communication, are considered to be reliant on the Strategic Road Network (SRN), and therefore require a resilient and reliable highway network.

Unemployment

The rate of unemployment in the region has increased from 3.2 in 2022, to 3.6 in 2024. This remains lower than the rate in the UK as a whole, which has increased from 3.7 in 2022, to 4.3 in 2024.



Businesses

Total businesses

Figure 0.4, uses a baseline of number of businesses in 2017 to show the change in total number of businesses in the region. The number of businesses in the ONS-defined South East region has decreased more than the UK as a whole. In the past two years there has been a further decline in total businesses, with a net loss of 13,410 businesses from 2022 to 2024. The total businesses in the South East in 2024 was 830,570.



Exporters

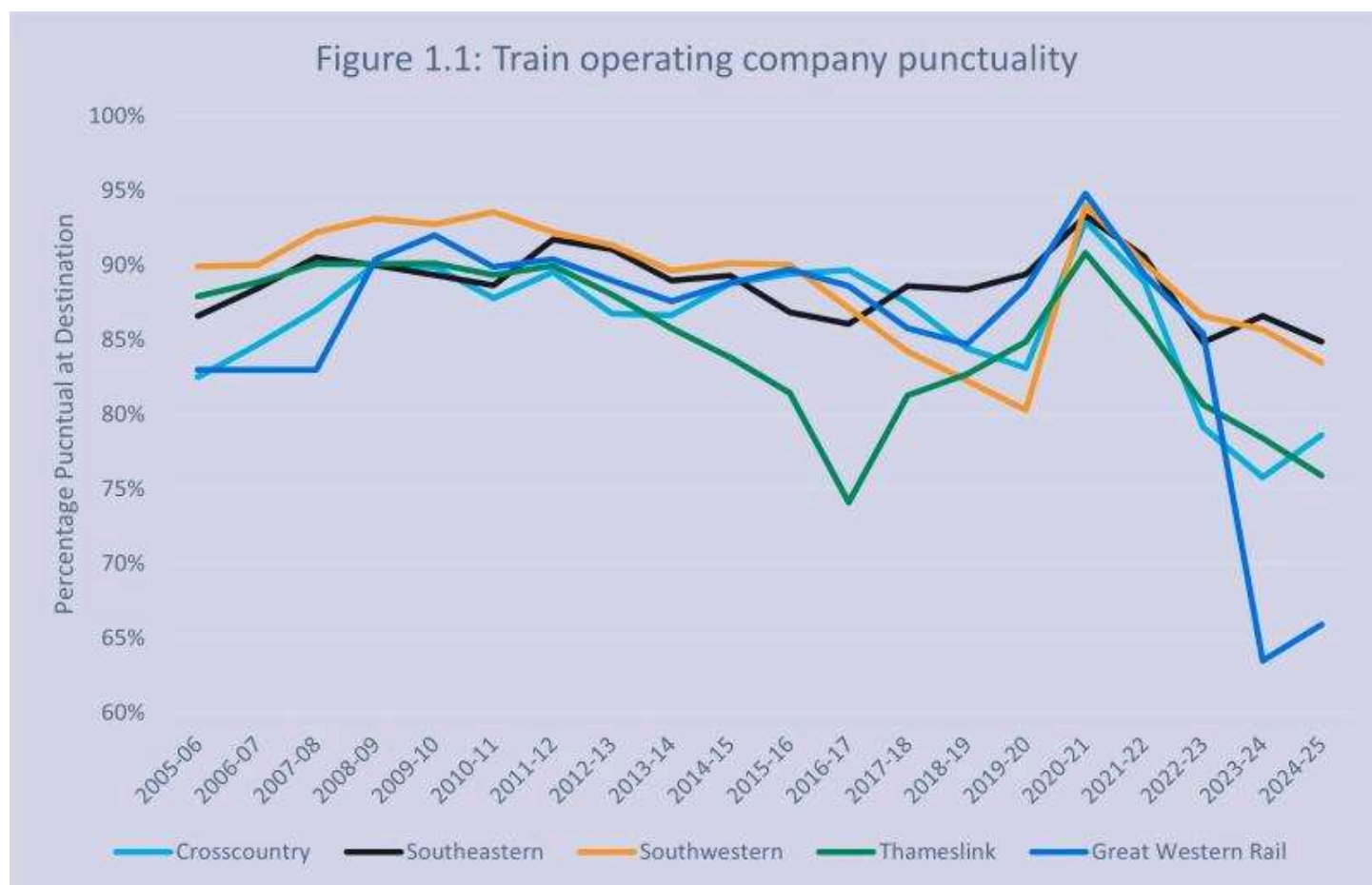
Figure 0.5 shows the total number of South East Businesses that are exporting goods.

Given the number and scale of international gateways (ports and airports) in the region, a thriving economy would be expected to generate a high number of businesses exporting goods. In the most recent two years of available data, the total number of exporters has increased, with 2023 recording the second-highest figure on record, surpassed only by 2020.

Strategic connectivity

This mission aims to improve strategic connectivity within the South East by enhancing regional transport corridors, ensuring communities have access to high quality transport links and essential services.

The following series of indicators measure strategic connectivity by monitoring the performance of the highway and public transport networks in the region, and the impact it has on freight movements.



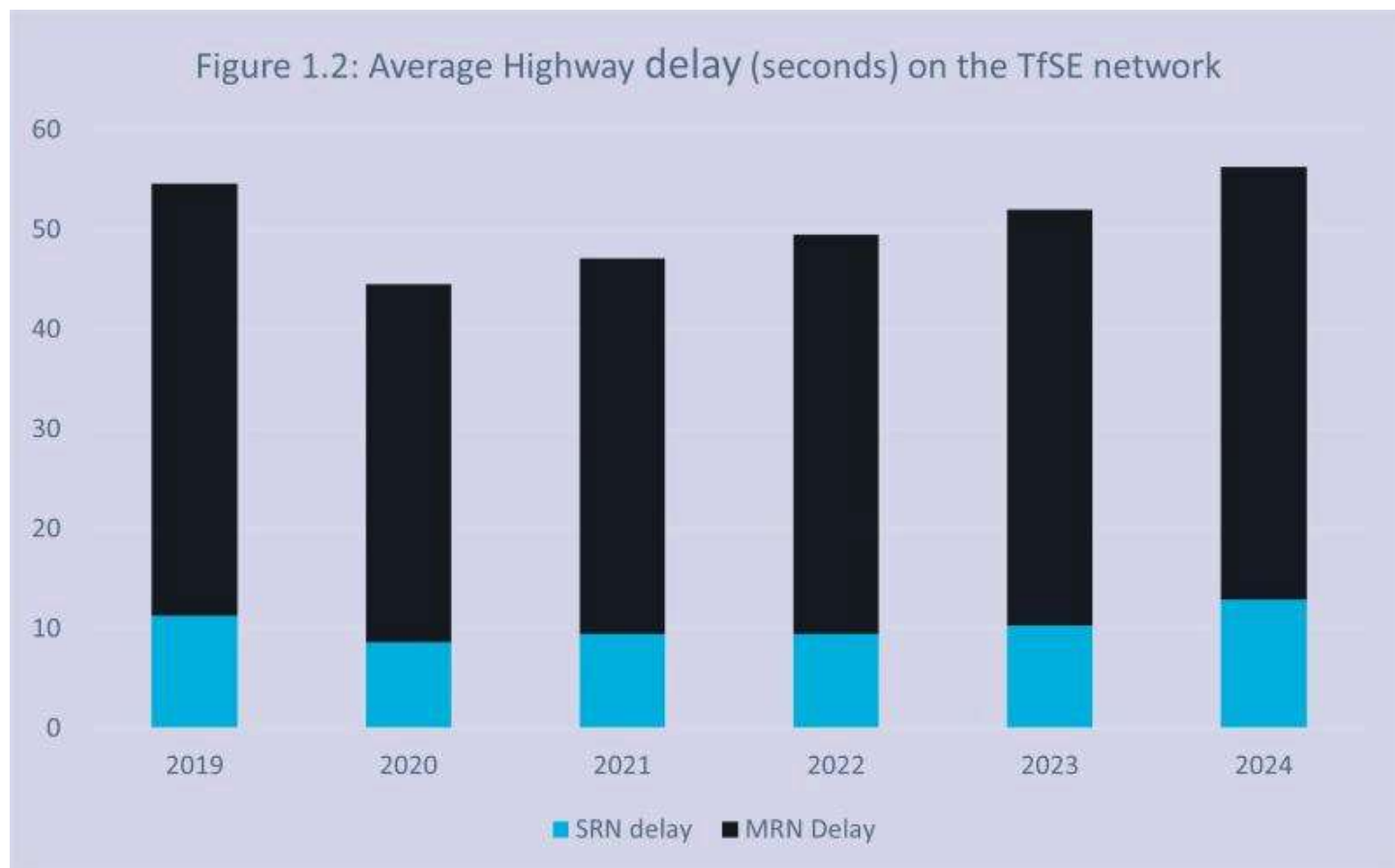
Journey time reliability

Rail

Figure 1.1 shows the reliability for total services run by each train operator in our geography. It is important to note that services for each operator do not exclusively run in the TfSE region. However, it still provides a good indicator for how punctual trains are for residents.

In the two years since the last *State of the Region* report, there has been a decline in average punctuality of

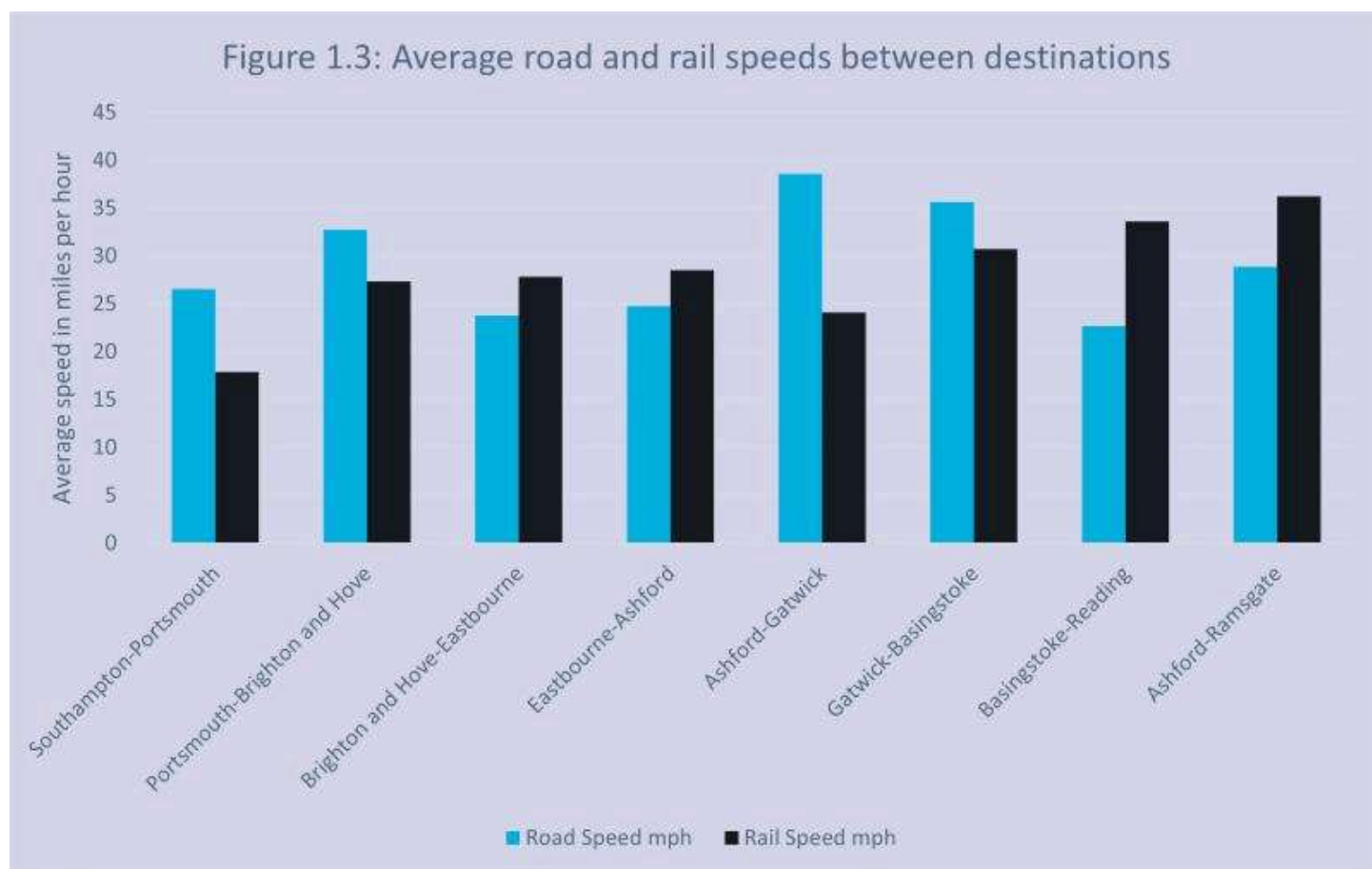
operators from 83.3% in 22/23 to 77.8% in 24/25. However, this is heavily skewed by the performance of Great Western. For the other operators in our geography the average has decreased from 82.8% to 80.7% in the same timeframe.



Highway

Figure 1.2 shows the average delay in seconds on the Major Road Network (MRN) and the Strategic Road Network (SRN) in our geography. Please note that the MRN and the SRN delay is calculated on different link lengths, so using this data to compare performance of the SRN against performance of the MRN is not appropriate.

Since the last report the average delay has returned to pre-pandemic levels on both the MRN and the SRN.



Journey times

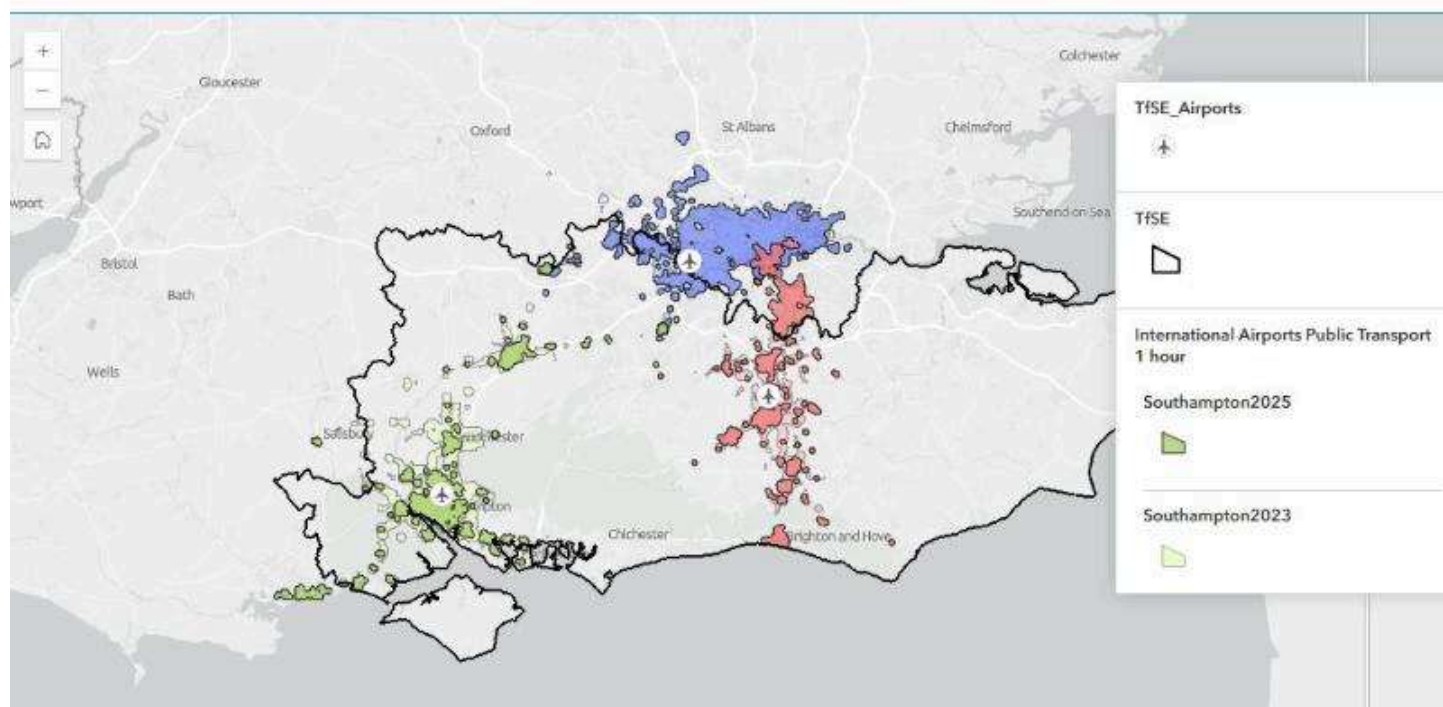
Figure 1.3 shows the difference in average speed for point-to-point journeys in our region that do not originate or end in London.

The data is taken as a snapshot for a mid-week off peak journey time. For peak journeys road speed would decrease due to more congestion.

For some journeys between key centres in the region, average rail speeds are faster than those by road. However, these figures reflect only speed and do not take into account the frequency of services or the time needed to access a station.

This suggests that where rail is as fast as, or faster than, road travel, the choice to use a private car is likely motivated by other factors, such as greater convenience or reliability.

Figure 1.4: Airport accessibility by public transport



Airport accessibility

Figure 1.4 shows the geography of residents who are able to access international airports within one hour by public transport.

The number of residents in our geography able to access Gatwick within one hour has increased from 533,619 in 2023 to 703,568 in 2025. This increase can be attributed to more parts of Brighton and Hove, and Oxted and Shalford moving into this catchment area, likely caused by an increased frequency of public transport. Access to Gatwick is still much easier from north-south compared to east-west of the region, we are advocating for enhanced rail from both Kent and the North Downs line to Gatwick Airport to improve public transport accessibility from the East and West to the airport.

Heathrow has also seen a large increase, from 412,982 in 2023 to 703,568 in 2025. Despite this increase, public

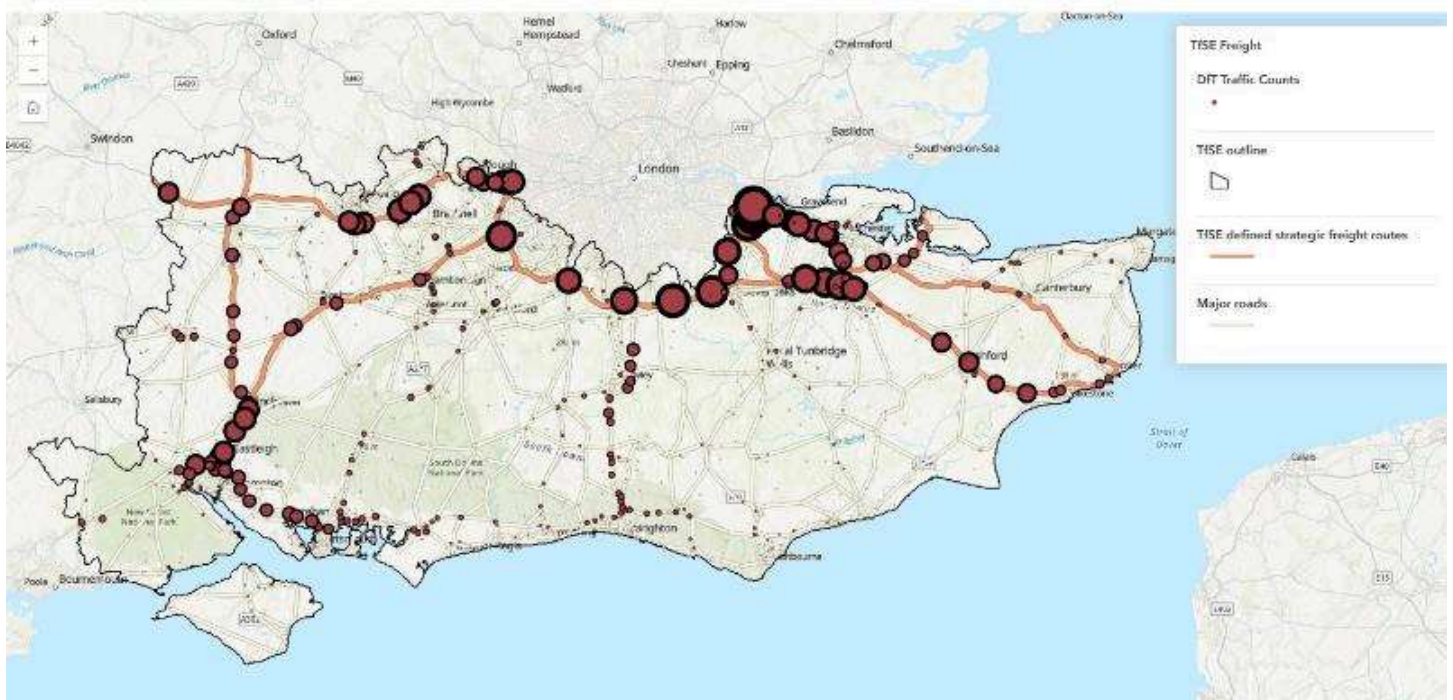
transport accessibility to Heathrow from our region remains poor when compared to equivalent distance journeys from London.

Southampton Airport has seen a moderate increase, rising slightly from 1,003,429 in 2023 to 1,065,702 in 2025.

Southampton Airport has the highest number of residents within our region who can access it by public transport in under an hour.

Despite the increases in total residents able to access airports within one hour by public transport, some areas which were previously within an hour journey time of an airport in 2023, are no longer within this catchment. This is most likely attributed to timetable changes for bus and rail services.

Figure 1.5: Freight routes in TfSE region

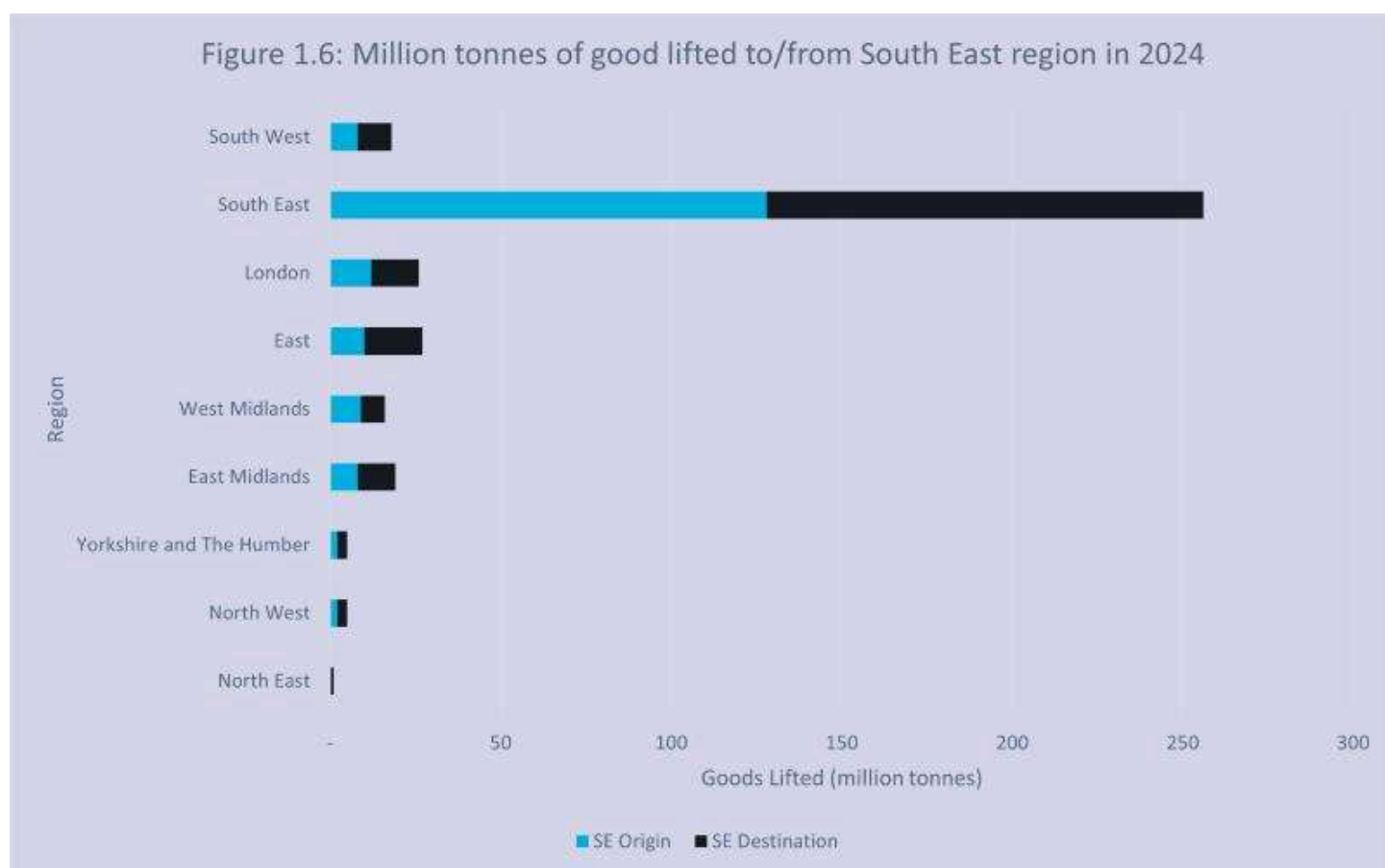


Domestic freight

Figure 1.5 shows the key freight routes in our region. The points are locations of automated traffic counters, the larger points have a higher number of annual average daily flow HGV movements as per DfT road traffic statistics raw count data.

The most significant links for freight in our region are clustered around the M25 for freight travelling from Kent. There is also a cluster around the port of Southampton, where freight is distributed north via the M3 and A34.

In addition, there is a relatively high amount of freight travelling on the M27 between Portsmouth and Southampton, and to a lesser extent on the M23 corridor.

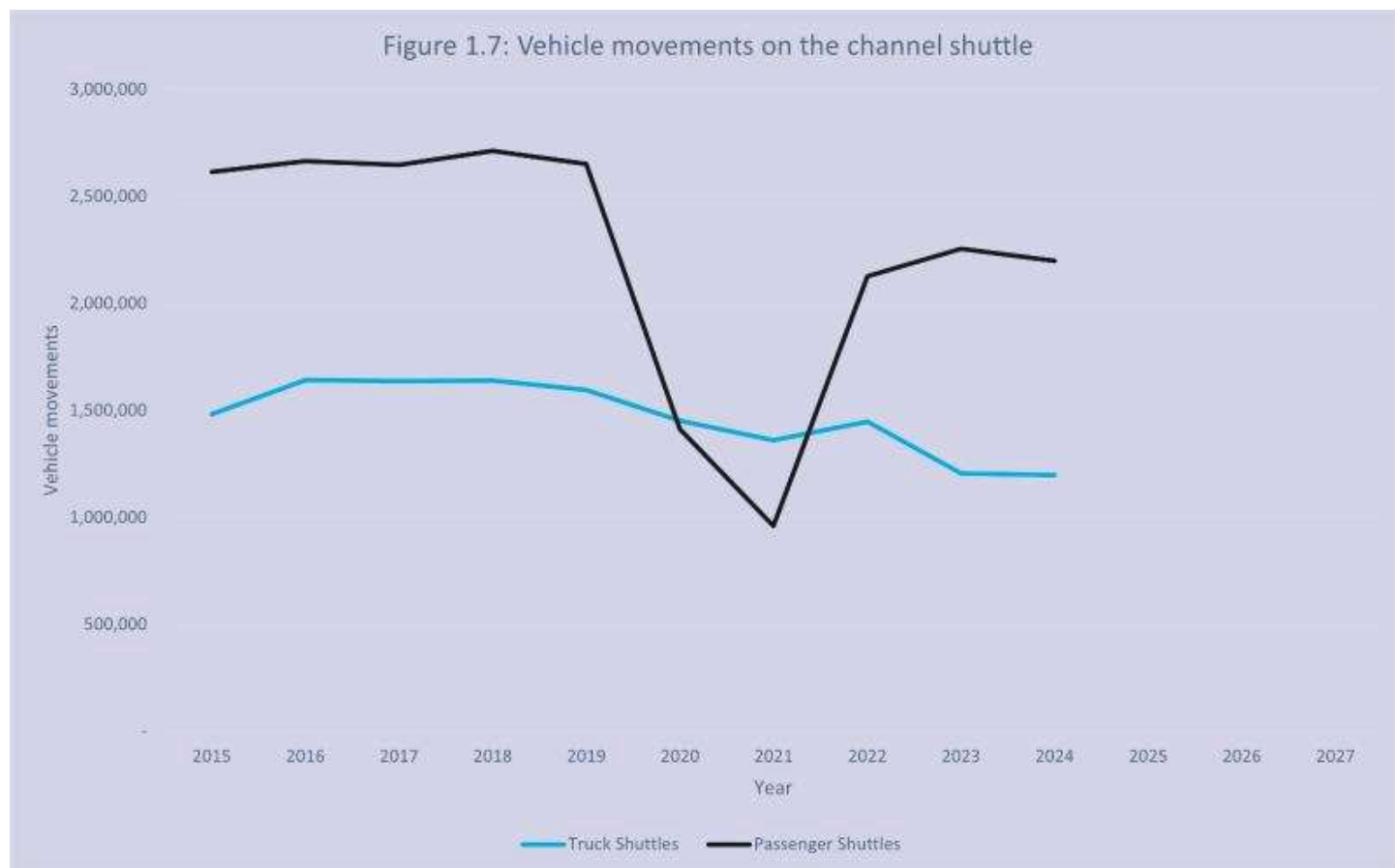


Freight moved

Figure 1.6 shows the total tonnage of domestic goods lifted with either an origin or destination in the South East (including Buckinghamshire, Milton Keynes and Oxfordshire) for each English region in 2024.

Compared to the previous iteration of this report, there has been a 9% increase in tonnage originating in the South East, and a 12% increase in goods destined for the South East.

There was a total combined tonnage in 2024 of 379 million tonnes.



International crossings

Figure 1.7 shows crossing data from the channel shuttle.

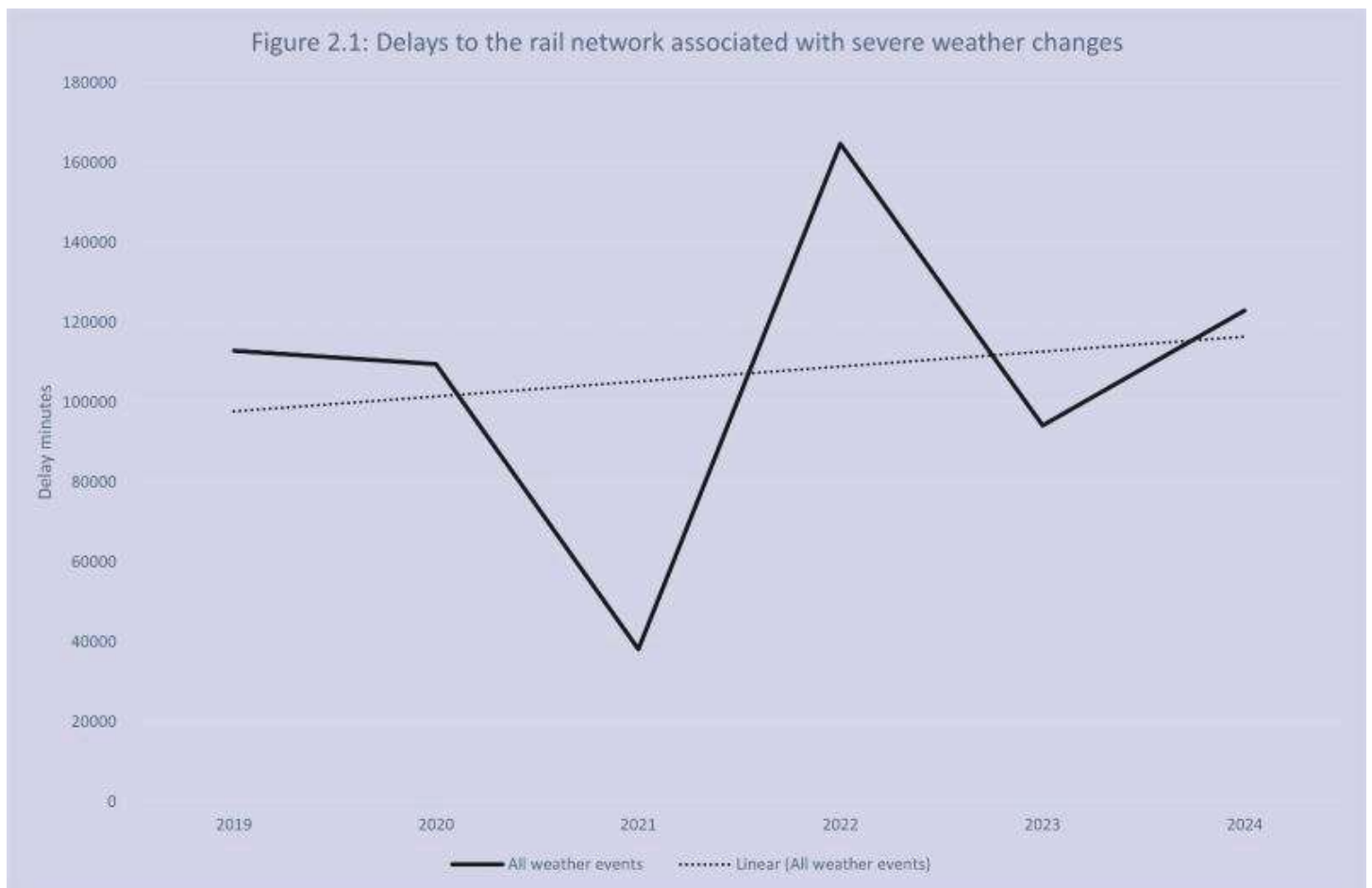
In 2024 there were 1,198,052 truck shuttle movements, 17.2% fewer compared to 2022. Passenger vehicles travelling on the shuttle saw a small increase of 3.4% over the same period, with 2,199,837 passenger vehicle shuttles in 2024. Figures have not returned to the numbers seen before 2020. This is most likely a combination of both Brexit and the Covid pandemic.

In 2024, there were 135 activations of operation TAP (the queueing system at Dover for HGVs travelling to the continent), this is comparable to the 128 seen in 2022. Both figures are higher than the 5 year average of 57 for the period 2017-2021. This is most likely a result of increased processing times at Dover due to additional checks required since leaving the European Union.

Resilience

This mission focuses on safeguarding and enhancing the resilience of the South East's transport network to ensure reliable and smooth journeys for all users.

This next set of indicators relates to our resilience mission and reports on the reliability of rail, including delays caused by severe weather. It also reports on the reliability of the road network and the number of road traffic accidents.



Road and rail reliability

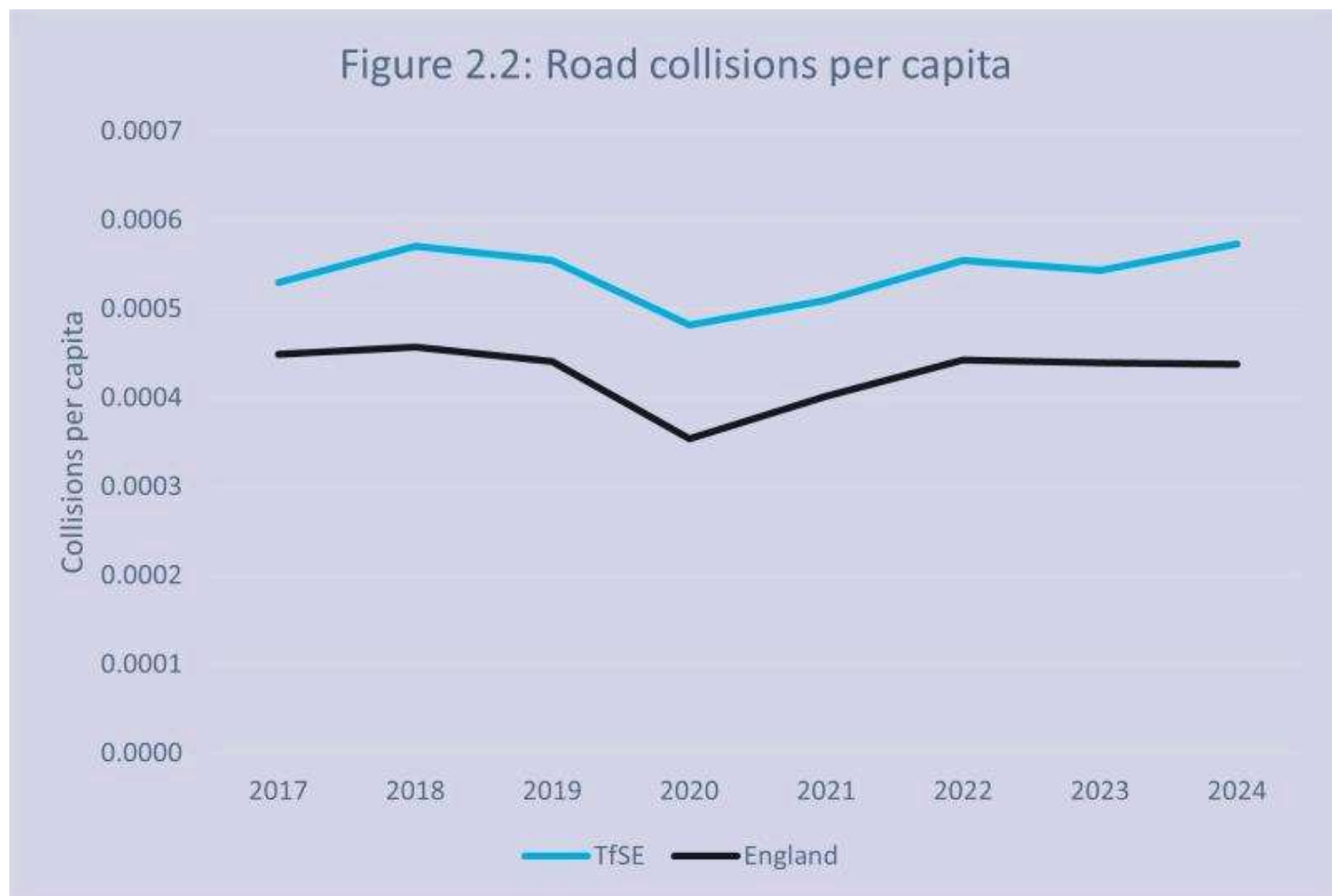
Figure 2.1 shows the delay caused to rail services by various severe weather. Note this data was provided by Network Rail for their southern region, which does not match the boundary of the TfSE geography.

As shown in the graph, there is a lot of variability year-on-year, but the overall trend is a gradual increase in delay minutes caused by severe weather events.

Since the last iteration of this report, there was a peak in delay minutes in 2022. Although there was a slight drop in 2023, the figure climbed again in 2024.

In the mid to late 20th century, extreme weather events tended to be infrequent and relatively predictable. In contrast, the 21st century has seen an increase in their frequency and severity, raising the likelihood of critical coping thresholds being exceeded and heightening the

risk of disruption to operations and services. Building resilience into the network is therefore essential to withstand these extremes.



Road collisions

Figure 2.2 shows the number of collisions per resident in the TfSE region, compared to England as a whole.

The number of recorded fatal or serious collisions in the TfSE geography (4,419) was the highest recorded in the past ten years.

Our region has consistently recorded a higher number of collisions per capita than the national average.

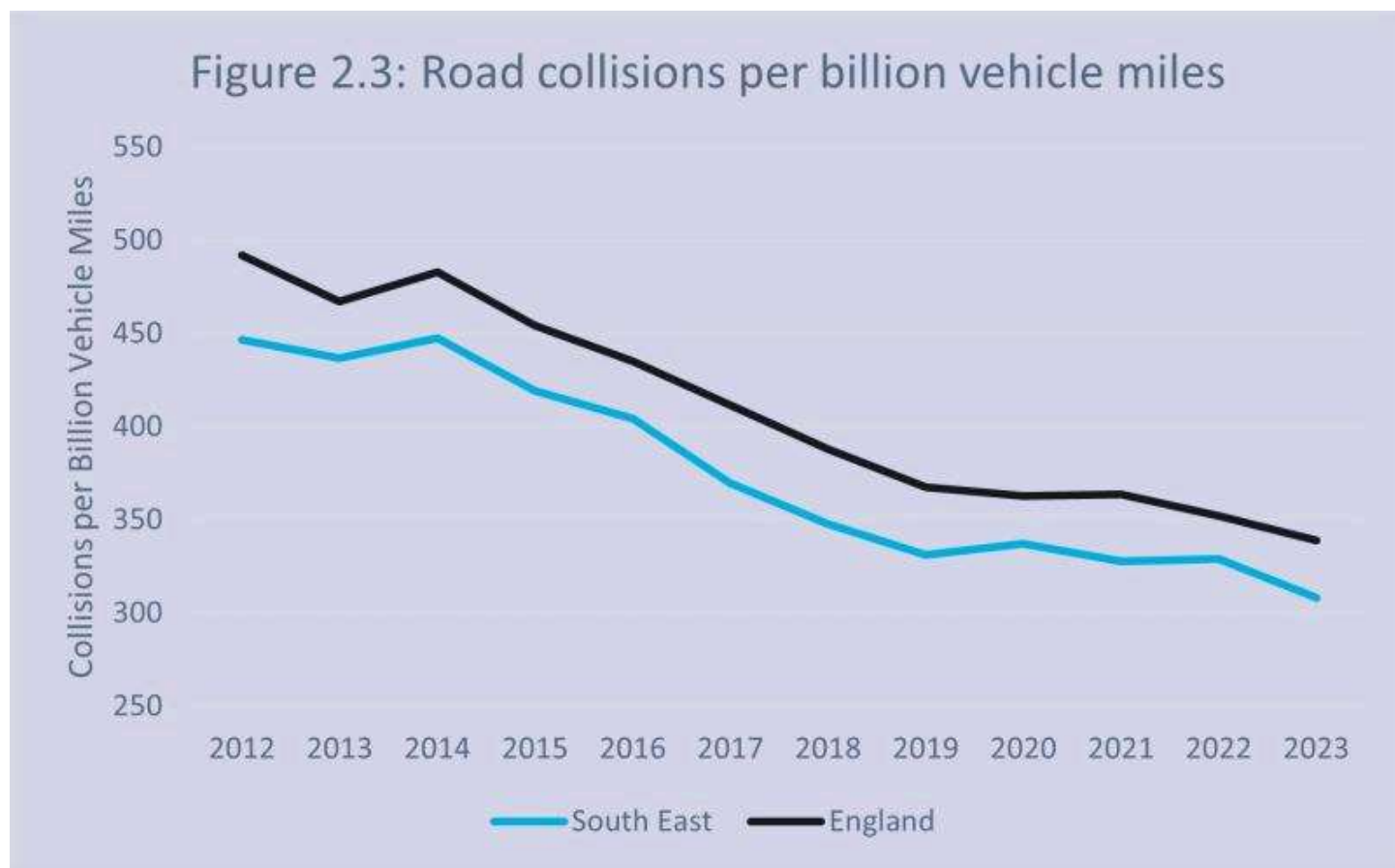
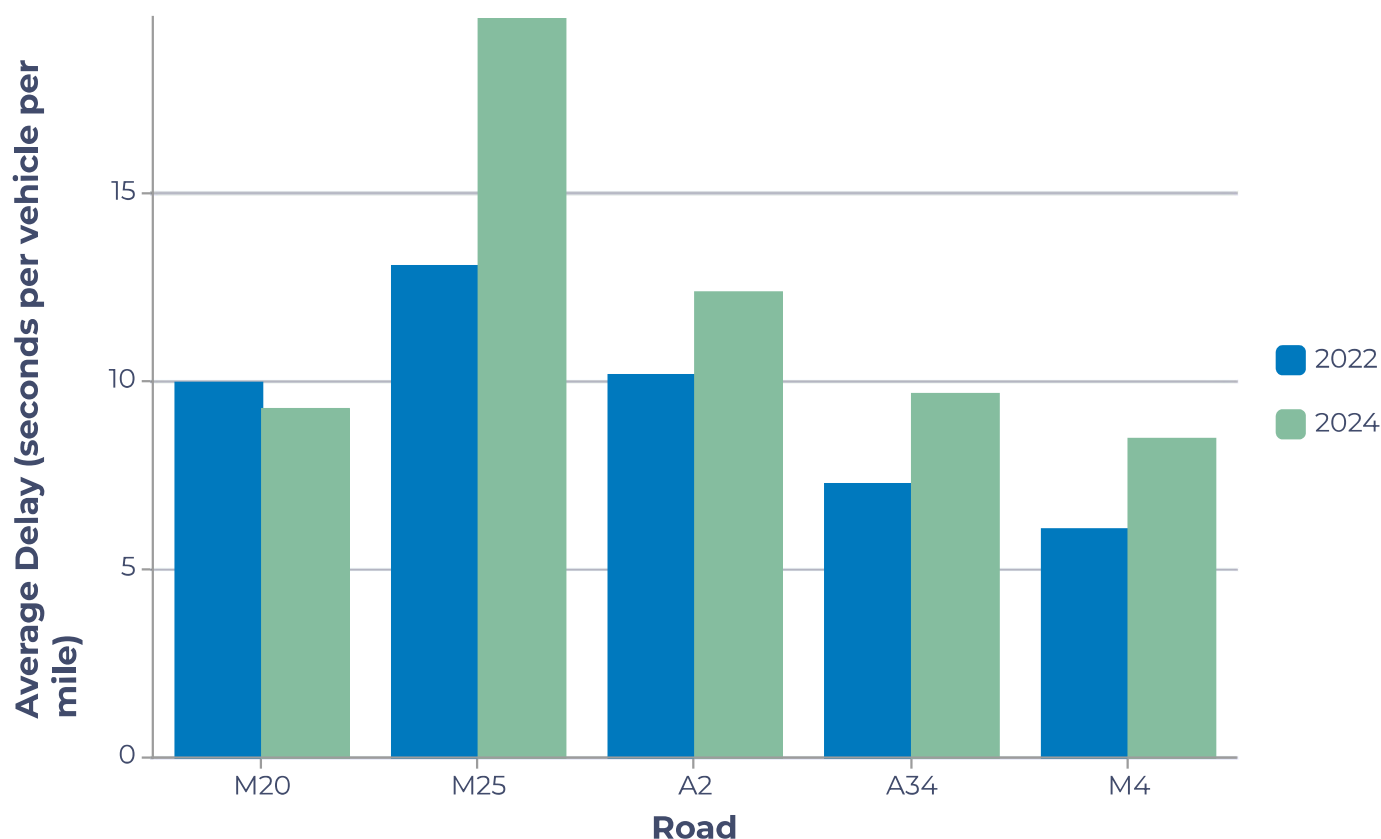


Figure 2.3 shows the number of collisions per billion vehicle miles in the South East (including Oxfordshire, Buckinghamshire and Milton Keynes from outside our geography).

Although the total number of collisions has increased, analysis against total vehicle miles shows a consistent decline in collisions per mile driven. This is a positive outlook for road safety and one that is desirable to see continue, however, it is still concerning that there are more collisions per capita in our geography than the national average.

**Figure 2.4: TfSE Strategic freight network delay**

Average delay on key freight routes

Figure 2.4 shows the average delay on key road freight routes in our region in 2024, compared to our previous report in 2022.

With the exception of the M20, the reliability of each of our key freight routes has worsened between 2022 and 2024.

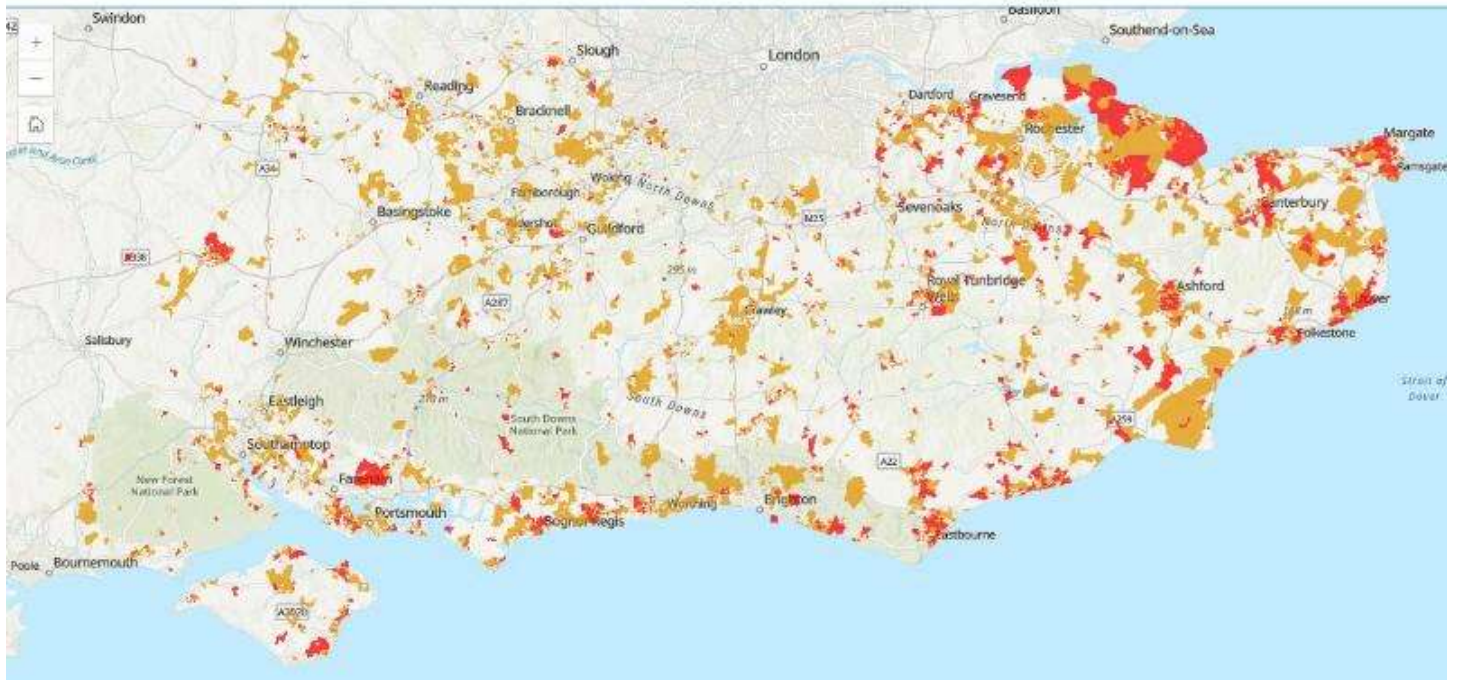
Inclusion and integration

This mission aims to create an inclusive, affordable, and integrated transport network across the South East, providing safe and seamless door-to-door connectivity for everyone.

The following indicators relate to the inclusion and integration mission by examining area deprivation and

accessibility to key services by public transport, as well as changes in the affordability of public transport.

Figure 3.1: Transport Related Social Exclusion (TRSE)



Transport related social exclusion

Transport Related Social Exclusion (TRSE) is a concept developed by Transport for the North to identify output areas where individuals or communities are unable to access the opportunities, services, and social connections they need because of limitations in the transport system. It arises when barriers such as poor connectivity, high costs, limited availability, or personal vulnerabilities (for example low income, insecure work, health conditions, or caring responsibilities) restrict people's ability to travel. The result is reduced participation in employment, education, healthcare, and community life, reinforcing wider social and economic inequalities.

This demonstrates that there is need for intervention to provide better accessibility to transport for our residents, particularly in coastal regions where the most at risk output areas are clustered.

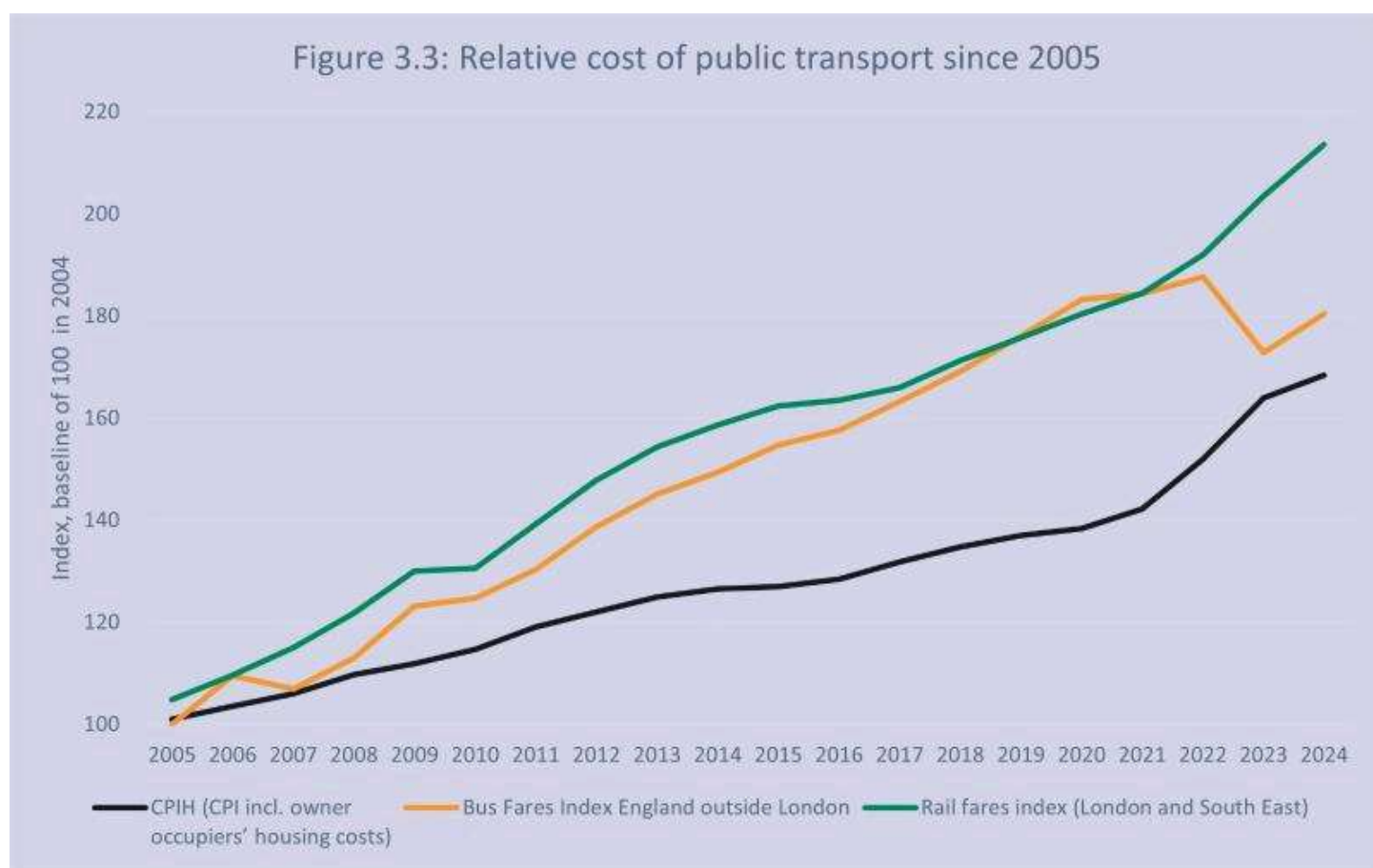
A map of the South East of England showing the distribution of the A171 virus. The map is color-coded: red indicates high prevalence and yellow indicates low prevalence. Major cities like London, Reading, and Brighton are labeled. The map shows a high concentration of red areas in the central and eastern parts of the region, particularly around London and the coast.

Figure 3.2, takes only the accessibility indicators that feed into the TRSE score. The shaded areas show the geographical areas at risk of exclusion based on accessibility when compared to the England average. The map shows there are large areas of our region with poor access to key facilities. The areas affected are largely rural with low population density.

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wide based on accessibility scores. However, 42% of our population are in the top 30% (amber) England-wide. This reflects the challenges that those living in rural areas have in accessing essential services using public transport, and highlights a root cause for car dependency.

The full report and data tool produced by Transport for the North is [available here](#).

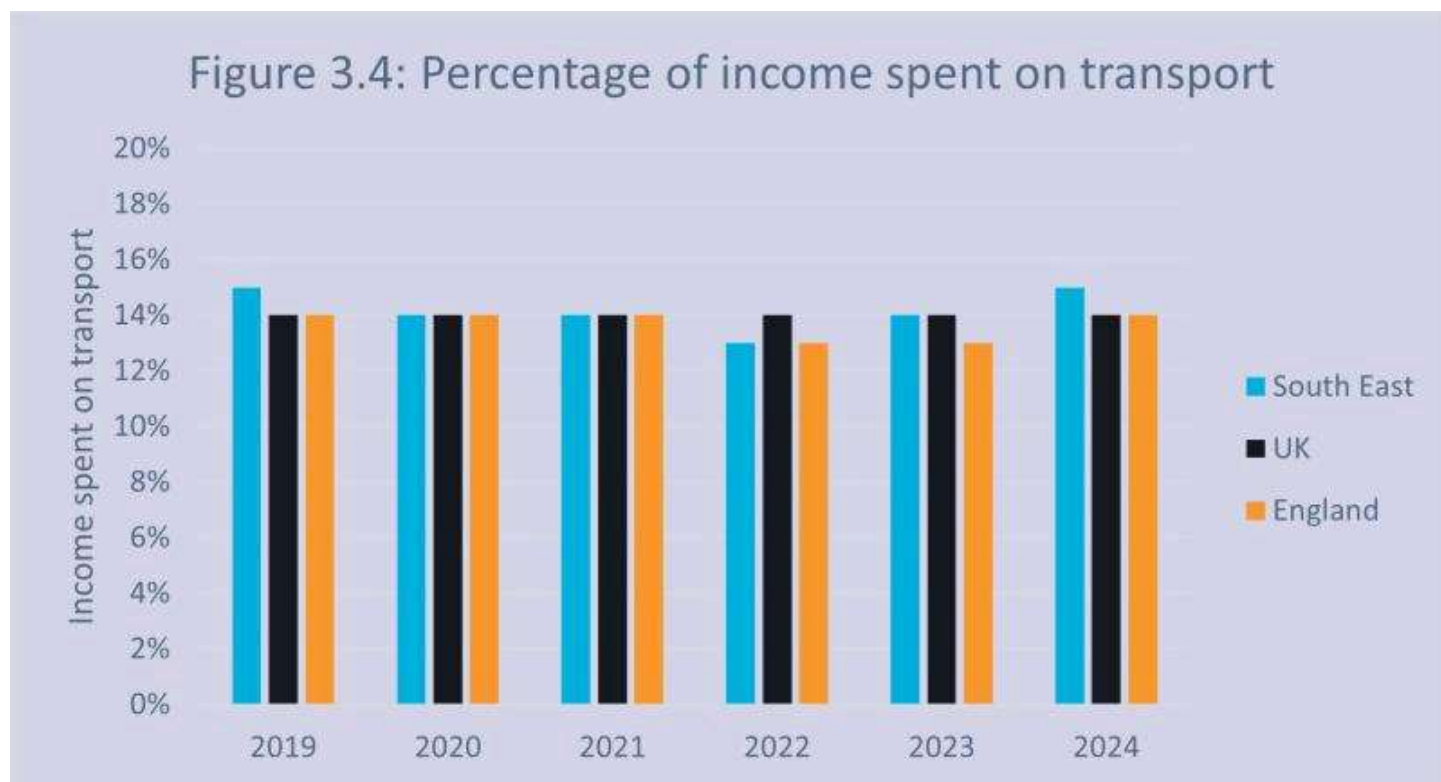


Public transport fares inflation

As can be seen in figure 3.3, in the past 20 years the price of bus and rail travel have exceeded the increase in the consumer price index (including housing costs) (CPIH).

However, since our last *State of the Region* report, we have seen a decrease in the cost of bus travel. This is due to the introduction of the £2 bus fare cap. This has begun to rise again with the increase in the fare cap from £2 to £3.

The cost of rail has continued to increase year on year.



Income spent on transport

Figure 3.4 shows the percentage of household income spent on transport based on a three year rolling average.

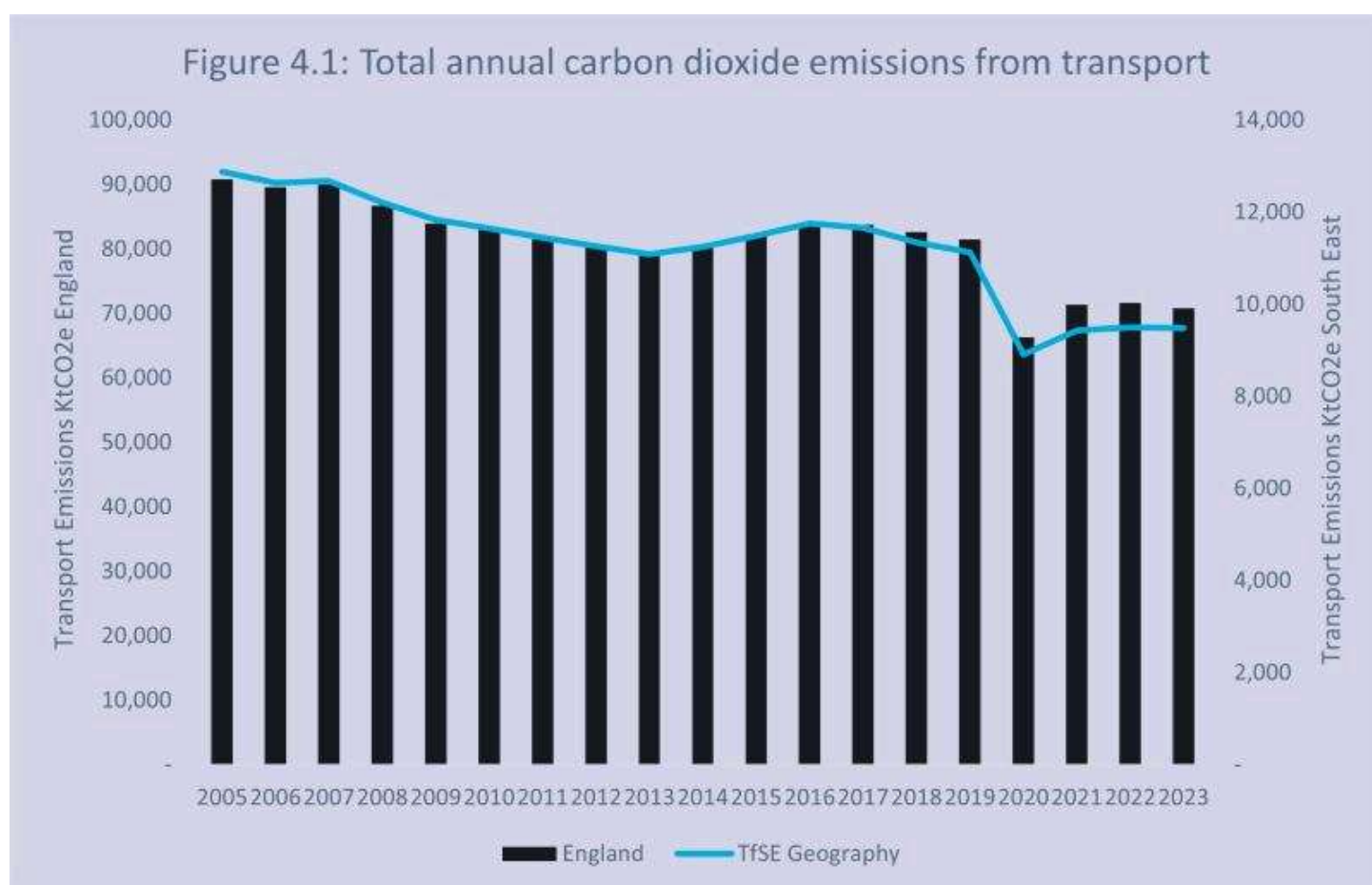
Since the last *State of the Region* report, there has been a return to pre Covid levels of expenditure.

The South East region has a slightly higher percentage of household income spent on transport than the rest of England and the UK. The percentage for England as a whole is skewed by London where there is an average of 10% of household income spent on transport.

Decarbonisation

This mission aims to deliver a net zero transport future for the South East by 2050. This will be achieved by accelerating zero-emission travel, incentivising sustainable travel choices and embracing new technologies to reduce emissions and mitigate climate change.

The next set of indicators relates to our decarbonisation mission. Firstly, it measures total transport emissions and air quality in the region to assess the overall carbon impact. Secondly, it examines the drivers of these changes, including the uptake of electric vehicles in the region as well as the development of micromobility schemes, which provide a much lower-carbon alternative to private cars.



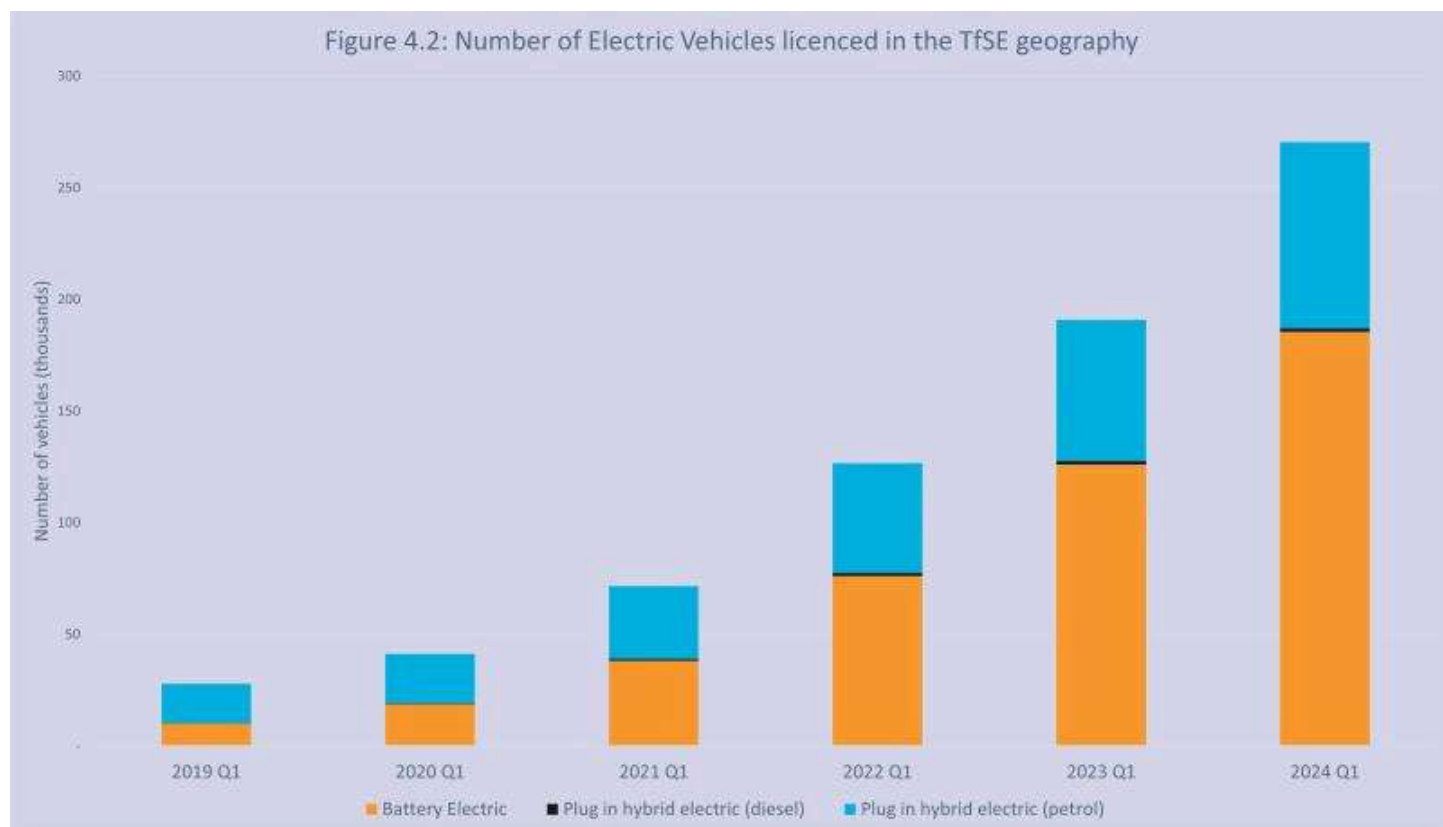
Carbon emissions

Figure 4.1 shows the total carbon dioxide emissions from transport in KtCO2e (kilo-tonnes of carbon dioxide

equivalent). Transport emissions include freight and passenger transport, both for private and business purposes.

The graph shows that in 2020 there was a sharp decrease in transport emissions, a result of the Covid pandemic. In the years of recovery since, we can see that transport related emissions have not returned to pre-Covid levels. As a comparison, emissions in 2019 in the TfSE geography were 17.34% higher than in 2023.

This is most likely a result of cleaner fuels. Employees being able to work from home in some professions may also be contributing to a reduction in total transport carbon emissions. TfSE's Regional Travel Survey responses show only 35% of our population commute to work everyday, 32% of respondents said they travel less often for commuting or education than they did pre-pandemic and only 12% said they travel more.



Licenced vehicles

Figure 4.2 shows the number of licenced electric vehicles (EV) in our geography.

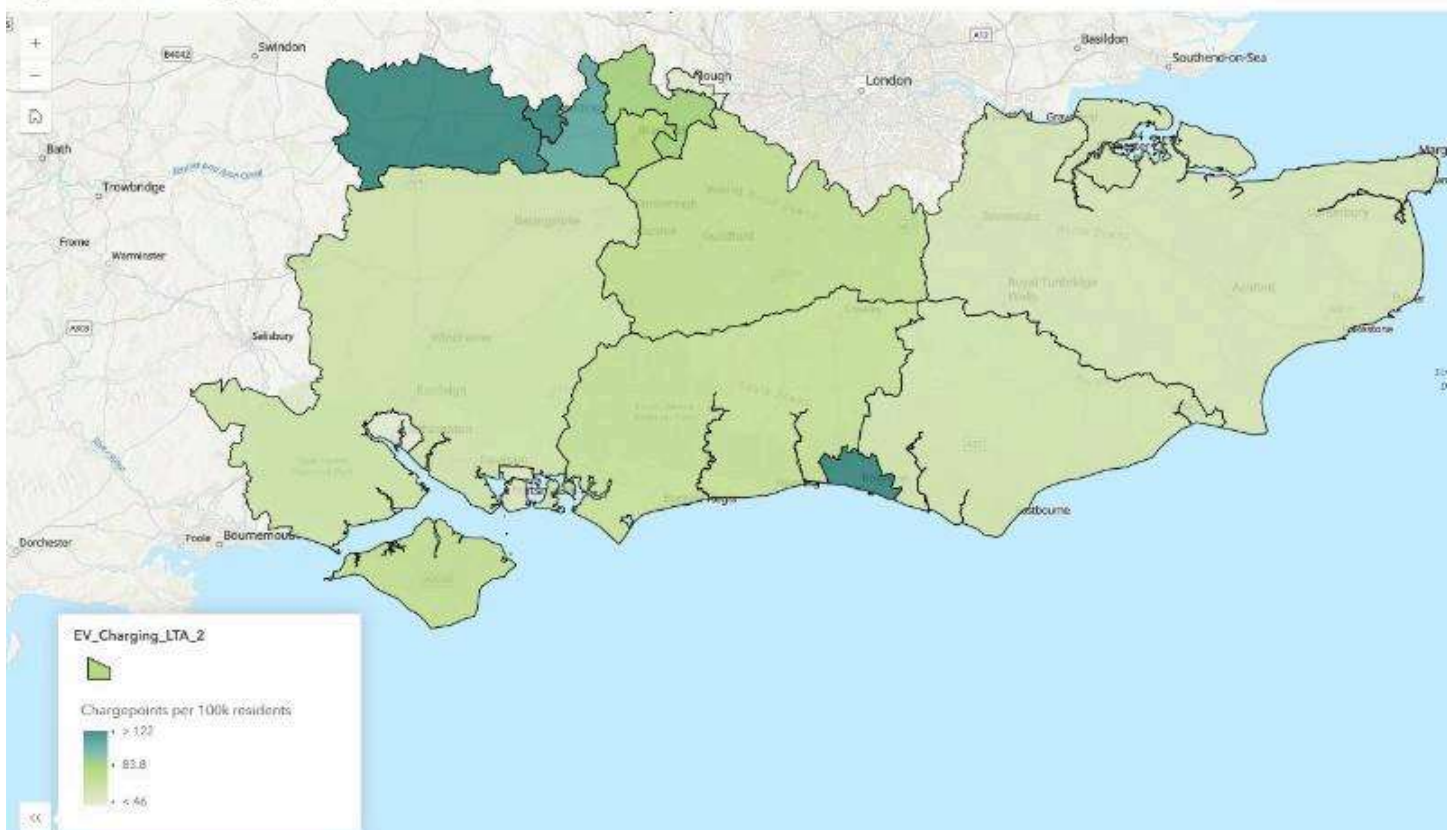
The shift to electric vehicles is seen as an important factor in reducing the carbon emissions produced by vehicles.

There has been a steady year-on-year increase in the number of licensed EVs and plug-in hybrid electric vehicles (PHEVs) in our region.

However, it should be noted, that EV and PHEV combined still only make up 5% of the total vehicles licenced in our region as of quarter one in 2024, this is an increase from 2.4% as of quarter one 2022.

Despite the uplift in electric vehicles licences, the majority are still petrol (58.5%) or diesel (36.5%).

Figure 4.3: Public charging points per 100k residents



EV charging

The uptake of EV relies on an increase in the number of EV public charging points available. Figure 4.3 shows the number of publicly available EV charging points by local authority area, displayed by number of chargers available per 100k of usual population.

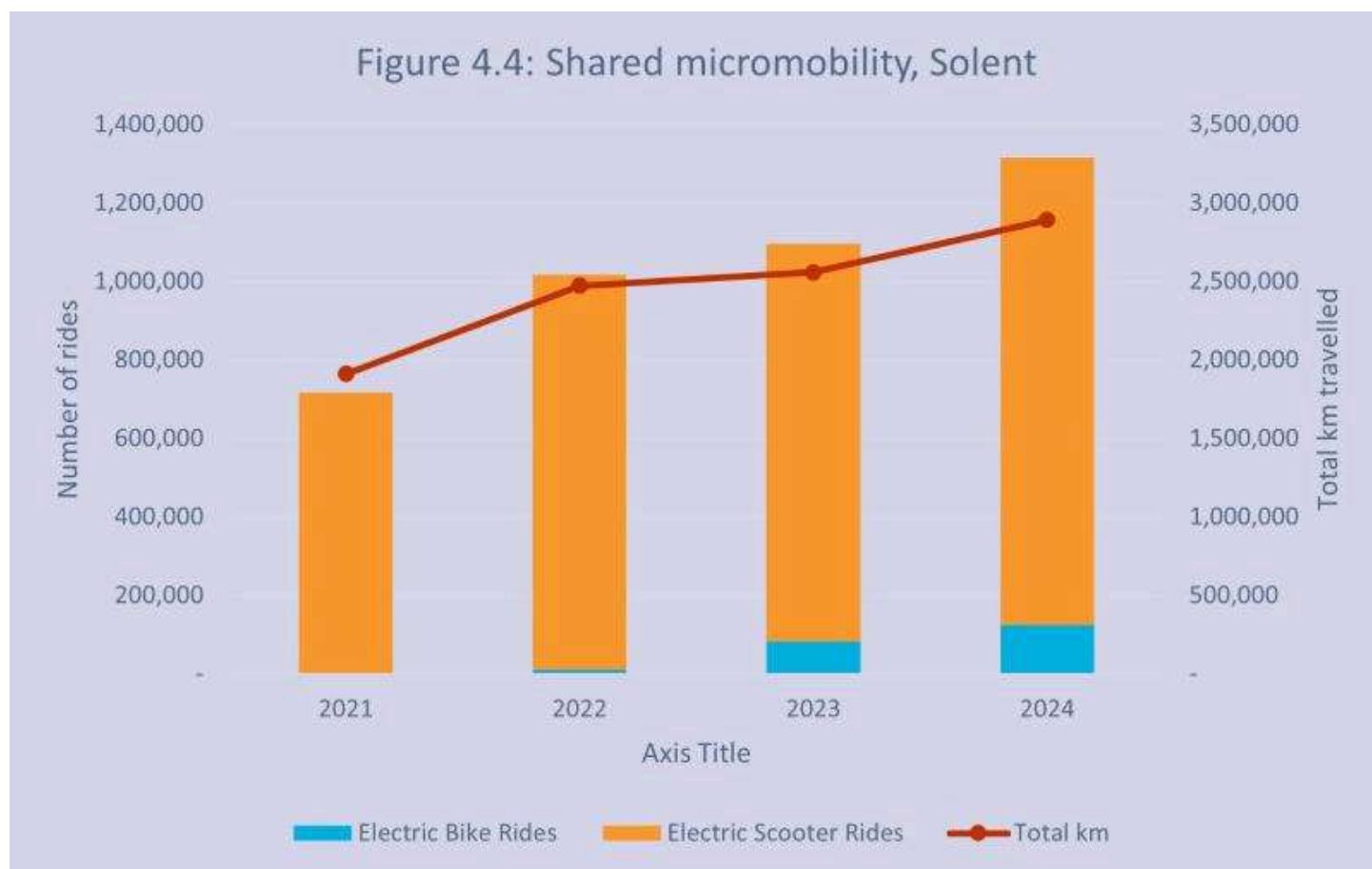
The best provision in our region is available in Reading, closely followed by Brighton and Hove, and West Berkshire. These three authorities have approximately 150 EV chargers available per 100k residents.

The authorities with the least charge points available have fewer than 50 chargers available per 100k residents.

From our Regional Travel Survey (RTS), 63% of EV owners charge at home.

7% charge using public infrastructure, however in Brighton and Hove there are 22% of EV owners using the public infrastructure. This could be attributed to fewer properties having private off street parking in the city.

TfSE has supported LTAs by providing a regional *Electric Vehicle Charging Infrastructure Strategy*, data-driven planning tools, and forecasting to help them identify future charging needs across the South East region. TfSE also facilitates collaboration through an EV Forum and a Centre of Excellence, offering a platform for local authorities to share best practice and lessons learned with one another.



Micromobility schemes

Figure 4.4 shows the number of e-bike and e-scooter hires by year for the Solent shared mobility scheme, as well as the total km travelled on both modes under the scheme.

Since the last version of this report, there has been growth year on year in both the number of rides and the total km travelled.

Greater uptake of micromobility can reduce the number of cars on the road. It should be noted that at time of writing It is illegal to ride a privately owned electric scooter in public, for example on pavements, on roads or in parks.

Figure 4.5 shows the Air Quality Management Areas (AQMA) in our geography (correct as of 08/03/2025).

In 2023, 5.1% of deaths recorded in the South East were linked to pollution, down from 5.4% in 2021. This is a significant improvement on pre-pandemic levels, which were recorded at 7.7% in 2018.

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the improvement in air quality cannot be attributed to reduced traffic levels following the Covid pandemic.

Sustainable development

This mission aims to champion transport interventions to unlock investment, enable sustainable growth and create healthy, vibrant, well-connected communities in the South East.

The next set of indicators relate to our sustainable development mission by looking at how active adults are. The aim is to reduce inactivity levels by promoting active travel as a viable alternative for shorter journeys. Evidence from our Regional Travel Survey is used to examine modal share and the reasons people choose the car over active travel options.

Figure 5.1: Adult inactivity levels

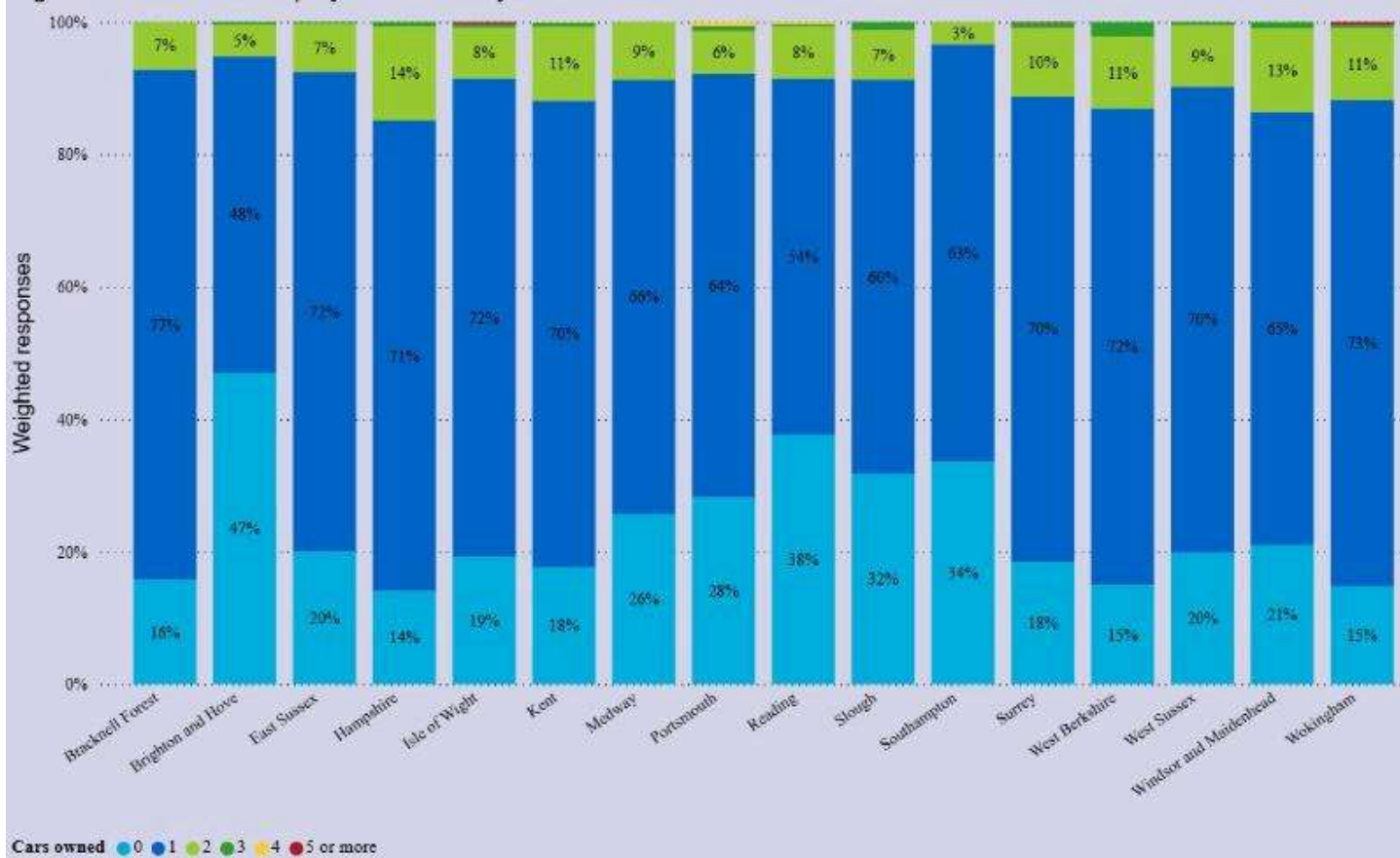


Adult inactivity

Inactivity in our region remains consistently lower than the England average and follows the same annual trend, as can be seen in figure 5.1.

Compared to two years ago, the level of inactivity among adults has decreased, however there does not seem to be a trend of sustained decrease.

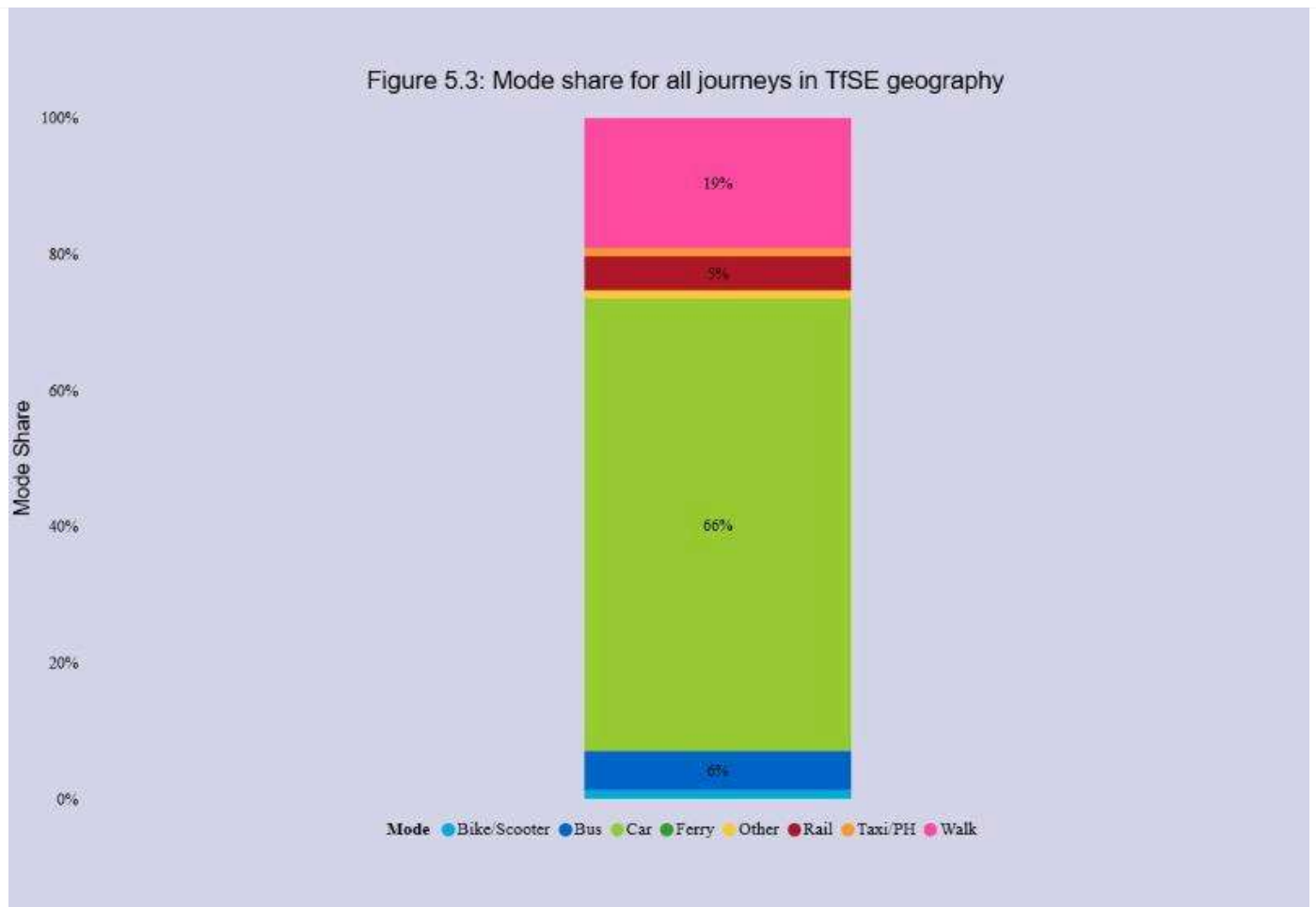
Figure 5.2: Car ownership by local authority



Car ownership

Figure 5.2 shows the number of cars owned by individuals from respondents to our Regional Travel Survey 2025.

The majority of households surveyed have one car or none. There are, however, many instances of households owning multiple cars, particularly within the more rural shire authorities.

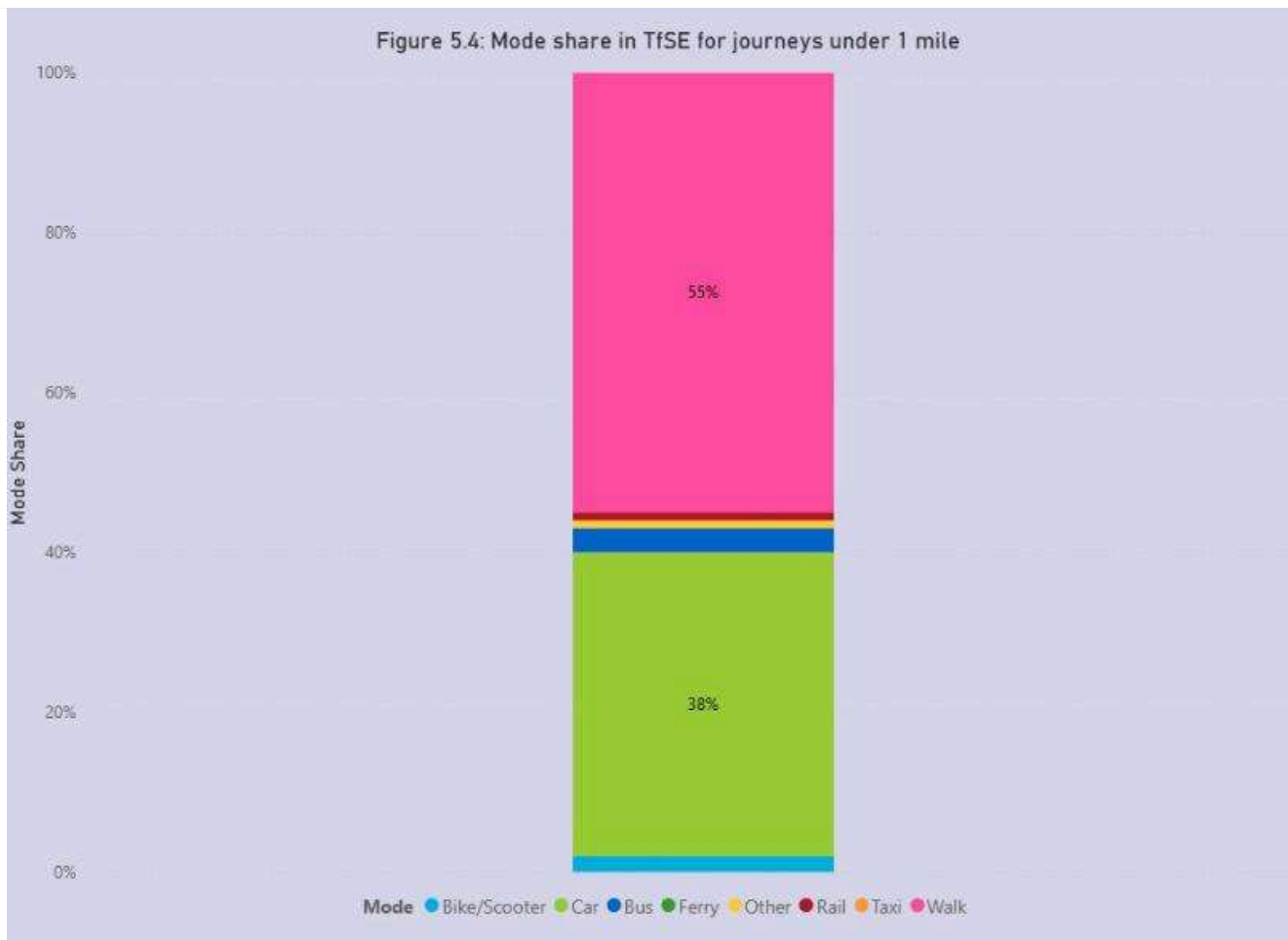


Mode of travel

Figure 5.3 shows the mode of travel used for all journeys, taken from our Regional Travel Survey

Two thirds of all journeys recorded were made by car in our region, whereas only 11% were made by public transport.

Our survey results show that there is a higher percentage of journeys made by car in the TfSE region than the national average of 59%, as reported in the 2024 National Travel Survey (NTS) (table NTSS0303).



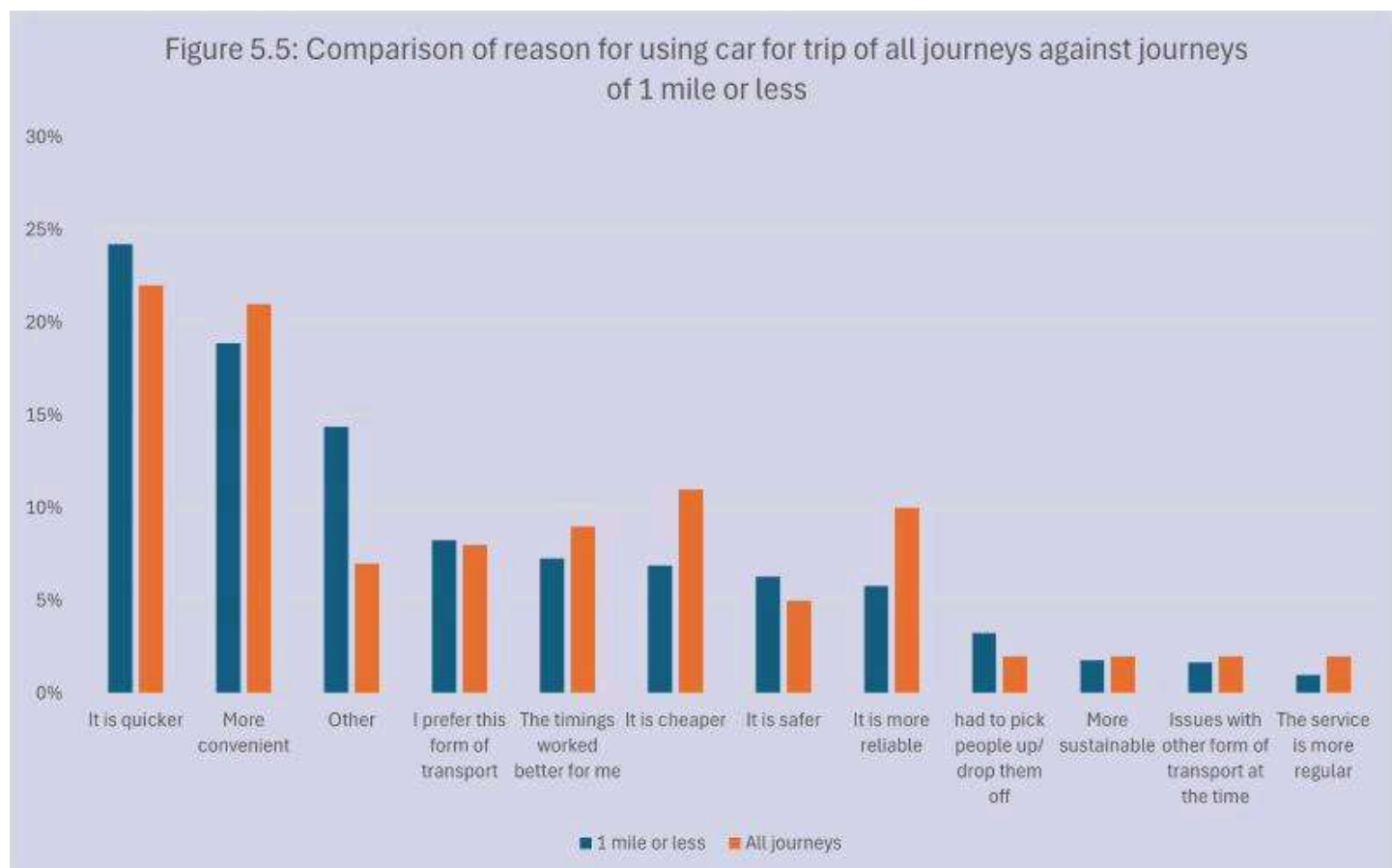
Mode of travel for short journeys

Figure 5.4 shows the mode of travel used for short journeys, which are described as those of less than one mile.

In our region 38% of short journeys are made by car, where as 55% are made by walking.

This is particularly poor when compared to the National Travel Survey (table NTS0308), where only 17% of short journeys were made by car or van as primary mode, and 81% mode share for walking.

To reduce the number of car journeys of less than one mile, provision for active travel must be built into the planning and design of new developments.



Reason for choosing the car

Figure 5.5 shows the reasons given for making car journeys, comparing all car journeys with those of one mile or less, based on responses to our Regional Travel Survey.

For all trip lengths, speed and convenience score highly as reasons for opting for the car. Where as, for longer journeys cost and reliability are more important factors.

As set out in our Transport Strategy we are working to encourage active travel for short journeys to promote decarbonisation and healthy lifestyles. To achieve this, TfSE supports sustainable neighbourhood planning principles to ensure residents can meet their daily needs within a short walk or cycle from home.

Summary

This State of the Region report shows that there have been significant changes in the TfSE region in the last few years.

Changes in the region can be attributed to a number of factors, such as the Covid pandemic and shifts in working patterns, which have influenced travel habits. Policy interventions, including the bus fare cap and the expansion of EV charging points, have also had an impact, as reflected in the reduction of total transport emissions across the region.

However, there is still a long way to go to achieve all the missions. There is a heavy reliance on car as a mode of transport in our geography, and as a result journey time reliability on the SRN and MRN has worsened. Additionally, many rural parts of our geography have limited options to make more sustainable travel choices, and where public transport is available rail continues to become less affordable year on year. Bus travel however, has become more affordable thanks to the fare cap, currently set at £3 per journey with participating operators. The [DfT evaluation](#) of the initial £2 bus fare cap reported the scheme contributed an estimated 5% increase in bus patronage outside of London.

TfSE will support the delivery of the missions in our Transport Strategy by focusing on areas needing urgent action, and where TfSE is uniquely positioned to drive change. TfSE's approach emphasises practical, achievable solutions. TfSE will support its partners with tools such as scheme development funding, an advanced analytical framework, and the Centre of Excellence, which enhances regional planning capacity and capability.

Report to: Partnership Board –Transport for the South East

Date of meeting: 27 October 2025

By: Chief Officer, Transport for the South East

Title of report: Transport for the South East Intermodal Rail Freight Interchange Study

Purpose of report: To agree TfSE's Intermodal Rail Freight Interchange Study report

RECOMMENDATIONS:

The members of the Partnership Board are recommended to:

- 1) Note the findings and conclusions of the Intermodal Rail Freight Interchange Study; and,
 - 2) Agree the study report, recommendations and next steps.
-

1. Introduction

1.1 The Freight, Logistics and Gateways Strategy agreed by the Partnership Board in January 2022 identified the shortage of interchanges for intermodal transfer of freight from road to rail as one of the main constraints on rail freight capacity in TfSE area. Where there is an inadequate provision rail freight interchanges, freight operators will continue to rely on road haulage, with associated lost opportunities for reducing emissions and road congestion.

1.2 The Intermodal Rail Freight Interchange Study was commissioned through TfSE's call-off contract to understand more about the existing provision of Integrated Rail Freight Interchanges (IRFI)s and the opportunities for increasing capacity through the expansion of existing facilities, or the creation of new ones. Background detail on the objectives and key finding of the study and the discussions that took place with key stakeholders are set out in **Appendix 1**.

2. Key findings

2.1 The key findings of the study include the following:

- In order to achieve the government's 75% rail freight growth target, the capacity and capability of the rail network and operations will need to significantly improve, not least in the provision of access points onto the network.
- In addition, without additional and/or expanded rail freight interchanges, particularly those for the intermodal sector, prospects for achieving the government's 75% rail freight growth target will be limited.
- The National Networks National Policy Statement and the study for the Great British Railways Transition Team (GBRTT) in 2022 have both shown that there are not sufficient intermodal rail freight interchanges in the TfSE or surrounding area to support this growth.
- A key risk if suitable locations for IRFI or SRFI are not found will be the continued reliance on road transport to deliver goods and services.
- Improving access to rail transport services and networks would also result in other benefits, including:

- o Increasing freight mode shift from road to rail thereby contributing to the decarbonisation of the transport sector in the TfSE area.
- o The potential to secure local investment and employment, such as the 4.2 million sq. feet of warehousing, 4,100 jobs and at least £500m of local investment that has been secured in other regions from delivering SRFIs.
- o Increasing the accessibility for local business to the rail network and contributing to the logistics needs of consumers.

3. Intermodal Rail Freight Interchange Study Recommendations & Next Steps

3.1 Local authorities are recommended to:

- Seek to use designated officer(s) with experience of freight-related issues that have been actively developed as part of their role.
- Gain a greater understanding of the nature of logistics and the challenges faced by the sector through TfSE's ongoing Freight Awareness programme.
- Joint working between local authority planning, transport and economic development officers during local plan development to collectively encourage and engage with potential IRFI and SRFI site owners/promoters, Network Rail and National Highways.
- Make a commitment to support the use of rail freight in national, regional and local strategies and plans.
- Use the Permitted Development route working with Network Rail and other railway undertakings for smaller IRFI and the Development Consent Orders for SRFIs, as an alternative to the Town & Country Planning Act, to speed up the planning process and reduce the cost to the local authority.

3.2 TfSE is recommended to:

- Consider holding a round table event with a range of stakeholders to gauge the level of interest in addressing the shortfall of interchange and network capacity.
- Work with central government to support the further strengthening of planning policy and guidance to ensure that interchanges are considered as critical components of regional infrastructure and enablers of employment and housing delivery.
- Consider exploring alternative methods for determining 'the scale of need' to enable local authorities to better account for the role of these facilities when responding to planning proposals.
- Work with the DfT and others to enhance the availability and utilisation of data on trends, demand, supply, and performance to facilitate more informed planning decisions.

4. Financial considerations for the Intermodal Rail Freight Interchange Study

4.1 The cost of the intermodal rail freight study was £33,410 and was funded from the DfT grant allocation for 2024/25.

5. Conclusions and recommendations

5.1 Members of the Partnership Board are recommended note the main findings and conclusions of the study and agree the Intermodal Rail Freight Interchange Study report and next steps.

RUPERT CLUBB

Chief Officer

Transport for the South East

Contact Officer: Kate Over

Tel. No. 07751 732 855

Email: kate.over@transportforthesoutheast.org.uk

Item 8 - Intermodal Rail Freight Interchange Study - Appendix 1

1. Introduction

1.1 The purpose of this appendix is to set out the objectives, key findings and set out the scope of the stakeholder engagement activity that has taken place as part of this study.

2. Objectives of the Intermodal Rail Freight Interchange Study

2.1 The objectives for the Intermodal Rail Freight Interchange study were as follows:

- Identify and assess the potential scale of future demand for intermodal rail freight to, from and within the TfSE area.
- Identify and assess the potential requirement for intermodal rail freight interchanges to facilitate freight movements by rail.
- Identify and assess existing and potential sites for interchanges to be developed.
- Understand stakeholder perspectives from local authorities and industry on the opportunities and barriers to delivering and operating interchanges in the area.
- Develop recommendations to support increased intermodal transfer between road and rail networks within TfSE's wider strategy for delivering sustainable freight to stimulate economic growth.

3. Main Findings for the Intermodal Rail Freight Interchange Study

3.1 The study identified the need for more interchange infrastructure in the TfSE area:

- A study undertaken by GBRTT in 2022 concluded that the wider development of intermodal rail freight in the UK requires a far broader geographical distribution of Intermodal Rail Freight Interchanges to complement the Strategic Rail Freight Interchange network.
- The National Network National Policy Statement 2024 reiterated the importance of SRFI and the compelling need to create an expanded network. It noted that in London and the South East most IRFI and associated rail-connected warehousing, is on a small scale and that expanding these rail freight interchanges would be particularly challenging.

3.2 The study identified a number of challenges associated with the provision of additional rail freight interchanges in the South East and TfSE area. The need for more rail freight interchanges in the South East is primarily a result of the fact that planning policy, land availability or distribution space demand/value have not supported the developer-led SRFI model. It does not reflect a lack of private investment or customer interest. It is more a result of:

- A scarcity of land and road / rail network capacity.
- A lack of suitable locations where road and rail networks meet in order to site an interchange.
- A lack of sites where both road and rail networks provide suitable capacity and capability for freight haulage and interchange services and where the

development of the land needed for these facilities align with local community and authority aspirations.

- A lack of awareness and engagement among local planning authorities.
- A lack of understanding of the needs of rail freight and the potential of SRFI/IRFIs within local authorities.
- Local opposition to proposals when they have been put forward.

3.3 The local authorities consulted as part of this study have stressed that they are not resourced or structured to gain insights into the nature, opportunities and challenges facing the freight sector. This is despite of their recognition of its role in supporting the wider economy and as a major component of economic activity in its own right.

3.4 Opportunities for additional rail freight interchanges in the TfSE and surrounding area have been identified. Analysis of research undertaken by GBRTT in 2022 suggests that if the current national share of total road and rail freight tonne km accounted for by intermodal rail services (3.6%) were applied to the South East, the demand for the equivalent of eight trains per day would be generated. This could remove over 700 long-distance HGV loads from the road network. In terms of interchange capacity, 8 trains per day would equate to at least two IRFI and/or SRFI.

3.5 The study found that it may be possible to deliver more interchanges in the TfSE and/or surrounding areas and it has identified some potential opportunity areas. These are as follows:

- Northfleet (Gravesham)
- Salfords (Reigate and Banstead)
- Crawley Goods Yard (Crawley)
- South Godstone (Tandridge)
- Theale (West Berkshire)
- Thorney Mill (Buckinghamshire)
- Oxfordshire SRFI (Oxfordshire)
- Barking (Barking & Dagenham)
- London Gateway (Thurrock)
- Thames Enterprise Park (Thurrock)

There are also other areas which may offer potential, either for non-intermodal traffic or for larger SRFI developments of 60 Ha or more. The latter would involve new main line and trunk road connections and associated warehousing development. Example of areas where these could be located are Andover, Crawley, Fratton, Micheldever and Newhaven. However, it should be noted that the areas identified are purely for illustrative purposes only and do not confirm or imply feasibility, or alignment with any local planning policy. Any site-specific proposal would be subject to full environmental and business case appraisal and associated planning consent(s).

4. Stakeholder engagement for the Intermodal Rail Freight Interchange Study

4.1 The local authorities and industry representatives who took part in this study included:

- Ashford Borough Council
- Bracknell Forest Council
- Brighton & Hove City Council
- Dartford Borough Council
- East Sussex County Council
- Elmbridge Borough Council
- Epsom & Ewell Borough Council
- Hampshire County Council
- Kent County Council
- Lewes & Eastbourne Borough Council
- Medway Council
- New Forest National Park
- Portsmouth Borough Council
- Slough Borough Council
- Southampton City Council
- Surrey County Council
- Swale Borough Council
- Wealden District Council
- West Sussex County Council
- Woking Borough Council
- Freightliner
- Maritime Transport
- Network Rail
- The Rail Freight Group.

4.2 The engagement with TfSE partner authorities included:

- Presentations to the Transport Strategy Working Group (TSWG) and the Wider South East Freight Forum.
- Undertaking an initial online surveying with partner authority practitioners.
- Hosting a workshop session on 25 February 2025 with attendees from TfSE partner authorities and industry representatives.
- Follow-up meetings with individual partner authorities including Brighton & Hove City Council, East Sussex County Council and Portsmouth City Council.

4.3 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.

Item 8 - Intermodal Rail Freight Study Report - Appendix 2

Intermodal Rail Freight Interchange Study

Report

October 2025: Version 6.2

Prepared by

Steer

14-21 Rushworth Street

London SE1 0RB

+44 20 7910 5000

www.steergroup.com

Prepared for

Transport for the South East

County Hall

St Anne's Crescent

Lewes

BN7 1UE

Control Information

Author/originator: Harshil Patel and Fiona Jenkins (Steer); Nick Gallop (Intermodality)

Reviewer/approver: Fiona Jenkins

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Executive summary

Background

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 increasing the volume of freight moved by rail by improving integration between different modes of freight. To address the potential for this, the Strategy includes a measure to undertake a detailed review into the potential for intermodal rail freight interchanges in the TfSE area.

This Intermodal Rail Freight Interchange Study was therefore commissioned by TfSE and prepared by Steer and Intermodality. The Study assesses the potential demand for freight currently moved entirely by road to and from the TfSE area, some of which could be moved by rail freight if the infrastructure was there to support commercially viable services.

Objectives

Within this context, the objectives of the Intermodal Rail Freight Interchange Study are to:

- Identify and assess the potential scale of future demand for intermodal rail freight to, from and within the TfSE area.
- Identify and assess the potential requirements for intermodal rail freight interchanges to facilitate freight movements by rail.
- Identify and assess existing and potential sites for interchanges to be developed.
- Understand stakeholder perspectives from local authorities and industry on the opportunities and barriers to delivering and operating interchanges in the area.
- Develop recommendations to support increased intermodal transfer between road and rail networks within TfSE's wider strategy for delivering sustainable freight to stimulate economic growth.

Approach

The study comprised four main phases of work:

- An initial phase of work principally involving desktop research to understand the market prospects for intermodal freight in the South East, examining the relationship between current intermodal rail services and existing freight interchanges. This phase built upon research carried out for the former Great British Railways Transition Team (GBRTT) in 2022, including an analysis of key regional

indicators such as population, warehousing capacity and freight traffic patterns¹. GBRTT has now completed its initial remit and will be replaced by a new Great British Railways (GBR) organisational structure and associated legislative framework in 2026.

- An assessment phase evaluating existing and potential intermodal rail freight interchange sites in and around the TfSE area, examining their proximity to warehousing and rail-linked facilities. This assessment aimed to identify opportunities to increase throughput at existing sites and develop a pipeline of potential new facilities where current capacity is insufficient.
- A stakeholder engagement phase, involving online surveys and discussions with industry representatives, to better understand the opportunities and barriers associated with intermodal rail freight interchanges, and to validate initial research findings against real-world experience.
- A final synthesis phase developing the final study report, combining market analysis, site assessment and stakeholder insights into comprehensive findings and recommendations.

Scope

There are different types of rail freight interchange in use, with this Study focussing on Intermodal Rail Freight Interchanges (IRFI) primarily with consideration of Strategic Rail Freight Interchanges (SRFI) as relevant.

Structure of this report

The remainder of the report is structured as follows:

- Chapter 2 sets out the context for rail freight and its role, structure, opportunities and benefits of rail freight services within the wider freight market, with a focus on the intermodal sector and the particular role played by interchanges in helping generate growth.
- Chapter 3 estimates the potential scale of opportunity for intermodal rail freight services and interchange facilities within the South East region/TfSE area.
- Chapter 4 considers ways to address barriers to and support growth in the intermodal sector, particularly in the South East region/TfSE area, considering both rail network capacity and capability, as well as the planning challenges facing promoters of new interchanges. This includes references to case studies from which to identify tangible actions which could be considered to help improve planning and delivery.
- Chapter 5 reviews potential opportunity areas for new or reinstated Intermodal or Strategic Rail Freight Interchanges in and around the TfSE area, including key criteria for identifying and shortlisting sites.
- Chapter 6 summarises the stakeholder engagement activity across meetings and survey findings, highlighting challenges and opportunities.

¹ Included in the 'Intermodal rail freight interchanges: levelling up regional provision, Market Assessment Report', Intermodality, 2022. A copy of this report can be made available by TfSE on request.

- Chapter 7 sets out closing conclusions, recommendations for delivery and next steps.

Role of rail freight in the UK economy

The UK logistics sector provides critical support for the rest of the economy, as well as being a significant component of the economy in its own right. In 2023, the sector generated over £1.2 trillion in revenue, contributing £170 billion to the UK economy and generating £24.3 billion for the Exchequer in fuel duties alone, with 2.7 million employees representing 8% of the UK workforce.²

The transport of domestic freight across Great Britain is dominated by road haulage, with 81% of domestic freight moved by road, 12% by water and 8% by rail³. Road freight has consistently accounted for the largest share of domestic freight movement in the UK, followed by goods transported by water, with rail freight representing the smallest proportion.

However, rail freight traffic increased following privatisation and the opening of the Channel Tunnel in the mid-1990s and has largely managed to maintain traffic levels to date. Globalisation has led to increased movement of deep-sea containers by rail from the major ports, whilst construction traffic has also increased. The rail freight market is now dominated by services for intermodal (containers) and construction traffic, at 43% and 33% respectively⁴.

Currently, in running around 680 trains per day across the network, the rail freight industry also supports companies such as British Steel, Danone, Drax, Jaguar Land Rover and Tesco, who rely on rail transport within their supply chains, helping keep the lights on and the shelves stocked.

Rail transport provides a more efficient and lower carbon alternative to road haulage for the movement of materials at scale. For example:

- trains can carry up to 3,200 tonnes per train, the equivalent of 110 articulated heavy goods vehicles⁵;
- trains for mail, parcels and other light goods can travel at high speeds of up to 100mph⁶, which is far higher than the legal speed limit for heavy goods vehicles; and
- rail transport has the equivalent of 71%⁷ less emissions per tonne-km than road haulage.

The ambition to grow rail freight volumes

² The Logistics Report Summary 2025, Logistics UK

³ Transport Statistics Great Britain: 2023 Freight, Department for Transport

⁴ Freight rail usage and performance April 2024 to March 2025, Office of Rail and Road

⁵ The role and value of rail freight in the UK, Deloitte report for the Rail Delivery Group, 2021

⁶ For example, InterCity Rail Freight services run by Great Western Railway and East Midlands Railway since 2017

⁷ UK Government GHG Conversion Factors for Company Reporting 2023, emissions for rail freight against all HGVs with average payload

Government policy has for many years sought a greater role in freight for rail transport, to help reduce the burden on the highway network and support the decarbonisation of the transport industry. In 2023 the then Conservative government announced a target of 75% growth in rail freight by 2050⁸, the equivalent of around 500 extra freight trains per day⁹ or around 8,000 articulated HGV loads removed from the road network.¹⁰

In order to achieve this, the capacity and capability of the rail network and operations will need to significantly improve, not least in the provision of access points onto the network, the majority of which were lost in the post-war period leading up to privatisation. In addition, without additional and/or expanded rail freight interchanges, particularly but not exclusively for the intermodal sector (movement of shipping containers), prospects for growth will be limited.

Intermodal rail in the South East

Within the UK, the South East region accounts for 14% of Gross Value Added¹¹ and 14% of population¹², 15% of warehousing¹³ and 11% of road freight traffic.¹⁴ However, unlike regions such as the West and East Midlands, Yorkshire & Humberside and the North West, which have much lower shares of GVA and population and similar levels of warehousing and road freight, the South East has no inland intermodal rail freight interchanges, either operational or seeking planning consent.

Furthermore, the South East provides the gateway for rail freight services linking the port of Southampton and the Channel Tunnel with the rest of the country. These rail services relieve the regional road network (particularly the M2, M3, M20, M25, M26, A2, A20 and A34) of up to 1,300 HGV loads per day.¹⁵ The region therefore benefits from the operation of these rail freight services and the inland interchanges which they serve but currently has no means to load or unload non-port traffic to and from the region itself.

Issues for rail freight and interchanges in the South East

Feedback from the freight and logistics sector¹⁶ indicates that the current planning approach frequently falls short for supporting interchanges and other freight-related infrastructure (e.g. warehousing, lorry parking). Specific challenges include:

- Land allocation conflicts: optimal sites are often lost to competing uses - such as housing development or other higher-value projects – leaving freight operators with limited options for developing consolidated hubs near rail networks.

⁸ [Rail freight growth target](#), Department for Transport, 2023

⁹ Estimated assuming 75% growth in number of trains run over present (195,000 per annum source ORR equating to 680 per day)

¹⁰ Average train payload 350 tonnes (source ORR) divided by average HGV payload 16 tonnes (source DfT) equates to 16 HGV loads per train x 500 extra trains

¹¹ Regional gross value added (balanced) by industry: all International Territorial Level (ITL) regions (2024), Office for National Statistics, 2025

¹² 2021 Census, Office for National Statistics

¹³ Savills' assessment for the TfSE Warehousing Study, 2025

¹⁴ Department for Transport Road freight statistics 2022

¹⁵ Intermodality analysis

¹⁶ National Infrastructure Commission (2018), [Freight Study Call for Evidence](#)

- Insufficient recognition of the role of interchanges: there is a limited understanding among planners of the strategic importance of interchanges in creating efficient supply chains. The planning framework tends to focus narrowly on traditional land use considerations rather than recognising the broader infrastructural benefits that interchanges provide, such as enabling multi-modal integration and supporting regional economic development.
- Lack of inter-authority co-operation: effective planning for interchanges requires co-ordination beyond local boundaries. Yet, the current system does not adequately facilitate co-operation between local authorities, resulting in fragmented planning that fails to address the needs of a regional freight network.

Main findings of the study

The opportunity for additional rail freight interchanges in the South East and TfSE area

Analysis of GBRTT's research in 2022 suggests that if the current national share of total road and rail freight tonne-km accounted for by intermodal rail services (3.6%) were applied to the South East, the equivalent of eight trains per day each way could be generated by the South East. This could remove over 700 long-distance HGV loads from the road network. This could be achieved if rail services were able to target the longer-distance flows from the South East to the North West, Yorkshire & Humber, Midlands and Wales, and excluded the container traffic moved by road to and from the port of Southampton.

This would represent a do-minimum/worst case scenario, or one-third the level of potential traffic identified in the GBRTT/Intermodality study. In terms of interchange capacity, eight trains per day would equate to at least two IRFI and/or SRFI.

The development of SRFI not only represents opportunities to encourage intermodal rail freight and decarbonisation by improving access to rail transport services and networks, but also to secure investment and employment. Examples in other regions have shown that SRFI could generate an average of 4.2 million sq. feet of warehousing, 4,100 jobs and at least £500m of local investment, therefore increasing the accessibility for local business to the rail network and contributing to the logistics needs of consumers.

Potential opportunity areas

The study, which builds on an earlier national study undertaken by Great British Railways Transition Team (GBRTT) has shown that it may be possible to deliver more interchanges in these areas, identifying potential opportunity areas as set out below. The colour-coding of site titles to a green, amber or red classification describes the relative deliverability of sites, including factors such as land conditions and classifications, and the ease of connectivity to, and capability of, road and rail networks.

- **Northfleet** (Gravesham)
- **Salfords** (Reigate and Banstead)
- **Crawley Goods Yard** (Crawley)
- **South Godstone** (Tandridge)
- **Theale** (West Berkshire)

- **Thorney Mill** (Buckinghamshire)
- **Oxfordshire SRFI** (Oxfordshire)
- **Barking** (Barking & Dagenham)
- **London Gateway** (Thurrock)
- **Thames Enterprise Park** (Thurrock)

There are other areas which may also offer potential, either for:

- non-intermodal traffic e.g. existing rail-linked sites at Andover, Crawley, Fratton, Micheldever and Newhaven for aggregates, waste, parcels; or
- for larger SRFI developments of 60 Ha or more at strategic road/rail network intersections suitable for larger regional distribution centres, involving new main line and trunk road connections and associated warehousing development.

However, it should be noted that the areas identified are purely for illustrative purposes only and do not confirm or imply feasibility, or alignment with any local planning policy. Any site-specific proposal would be subject to full environmental and business case appraisal and associated planning consent(s).

Challenges for additional rail freight interchange provision in the South East and TfSE area

The need for more rail freight interchanges in the South East is primarily because planning policy, land availability or distribution space demand/value has not supported the developer-led SRFI model in the past. It does not reflect a lack of private investment or customer interest. It is more focussed on:

- the scarcity of land and road / rail network capacity (as recognised in Network Rail's forecasts for 75% growth);
- the lack of suitable locations where road and rail networks meet in order to provide an interchange;
- the lack of sites where both road and rail networks provide suitable capacity and capability for freight haulage and interchange services and where the development of the land needed for these facilities align with local community and local authority aspirations;
- the lack of awareness within local authorities of the needs of rail freight and the potential of SRFI/IRFIs and the lack of engagement between local planning authorities; and
- local opposition to proposals where they have been put forward.

This means that national and regional need and benefits have tended to be overshadowed by a focus on local issues. As observed by the local authorities consulted as part of this study, local authorities are not resourced or structured to gain insights into the nature, opportunities and challenges facing the freight sector. This is despite its role in supporting the wider economy and as a major component of economic activity in its own right. This means that there is not enough understanding of the needs of rail freight and the potential of IRFI/SRFI in particular.

Conclusion, recommendations and next steps

Conclusion

In order to achieve the government's 75% rail freight growth target, the capacity and capability of the rail network and operations will need to significantly improve, not least in the provision of access points onto the network.

In addition, without additional and/or expanded rail freight interchanges, particularly but not exclusively for the intermodal sector prospects for growth will be limited.

The National Networks National Policy Statement and a study for GBRTT in 2022 have both shown that there are not sufficient intermodal rail freight interchanges in the TfSE or its surrounding area to support this growth.

The other key risks of not finding suitable locations for IRFI or SRFI in the TfSE area will be the increasing difficulty of being able to deliver goods and services without the continued reliance on road transport and the highway network. In turn this will also mean using distribution sites which may never offer scope for rail access. If this is not addressed, it could also result in the missed opportunities to generate local investment and employment as outlined above.

Recommendations

Despite the lack of resources faced by local authorities to support the development of intermodal rail freight interchanges in the TfSE area, there could be scope to improve outcomes through relatively low-intensity interventions by or with local authorities.

These include:

- Seeking the use of designated officer(s) with freight-related issues that have been actively developed as part of their role, backed by Continuous Professional Development (CPD) to improve knowledge of the freight sector. It might be possible to appoint a jointly funded cross-boundary officer to make best use of resources.
- Gaining a greater understanding of the nature of logistics and the challenges faced by the sector through the ongoing Freight Awareness work programme. This is being developed by TfSE, England's Economic Heartland and Transport East.
- Joint working between officers during local plan development through jointly requesting site consultations. This could mean that land-use, economic development and transport planners collectively encourage and engage with potential SFRI/IRFI site owners/promoters, as well as with Network Rail and National Highways.
- Making a commitment to supporting the use of rail freight in relevant strategies and plans. For example, East Sussex County Council have committed to ensuring rail routes and supporting infrastructure support the growth of rail freight in their draft Freight Strategy.
- Making best use of the planning and delivery tools available, for example, using the Permitted Development route working with Network Rail and other railway undertakings for smaller RFI. For larger, and often more contentious SRFI, using the

Development Consent Order could provide an alternative to the Town & Country Planning Act, to speed up the process and reduce the cost to the local authority.

In addition, TfSE will:

- Work with Network Rail, GBR once established, other potential delivery partners and our partner local authorities to review the opportunities this study offers.
- Explore working with central government to support the further strengthening of planning policy and guidance to ensure that these facilities are considered as critical components of regional infrastructure and as an enabler of employment and housing delivery.
- Explore alternative methods for determining 'the scale of need'. This would enable local authorities to better account for the role of these facilities in enabling efficient supply chains and their role in supporting more efficient distribution to and servicing of population centres.
- Work with the DfT and others to enhance the availability and utilisation of data on trends, demand, supply, and performance to facilitate more informed planning decisions.

Next steps

In order to gain further momentum for the provision of rail freight interchange facilities and services for the TfSE area, TfSE will share the report with its partner local authorities, the Wider South East Freight Forum (WSEFF), freight operators, developers of interchange facilities, Network Rail, other Sub National Transport Bodies, the Wider South East Rail Partnership and the Department for Transport.

It may also be worth considering holding a round table event to gain a clearer understanding of the current level of interest in addressing the shortfall of interchange and network capacity in the TfSE area. Potential attendees could include representatives from Network Rail alongside potential developers, interchange operators, freight operators, end users e.g. retail and aggregate companies and those local authorities who have already shown an interest in developing RFIs.

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Glossary of terms

Term	Description
CAZ	Clean Air Zones
DCO	Development Consent Order, a process for applying to the Planning Inspectorate for planning consent for SRFI and other Nationally Significant Infrastructure Projects set out in the Planning Act 2008
DfT	Department for Transport, Government body with responsibility for the English transport network and other non-devolved transport matters in Scotland, Wales & Northern Ireland
DIRFT	Daventry International Rail Freight Interchange, an existing SRFI near Rugby
E	East of England Region
EM	East Midlands Region
GB	Great Britain
GBR	Great British Railways, a new organisation proposed to integrate Network Rail and passenger train operator franchises
GBRTT	Great British Railways Transition Team, an interim organisation set up to plan a future structure for Great British Railways
GVA	Gross Value Added, a measure of economic activity
Ha	Hectare
HGV	Heavy Goods Vehicle, defined by the DfT as any goods-carrying vehicle in excess of 3.5 tonnes
iPort Doncaster	A Strategic Rail Freight Interchange located near Doncaster
IRFI	Intermodal Rail Freight Interchange, a type of rail freight interchange operated as a standalone facility without the associated warehousing found on Strategic Rail Freight Interchanges
KIG	Kent International Gateway, a proposed SRFI
km	Kilometres
LEZ	Low Emission Zones
LIFE	London International Freight Exchange, a proposed SRFI
Loading gauge	The maximum cross-sectional area of a railway vehicle and its payload permitted to operate along a given section of route, defined in Great Britain by a series of W (for wagon) profiles ranging from W6A (smallest) to W12 (largest)
LUK	Logistics UK a trade association formerly known as the Freight Transport Association
m	Metre
mph	Miles per hour
NDC	National Distribution Centre, a warehouse which distributes goods across the entire country, either to other Regional Distribution Centres or direct to customers
NE	North East Region
NNNPS	National Networks National Policy Statement
NPPF	National Planning Policy Framework

NR	Network Rail, licensed to operate the national rail network in Great Britain
NW	North West Region
ORR	Office of Rail & Road, a non-ministerial government department responsible for the economic and safety regulation of Britain's railways, and the economic monitoring of National Highways
PD	Permitted Development rights
RA	Route Availability, a measure of the permitted axle load applied to a section of railway, from RA1 to RA10
RDC	Regional Distribution Centre, a warehouse which distributes goods to customers within a defined regional catchment area
RFG	Rail Freight Group, a trade association which represents rail freight users and operators
RFI	Rail Freight Interchange, typically smaller in size and/or catchment areas than SRFI, but which can operate with and alongside SRFI as part of an intermodal shipment
RHA	Road Haulage Industry, a trade association
SE	South East Region
SEEDA	Former South East Economic Development Agency
SFN	Strategic Freight Network, a core network of strategic main line routes identified by the DfT and NR to cater for 775m length trains operating within W10/12 loading gauge, linking with inland SRFI and RFI, ports and the Channel Tunnel
SIFE	Slough International Freight Exchange, a proposed SRFI
sq ft	Square feet
sq m	Square metres
SRA	Former Strategic Rail Authority
SRFI	Strategic Rail Freight Interchange, a class of Nationally Significant Infrastructure Project as defined in the Planning Act 2008
SW	South West Region
TCPA	Town & Country Planning Act
TfSE	Transport for the South East
tonne-km	tonne-kilometres, a measure of freight movement
TSWG	Transport Strategy Working Group
UK	United Kingdom
WM	West Midlands Region
WSEFF	Wider South East Freight Forum
WYCA	West Yorkshire Combined Authority
Y&H	Yorkshire & Humberside Region

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 Intermodal Rail Freight Interchange Study to:

- Gain a clearer understanding of and identify the current and potential for increased intermodal transfer of freight between road and rail networks within the TfSE area.
- Examine the current and future potential for Intermodal Rail Freight Interchanges (IRFI) in the TfSE area through market analysis, site assessment, stakeholder engagement.
- Develop recommendations to enhance intermodal freight movements and support wider socio-economic and environmental goals.

Steer has been supported in this work by Intermodality who have led the market analysis and assessment of potential sites for interchanges and supported stakeholder engagement and recommendations.

1.2 Study context

1.2.1 Transport for the South East's Transport Strategy

TfSE's existing 2020 Transport Strategy envisions the area's growth and transformation through to 2050, aiming for the South East of England to become a leading global hub for net zero carbon with sustainable economic growth.

The 2020 Transport Strategy is in the process of being refreshed, with a new Draft Transport Strategy 2024 (covering the period 2025 to 2050) consulted on in late 2024 to early 2025. The refreshed Transport Strategy sets out a bold vision for a more sustainable, inclusive and resilient transport system. It is structured around five core missions:

- Improving strategic connectivity between major urban areas and with international gateways, especially by public transport, which is crucial for economic growth.
- Improving the resilience of the network, so that it offers reliable journeys and can respond to current and future risks to its operation.
- Tackling the inclusion and integration challenges facing communities, such as transport-related social exclusion and providing a joined-up transport network to enhance connectivity and improve people's lives.
- Decarbonising the surface transport network, essential for meeting climate change goals.
- Achieving sustainable growth through planned housing and employment growth which has sustainable transport at its heart.

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 Transport Strategy, 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 has seven strategic objectives across economic, social and environmental themes, four of which relate directly to the importance of increasing the network's capacity for rail freight, including the provision of intermodal facilities. These are:

1. To improve the capacity, and operational efficiency of the freight and logistics sector in the TfSE area through:
 - o improved reliability and capacity for freight on the transport network;
 - o improved integration between different modes of freight transport; and
 - o increased land availability for current and future freight and logistics activities.
2. To enhance the contribution of the freight and logistics sector as an important industrial sector as an important industrial sector and employer in the TfSE area through:
 - o improved freight and logistics skills and job opportunities; and
 - o support for inward investment and innovation best practice.
3. To improve connectivity to the international gateways in the TfSE area through:
 - o infrastructure provision to meet changing patterns of demand.
4. To reduce the impact of freight on communities, through reductions in noise and air quality impacts, intermodal transfers, and informal overnight lorry parking.

In relation to supporting mode shift from road to rail and rail freight growth in general, the lack of suitable intermodal facilities in the region is identified as a particular issue:

- "There are relatively few intermodal freight transfer sites in or near the South East, except for those provided at deep seaports (e.g. Southampton and London Gateway/Tilbury) with supply chains linked to national distribution centres located across other parts of the UK."¹⁷
- "Although rail freight terminals for construction materials, especially at ports and wharves on the Thames, are well placed for moving additional volumes of traffic, a shortage of intermodal terminals is one of the most significant constraints to mode shift across the Transport for the South East region."¹⁸

Three main issues are identified with regards to rail freight capacity in the area:

¹⁷ Freight, Logistics and Gateways Strategy, TfSE, 2022, paragraph 3.19 page 26

¹⁸ Freight, Logistics and Gateways Strategy, TfSE, 2022, paragraph 3.31 page 32

- Capacity on major rail corridors being shared with passenger services.
- Shortage of interchanges for intermodal transfer of freight.
- Limited extent of rail height clearances (loading gauge) for taller shipping containers.

The Freight and Logistics Gateways Strategy therefore identifies the importance of Intermodal Rail Freight Interchanges (IRFI) in enabling efficient, cost-effective and low-carbon supply chains. These facilities play a crucial role in transferring containerised goods and bulk materials between road and rail networks. Where there is inadequate provision of suitable IRFI, operators will then continue to rely on road haulage, with associated lost opportunities for reducing emissions and road congestion.

Planning authorities can facilitate the development of IRFI in strategic locations by recognising areas with greater potential for intermodal freight transfer and designating sufficient land for future development. They can also protect suitable rail-connected sites from development for other purposes such as housing or retail, where there is an opportunity and need to do so, but this requires knowledge of, and engagement with the freight sector across users, operators and developers.

The Freight and Logistics Gateways Strategy includes a strategic action to support the transfer of freight from road haulage to cleaner alternatives, which includes a short-term action to produce guidance on road to rail modal shift. There is a further strategic action to review the existing provision of intermodal terminal facilities. This study seeks to respond to these strategic actions.

1.3 Objectives of the study

Within this context, the objectives of the Intermodal Rail Freight Interchange Study are to:

- Identify and assess the potential future demand for intermodal rail freight to, from and within the TfSE area.
- Identify and assess the potential requirement for intermodal rail freight interchanges to facilitate freight movements by rail.
- Identify and assess existing and potential sites for intermodal rail freight interchange development.
- Understand stakeholder perspectives from local authorities, the rail freight and logistics sector, businesses and end-users on the opportunities and barriers to delivering and operating rail freight interchanges in the area,
- Develop recommendations to support increased intermodal transfer between road and rail networks within TfSE's work on delivering sustainable freight to stimulate economic growth.

1.4 Approach to delivering the study

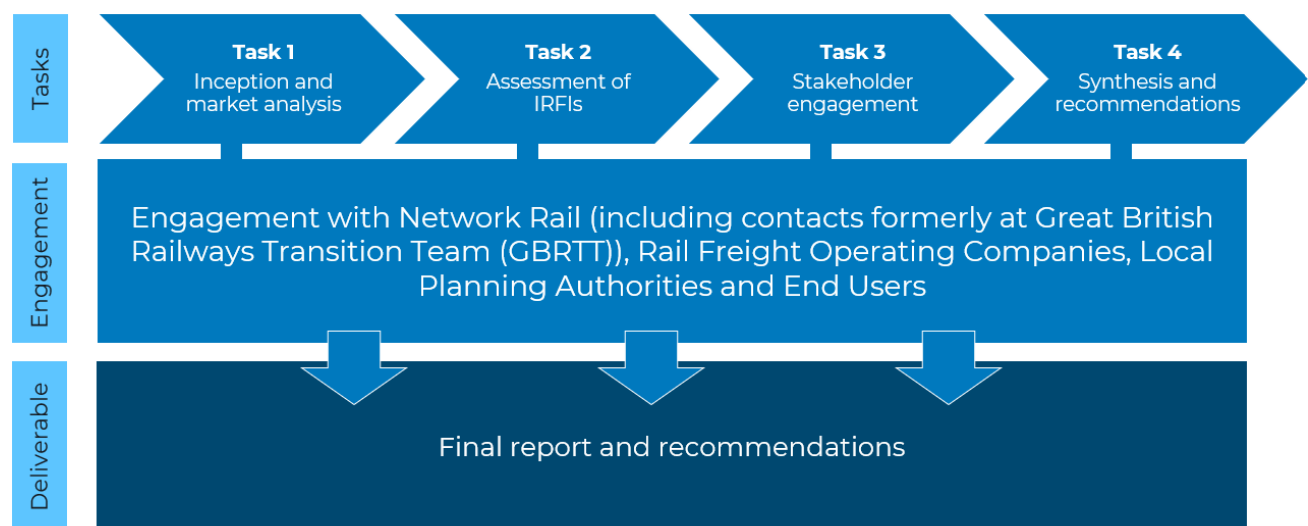
The study comprised four main phases of work:

1. An initial phase of work principally involving desktop research to understand the market prospects for intermodal freight in the South East, examining the relationship between current intermodal rail services and existing freight interchanges. This phase built upon previous work by the former Great British

Railways Transition Team (GBRTT) and included analysis of key regional indicators such as population, warehousing capacity and freight traffic patterns.¹⁹ This work was presented in a report called Intermodal Rail Freight Interchanges: levelling up regional provision, Market Assessment Report carried out by Intermodality for GBRTT in 2022. GBRTT has now completed its initial remit and is now being replaced by a new Great British Railways (GBR) organisational structure and associated legislative framework.

2. An assessment phase evaluating existing and potential Intermodal Rail Freight Interchanges (IRFI) sites in and around the TfSE area, examining their proximity to warehousing, logistics spaces and rail-linked facilities. This assessment aimed to identify opportunities to increase throughput at existing sites and develop a pipeline of potential new facilities where current capacity is insufficient.
3. A stakeholder engagement phase with local authority transport and spatial planners and economic development practitioners in the TfSE area, along with industry representatives (including Network Rail, contacts formerly at GBRTT, the Rail Freight Group and intermodal logistics operators Freightliner and Maritime Transport), to understand perceived opportunities and barriers to using rail freight interchanges, and to validate initial research findings against real-world expertise. This was to support TfSE in understanding the nature and extent of the challenges and opportunities, and the local level of interest in intermodal rail freight interchanges.
4. A synthesis phase developing the final study report, combining market analysis, site assessment and stakeholder insights into comprehensive findings and recommendations. This included analysis of how associated warehousing development can help offset infrastructure costs and consideration of critical mass requirements for viable new interchange facilities.

Figure 1-1 Summary of study tasks, engagement and output



¹⁹ Included in the 'Intermodal rail freight interchanges: levelling up regional provision, Market Assessment Report', Intermodality, 2022

1.5 Structure of this report

The remainder of the report is structured as follows:

- Chapter 2 sets out the context for rail freight and its role, structure, opportunities and benefits of rail freight services within the wider freight market, with a focus on the intermodal sector and the particular role played by interchanges in helping generate growth.
- Chapter 3 estimates the potential scale of opportunity for intermodal rail freight services and interchange facilities within the South East region/TfSE area.
- Chapter 4 considers ways to address barriers to and support growth in the intermodal sector, particularly in the South East region/TfSE area, considering both rail network capacity and capability, as well as the planning challenges facing promoters of new interchanges. This includes references to case studies from which to identify tangible actions which could be considered to help improve planning and delivery.
- Chapter 5 reviews potential opportunity areas for new or reinstated Intermodal or Strategic Rail Freight Interchanges in and around the TfSE area, including key criteria for identifying and shortlisting sites.
- Chapter 6 summarises the stakeholder engagement activity across meetings and survey findings, highlighting challenges and opportunities.
- Chapter 7 sets out closing conclusions, recommendations for delivery and next steps.

2 The role of rail freight services and interchanges

This chapter sets out the general context for rail freight and the role, structure, opportunities and benefits of rail freight services within the wider freight market, with a focus on the intermodal sector and the particular role played by interchanges in helping generate growth. Chapter 3 then, with reference to this context, focuses on the specific opportunities for intermodal rail freight services and interchange facilities in the South East.

2.1 Logistics and the role of rail freight

The UK logistics sector provides critical support for the rest of the economy, as well as being a significant component of the economy in its own right. In 2023, the sector generated over £1.2 trillion in revenue, contributing £170 billion to the UK economy and generating £24.3 billion for the Exchequer in fuel duties alone, with 2.7 million employees representing 8% of the UK workforce.²⁰

The transport of domestic freight across Great Britain is dominated by road haulage, with 81% of domestic freight moved by road, 12% by water and 8% by rail.²¹ Road freight has consistently accounted for the largest share of domestic freight movement in the UK, followed by goods transported by water, with rail freight representing the smallest proportion. Despite fluctuations in overall trends, the relative proportions of these modes of transport have remained stable since data comparisons began in 2000.²²

Rail transport can provide a more efficient alternative to road haulage for the movement of materials at scale (up to 3,200 tonnes per train, the equivalent of 110 articulated Heavy Goods Vehicles or HGVs²³) or which can travel at high speeds (up to 120mph²⁴), which is far higher than the legal speed limit for heavy goods vehicles and, per tonne-km, 71% less emissions.²⁵ Running around 680 trains per day across the network, the rail freight industry supports companies such as British Steel, Danone, Drax, Jaguar Land Rover and Tesco, who rely on rail transport within their supply chains, helping keep the lights on and the shelves stocked.

Rail freight traffic surged following privatisation and the opening of the Channel Tunnel in the mid-1990's and has largely managed to maintain traffic levels in the face of the near elimination of coal traffic, which accounted for up to a third of the railway's traditional traffic base. Globalisation has led to increased movement of deep-sea containers by rail from the major ports, whilst construction traffic has also increased to

²⁰ The Logistics Report Summary 2025, Logistics UK

²¹ Transport Statistics Great Britain: 2023 Freight, Department for Transport

²² Transport Statistics Great Britain: 2023 Freight, Department for Transport

²³ The role and value of rail freight in the UK, Deloitte report for the Rail Delivery Group, 2021

²⁴ For example, InterCity Rail Freight services run by Great Western Railway and East Midlands Railway since 2017

²⁵ UK Government GHG Conversion Factors for Company Reporting 2023, emissions for rail freight against all HGVs with average payload

the point where the rail freight market is now dominated by services for intermodal (containers) and construction traffic, at 43% and 33% respectively²⁶.

Alongside renewed interest from business in using rail transport following privatisation and the Channel Tunnel opening, government policy has for many years sought a greater role in freight for rail transport, to help reduce the burden on the highway network and help with decarbonisation of the transport industry. In 2023 the then Conservative government announced a target of 75% growth in rail freight by 2050²⁷, the equivalent of around 500 extra freight trains per day²⁸ or around 8,000 articulated HGV loads removed from the road network.²⁹

In order to achieve this, the capacity and capability of the rail network and operations will need to significantly improve, not least in the provision of access points onto the network, the majority of which were lost in the post-war period leading up to privatisation. Without additional and/or expanded rail freight interchanges, particularly but not exclusively for the intermodal sector, prospects for growth will be limited.

2.2 National policy context for rail freight and interchange infrastructure

Volumes of intermodal traffic moved by rail have increased since 1998³⁰, reflecting both the substantial private-sector and public-sector investment, as well as the evolving public policy framework. Since the late 1990s, successive governments have recognised the important role of rail freight in transport, economic development and environmental terms, and the need to support rail freight through the provision of interchange infrastructure. The public policy context has created conditions favourable to the planning and development of rail freight services and infrastructure, to which industry has responded with further investment and traffic captured to rail.

2.2.1 The Williams-Shapps Plan for Rail, 2021

In 2021, the then Conservative government published the Williams-Shapps Plan for Rail, which outlined a major reform of the UK rail system, aiming to bring track and passenger train operations together through a new integrated Great British Railways (GBR) organisation.

Rail freight operators, apart from Direct Rail Services, would remain outside of government ownership under the GBR model. The Plan for Rail identified that the railways should support a shift away from planes, cars and HGVs for long-distance travel. For freight, this would mean improving connectivity through interchanges and creating

²⁶ Freight rail usage and performance April 2024 to March 2025, Office of Rail and Road

²⁷ [Rail freight growth target](#), Department for Transport, 2023

²⁸ Estimated assuming 75% growth in number of trains run over present (195,000 per annum source ORR equating to 680 per day)

²⁹ Average train payload 350 tonnes (source ORR) divided by average HGV payload 16 tonnes (source DfT) equates to 16 HGV loads per train x 500 extra trains

³⁰ Freight moved by commodity, Great Britain, April 1982 to March 2025, Office of Rail and Road

links with freeports. The Plan made a commitment to set a rail freight growth target (see below).

The Great British Railways Transition Team (GBRTT), formed to commence high-level work on creating Great British Railways as a unified structure for Network Rail and state-managed passenger train operations, included freight within its remit.

2.2.2 The Future of Freight: A Long Term Plan, 2022

In 2022, the Department for Transport (DfT) published The Future of Freight: A Long Term Plan. The Plan is currently being updated and a new version is anticipated in late 2025. The 2022 version of the Plan, published under the then Conservative government, set out how government and industry would work together towards a freight sector that is cost-efficient, reliable, resilient, environmentally sustainable and valued by society. The Plan notes that:

- Rail freight was estimated to have resulted in 6.4 million fewer lorry journeys in 2019/20, reducing congestion on the road.
- A cross-modal approach to freight was most visible in work to facilitate modal shift through investment in rail freight interchanges.
- Strategic Rail Freight Interchanges (SRFI) have been built across the country and not only meet the needs of the freight sector but also support wider government objectives around decarbonisation and congestion. However, the lack of awareness of the value of end-to-end freight journeys has also made it harder for vital warehousing and distribution centres and rail freight interchanges to get through local planning systems.

The Plan was therefore aimed at ensuring that the planning system provides appropriate support to enable logistics developers seeking to grow operations in all regions of the country to locate them where they need to be – near to the strategic road and rail network and close to an employment market.

2.2.3 Rail freight growth target, 2023

As stated above, the Williams-Shapps Plan for Rail (2021) committed government to establish a rail freight growth target. GBRTT was commissioned by the DfT to develop a range of options for the growth target. In 2023, following GBRTT's call for evidence and own analysis, the Conservative government announced a rail freight growth target for at least 75% growth in freight moved by rail by 2050³¹. It was noted that the achievement of the target would be dependent on the full industry, as well as Network Rail and the future GBR, playing a full role, collaborating where appropriate and taking the necessary steps to deliver rail freight growth.

The announcement of the rail freight growth target included a clarification that it was expected that the primary facilitator of growth would be through identifying network efficiencies and terminal (interchange) development, with additional services on the key main lines primarily accommodated within existing freight paths/opportunities. It was stated that government departments (transport and planning) would continue to

³¹ [Rail freight growth target](#), Department for Transport, 2023

collaborate so that the enhanced evidence base could help to underpin any new or amended planning policies and guidance to ensure sufficient land is allocated to service the needs of freight and logistics.

2.2.4 National Networks National Policy Statement (NNNPS), 2024

The NNNPS, published by DfT in 2024, reiterates the importance of Strategic Rail Freight Interchanges (SRFI) and the compelling need to create an expanded network. These aspects of the NNNPS are of particular relevance to this study:

- Recognition that Intermodal Rail Freight Interchanges (IRFI) and rail-connected warehousing in London and the South East is typically on a smaller scale than facilities in the Midlands and the North, but that such smaller scale (and even poorly located) rail-connected facilities can continue to play an important role in delivering modal shift – and so effort should be made to ensure such facilities are upgraded and improved to maximise their value alongside any proposals for new SRFI.
- The assessment that SRFI capacity needs to be provided at a wide range of locations, both in regions where they are currently located and, more broadly, to provide the flexibility needed to match the changing demands of the market, possibly with traffic moving from existing Rail Freight Interchanges to new larger facilities.
- Recognition that there is a particular challenge in expanding rail freight interchanges serving London and the South East. The Policy Statement says that consideration should be given to existing SRFI locations when making an application, to ensure that SRFI are strategically located and thus enable a more extensive cross-country network which unlocks the full range of benefits that an expanded network of SRFI can provide. Further, it is stated that particular consideration should be given to proposals for SRFI in areas where there is currently lesser provision (e.g. the South East).

2.2.5 National Planning Policy Framework, 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.

Overall, there is limited direct reference made to freight or logistics within the document. However, references to logistics facilities are made in terms of planning for warehousing in order to support the objective of establishing a robust and competitive economy, which outlines the following:

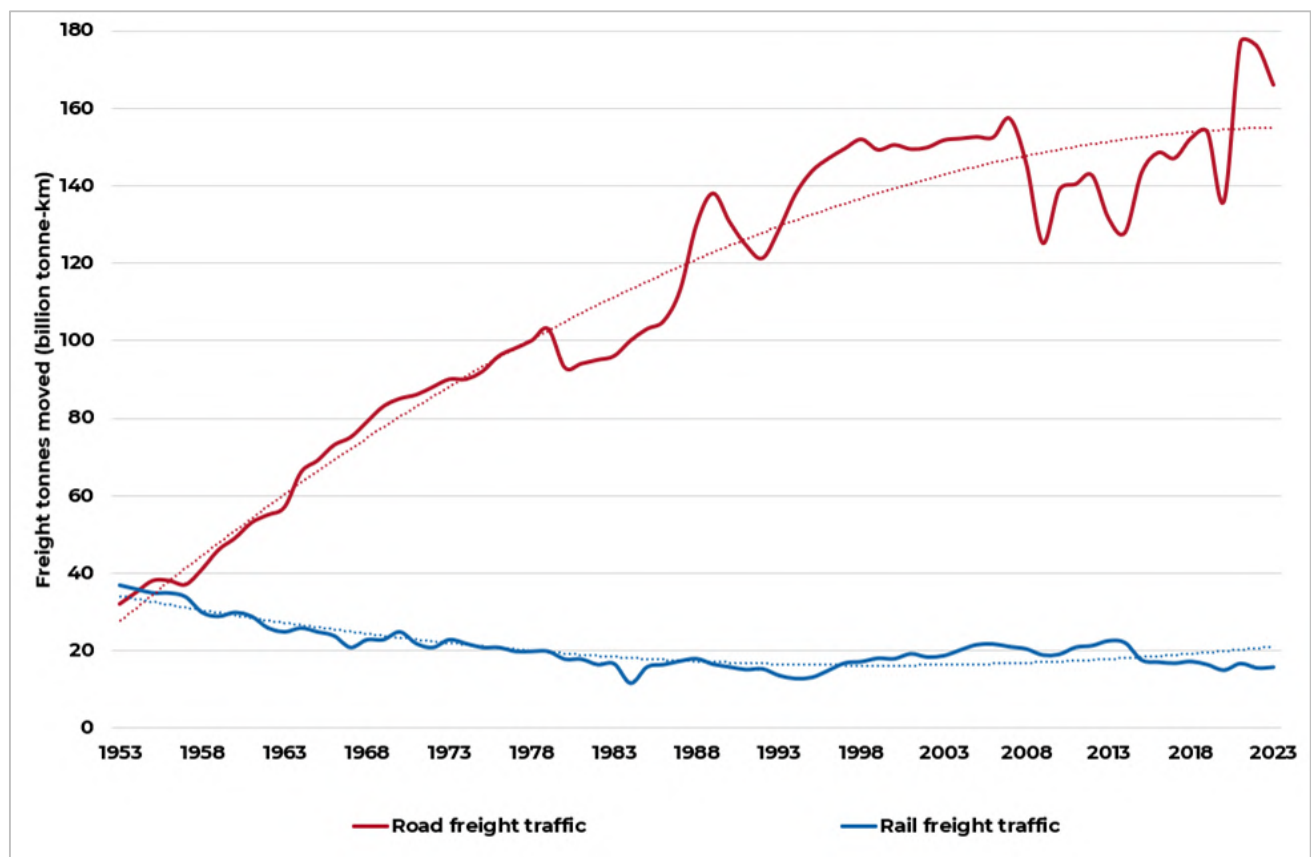
- planning policies should “pay particular regard to facilitating development to meet the needs of a modern economy, including by identifying suitable locations for uses such as laboratories, gigafactories, data centres, digital infrastructure, freight and logistics;” (NPPF, paragraph 86c) and;
- planning 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 efficient and reliable handling of goods, especially where this is needed to support the supply chain, transport innovation and decarbonisation.” (NPPF, paragraph 87b).

2.3 Opportunities and challenges for rail in logistics supply chains

Modern freight and logistics distribution services operate across a sequence of transport links in the supply chain, with the nodes between each link being represented by an interchange between different transport modes or vehicles (e.g. articulated lorry to rigid lorry, or ship to train), sometimes with intermediate storage at these interchange points.

Figure 2-1 below shows the changing fortunes of road and rail freight transport during the post-war period. Road haulage has grown from a 50% share of surface freight in the 1950s to a position of dominance today at 81%, a reflection of the greater flexibility of, and investment in, road transport and the highway network. Rail's declining share to 8% over the same period reflects the corresponding lack of investment in modernising the rail network, which has shrunk by 50% in length,³² along with a decrease in the numbers of most of the former rail freight interchanges and rail-served industrial sites.

Figure 2-1 Road and rail freight moved, 1953 to 2023



Source: Department for Transport/Office of Rail & Road

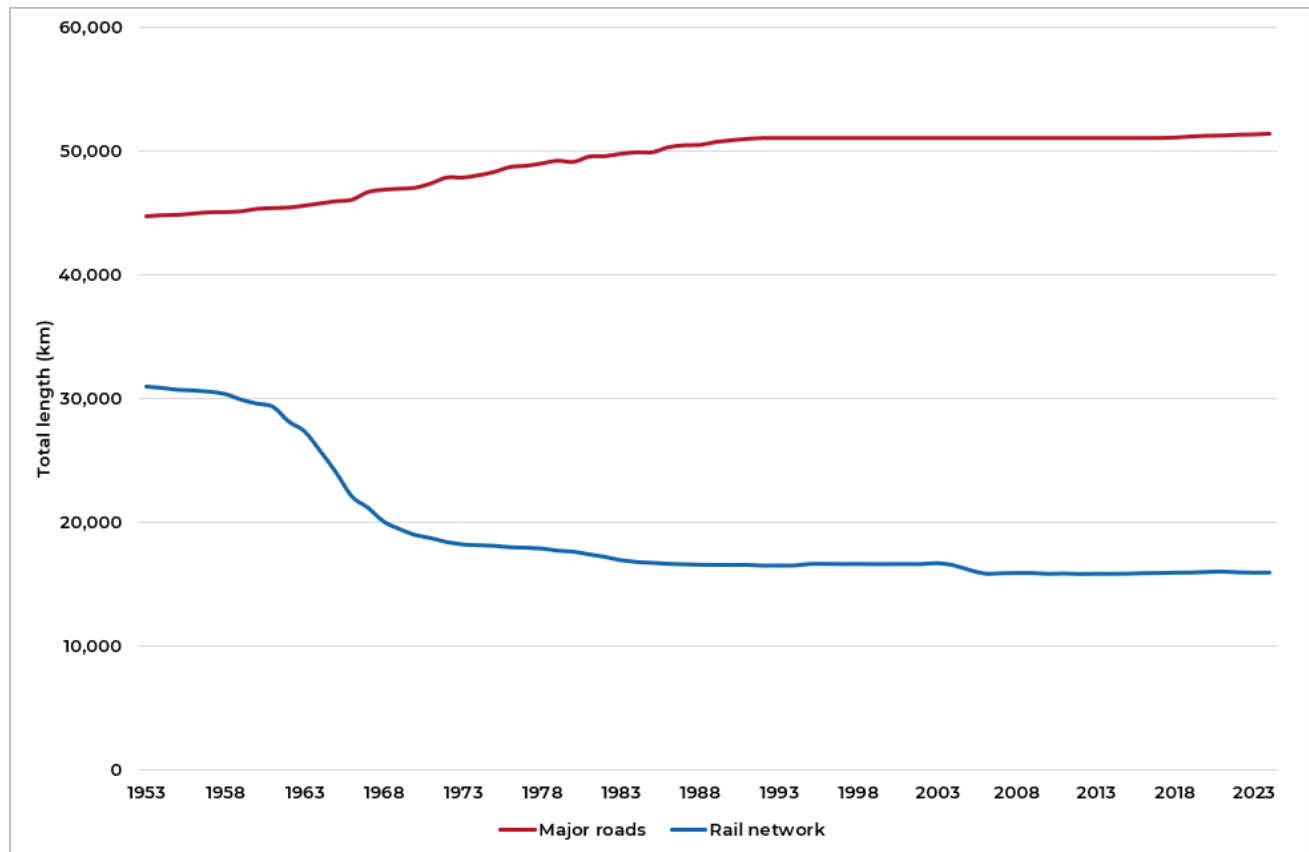
Yet the road haulage industry is now facing its own set of challenges, from cost pressures driven by labour and fuel, traffic congestion and labour shortages.

Figure 2-2 shows the comparative size and growth of the major road network and the rail network from 1953 to date, and whilst the two networks have seen contrasting

³² Transport Statistics Great Britain, Department for Transport, Office of Rail & Road

fortunes between the 1960s and 1990s, both have now levelled out. As the primary infrastructure for movement of freight, the road network may therefore increasingly struggle by itself to cater for additional growth in traffic.

Figure 2-2 Major road and National Rail network length UK



Source: Department for Transport/Office of Rail & Road

There is also a demographic challenge approaching the road haulage industry. A 2025 report from the Road Haulage Association (RHA) warns that the UK's logistics industry will require 40,000 new HGV drivers annually for the next five years to meet growing demand and to avoid any potential future driver shortages. RHA notes significant structural issues with the driving labour force including driver retention, narrow diversity and an ageing workforce. In the case of the latter, the average age of HGV drivers in the UK is 51, and 55% of drivers are between 50 and 65. This means many experienced HGV drivers could retire in the short term, leading to a sharp decline in the driver pool.³³

Given these challenges, government and business therefore wish to see more freight moved by rail, as well as to reduce the overall level of emissions produced by transport, reduce congestion on the road network and relieve the pressure on road haulage services.

³³ Lorry drivers – the vital link – attracting, training and retaining key workers in the UK supply chain, RHA 2025

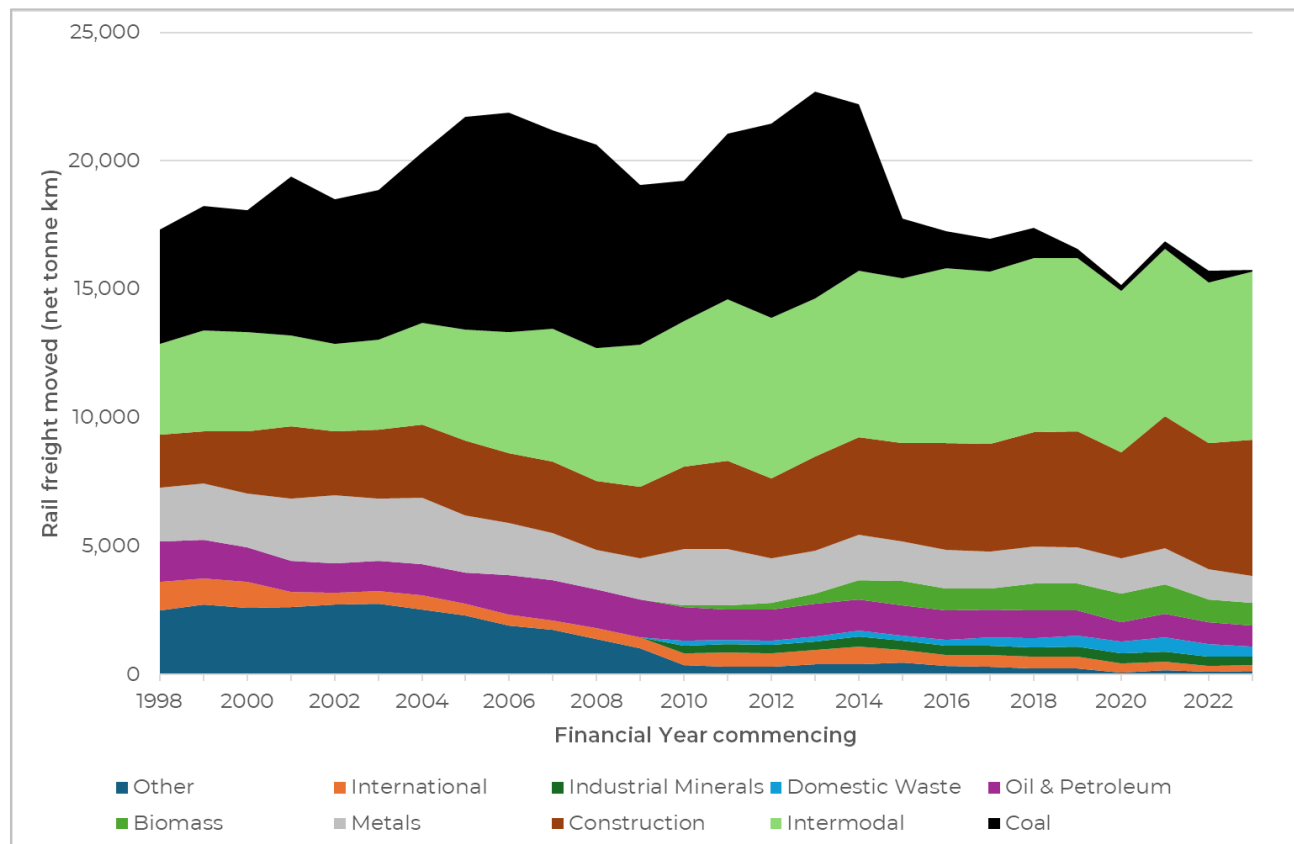
This represents an opportunity for Network Rail, rail freight operators, logistics companies and infrastructure developers to respond with new facilities and services. In so doing, there are challenges which the rail freight sector collectively, and the TfSE region particularly, would have to address, including:

- Constraints on network capacity and capability, such as competition for space with passenger trains, limits on height and width (loading gauge) for carrying containers and limits on train length and weight.
- Funding and delivering major new infrastructure projects which could address some of these constraints.
- Critically, a lack of access points for end users onto the rail network, the result of decades of rationalisation and the redevelopment of former rail freight facilities from the 1960s to the 1990s.

2.4 Rail freight market structure and growth potential

The market for rail freight has changed considerably over recent years (Figure 2-3) on the following page, in particular the elimination of coal traffic which had previously accounted for a third of all freight moved by rail. This was the result of government policy to decarbonise the electricity supply industry, combined with structural decline in heavy industry.

Figure 2-3 Rail freight tonnes moved 1998-2024



Source: Office of Rail & Road

The rail sector has compensated for the decline in coal and other industrial traffic by capturing a higher level of intermodal (containerised) traffic through the ports in response to globalisation of trade, together with increased use of rail for construction traffic and, to a lesser extent, biomass and domestic waste feedstock for power stations

Intermodal traffic is now the largest single sector of traffic moved by rail, from 29% in 2011 to around 40% in 2024, tonnes moved increasing by 14% from 5.51 to 6.26 billion net tonne-km over the same period.

The current government supports the ambitious growth target for Network Rail and the train operators of 75% in tonnes moved by rail between 2023 and 2050. It is expecting this to be taken forward by the new Great British Railways (GBR) organisation that is charged with managing the rail network infrastructure and most of the passenger rail services from 2027 onwards.

A series of preceding 'unconstrained'³⁴ growth targets set since privatisation by industry and/or previous governments have been missed by a considerable margin, but the more recent range of forecasts produced by DfT and Network Rail³⁵ have sought to account for the impact of various market, industry and infrastructure constraints (including slow progress with expanding interchange capacity) and, as such, align more closely to the current trajectory of around 15% growth anticipated by 2050³⁶. Network Rail has stated the following in relation to its most recent forecasts (which predated the 75% growth target being announced):

"Industry established and endorsed forecasts by the consultants MDS Transmodal (MDST) indicate that very strong long-term growth in demand for rail freight services should be expected between now and 2043/44, even when allowing for a wide range of possible market scenarios. These scenarios included factors that favour, and disfavour rail compared to road and considered both low and high market growth. The study forecast the tonnage of rail freight per commodity sector for 2033/34 and 2043/44, using 2016/17 as the baseline year... All modelled scenarios depict growth in the rail freight sector. However, the MDST study found that the two most considerable growth markets for rail freight are Intermodal and Construction materials...

Established rail freight forecasts were developed prior to the 2019 legislation (on GHG [Greenhouse Gas] targets) and therefore do not account for this impact. This only adds to the expectations of growth, as a step change in rail's modal share of surface freight appears essential for the net-zero commitment to be upheld.

³⁴ 'Unconstrained' is a term used by Network Rail in forecasting. In rail forecasting terms, it means that the forecasts are not restricted or limited by market, industry and infrastructure constraints, including the network's capacity.

³⁵ Rail Freight Strategy: Moving Britain Ahead (Table 1), Department for Transport, 2016; Freight & National Passenger Operators Route Strategic Plan (Page 61), Network Rail, 2019; Rail freight forecasts: Scenarios for 2033/34 & 2043/44, MDS Transmodal for Network Rail, 2019; Freight Strategy (Section 9), Final Report, Network Rail, 2021

³⁶ Intermodality 'business as usual' projection based on last 20 years of rail freight traffic outturn data

The forecasts depict unconstrained rail freight growth and provide a useful starting point for understanding the requirement for daily trains and hourly paths on any given section of railway geography. However, a forecasting model will never be able to precisely reflect actual traffic volumes and all the market opportunities or changing consumer trends that will impact the rail freight sector. The GB Freight Model, used in the MDST forecast report, did not capture entirely new market entrants, traffic derived from significant civil engineering schemes or the impact new terminal developments may have on future traffic flows. As well as changing consumer trends and expectations, these all represent opportunities to realise rail freight growth beyond what is displayed in the industry endorsed forecasts.”³⁷

In practice, a number of factors will determine the future trajectory of rail freight traffic, not least the competitive position relative to road haulage, international trade, network capability and accessibility. In the case of the latter, this includes the number, location, capability and capacity of rail freight interchanges relative to sources of demand.

As the biggest single source of rail freight traffic at present, and as the focus for this study, intermodal services carry the widest range of products amongst all the sectors of the rail freight market. Intermodal rail services operate over an average distance of around 360km³⁸ each way between origins and destinations (e.g. Southampton to Doncaster 390km, Port of Felixstowe to Leeds 320km), together with relatively short collection and delivery trips by road at either end.

To set the scale of the potential “addressable market” for rail, Table 2-1 below shows a breakdown of the current road freight market by commodity and average length of haul, against the equivalent for all rail freight and for intermodal rail freight.

³⁷ Source: Network Rail Freight Strategy 2021

³⁸ Timetable analysis

Table 2-1 Tonnes moved in GB-registered road vehicles, 2023

Commodity	Tonnes moved (billion net tonne-km)	Average length of haul (km)
Groupage (hauliers combining small loads into full-truck loads)	48.1	122
Food products, including beverages and tobacco	30.2	138
Metal ore and other mining and quarrying	15.8	68
Waste related products	12.6	65
Empty containers, pallets and other packaging	11.1	128
Agricultural products	9.7	118
Glass, cement and other non-metallic mineral products	6.7	74
Chemical products	5.3	151
Coke and refined petroleum products	4.6	105
Wood products	4.3	139
Metal products	3.9	133
Transport equipment	3.5	132
Mail and parcels	3.1	181
Household and office removals and other non-market goods	2.5	73
Machinery and equipment	2.3	120
Unidentifiable goods	1.1	164
Furniture and other manufactured goods	1.0	157
Textiles and textiles products, leather and leather products	0.8	139
Coal and lignite	0.2	152
Other goods not elsewhere classified	0.1	108
All commodities (GB-registered road vehicles)	167	107
Rail freight (all commodities)	15	160
Rail freight (intermodal)	6	340

Source: Domestic road freight statistics, Department for Transport, 2023

Table 2-1 indicates that tonnes moved by road haulage is over 11 times greater than that moved by rail, and 28 times greater than that moved by intermodal rail services. The road haulage market also operates over an average length of haul which is less than half that of all rail freight, and less than a third that of intermodal rail freight.

At first sight, this would suggest only limited prospects for capturing more freight from road haulage to intermodal rail services, particularly within the South East where the average length of haul is shorter due to the proximity of several major ports. However,

the 360km average length of haul for intermodal rail services reflects the current mix of traffic and network of inland SRFI and IRFI (see Figure 2-3, page 29 below), rather than a fixed breakeven distance. In practice, intermodal rail services currently operate over distances as short as 160km (e.g. DIRFT³⁹ to Tilbury, iPort Doncaster⁴⁰ to Teesport), bringing much of the current road haulage market (77% or 129 billion tonne-km from Table 2-1) within the commercially viable range of rail services. While the distance over which goods need to be transported is an important factor in determining whether rail freight is viable for the intermodal market, there are other factors which can combine to make a strong case for the use of rail freight.

2.5 Role of interchanges in delivering rail freight growth

Interchanges between the rail network and road transport (or sea transport at ports) address one of the challenges for rail freight referred to in section 2.3 earlier, in providing access to the rail network.

Most freight and logistics operators do not generate sufficient volumes of freight per day or week to warrant their own dedicated rail freight services, and even if they could, most do not have factories or warehouses adjacent to existing rail freight interchanges which could facilitate movement by rail. This then creates two major challenges in trying to encourage use of rail for freight movement:

- Firstly, road haulage is usually still needed to make trips at either or both ends of the rail haul. The road haulage adds cost and time to that of the rail haulage, which together may then constrain the size of the freight market where a competitive alternative exists to traditional “door-to-door” road haulage.
- Secondly, a “critical mass” of freight volume is needed to make rail freight services competitive against door-to-door road haulage (typically in excess of 30 x 40’ container loads per intermodal train in each direction). Without this level of regular business, trains then either cannot be operated commercially, or have to run less frequently (i.e. weekly rather than daily), to allow volumes to build up to trainload quantities). A less frequent service may then be less desirable to an end user, particularly one relying on daily replenishment for a production line or store network.

For rail to maximise its competitiveness, the time/distance of road haulage needed at one or both ends of the rail haul needs to be minimised, and/or the volume of freight available every day for movement by rail needs to be maximised. Interchanges are therefore critical to addressing these challenges, where these can be provided in the right locations and with suitable facilities.

Within the intermodal (containerised) sector of the rail freight market, as the largest sector and where most of the 75% growth in traffic is anticipated to come from, two types of interchange are used:

³⁹ Daventry International Rail Freight Terminal, the largest SRFI by floorspace and rail traffic, developed in three main phases since the 1990s – see Figure 2-3

⁴⁰ SRFI developed in Doncaster from 2009 onwards – see Figure 2-3

- Intermodal Rail Freight Interchanges (IRFI), which tend to be standalone self-supporting facilities using mainly existing rail-linked sites, serving a wide range of individual customers in the surrounding hinterland.
- Strategic Rail Freight Interchanges (SRFI), which tend to be greenfield or brownfield developer-driven regional distribution parks integrating warehousing, road and rail interchange facilities into a single site. The existing IRFI facilities tend to serve major occupiers based on site (e.g. Tesco at Daventry International Rail Freight Terminal (DIRFT)) but also serve other businesses in the hinterland. SRFI have not only provide a catalyst for generating rail freight traffic, but also for generating sufficient value from the land and warehousing to fund the significant costs of the rail and road connections to the transport network.

Interchange developments help consolidate local freight traffic activity into the critical mass needed to make trainload rail services, bringing together traffic from on-site occupiers and/or other local companies in the hinterland who may not wish to relocate to site, but still want access to rail services.

Figure 2-3 below shows the current geographical locations of IRFI, SRFI and ports. As shown, over half of the nine established SRFI in Great Britain are all based in the Midlands, reflecting the concentration of National Distribution Centres (NDCs) and optimal geographic position for such activities towards the centre of the country. This also highlights the lack of inland facilities within the South East and, hence, the need for new facilities to support the 75% rail freight growth target.

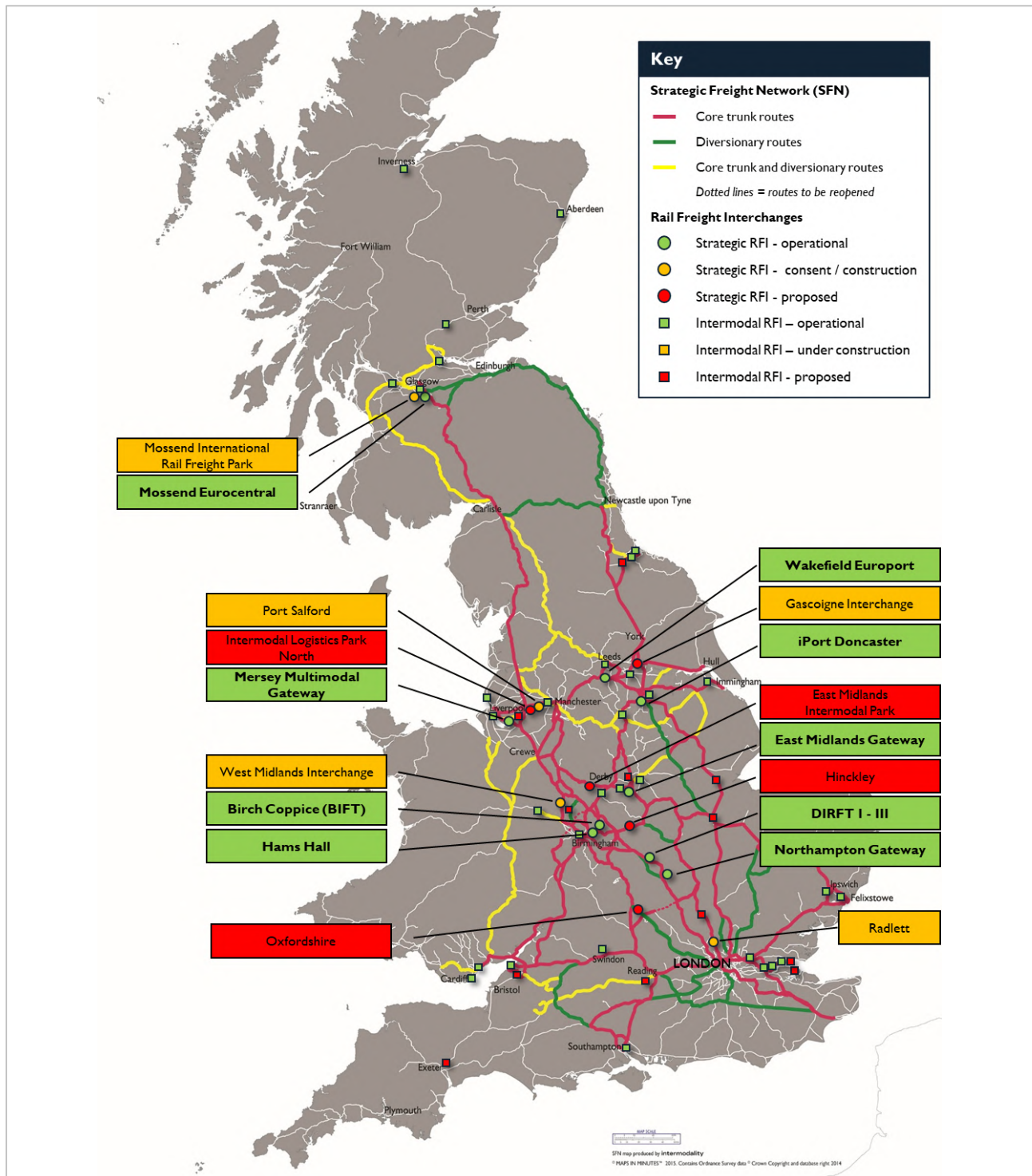
The remaining SRFI are based in Scotland and the North of England, providing locations more tailored towards that region's distribution network and associated Regional Distribution Centres (RDC). The expanding network of SRFI (see the additional sites consented or under construction in Figure 2-3) therefore includes sites with national and/or regional distribution activities. In addition, three other SRFI are under development in the North West at Port Salford (two million sq. ft), in the Midlands at West Midlands Interchange (8 million sq. ft) and at Radlett in the East of England (3.3 million sq. ft).

Some of the IRFI/SRFI sites co-exist in relatively close proximity, including (I for IRFI and S for SRFI):

- Garston (I) and Ditton (S)
- Leeds Stourton (I) and Wakefield Europort (S)
- Doncaster Railport (I) and iPort (Inland Port) Doncaster (S)
- Birch Coppice Intermodal Freight Terminal (BIFT) (S) and Hams Hall (S)
- Hams Hall (S) and Lawley Street (I)
- DIRFT (S) and Northampton Gateway (S)

These pairings are all within 16 km of each other. In addition, sites such as Trafford Park (I) and DIRFT (S) each have two to three interchanges co-located, each having distinct groups of rail services and customers.

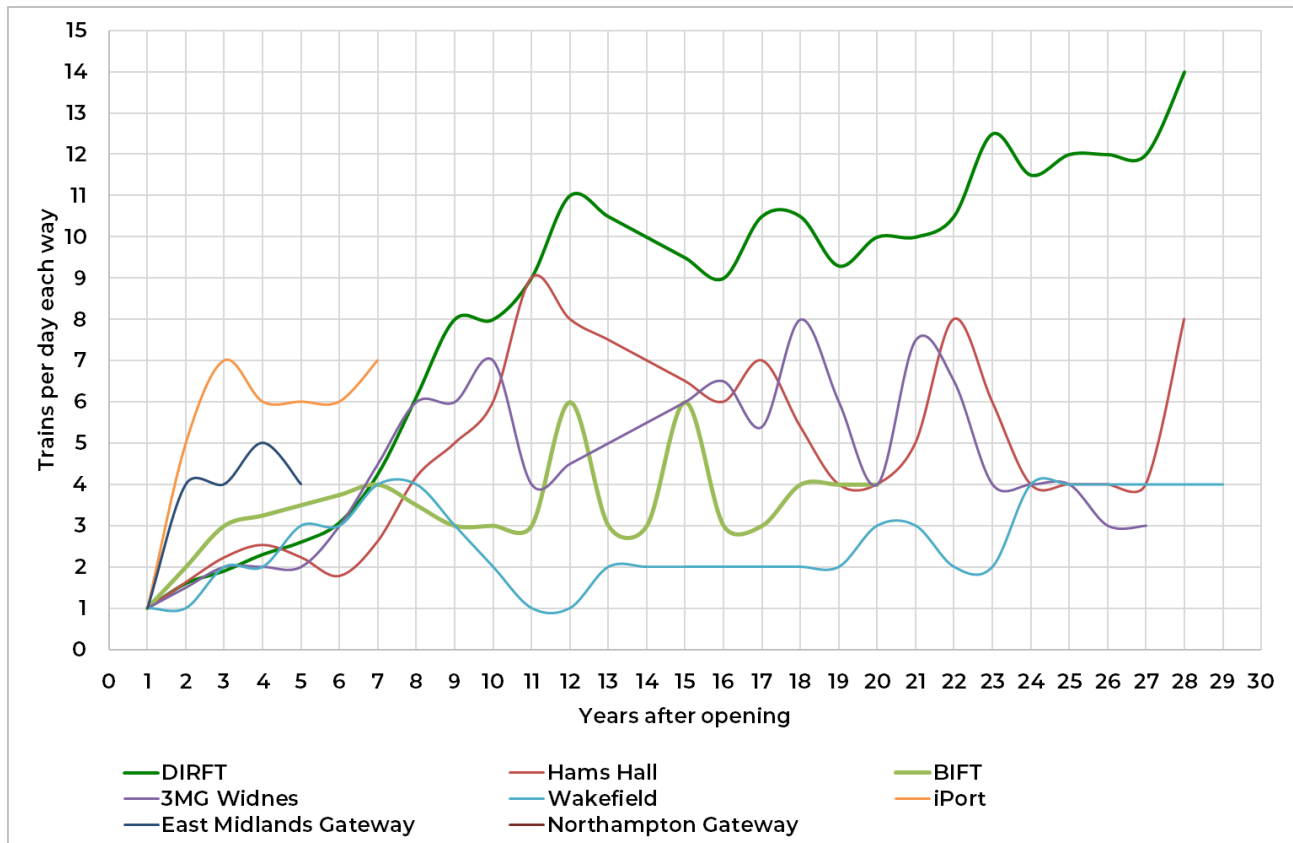
Figure 2-3 Map of intermodal rail freight interchanges



Source: Intermodality, 2025

Figure 2-4 below shows the growth in traffic from each of the operational SRFI in England from year of opening. It is notable that the most recent SRFI at iPort and East Midlands Gateway have seen much faster growth in the years following opening than the older, first-generation SRFI. This suggests increasing penetration of intermodal rail services into the wider freight market, with less initial inertia in converting users to rail.

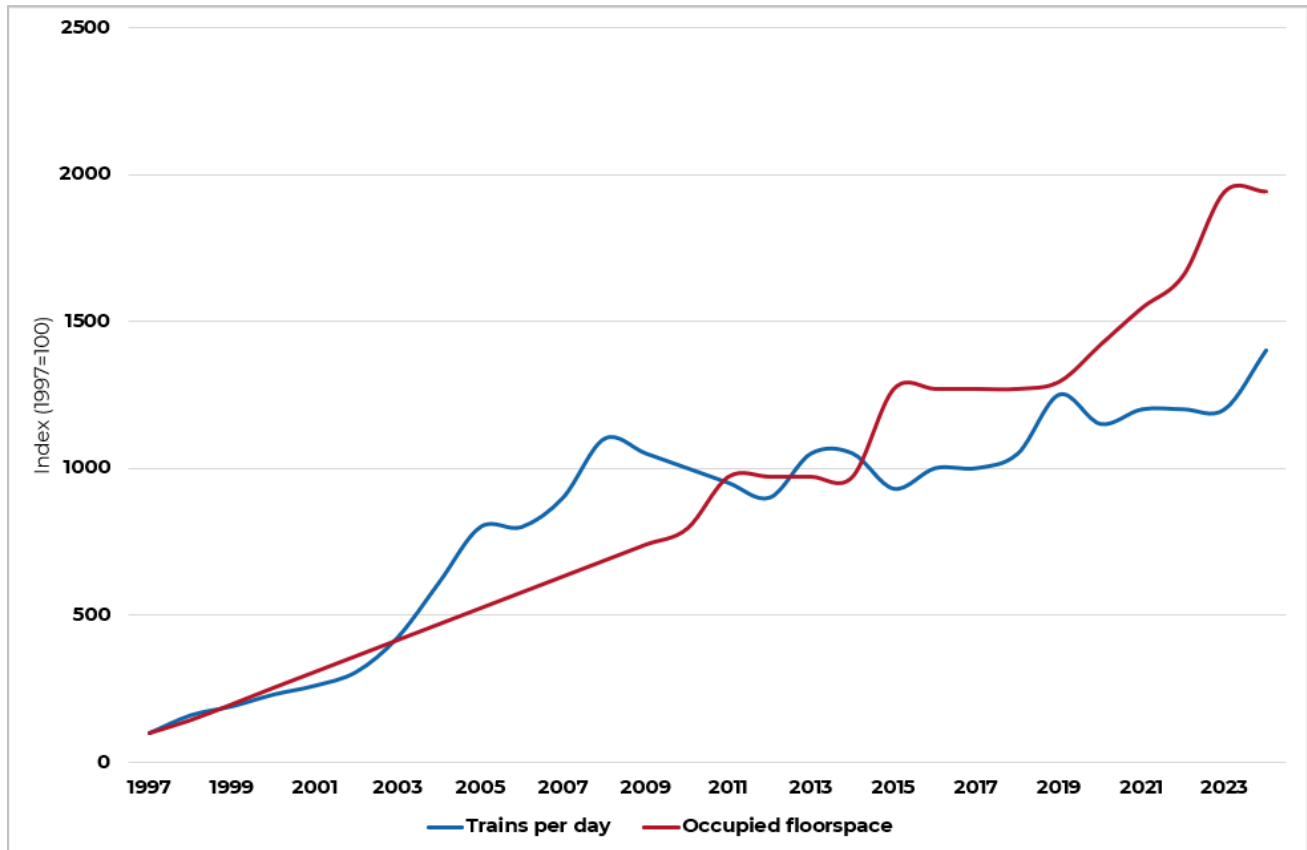
Figure 2-4 Evolution of rail traffic through operational SRFI in England



Source: *Intermodality*, 2025

Traffic growth from SRFI also reflects the level of associated floorspace within the immediate hinterland of the site. This is particularly the case with DIRFT, which has latterly achieved up to 14 trains per day, primarily in domestic traffic (the site originally conceived for Channel Tunnel services) but also in maritime and continental traffic. Figure 2-5 below shows how rail traffic and floorspace have grown in parallel.

Figure 2-5 Growth in floorspace and rail freight traffic at DIRFT



Source: *Intermodality*, 2025

The occupiers at these established SRFI include logistics companies and retailers who would otherwise locate at road-served distribution parks. As anticipated by government policy over two decades ago,⁴¹ the first companies to occupy warehouses included those with little or no use of or exposure to rail freight services (e.g. Eddie Stobart and Tesco at the SRFI at DIRFT). Over time, an increasing number of occupiers on site and in the surrounding hinterland have started using rail on a regular basis. Rail services are used to connect SRFI to the ports and mainland Europe, as well as between SRFI and IRFI.

The customer catchment areas of SRFI and IRFI can vary considerably. Traffic survey evidence from Prologis, the developer and operator of the SRFI at DIRFT, suggested most traffic delivered by rail is destined for users within a relatively small catchment area (25 km).⁴² This is because the further the destination of the goods is by road from a rail freight interchange, the less competitive the rail element of the journey becomes.

⁴¹ Strategic Rail Freight Interchange Policy, Strategic Rail Authority March 2004, NNNPS 2014/24

⁴² DIRFT III Development Consent Order Application, Need Report, Lichfields for Prologis 2012

Discussions with Maritime Transport at the East Midlands Gateway SRFI suggest the catchment area was initially up to 100 km but has since decreased below 30km. As the new rail-based services and associated economics have become established, so customers closer to the site are able to benefit from a more competitive service compared to those further away – the latter then either reverting to road haulage or (where available) switching to another closer rail freight interchange.

In terms of the role of SRFI in supporting future growth, each new SRFI generates an average of six new trains per day to and from the sites (i.e. 12 train movements). This represents around 5% growth based on the current level of intermodal rail traffic (260 trains per day). IRFI each generate around 4.5 new trains (nine train movements), representing 3% growth in intermodal rail traffic.

2.5.1 Role of additional interchanges in delivering the government's rail freight growth target

Setting this in further context, the government's 75% growth target would represent an increase in traffic from 680 to 1,190 trains per day. With around half of the extra 510 trains expected to be generated by intermodal traffic through SRFI and IRFI, this suggests the equivalent of 21 new SRFI or 28 new IRFI delivered across Great Britain over the next 25 years, assuming no further growth was achieved through existing SRFI and IRFI.

To consider further the role and growth potential of IRFI/SRFI, GBRTT commissioned a national study on identifying the role and potential for IRFI in 2022.⁴³ This suggested that there is a relationship between IRFI/SRFI provision and regional indices population, warehousing, road freight traffic as was demonstrated in regions with well-developed IRFI/SRFI provision e.g. the Midlands, North West and Yorkshire & Humberside. Using these examples, the remaining regions with little or no interchange provision (including the South East) could, in comparison generate around 100 extra intermodal trains per day each way through the development of about 22 IRFI or 14 SRFI in the “undiscovered” regions. This could amount to an estimated 75% growth over the current level of traffic towards achieving the government's growth target for 2050.

2.6 Wider benefits of rail freight and rail freight interchanges

Efficient freight and logistics have long been recognised as key drivers of economic growth. Public policy initiatives have sought to create favourable conditions for the planning and development of rail freight services and infrastructure. In response, the freight industry (users, operators, developers, Network Rail) has increased investment and shifted more traffic to rail.

The NNNPS⁴⁴ reinforces the need for additional rail freight interchanges to stimulate growth in rail freight traffic, stating the “compelling case” for rail freight interchange expansion. This reflects the wider role that interchanges perform beyond simply providing transfer points between different modes of transport. To date the relatively

⁴³ Included in the 'Intermodal rail freight interchanges: levelling up regional provision, Market Assessment Report', Intermodality for GBRTT, 2022

⁴⁴ See Section 2.2.4

small number of SRFI built to date (nine) have not only generated 45 trains each way per day of new-to-rail business (around 3,400 long-distance lorry loads removed from the road network) but have also created over 34 million sq. ft of floorspace and employment in the order of over 33,000 employees.⁴⁵ Each site represents between £0.5 billion and £1 billion of initial investment, into local economies during construction and once operational (including developer contributions and occupier business rates).

However, the NNNPS specifically references London and the South East as a challenge for expanding rail freight interchange capacity, for the reasons explained later in this report, primarily related to securing planning consent.

Table 2-2 shows the relatively lower capture of benefits in the South East compared to other regions, which can be attributed to the current rail service patterns which in turn reflect the limited availability of rail freight interchanges and associated rail-served warehousing. Key regional concentrations of benefits are currently observed in:

- Power stations and industrial centres in Yorkshire and the Humber and NW England;
- Logistics and manufacturing hubs in the Midlands and Wales; and
- Container traffic flowing from deep-sea ports to inland domestic terminals across the country, from the ports of South/East England to the Central Belt of Scotland.

Table 2-2 Rail freight economic contribution across the UK

Region	Total benefits (£m, 2018/19)	% share (of total)	User benefits (£m, 2018/19)	Social benefits (£m, 2018/19)
North East	100	4%	65	35
North West	225	9%	125	100
Yorkshire & Humber	860	35%	735	125
East Midlands	375	15%	300	75
West Midlands	95	4%	35	60
East of England	190	8%	45	145
London	75	3%	35	40
South East⁴⁶	120	5%	45	75
South West	45	2%	10	35
Wales	260	11%	200	60
Scotland	105	4%	45	60

Source: Assessing the Value of Rail Freight, Deloitte for Rail Delivery Group, April 2021

⁴⁵ Based on 1 employee per 1009 sq. ft (1 per 95 sq. metres), Critical Infrastructure: Driving Employment Growth Within The UK's Logistics Sector, Prologis 2023

⁴⁶ TfSE area plus Buckinghamshire and Oxfordshire

3 Rail freight growth and the South East

This chapter explores the potential for intermodal rail freight in the South East, an area that currently lacks any operational or proposed Intermodal Rail Freight Interchanges (IRFI) or Strategic Rail Freight Interchanges (SRFI). Drawing on data from Network Rail and the Great British Railways Transition Team (GBRTT), the opportunity for modal shift from road to rail in the South East is quantified, and the potential benefits of new interchange capacity in the area are explored. Chapter 4 then considers ways to address barriers to and support growth in the intermodal sector in the context of the overall opportunity.

3.1 The scale of opportunity

As noted earlier in section 2.1.1, the National Networks National Policy Statement (NNNPS) highlights the particular challenges associated with delivering enhanced interchange capacity in the South East. These include constraints on land availability, competing demands for land use, and a lack of political or community support for larger SRFI developments (see case studies in Section 4.3).

Within the UK, the South East region accounts for 14% of Gross Value Added⁴⁷ and 14% of population⁴⁸, 15% of warehousing⁴⁹ and 11% of road freight traffic.⁵⁰ However, unlike regions such as the West and East Midlands, Yorkshire & Humberside and the North West, which have much lower shares of GVA and population and similar levels of warehousing and road freight, the South East has no IRFI or SRFI, either operational or seeking planning consent.

Network Rail has provided TfSE with a breakdown of current rail freight services operated to, from and within Network Rail's Southern Region. Although this differs in geographic extent to the TfSE area, it still provides a useful proxy. Of the 800 million tonne-km generated in 2023/4 (excluding Network Rail's internal engineering traffic), intermodal traffic accounted for 38% of the total, slightly lower than the 41% share of national traffic. Of the remainder, 49% is accounted for by construction traffic, considerably higher than the equivalent 34% share of national traffic.

Network Rail has also supplied illustrative forecasts as to how current rail freight flows might change if the 75% growth target was achieved by 2050. The forecasts are not constrained by network capacity for the additional trains and, for intermodal services, assume the availability of suitable loading gauge clearances.

Currently, rail freight services linking the port of Southampton and the Channel Tunnel with the rest of the country transit across the South East. These services relieve the regional road network (particularly the M2, M3, M20, M25, M26, A2, A20 and A34) of up to 1,300 HGV loads per day. The region therefore benefits in terms of highway relief from

⁴⁷ Regional gross value added (balanced) by industry: all International Territorial Level (ITL) regions (2024), Office for National Statistics, 2025

⁴⁸ 2021 Census, Office for National Statistics

⁴⁹ Savills' assessment for the TfSE Warehousing Study, 2025

⁵⁰ Department for Transport

the operation of these rail freight services and the inland interchanges which they serve elsewhere in the country, but for companies based within the South East (excluding those based on the Port of Southampton) there are currently no means to access the rail network with containerised goods.

Around three-quarters of all intermodal services travel to and from the ports in the “Greater South East,” i.e. the South East, London and the East of England through ports on the Solent, Thames and Haven. Much of this port-related traffic, particularly from the Solent and Thames, would arguably not warrant being moved by rail to any new interchanges in the South East itself. There are, however, exceptions to the perception about where rail freight can be competitive, one notable example being the daily rail freight service which directly links the ports of Southampton and London Gateway by rail (190km each way) rather than by sea or road.

Sources of demand for intermodal rail freight from companies based in or delivering to the TfSE area could include:

- Deep-sea and shortsea ports with established rail services, which are sufficiently distant to make rail freight services more competitive against road haulage, such as Felixstowe (>160km), Liverpool Seaforth (>300km) and Teesport (>320km).
- Inland IRFI and SRFI typically more than 160km distant, connecting National Distribution Centres in the Midlands and beyond with Regional Distribution Centres in and around the TfSE area. Examples include Birch Coppice SRFI (>160km), West Midlands Interchange SRFI (>180km), East Midlands Gateway SRFI (>200km), iPort Doncaster (>300km).
- Mainland Europe via the Channel Tunnel, linking areas latterly generating rail traffic to/from GB e.g. the Ruhr (>500km), Northern Italy (>1,100km) and Spain (>1,600km).

To quantify the potential scale of the opportunity, the study by GBRTT in 2022⁵¹ was undertaken. It indicated that, based on intermodal traffic in regions with more established IRFI/SRFI provision, the South East should generate around 27 trains per day each way when measured proportionately against the same indices of population, warehousing, road freight traffic and intermodal rail services.

To further refine this high-level estimate, reference can be made to existing road freight traffic between the South East and the rest of the country (the addressable market). At present the South East generates around 231 million tonnes of road freight traffic to and from the rest of Great Britain, the equivalent of 25 billion tonne-km and an average length of haul of 110km.⁵² Whilst the average length of haul is relatively short by comparison with current rail freight services, if this is broken down further by region a different picture emerges, as set out below in Table 3-1.

⁵¹ Included in the ‘Intermodal rail freight interchanges: levelling up regional provision, Market Assessment Report’, Intermodality, 2022

⁵² Road Freight Statistics, Department for Transport 2024

Table 3-1 Regional road freight to/from the South East 2023

Region	Million tonnes	Million tonne-km	Average length of haul km
North East	No data	No data	-
North West	1,545	5	309
Yorkshire & Humber	1,391	5	278
East Midlands	3,165	16	198
West Midlands	2,947	14	211
East of England	3,332	28	119
London	1,573	24	66
South West	2,953	19	155
Wales	3,611	6	602
Scotland	No data	No data	-

Source: Road Freight Statistics, Department for Transport 2024

If the current national share of total road and rail freight tonne-km accounted for by intermodal rail services (3.6%) were applied to the South East, the equivalent of eight trains per day each way could be generated by the South East. This could remove over 700 long-distance HGV loads from the road network. This could be achieved if rail services were able to target the longer-distance flows from the South East to the North West, Yorkshire & Humber, Midlands and Wales, and excluded the container traffic moved by road to and from the port of Southampton.

This would represent a do-minimum/worst case scenario, or one-third the level of potential traffic identified in the GBRTT study. In terms of interchange capacity, eight trains per day would equate to at least one IRFI and/or SRFI, the latter generating an average of 4.2 million sq. feet of warehousing and 4,100 jobs, or two IRFI, increasing the accessibility for businesses to the rail network.

3.2 Main findings

IRFI and SRFI provide a critical catalyst for growing intermodal rail traffic, now the largest part of the rail freight market. They can provide more than simple transfer points between modes, by helping signpost and attract business, floorspace and employment, as well as reducing growth in long-distance HGV traffic and associated contribution to emissions⁵³, congestion⁵⁴ and accidents.⁵⁵

⁵³ HGVs accounted for 16% of domestic transport greenhouse gas (GHG) emissions in 2023, source Department for Transport Overview of the road freight sector July 2025

⁵⁴ HGVs accounted for 4.9% of all motor vehicle traffic in Great Britain in 2024, source Department for Transport Road Traffic Statistics

⁵⁵ HGVs were involved in 2% of all road traffic statistics in Great Britain in 2023, source Department for Transport Road Safety Statistics

There is considerable untapped potential for intermodal rail freight to and from the South East, exemplified by the scale of the addressable market represented by inter-regional traffic currently moved by road haulage to and from the South East.

The scale of the potential opportunity is reflected in the interest shown by promoters and their prospective end users in developing interchanges in the South East. Three attempts have been made to secure consent for SRFI in Bexley and Kent, along with two attempts in Slough, all of which ultimately failed on appeal. Promoters have faced widespread opposition from communities and local authorities, ultimately failing to convince local authorities or the Secretary of State that consent should be granted.

Yet, without expansion of interchange provision, businesses in and around the TfSE area will continue to rely on road haulage (with higher emissions) for movement of goods across the highway network. They will continue to locate on sites without rail access, perpetuating the lack of growth in new rail freight services. Note too that growth in rail freight interchanges in other parts of Britain, and prospective connecting rail services, will also be constrained to an extent by the lack of traffic to and from the South East.

Local planning authorities will have a critical role to play in determining new or expanded major employment sites in areas close to the strategic rail freight network, ideally where main line connections already exist, through the provision of suitable land in local plans.

4 Catering for intermodal rail freight growth

This chapter explores, primarily through case studies, the ways in which some of the main barriers to catering for intermodal rail freight growth (through the delivery of new rail freight interchanges) could be addressed.

4.1 Site identification for rail freight interchanges

The National Networks National Policy Statement (NNNPS) and the National Planning Policy Framework (NPPF) both make the case for a compelling need to expand the network of intermodal interchanges, but the rationalisation of rail freight facilities during the last 50 years has meant that many areas across the TfSE area either no longer have any interchange facilities, and the few “legacy” sites which still exist often suffer from poor location, accessibility, capacity or facilities. This in conjunction with the competition for land availability from the need for housing and employment facilities in the crowded South East has also resulted in a shortage of suitable Strategic or Intermodal Rail Freight Interchanges (SRFI and IRFI) and any supported warehousing.

Independent research from as far back as 1999 highlighted the challenge of locating large freight terminals within established urban areas. Existing rail freight sites typically lacked adequate space, while much of the former network of urban rail freight facilities had often been sold and redeveloped. Ideal locations required large sites around or between urban areas where strategic road and rail networks intersect, areas often protected by green belt designations or restrictive planning regulations. The research warned of the limited number of rail accessible sites in a local authority area with potential for rail freight. The research suggested that the priority for such sites would be to retain/secure rail freight development on them, over-riding other demands such as the need to develop housing on brownfield sites, or to retain low-grade farmland for agriculture as part of an urban containment strategy because once the rail freight connectivity/capability of a site is lost, it is often prohibitively expensive to reinstate and the rail capability of the site (and the opportunity associated with the ability to transport goods by rail) is therefore rendered null and void.⁵⁶

4.2 Planning challenges for rail freight interchanges

The recently updated National Planning Policy Framework (NPPF) now makes some, if limited, reference to the need for local authorities to prepare local plans which consider the needs of freight and logistics infrastructure and development. It is stated that:

- 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

⁵⁶ Rail Freight Growth and the Land Use Planning System, Sheffield Hallam University 1999

operations at a variety of scales and in suitably accessible locations that allow for the efficient and reliable handling of goods, especially where this is needed to support the supply chain, transport innovation and decarbonisation.” (NPPF, paragraph 87b).

The references to “suitable locations” and “the specific locational requirements of different sectors” in NPPF are intended to recognise that freight facilities need to be located near strategic transport networks to facilitate efficient distribution.

Despite this, feedback from the freight and logistics sector⁵⁷ indicates that the current planning approach frequently fails to provide the land and infrastructure required by the sector. Specific challenges include:

- Land allocation conflicts: optimal sites are often lost to competing uses - such as housing development or other higher-value projects - leaving freight operators with limited options for developing consolidated hubs near rail networks.
- Insufficient recognition of the role of interchanges: there is a limited understanding among planners of the strategic importance of interchanges in creating efficient supply chains (see Chapter 6). The planning framework tends to focus narrowly on traditional land use considerations rather than recognising the broader infrastructural benefits that IRFI provide, such as enabling multi-modal integration and supporting regional economic development.
- Lack of inter-authority co-operation: effective planning for interchanges requires co-ordination beyond local boundaries. Yet, the current system does not adequately facilitate co-operation between local authorities, resulting in fragmented planning that fails to address the needs of a regional freight network. There is some precedent for cross-border co-operation and planning for freight facilities between local authorities, but it is limited and increasingly dated. There is a significant role for the Sub-national Transport Bodies such as TfSE, and, in turn, for new Strategic Authorities such as Sussex and Brighton and Hampshire and Solent, to play in raising awareness of the need to plan at the appropriate spatial scale for freight facilities and supporting efforts by local planning authorities to do so.

A more holistic approach is needed, which recognises the critical role of interchanges in consolidating freight flows near railway networks, and that also supports regional co-ordination. Enhancing the planning framework in this way would not only optimise infrastructure investment but also support the development of a resilient, efficient, and sustainable freight network across the country, and so contribute to the realisation of the economic and environmental objectives of the NPPF itself.

4.3 Planning case studies in and around the TfSE area

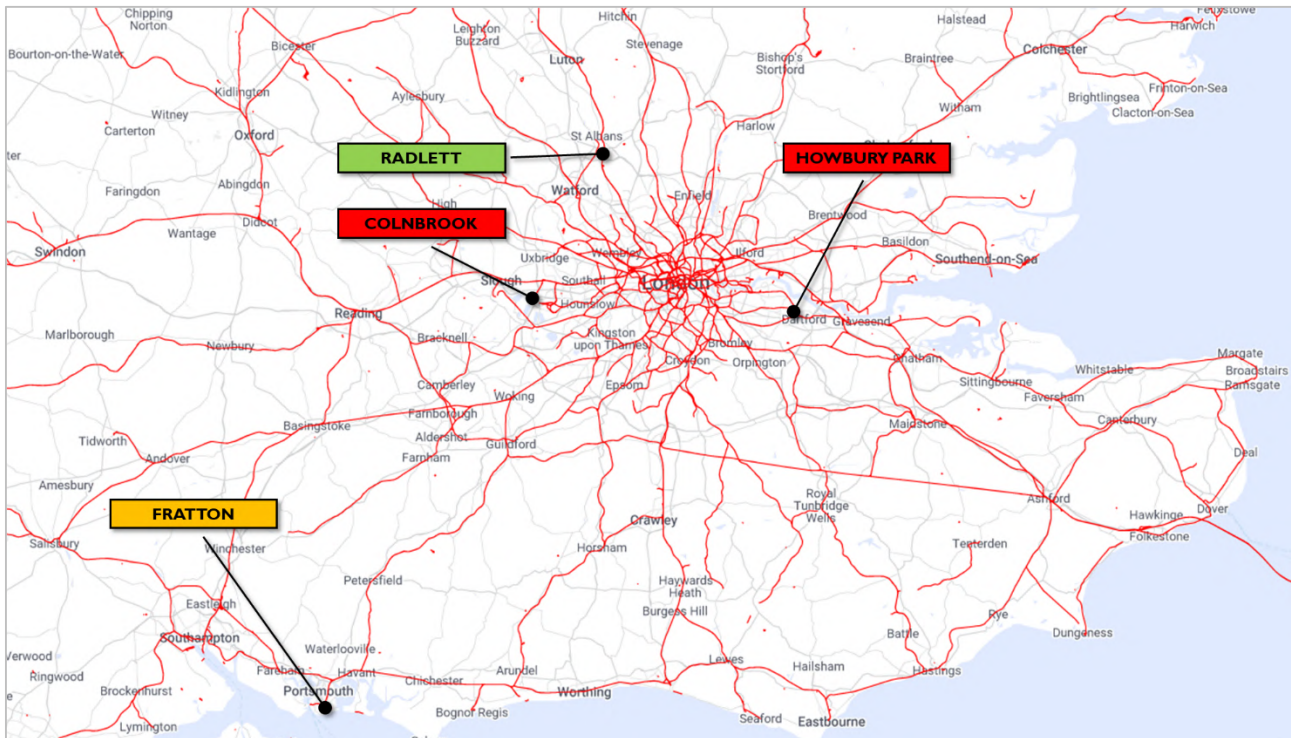
In the 1990s, the Strategic Rail Authority (SRA) envisaged three or four new Strategic Rail Freight Interchanges (SRFI) around the M25 to serve London and the Greater South East, supplemented by other Intermodal Rail Freight Interchanges (IRFI). The history of SRFI development in and around the South East exemplifies the challenges of delivery as acknowledged by the Strategic Rail Authority (SRA) and latterly by the NNNPS. The following case studies highlight the real-world challenges encountered by promoters,

⁵⁷ National Infrastructure Commission (2018), [Freight Study Call for Evidence](#)

when attempting to develop rail freight interchanges in and around the TfSE area through the public planning process.

These examples illustrate specific issues related to site selection, environmental constraints, and demonstrating a compelling/over-riding need for development. Figure 4-1 below shows the respective locations and status (green under construction, orange not in use at present, red refused planning consent). Note the map excludes the proposed SRFI east of Maidstone (Kent International Gateway) which was refused planning consent in 2010.

Figure 4-1 Map of case study sites in and around the TfSE area



4.3.1 London International Freight Exchange/Slough International Freight Exchange SRFI

In 2001, a proposal for the London International Freight Exchange (LIFE) was submitted by developer Argent. This project aimed to establish a SRFI near the M4/M25 motorway intersection and in proximity to Heathrow Airport. The scheme, within an area of quarrying activity, proposed an intermodal terminal integrated with 2 million square feet of rail-served warehousing, with direct rail access to the Great Western Main Line. The planning authorities refused consent, reasons cited including:

- a lack of a clear and compelling need to relieve congestion; and
- insufficient evidence that the proposed facility would address existing freight capacity challenges.

A decade later, a proposal for 'Slough International Freight Exchange' (SIFE) was resubmitted for the same site by a different developer (Goodman) (Figure 4-2 below).

Although the proposal retained most of the original plan, it too was refused planning consent on appeal in 2016. The Secretary of State's decision highlighted the significant environmental impact on protected areas, particularly the Green Belt and the need to protect a "strategic gap" between settlements, which could not be justified by the benefits offered by the scheme. Such challenges led to the scheme being abandoned, the site now falling within the area of interest for expansion of Heathrow Airport itself.

Figure 4-2 Slough International Freight Interchange SRFI



Source: FCPR Environment and Design Ltd (for Goodman)

4.3.2 Howbury Park SRFI

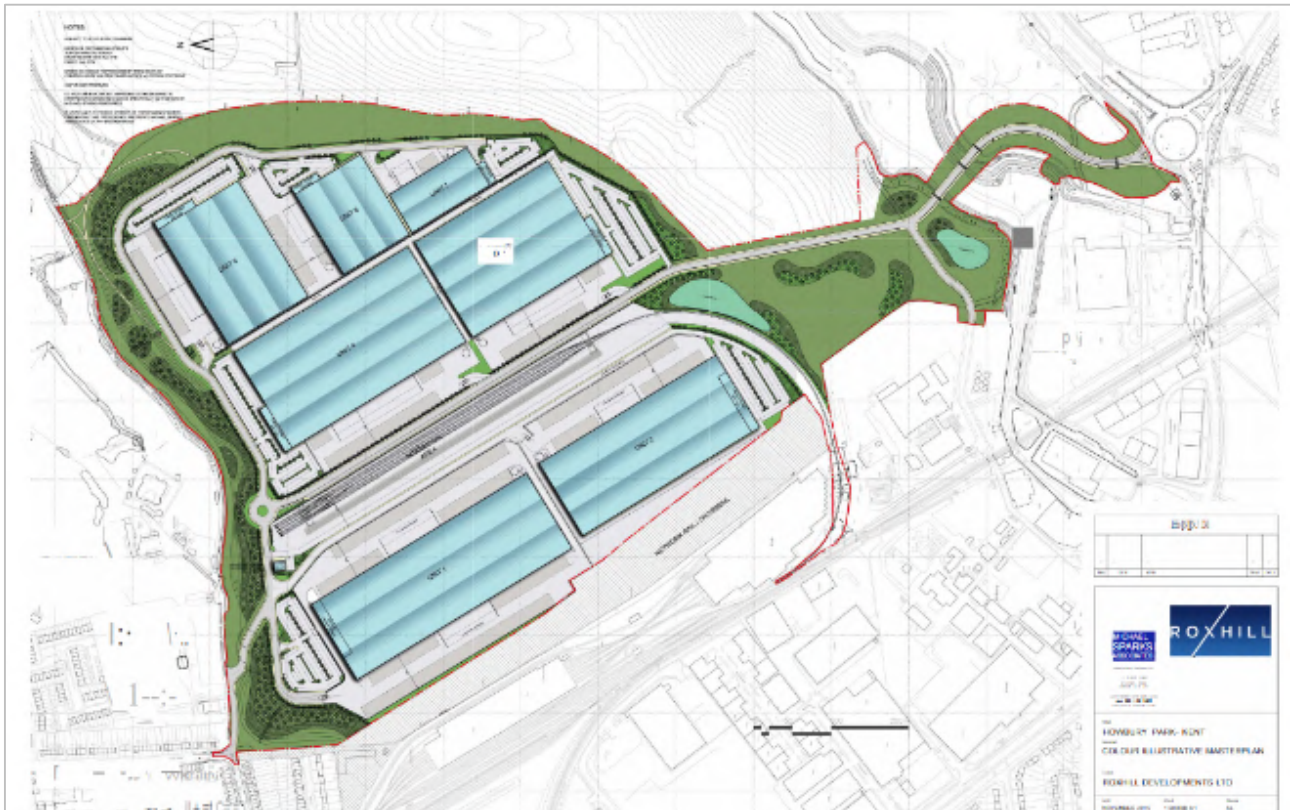
The proposal submitted by Prologis sought to develop a Strategic Rail Freight Interchange on agricultural land in Bexley. Like LIFE/SIFE, the scheme proposed an intermodal terminal integrated with two million square feet of rail-served warehousing, with direct rail access to the North Kent Main Line and the M25/A206 junction with the Dartford Crossing. The scheme was refused planning consent by Bexley Council but subsequently granted on appeal in 2007 with support from the Strategic Rail Authority (SRA), Network Rail and the Mayor of London. However, the financial recession that followed in 2008 prompted Prologis to halt the project. Nearly a decade later, a new proposal was submitted by Roxhill in 2015 (Figure 4-3 below). With support from Network Rail, Bexley Council granted consent, but this time the decision was overturned by the Mayor of London, who argued that:

- The "very special circumstances" justification for the development was inadequate, and the environmental harm, particularly to the Green Belt, outweighed any potential benefits.

- The development of the London Gateway port reduced the need for additional interchange capacity in the area.

The subsequent appeal was ultimately refused by the Secretary of State and no further proposals have yet been made.

Figure 4-3 Howbury Park SRFI



Source: Roxhill Developments (now part of SEGRO), second application proposals

4.3.3 Radlett SRFI

The Radlett project dates back to 2002, following interest from Railtrack in establishing a major rail freight interchange on the site, a former aerodrome, V-bomber factory and quarry which was latterly crossed by the M25 motorway. In 2006 Helioslough (now SEGRO) submitted a proposal for an SRFI with an intermodal terminal integrated with 3.3 million square feet of rail-served warehousing, with direct rail access to the Midland Main Line and the A414, linking with M25 Junctions 21a and 22. Of the 1,000 acres included in the scheme, 20% would be used for the SRFI with the remaining 80% used for landscaping and a country park (Figure 4-4 below).

Despite its ambitious scope and support from the SRA and Network Rail, the proposal was refused planning consent, with a subsequent appeal rejected in 2008. The Secretary of State ruled that the development was inappropriate for the Green Belt, that the environmental harm could not be outweighed by the benefits, and that the appellant had failed to demonstrate that no other site could address the need for development. The scheme was resubmitted in 2009 and again refused consent, the second appeal

also dismissed by the Secretary of State (over-riding the Planning Inspectorate recommendation that consent be granted) on the basis that:

- the proposal did not clearly demonstrate that no alternative sites could meet the need for further rail freight interchanges in the area; and
- the environmental impact, particularly on the Green Belt, was substantial and could not be justified by the benefits offered.

The developer then sought a High Court review, which resulted in the appeal decision being quashed in 2011. A “minded to grant” decision followed in 2012, and consent was finally granted in 2014. However, in 2015 the District Council challenged this decision, proposing that the site be allocated instead for residential development as part of the Local Plan. The Planning Inspectorate Inquiry into the Local Plan expressed concerns about the counterproposal, which led to the District Council abandoning the proposals.

The scheme then faced a further challenge when, following the decision by the County Council to sell land needed for the SRFI, an application was made by a group of individuals to the High Court to challenge this decision, dismissed in June 2024. After almost 20 years of planning hurdles, the project has commenced initial infrastructure works, including the new underpass through the Midland Main Line for the new rail access. It is expected to become operational in 2028 – the only survivor of the original SRA proposals for a ring of SRFI around the M25.

Figure 4-4 Radlett SRFI



Source: SEGRO

4.3.4 Fratton IRFI, Portsmouth

At Portsmouth International Port, efforts began in the late 1990s to identify a suitable site for a rail freight interchange to support the port's container operations. A site within the former Fratton Goods Yard was chosen, utilising an existing disused main line connection, the rest of the site having been lost to retail development.

With support from European funding via the Regional Development Agency South East Economic Development Agency (SEEDA) in 2007, a 300-metre siding and apron were constructed. Critically, use of Permitted Development rights⁵⁸ enabled the facility to be constructed by the rail industry on railway operational land, without requiring a lengthy or uncertain planning application process.

A pilot intermodal service commenced in 2009, which combined separate train portions from the ports of Portsmouth and Southampton at Eastleigh, for onward long-distance movement to the North of England. However, with a relatively small throughput of containers and customers compared to Southampton (20,000 per annum for Portsmouth against one million per annum for Southampton), with much of the target traffic already moved by Portsmouth International Port's in-house road haulage operation, and cancellation of the "twin-port" rail service, the pilot service was not extended into full operation. Nevertheless, the Fratton site has been safeguarded and integrated into a broader redevelopment of local depot facilities, providing a multi-role facility supporting freight and passenger operations. This demonstrates that:

- existing rail connections can offer a cost-effective solution, especially when Permitted Development protocols on operational railway land are utilised; and
- the success of such projects is highly dependent on a sustained critical mass of customer interest, as well as "hub and spoke" rail freight services able to combine less-than-trainload volumes from multiple locations.

4.4 Case studies from outside of the South East

Despite the challenges of delivering rail freight interchanges in and around the South East, there are examples of positive engagement and outcomes elsewhere in England, between scheme promoters, local authorities and communities, including the examples outlined below.

4.4.1 DIRFT SRFI, West Northamptonshire

The District Council at the time (now incorporated into a larger combined authority) and the original promoters (and subsequently Prologis) worked together to assess the economic contribution of the SRFI to the local area, as well as capturing and addressing operational issues as the new development settled in. Reflecting a long partnership with

⁵⁸ Under The Town and Country Planning (General Permitted Development) (England) Order 2015, specified categories of development are granted an automatic planning permission by law, and therefore do not require any application for planning permission. Part 8, Class A (railway or light railway undertakings) classes development by railway undertakers (e.g. Network Rail) on their operational land, required in connection with the movement of traffic by rail, as Permitted Development (PD)

the public sector and local community, one of the more recent developments on site has been “The Hub,” jointly funded by Prologis, BT and Aviva, for use by occupiers at DIRFT. The Hub is home to DIRFT's Police Community Support Officers and site management team, as well as the Prologis Warehouse and Logistics Training Programme - an initiative aimed at training those leaving education and re-skilling the unemployed to pursue careers in logistics. The site is now approaching 14 million sq. ft of floorspace built across three main phases, handling up to 14 trains per day – the largest generation of rail freight traffic of all the SRFI in England to date. Alongside, a new sustainable urban extension for Rugby is delivering 6,200 new homes, improving the supply of local housing to complement the employment site.

4.4.2 Doncaster Railport IRFI and iPort Doncaster SRFI

The Borough Council was one of the pioneering local authorities who chose to actively respond to the opportunities presented by construction of the Channel Tunnel. In 1989 after the passing of the Channel Tunnel Act 1987 the Council promoted a 5 Ha site as an IRFI, subsequently constructed by a public/private joint venture alongside a consent for around 1 million sq. ft of warehousing. The Council leases the site to Freightliner which handles its own trains as well as other competing train operators. The Council subsequently engaged with the promoter Helioslough on the application for a six million sq. ft SRFI scheme which, at 400 hectares (171 used for the development and the balance for access and landscaping), was the largest green belt SRFI development of its kind at the time.

The site sat alongside Rossington Colliery, the main local employer which closed in 2007, creating significant scope to regenerate the area. When delays connecting the site to the main line threatened knock-on impacts to the wider development and regeneration, the local authority worked with the promoter to revisit the planning conditions to allow warehousing development to be brought forward ahead of the intermodal terminal. This not only helped deliver employment to the local community, it also helped establish freight users and operations on site in advance of the intermodal terminal and rail services becoming operational. iPort Doncaster has since become the fastest-growing SRFI in terms of rail traffic, reaching seven trains per day within only two years of opening. Alongside the SRFI, the Council has worked with Helioslough (now Verdion) and other stakeholders to deliver a new access road from the M18, and in 2012 granted permission for a £100 million housing development including 1,200 new homes a primary school and hotel on the former colliery site, with construction starting in 2015. Both the Railport and iPort continue to operate their respective services, despite being only 3km apart.

4.4.3 Mersey Multimodal Gateway (3MG) SRFI, Halton

The Borough Council has jointly promoted the SRFI development alongside a consortium of landowners, developers and operators/occupiers. The lead officer at the time has responded to this study, noting lessons learnt as part of promoting the scheme with the private sector:

- Setting realistic timescales and cost estimates, ensuring significant contingencies are built in from the start, particularly where new rail and road connections are required.

- Avoid the risk of over-accelerating the delivery process, resisting pressure from other stakeholders, particularly in the private sector.
- Manage expectations within and between stakeholders, including being aware of community opposition and giving it serious consideration.

4.4.4 Intermodal Logistics Park North SRFI, St Helens

Staying in the North West, St Helens Council has provided the catalyst for restarting proposals for a SRFI in and around the former Parkside Colliery. This was closed in 1993 and was the focus for a series of abortive attempts by Railtrack, Prologis and others to deliver a new SRFI equidistant between Manchester and Liverpool because it was located at the intersection of the West Coast Main Line and the M6 motorway. Key interventions by the Council over the last decade have included:

Commissioning the Parkside Logistics and Rail Freight Interchange Study in 2016 to investigate the feasibility of delivery options for a road and rail-linked logistics development on land at the former Parkside Colliery site, to help inform and advise the preparation of the new draft Local Plan.

Working to secure the original Parkside Colliery site for warehousing development with private-sector developer Langtree, the planning consent including a safeguarded corridor for future rail access into the site. Final consent for the first phase was granted in 2024.

Identifying and promoting a green belt site to the east of the Parkside Colliery site for a SRFI, as the main employment component of the draft Local Plan. The Council undertook further scoping studies, with input from Network Rail, train operator Freightliner and other stakeholders to demonstrate the need for, and feasibility of, a SRFI development on the site. The Local Plan Inquiry, having heard the Council's case alongside other stakeholders (including objectors), accepted the proposed removal of the site from Green Belt to allow an application to be progressed by Freightliner and development partner Tritax.

Currently, the Council continues to be involved in the progression of the proposals by Tritax through the Development Consent Order process, which will ultimately be determined by the Secretary of State.

4.4.5 Other examples

Other examples of positive engagement and feedback to the study have been provided by local authorities in the East of England (Breckland, South Holland), Yorkshire & Humberside (WYCA, North Yorkshire), the North East (Stockton-on-Tees, Tees Valley Combined Authority) and Scotland (Fife), where local authorities are seeking to attract rail-served development, for similar reasons to those already listed.

4.5 Main findings

Across the case studies common challenges emerge:

- Site scarcity and competition: optimal locations for rail freight interchanges are often highly sought after for alternative, higher-value developments, such as housing. This

results in intense competition for suitable land, particularly in environmentally sensitive areas.

- Environmental constraints: significant environmental concerns, notably the potential harm to the Green Belt, have been a consistent barrier. In each case, planning authorities have been unwilling to approve developments that could lead to irreversible environmental damage, even when the economic benefits are substantial. The recent introduction of the “Grey Belt” designation may assist in this regard.
- Demonstrating demand/need: proposals have struggled to demonstrate evidence of the need for additional rail freight interchange capacity, a situation since addressed in part by the NNNPS confirmation of a compelling national need.
- Operational and technical limitations: constraints on rail and highway network capability, combined with the need for new rail and highway connections, create further challenges, as exemplified by the recent refusal of a proposed SRFI at Hinckley in Leicestershire, primarily on the grounds of unresolved highway issues.

There is also a significant contrast between the approach and outcomes of interchange development in and around the South East, against other parts of the country. In the case of the latter, there appears to have been a greater willingness to engage proactively in the positive benefits of interchange development (e.g. regional/national mode shift and decarbonisation of freight, inward investment, employment, economic (re)generation) as demonstrated in Daventry, Doncaster, Halton and St Helens.

These case studies provide lessons and recommendations to address the challenges for potential new interchanges in and around the TfSE area. These include:

- Revising planning frameworks: update planning criteria to treat rail freight interchanges as essential strategic infrastructure, recognising their role in supporting economic growth, not least through improving the critical mass needed for mode shift of freight from road to rail at scale, and associated air quality and environmental benefits.
- Enhancing regional co-ordination: foster stronger cross-boundary collaboration between local planning authorities, regional transport bodies, Network Rail/GBR and National Highways, with input from users and operators of freight services, to create a more unified and effective approach to site allocation and delivery – taking account of rail industry restructuring and the opportunity presented by local government devolution⁵⁹.
- Strengthen the evidence base: support and inform the NNNPS view of the compelling need for interchanges, with more robust methods for assessing freight demand at regional and sub-regional levels, including detailed analysis of current freight flows and warehouse provision, along with growth forecasts.

⁵⁹ The [English Devolution White Paper](#) 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

These improvements could help overcome the challenges observed in the case studies, ensuring that rail freight interchanges are developed in a timely and sustainable manner to support TfSE and national economic and environmental goals.

5 Interchange opportunities in the TfSE area

This chapter identifies the potential opportunity areas for new or reinstated Strategic Rail Freight Interchanges (SRFI) in and around the TfSE area, including the key criteria used to identify and shortlist sites. It should be noted that the sites identified as potential opportunity areas are not promoted by TfSE as their development (or otherwise) would be a matter between a developer and a local planning authority; the purpose of identifying them here is to provide information as to where further work could be focused if there was interest in taking any of the sites forward.

5.1 Key criteria for IRFI and SRFI development

Building on the case studies of the interchange sites exemplified above, Table 5-1 below sets out the key criteria in the National Networks National Policy Statement (NNNPS) for a SRFI, with an additional column for IRFI to indicate where the two types of RFI differ in scope and in scale.

Table 5-1 Key criteria for rail freight interchanges

Criteria	SRFI	IRFI
At least 60 Hectares situated in England	✓	>1.5 Ha
Appropriately located relative to the markets they will serve, which will focus largely on major urban centres, or groups of centres	✓	✓
Being part of the railway network in England	✓	✓
Located alongside the major rail routes, in particular the Strategic Rail Freight Network	✓	✓
Located on a rail route with a gauge capability of W8 or more, or capable of enhancement to a suitable gauge	✓	✓
Capable of handling 775 metre trains with appropriately configured on-site infrastructure and layout, minimising the need for on-site rail shunting and provide for a configuration which, ideally, will allow main line access for trains from either direction	✓	>500m trains or longer with shunting
Being close to major trunk roads	✓	Major roads
Capable of accommodating rail-served warehousing, container handling facilities, manufacturing and processing activities	✓	Customer dependent
Capable of handling consignments of goods from more than one consignor and to more than one consignee	✓	Customer dependent
Capable of handling four trains per day and, where possible, be capable of increasing the number of trains handled	✓	Customer dependent
Capable of providing a number of rail connected or rail accessible buildings for initial take up, plus rail infrastructure to allow more extensive rail connection within the site in the longer term	✓	Customer dependent

Criteria	SRFI	IRFI
The initial stages of the development must provide an operational rail network connection and areas for intermodal handling and container storage	✓	✓
It is not essential for all buildings on the site to be rail connected from the outset, but a significant number should be	✓	Customer dependent
Availability of workforce	✓	✓

In addition to the high-level criteria set out in the NNNPS for SRFI, other practical features which can assist with delivery of new sites include:

- Availability of an existing main line connection - as a new signalled main line connection can cost upwards of £5m to install.
- Access to the main line tracks without the need to provide complicated, expensive or visually intrusive additional infrastructure e.g. flyovers or underpasses - to avoid costs and potential environmental impact of structures.
- Access to a main line with sufficient capacity in the timetable to accommodate additional trains - to ensure sufficient throughput in trains and intermodal units for commercially sustainable operation.
- Sufficient level topography for train berthing, handling equipment and articulated HGVs manoeuvring (16m minimum turning circle), and intermodal unit storage (warehousing if relevant can be at a different plateau height to the rail facilities).
- Well-drained site outside of medium and high-risk flood zone areas.
- Sufficiently distanced from residential development, with highway access to the trunk road network avoiding residential areas.
- Sufficiently distanced from sensitive areas (e.g. Sites of Special Scientific Interest, Areas of Outstanding Natural Beauty).
- Utility connections (power and water), with sufficient capability for future electrically powered handling equipment and vehicles.

5.2 GBRTT methodology for identifying sites

The GBRTT study in 2022 identified a future pipeline of sites in England.⁶⁰ These would be able to provide additional capacity in the event of existing I/SRFI facilities being exhausted, and/or where no material capacity exists at present, to serve particular regions or sub-regions, for example, the South East of England.

The process of identifying potential sites used the same criteria discussed in the previous section, working through a sequence of:

- a) existing operational sites;
- b) non-operational sites with existing main line connections;
- c) sites with previous main line connections; and

⁶⁰ Included in the 'Intermodal rail freight interchanges: levelling up regional provision, Market Assessment Report', Intermodality for GBRTT 2022

d) other sites with potential merit in terms of location and accessibility by rail.

The methodology for shortlisting and sifting sites involved using online mapping (including historic records) and satellite imagery. This enabled identification of existing and former rail-linked sites, where despite the connections and sidings being removed many years ago in most cases, the former rail formation has been retained, providing an indication of rail feasibility. In addition, other sites were identified with no previous main line connection, but which could provide a suitable location for interchange with the road network and/or existing industrial land.

Those sites emerging from the initial identification and sifting process (using the high-level criteria in Table 5-1) were then assessed against a more detailed set of criteria, summarised in Table 5-2 below (which draw on the bulleted list above).

Table 5-2 GBRTT assessment criteria for shortlisted potential sites

Site Characteristics	Description
Site topography	Overall levels/gradients across the site (rail needing relatively flat sites)
Rail topography	Extent to which rail access is constrained by cuttings or embankments
Rail loading gauge (height and width of rail vehicle and payload)	(W6-W12) – the larger the gauge, the greater the range of rail service options available. Ideally routes at or capable of W8 gauge to enable carriage of the tallest deep-sea shipping containers
Rail Route Availability (axle load of rail vehicle)	(RA1-RA8) – the larger the Route Availability classification, the greater the wagon payload (i.e. the amount of freight carried)
Train length	Intermodal trains will typically need to be at least 450m in length to be viable, ideally closer to 640-750m, the entire train needing to enter or exit the main line in a single manoeuvre to avoid impeding progress of other trains on the main line
Network capacity	The ability of the connecting route to accommodate additional freight trains, given these may require windows of 10-15 minutes between other trains to enter or exit the site
Rail main line access	Existing, previous or no previous connection
Highway topography	Extent to which road access can be achieved between railway and highway
Highway access	Capability of local highway network to accommodate HGV traffic at scale (an intermodal train may typically generate 40 HGV trips each way through an IRFI/SRFI, compared to other RFI for heavier bulk trains such as aggregates generating up to 80 HGV trips each way)
Flood risk	Extent to which sites might be affected by flooding
Maximum site length	RFI will need to accommodate trains 450 – 775m clear of the main line
Maximum site width	Sufficient to accommodate the sidings and handling area (typically >30m)
Maximum site extent	A view on how far a site could be assembled around other uses/boundaries

Site Characteristics	Description
Nearest settlement	How close would potential residents be (and be potentially concerned) and any screening offered by topography/vegetation
Electricity power lines	The presence of high-voltage lines could fetter crane operations
Local Plan status	Extent to which RFI development would align with local policies
Current usage	How far might existing uses/users complement or conflict with RFI development and associated distribution activity, in particular Regional Distribution Centres which tend to be larger buildings with greater flows of freight traffic, with direct transport links to National Distribution Centres in the Midlands/North of England

5.3 Interchange opportunities for the TfSE area

Drawing on the 2022 GBRTT commissioned study methodology and findings, and re-visiting the sites identified at the time, Figure 5-1 below shows how factors such as highway accessibility, rail loading gauge and existing clusters of regional distribution assist in focussing on those areas most likely to support development of either IRFI or larger integrated SRFI in the TfSE area.

The key locational criteria for ensuring success of IRFI/SRFI focus on intersections between the strategic road and rail networks, particularly where the latter is already configured for accommodating intermodal traffic (i.e. having or capable of having at least W8 loading gauge). Beyond this, proximity to established major clusters of population and/or demand (particularly for Regional Distribution Centres) will be important, as the latter will tend to involve a scale of baseload freight traffic capable of sustaining trainload intermodal freight services.

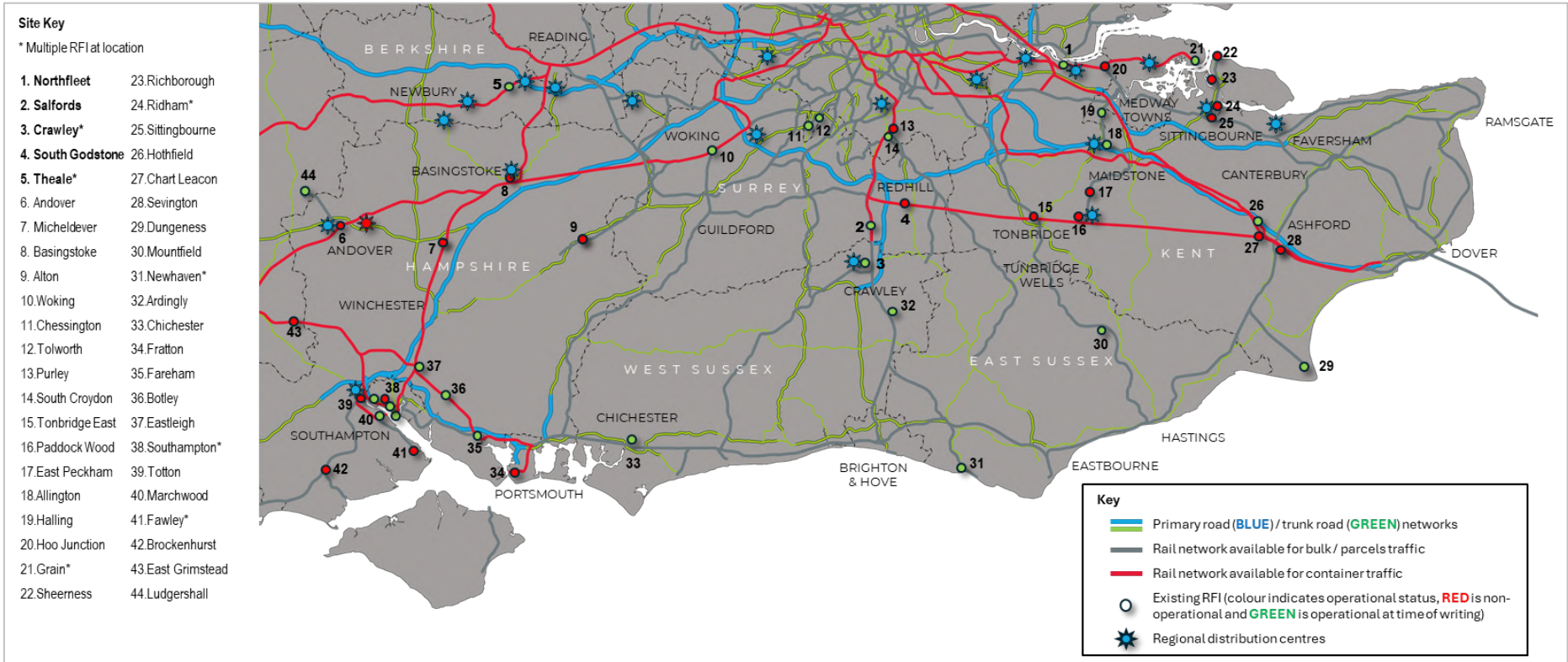
It is apparent from Figure 5-1 that, to accommodate IRFI or SRFI, the main areas of opportunity will generally fall towards the north and west of the M3, M25 and M20 motorways, where the connecting rail routes are cleared for carrying containers. Outside of these areas, other RFI could also be delivered for other traffic, such as aggregates or parcels traffic, which use other types of rolling stock less constrained by height/width.

The 2022 GBRTT second stage assessment classified sites as follows:

- **Green:** existing operational main line connection in place, with existing operations or strong prospects for using the site for rail-related purposes.
- **Orange:** some challenges in creating a site, due to a lack of a rail connection and associated cost (£5m) and/or highway access issues, land availability, flood risk or local plan allocations/designations or potential commercial issues. Potentially deliverable subject to funding and/or local authority policy support.
- **Red:** significant obstacles to creating a site, primarily due to physical factors e.g. railway line in tunnel/cutting/embankment, lack of suitable local highway access, space constraints, redevelopment of site for other purposes, planning policy conflict. Unlikely to be deliverable even with funding available.

The sites identified and shortlisted in the 2022 exercise for the South East region and surrounding areas have been reviewed again and are set out below, together with additional sites which have emerged in the interim.

Figure 5-1 Potential opportunity areas for interchange development



Source: Intermodality analysis⁶¹

⁶¹ Note: any sites shown are purely for illustrative purposes only and do not confirm or imply feasibility, or alignment with local planning policy. Any site-specific proposal would be subject to full environmental and business case appraisal and associated planning consent(s).

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5.3.1 Potential opportunity areas in the TfSE area

Based on the information above, areas with potential opportunities for rail freight interchange facilities are set out below, the colour-coding of site titles relating to the previous green, amber or red classification described above.

It should be noted that the areas identified are purely for illustrative purposes only and do not confirm or imply feasibility, or alignment with any local planning policy. Any site-specific proposal would be subject to full environmental and business case appraisal and associated planning consent(s).

1. **Northfleet** (Gravesham): existing third-party rail-linked site with wharf access on Strategic Freight Network (SFN)⁶² core route, close to A2 with scope for additional connectivity to HSI at Ebbsfleet from adjacent disused stabling sidings, subject to loading gauge confirmation through into site.
2. **Salfords** (Reigate and Banstead): partly undeveloped Network Rail rail-linked site close to SFN core route with potential for multi-role facility, intermodal operations dependent on confirmation of W8/W9 loading gauge availability.
3. **Crawley Goods Yard** (Crawley): scope to expand existing Network Rail rail-linked site close to SFN core route, current multi-user aggregates RFI (safeguarded in Minerals Plan) with adjacent third-party land, close to M23. Intermodal operations dependent on confirmation of W8/W9 loading gauge availability.
4. **South Godstone** (Tandridge): industrial estate with retained main line access alongside SFN core route (W9 loading gauge and third-rail electrification), safeguarded in Local Plan, rural road access to A22 and M25.
5. **Theale** (West Berkshire) land adjacent to existing third-party multi-role rail-linked site alongside SFN core route (W10 loading gauge and electrification to/from Reading) and close to M4 Junction 12, with scope to create an intermodal facility. In the 2022 review this site was initially classified as a “red” site, reflecting uncertainties regarding local authority support, land availability and flood risk mitigation. In the intervening period, discussions brokered by the Chartered Institute of Logistics and Transport, West Berkshire Council and the landowner has led to the latter proposing the site for allocation as part of updating of the local plan, with support from Network Rail and responding to a requirement from a major end user for an IRFI to link with a nearby Regional Distribution Centre.

⁶² The 2007 Rail White Paper defined the SFN as: “a core network of trunk freight routes, capable of accommodating more and longer freight trains, with a selective ability to handle wagons with higher axle loads and greater loading gauge, integrated with and complementing the UK’s existing mixed traffic network.”

5.3.2 Potential opportunity areas in surrounding regions

As interchanges and associated supply chains do not recognise arbitrary boundaries defining local authority areas, it is expected that some of the interchange capacity capable of serving the TfSE area could also be located in the wider South East region, and possibly on the margins or adjoining regions/Sub-national Transport bodies. This might then affect the level of interchange capacity needed to be provided within the TfSE area. However, as noted in section 2.4 earlier the ability of multiple sites can co-exist in an area. Additional sites have therefore been noted where these could provide such a role:

Thorney Mill (Buckinghamshire): recently reactivated Network Rail rail-linked site close to SFN core route, current multi-user aggregates RFI (safeguarded in Minerals Plan) with adjacent third-party land, close to M4/M25. Intermodal operations dependent on confirmation of W8/W9 loading gauge availability.

Oxfordshire SRFI (Oxfordshire): proposals being developed for a Development Consent Order (DCO) application for a SRFI north west of Bicester with highway access to the M40 Junction 10 and rail access to the Chiltern Main Line (SFN diversionary route). Loading gauge is currently W7, the route was previously used by W9 gauge intermodal services and is proposed for clearing to W8 gauge.

Barking (Barking & Dagenham): proposals being developed by Network Rail and third-party landowner to redevelop the former IRFI and surrounding rail-locked land as a major facility for domestic and Channel Tunnel intermodal traffic. Site has access to Network Rail (W12 loading gauge) and High Speed 1 (continental GB1 loading gauge) via Ripple Lane West Yard (partially electrified), with road access to the A13 to the north and east (the latter grade-separated).

London Gateway (Thurrock): the port has recently announced plans to expand operations and develop a second rail terminal on site (W12 loading gauge).

Thames Enterprise Park (Thurrock): situated immediately east of London Gateway, the former Shellhaven refinery complex is now being redeveloped across 412 acres, providing over 3.7 million sq. ft of development space for manufacturing, energy and logistics operations. The site is adjacent to the 13-acre Thames Haven Yard owned by Network Rail, which retains an operational main line connection and has recently received its first train after many years of disuse.

5.4 Main findings

The key factors for determination and delivery of IRFI/SRFI sites include:

- Proximity to strategic road and rail network intersections, ideally with existing/former connection points.
- Suitable scale/topography of available land - at least one hectare (Ha) for IRFI or 60 Ha for SRFI.

- Rail network capability – ideally, cleared for carrying shipping containers (which needs a Loading Gauge of W8 or higher), for wagons up to 90 tonne gross weight (which needs Route Availability 8 or higher), for trains of 450-750m in length and of 1200 - 1800 tonne weight. One to four trains per day main line capacity.
- Highway network capability – ideally, able to cater for at least 40x articulated 44-tonne HGVs arriving or departing site for each train through the site.
- Distance from sensitive land designations and/or receptors.

The areas with most potential in the TfSE area for IRFI/SRFI are typically north/west of the major motorway corridors, including:

- Theale (West Berkshire)
- Northfleet (Gravesham)
- Salfords (Reigate & Banstead)
- South Godstone (Tandridge)

There are other areas which may also offer potential, either for:

- non-intermodal traffic e.g. existing rail-linked sites at Andover, Crawley, Fratton, Micheldever and Newhaven [which would be in the wrong place or too small for intermodal traffic, but would be fine for aggregates, waste, parcels]; or
- for larger SRFI developments of 60 Ha or more at strategic road/rail network intersections suitable for larger regional distribution centres, involving new main line and trunk road connections and associated warehousing development. As Figure 5-1 indicates, these would be anticipated towards the northern, eastern and western extents of the TfSE area, where rail routes cleared for containers intersect with the strategic highway network, and where the market has shown interest in locating larger regional distribution centres. Other areas could then fall into scope with suitable investment in the rail network to improve its capability in terms of containers and/or capacity.

6 Stakeholder engagement

A key element of this study involved engaging with TfSE's key stakeholders to understand their perspectives on the opportunities and challenges presented by rail freight and intermodal facilities in terms of their local areas. The engagement that was undertaken helped to identify the challenges and opportunities for local authorities in making the case and planning for new/enhanced interchange facilities.

This chapter outlines the findings from the stakeholder engagement activities.

6.1 The local authorities and industry representatives who took part in this study

- Ashford Borough Council
- Bracknell Forest Council
- Brighton & Hove City Council
- Dartford Borough Council
- East Sussex County Council
- Elmbridge Borough Council
- Epsom & Ewell Borough Council
- Hampshire County Council
- Kent County Council
- Lewes & Eastbourne Borough Council
- Medway Council
- New Forest National Park
- Portsmouth Borough Council
- Slough Borough Council
- Southampton City Council
- Surrey County Council
- Swale Borough Council
- Wealden District Council
- West Sussex County Council
- Woking Borough Council
- Freightliner
- Maritime Transport
- Network Rail
- The Rail Freight Group.

6.2 Approach to stakeholder engagement

The engagement with TfSE partner authorities included:

- Presentations to the Transport Strategy Working Group (TSWG) and the Wider South East Freight Forum (WSEFF).
- Undertaking an initial online surveying with partner authority practitioners.
- Hosting a workshop session on 25 February 2025 with attendees from TfSE partner authorities and industry representatives.

- Follow-up meetings with individual partner authorities including Brighton & Hove City Council, East Sussex County Council (in relation to their emerging Rail and Freight Strategies) and Portsmouth City Council.

These meetings were undertaken to:

- Enable local authorities to gain more information about the importance of rail freight from industry representatives.
- Gauge awareness of, and support for, the freight sector as a component of employment and economic growth by local authorities.
- Gauge local authority support for encouraging mode shift support of freight to rail through new or enhanced interchange facilities.
- Learn more about specific local authorities' rail freight plans, where appropriate.

6.3 Key findings from the stakeholder engagement

6.3.1 The role of freight and logistics in local employment is broadly recognised

The importance of the freight and logistics sector in supporting local employment was acknowledged by survey respondents, particularly those with an economic development role. Freight and logistics was highlighted as a key driver for job creation, particularly in existing logistics hubs and along key transport corridors. In rural and peripheral areas, logistics can be a major source of employment ('[logistics is] one of the main employment drivers in our region') due to fewer land constraints and therefore the availability of suitable land for logistics facilities. However, such areas can also face challenges in attracting investment due to their weaker transport connectivity.

In contrast, urban areas struggle with space constraints, making it difficult to balance logistics needs with other land uses. Transport and spatial planners responding to the survey recognised the employment potential of logistics but expressed concern over accommodating logistics developments given significant competition for land for other purposes, most notably housing, for example: 'finding sufficient space for logistics without impacting other priorities is a challenge.'

Economic development practitioners reported that logistics connectivity is a key determinant in business location decisions, with one respondent explicitly stating, "Investors always ask about logistics accessibility before committing to a site." Transport and spatial planners acknowledged its importance but highlighted challenges in co-ordinating infrastructure upgrades to match investor demand, as reflected in comments such as 'timing of infrastructure investment and business demand rarely align.' Access to non-road modes of freight transport were seen to be slightly less important factors in investors' decisions on location than highway connectivity, though responses varied by region. In areas with established rail and water freight infrastructure, such as those near the area's ports, interest in non-road modes was stronger, while landlocked regions reported minimal discussion on alternatives. One respondent stated, 'Rail freight is only considered where infrastructure already exists; otherwise, it's not seen as viable.'

6.3.2 Limited understanding of the freight sector among local authorities

A key observation from responses to the survey is that many local authorities lack the time and resources to engage proactively with the freight and logistics sector. While there is a broad understanding of the sector, detailed knowledge and expertise is often limited – particularly among economic development practitioners, who tend to focus more on logistics' role in employment and investment. In contrast, transport and spatial planners generally reported a slightly stronger understanding of the freight and logistics sector but engaged with the topic in terms of understanding and mitigating its impacts, rather than how to enable and grow the sector within the local area.

Engagement with the freight sector is typically reactive rather than proactive, especially in smaller or less growth-focused authorities. Urban and high-growth areas reported more consistent dialogue with the sector, often driven by ongoing infrastructure projects. In contrast, smaller authorities noted that engagement usually occurs only when specific schemes require it, making sustained relationships with freight stakeholders difficult to maintain. This reactive approach limits the ability of many authorities to develop a strategic understanding of freight needs and opportunities. There was also some discussion about the potential opportunities for improved engagement and planning for rail freight and IRFIs through the development of spatial development plans as part of the new Mayoral Combined County Authorities responsibilities.

6.3.3 Freight emissions present a major challenge for meeting air quality targets so local authorities can be wary of supporting new sites/facilities

Respondents to the survey recognised the transport emissions associated with freight and logistics sites and facilities as a major challenge to achieving their air quality targets, particularly in congested urban areas: 'freight emissions are a primary contributor to non-compliance with air quality standards.'

Respondents from urban authorities said that they must prioritise emissions reduction and often struggle to balance environmental regulations with the need to attract and support logistics investment. Transport and spatial planners need to focus on long-term mitigation strategies such as Clean Air Zones, alternative fuels, and modal shift projects, while economic development practitioners expressed concern that overly strict measures could deter business interest.

Again, there was some geographical variation in the responses: respondents from urban areas emphasised emissions reduction as a priority, whereas rural authorities ranked air quality lower on their list of priorities.

6.3.4 Land and highway capacity can be key barriers to the growth of the logistics sector

Land and highway capacity were recognised by respondents as major constraints on the growth of the logistics sector, particularly in high-demand urban areas. Urban authorities identified limited land availability and road capacity as significant barriers to new logistics development. Transport and spatial planners cited the challenge of allocating sufficient space for logistics amid competition from other land uses, while

economic development practitioners stated that constrained land supply was driving up costs of development, leading to investment concerns. These issues are particularly acute in the South East, where demand for land that can be developed is in very short supply.

Highway network limitations, including congestion and a lack of freight-specific infrastructure such as warehousing, further deter investment. Respondents noted that investors often reconsider sites due to inadequate road capacity, especially in areas without bypasses or dedicated freight routes. While respondents from less land-constrained authorities reported greater land flexibility, they faced connectivity challenges that limited their attractiveness to logistics investors. These combined constraints on land and infrastructure significantly impact both employment and investment potential in the logistics sector.

6.3.5 Geographical location and availability of rail freight infrastructure limits opportunity for modal shift

High-quality transport infrastructure is essential for attracting logistics investment, but access to non-road freight modes – particularly rail – remains limited in many areas, constraining modal shift opportunities. Respondents to the survey from areas near ports or established rail hubs showed stronger interest in diversifying transport modes. Transport and spatial planners were also the most vocal supporters of shifting long-distance freight from road to rail, citing benefits for congestion and air quality. However, economic development practitioners were more divided, raising concerns about infrastructure readiness and commercial viability. Support for mode shift to rail freight varied by the capacity and capability of the existing network in the area, with stronger backing in areas close to major freight terminals and weaker engagement where infrastructure is lacking.

Discussions highlighted the challenges for local authorities in resourcing to better engage with and understand the logistics sector, and for all stakeholders in trying to identify suitable sites for logistics-related development, including interchanges. Broad locations for possible development or expansion of interchanges were also discussed including areas around Gatwick, Havant, Medway, Portsmouth and Southampton.

6.4 Summary of stakeholder discussions

- Delivery challenges persist for interchanges due to an imbalance between perceived impacts and benefits in the local area relative to contributions made to national policies and targets. This is particularly the case for rail freight growth and transport decarbonisation.
- There is a lack of local authority resources (staff/time) to achieve more joined-up working internally and with external stakeholders to build knowledge and bridges with industry. This would achieve a better awareness and consensus about outcomes of local plan allocations and applications.
- Experience from other areas and projects suggests scope exists to improve outcomes through low-intensity interventions by/with local authorities. This would include encouraging more fieldwork in the freight sector from which to yield more informed proposals and decisions within local plans and planning applications.

- The establishment of Mayoral Combined County Authorities will require the production of Spatial Development Strategies. These may present opportunities for more strategic and regional approaches to both planning and engagement with the rail and freight sectors, as experienced in the Midlands and North East of England.
- For Intermodal Rail Freight Interchange (IRFI) projects, opportunities exist to work with Network Rail and interchange promoters to expedite delivery by making best use of the provisions of the Town & Country Planning Act 1990, the Planning Act 2008 and The Town and Country Planning (General Permitted Development) (England) Order 2015. The latter particularly useful for delivery of smaller and/or pre-existing rail-linked sites.
- For larger SRFI projects, the National Significant Infrastructure Project/DCO process could be used. While these are significantly more expensive for scheme promoters, they can provide greater clarity and benefits to both developers and local authorities alike where projects are assessed on a collaborative rather than confrontational basis (which places equal responsibility on private and public sectors to achieve this).

7 Key findings, conclusion and recommendations

This study, commissioned by TfSE, has sought to build on the Great British Railways Transition Team's (GBRTT's) work at the sub-national level. It has considered how TfSE, working in partnership with the local authorities in the TfSE area, could best identify and unlock opportunities for Intermodal Rail Freight Interchanges (IRFI), and to a lesser extent Strategic Rail Freight Interchanges (SRFI), in and around the TfSE area.

7.1 Key findings

7.1.1 The need for interchange infrastructure

Rail transport can provide a more efficient alternative to road haulage for the movement of materials given it can carry up to 3,200 tonnes per train and, for some mail and parcel services, which can travel at speeds of up to 100mph⁶³, far higher than the legal speed limit for HGVs. Rail freight can also remove the equivalent of up to 110 articulated heavy goods vehicles from the road network per train and per tonne-km, generating up to 71% less emissions.

The current and preceding governments support a greater role in freight for rail transport to help reduce the burden on the highway network and help with decarbonisation of the transport industry and in 2023 announced a target of 75% growth in rail freight by 2050. This is the equivalent of around 500 extra freight trains per day or around 8,000 articulated HGV loads removed from the road network.

To achieve this, the capacity and capability of the rail network and operations will need to improve access to the network, along with developing additional and/or expanded intermodal rail freight interchanges. Without either the prospects for growth will be limited. This is because intermodal services carrying containers between ports and inland distribution centres now account for the largest share of rail traffic. Investment in expanding interchange facilities, both at ports and at inland sites, has supported unprecedented growth of intermodal rail services in recent years through both standalone IRFI and larger integrated SRFI.

The study undertaken by GBRTT in 2022⁶⁴ concluded that the wider development of intermodal rail freight in the UK requires a far broader geographical distribution of IRFI to complement the SRFI network. This requirement is particularly applicable in areas, including the South East, where to date planning policy, land availability or distribution space demand/value would not support the developer-led SRFI model. Here the level of SRFI/IRFI provision and/or associated intermodal traffic falls below that of more established regions, and where initial market research confirms there is an interest.

The National Networks National Policy Statement (NNNPS) also reiterated the importance of SRFI and the compelling need to create an expanded network. It notes

⁶³ For example, InterCity Rail Freight services run by Great Western Railway and East Midlands Railway since 2017

⁶⁴ Included in the 'Intermodal rail freight interchanges: levelling up regional provision, Market Assessment Report', Intermodality, 2022. A copy of this report can be made available by TfSE on request.

that in London and the South East, away from the deep-sea ports, most IRFI and associated rail-connected warehousing is on a small scale and can be poorly located in relation to the main urban areas. It is also noted that there is a particular challenge in expanding rail freight interchanges serving London and the South East. This is evident in the multiple failed attempts to date to deliver SRFI in the wider South East region or the TfSE area within it.

7.1.2 Challenges for additional rail freight interchange provision in the South East and TfSE area

The need for more rail freight interchanges in the South East is primarily because planning policy, land availability or distribution space demand/value has not supported the developer-led SRFI model in the past. It is not due to a lack of private investment or customer interest. This means that there is:

- a scarcity of land and road / rail network capacity;
- a lack of suitable locations where road and rail networks meet in order to site an interchange;
- a lack of sites where both road and rail networks provide suitable capacity and capability for freight haulage and interchange services and where the development of the land needed for these facilities align with local community and authority aspirations;
- the lack of awareness within local authorities of the needs of rail freight and the potential of SRFI/IRFIs and the lack of engagement between local planning authorities; and
- local opposition to proposals when they have been put forward.

Therefore, national and regional needs and benefits have tended to be overshadowed by a focus on local issues. As observed by the local authorities consulted as part of this study, local authorities are not resourced or structured to gain insights into the nature, opportunities and challenges facing the freight sector. This is despite its role in supporting the wider economy and as a major component of economic activity in its own right. This means that there is not enough understanding of the needs of rail freight and the potential of IRFI/SRFI in particular.

7.1.3 The opportunity for additional rail freight interchanges in the TfSE and surrounding area

Analysis of the GBRTT 2022 research suggests that if the current national share of total road and rail freight tonne-km accounted for by intermodal rail services (3.6%) were applied to the South East, the equivalent of eight trains per day each way could be generated by the South East. This could remove over 700 long-distance HGV loads from the road network. This could be achieved if rail services were able to target the longer-distance flows from the South East to the North West, Yorkshire & Humber, Midlands and Wales, and excluded the container traffic moved by road to and from the port of Southampton. Eight trains per day would equate to least two IRFI or SRFI based on the average throughput of existing RFI.

The development of IRFI/SRFI would not only represent opportunities to encourage intermodal rail freight and decarbonisation by improving access to rail transport

services and networks, but also to secure investment, employment. Examples in other regions have shown that SFRI could generate an average of 4.2 million sq. feet of warehousing, 4,100 jobs and at least £500m of local investment, therefore increasing the accessibility of the rail network for local businesses and contributing to the logistics estate and network requirements of consumers.

7.1.4 Potential opportunity areas in the TfSE and surrounding area

The study has shown that it may be possible to deliver more interchanges in these areas and the study has identified some potential opportunity areas as set out below. The colour-coding of site titles to a green, amber or red classification describing the relative deliverability of sites, including factors such as land conditions and classifications and the ease of connectivity to, and capability of, road and rail networks.

- **Northfleet** (Gravesham)
- **Salfords** (Reigate and Banstead)
- **Crawley Goods Yard** (Crawley)
- **South Godstone** (Tandridge)
- **Theale** (West Berkshire)
- **Thorney Mill** (Buckinghamshire)
- **Oxfordshire SRFI** (Oxfordshire)
- **Barking** (Barking & Dagenham)
- **London Gateway** (Thurrock)
- **Thames Enterprise Park** (Thurrock)

There are other areas which may also offer potential, either:

- for non-intermodal traffic e.g. existing rail-linked sites at Andover, Crawley, Fratton, Micheldever and Newhaven for intermodal traffic, but would be fine for aggregates, waste, parcels; or
- for larger SRFI developments of 60 Ha or more at strategic road/rail network intersections suitable for larger regional distribution centres, involving new main line and trunk road connections and associated warehousing development.

However, it should be noted that the areas identified are purely for illustrative purposes only and do not confirm or imply feasibility, or alignment with any local planning policy. Any site-specific proposal would be subject to full environmental and business case appraisal and associated planning consent(s).

7.2 Conclusion

In order to achieve the government's 75% rail freight growth target, the capacity and capability of the rail network and operations will need to significantly improve. This includes the provision of access points onto the network.

In addition, without additional and/or expanded rail freight interchanges, particularly but not exclusively for the intermodal sector, prospects for growth will be limited.

The National Networks National Policy Statement and a study for GBRTT in 2022 have both shown that there are not sufficient intermodal rail freight interchanges in the TfSE or its surrounding area to support this growth.

The other key risks of not finding suitable locations for IRFI or SRFI in the TfSE area will be the increasing difficulty of being able to deliver goods and services without the continued reliance on road transport and the highway network. In turn this will also mean using distribution sites which may never offer scope for rail access.

It could also result in missed opportunities to generate local investment and employment as outlined above.

7.3 Recommendations

Despite the lack of resources faced by local authorities to support the development of intermodal rail freight interchanges in the TfSE area, there could be scope to improve outcomes through relatively low-intensity interventions by or with local authorities. These include:

- Seeking the use of designated officer(s) with freight-related issues that have been actively developed as part of their role, backed by Continuous Professional Development (CPD) to improve knowledge of the freight sector. It might be possible to appoint a jointly funded cross-boundary officer to make best use of resources.
- Gaining a greater understanding of the nature of logistics and the challenges faced by the sector through the ongoing Freight Awareness work programme. This is being developed by TfSE, England's Economic Heartland and Transport East.
- Joint working between officers during local plan development through jointly requesting site consultations. This could mean that land-use, economic development and transport planners collectively encourage and engage with potential SRFI/IRFI site owners/promoters, as well as with Network Rail and National Highways. This may become easier with the establishment of the Mayoral Combined County Authorities and development of strategic development plans.
- Making a commitment to supporting the use of rail freight in relevant strategies and plans. For example, East Sussex County Council have committed to ensuring rail routes and supporting infrastructure support the growth of rail freight in their draft Freight Strategy.
- Making best use of the planning and delivery tools available, for example, using the Permitted Development⁶⁵ route working with Network Rail and other railway undertakings for smaller RFI. For larger, and often more contentious SRFI, using the Development Consent Order could provide an alternative to the Town & Country Planning Act, to speed up the process and reduce the cost to the local authority.

⁶⁵ Under The Town and Country Planning (General Permitted Development) (England) Order 2015, specified categories of development are granted an automatic planning permission by law, and therefore do not require any application for planning permission. Part 8, Class A (railway or light railway undertakings) classes development by railway undertakers (e.g. Network Rail) on their operational land, required in connection with the movement of traffic by rail, as Permitted Development.

In addition, TfSE will:

- Work with Network Rail, GBR once established, other potential delivery partners and our partner local authorities to review the opportunities this study offers.
- Explore working with central government to support the further strengthening of planning policy and guidance to ensure that these facilities are considered as critical components of regional infrastructure and as an enabler of employment and housing delivery.
- Explore alternative methods for determining 'the scale of need'. This would enable local authorities to better account for the role of these facilities in enabling efficient supply chains and their role in supporting more efficient distribution to and servicing of population centres.
- Work with the DfT and others to enhance the availability and utilisation of data on trends, demand, supply, and performance to facilitate more informed planning decisions.

7.4 Next steps

In order to gain further momentum for the provision of rail freight interchange facilities and services for the TfSE area, TfSE will share the report with its partner local authorities, the Wider South East Freight Forum (WSEFF), freight operators, developers of interchange facilities, Network Rail, other Sub National Transport Bodies, the Wider South East Rail Partnership and the Department for Transport.

It may also be worth considering holding a round table event to gain a clearer understanding of the current level of interest in addressing the shortfall of interchange and network capacity in the TfSE area. Potential attendees could include representatives from Network Rail alongside potential developers, interchange operators, freight operators, end users e.g. retail and aggregate companies and those local authorities who have already shown an interest in developing RFIs.

Agenda Item 9

Report to: Partnership Board –Transport for the South East

Date of meeting: 27 October 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 Thursday 25 September 2025. This report provides a summary of the discussions and actions to take forward.

2. Funding for local transport, and future status of TfSE

2.1 The Committee received an update on the Local Transport Grant settlement and associated with this, the letter that DfT sent to Sub-National Transport Bodies on their future funding.

2.2 The Committee provided their initial views, ahead a wider discussion at the Partnership Board meeting in October. Moving forward, the Committee will play a key role in scrutinising any plans for the future status of TfSE.

3. Updates to the TfSE Constitution and Inter Authority Agreement

3.1 The Committee were briefed on amendments to TfSE's Constitution and Inter Authority Agreement that would need to happen as a result of Devolution and Local Government Reorganisation.

3.2 The Committee were also briefed on a number of other amendments that could be made concurrently.

3.3 Changes to TfSE's Constitution will be presented to the Committee and to Partnership Board for approval at the appropriate time. A deed of variation to the Inter-

Authority Agreement must be agreed by each constituent authority's legal team, so it is a longer process to update this.

4. Internal Audit Report

4.1 The Committee reviewed the Internal Audit Report which was commissioned earlier this year to provide assurance over TfSE's governance, financial controls and management of suppliers.

4.2 The audit concluded with the decision of Reasonable Assurance. This means that most controls are in place and are operating as expected to manage key risks to the achievement of system or service objectives.

4.3 The report highlights a number of areas where TfSE delivers good practice, including the work of the Audit and Governance Committee's work to regularly review TfSE's risks and financial management.

4.4 The audit found two actions that TfSE need to undertake to improve governance: update the register of Partnership Board Member Interests; and ensure there is documented Management Team approval before each task order to consultants is signed. Both of these have been implemented, and East Sussex County Council will reassess as part of the next audit review.

4.5 The Committee welcomed the findings of the Internal Audit and the work that TfSE officers undertake to deliver good practice.

5. Finances and Risks

5.1 The Committee reviewed TfSE's finances, which have been presented to the Board, and reviewed TfSE's risk register, which will next be presented to the Board in January.

6. Conclusions and recommendation

6.1 The Partnership Board is recommended to note 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: Keir Wilkins

Email: Keir.Wilkins@transportforthesoutheast.org.uk

Report to: Partnership Board –Transport for the South East

Date of meeting: 27 October 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 TfSE's financial position to the end of Quarter 2 2025/26.

1. Overview

1.1 The purpose of this report is to update the Partnership Board on TfSE's financial position to the end of Quarter 2 2025/26.

2. Background

2.1 The Board agreed TfSE's final budget and Business Plan for 2025/26 in July, which sets out how funding is allocated to each of TfSE's technical work areas for the year ahead. This report sets out our progress in spending money against each budget line and forecasts our outturn to the end of the Financial Year.

3. Summary of our Financial Position budget for 2025/26

3.1 **Appendix 1** sets out our financial position to the end of September 2025. In the five months from April to September, TfSE spent £988,127 across all budget lines.

3.2 This is in line with our expectations at the start of the year. We only pay for work on completion, so expenditure on the technical programme will increase as the financial year progresses.

3.3 As we have scoped work in the Business Plan, we now have a more informed forecast on our outturn to the end of the Financial Year. Our forecast expenditure is now £3,234,041, against a budget of £3,807,322. This paper breaks down the forecast for each expenditure line in the budget.

4. Staffing Costs

4.1 Staffing expenditure is in line with expectations. Our forecast expenditure to the end of the year is £1,195,000. The forecast confidence rating has increased from a 3 to a 4, as staff, who are employed by our accountable body East Sussex County Council, have now received the Council's pay award for the year ahead. There is a small risk of exceeding this forecast if pension and taxation changes are announced in the October

Budget, but changes should take effect in the 2026/27 Financial Year. We could underspend against the forecast if any members of staff leave their posts, depending on whether we decide to replace them and how long recruitment takes.

5. Technical Programme Costs

5.1 We still forecast to spend £120,737 on the Transport Strategy. However, the confidence rating has decreased from a 5 to a 4, because there is a chance of a small underspend, because of work that was forecasted that is no longer needed. The forecast for the Strategic Investment Plan (SIP) Refresh is £98,144 after scoping.

5.2 Forecast expenditure on SIP Implementation has decreased from £482,473 to £405,138. This is because £60,000 of funding had been allocated for work supporting National Highways to develop strategic cases for pipeline schemes and this has now been de-prioritised following the latest Road Investment Strategy (RIS) settlement. Less funding than was budgeted for to support Kent-Gatwick Strategic Outline Business Case development is likely to be needed because we expect to receive third party contributions to this work. The forecast confidence rating stays at a 4, because there is a chance that additional funding is needed to develop this business case, and a risk that the scheme development work may not fully complete this financial year.

5.3 Forecast expenditure on the Analytical Framework has decreased from £546,948 to £513,833, as a small amount of the work plan is expected to be delivered in 2026/27.

5.4 Forecast expenditure on Future Mobility and Active Travel has decreased to £0, as instead of developing further strategies in these areas, work will be delivered through the Centre of Excellence, tailored to the requests of Local Authority officers. The confidence rating has increased from a 4 to a 5.

5.5 As work has been scoped with suppliers, we have revised forecast expenditure: decarbonisation has decreased from £40,000 to £25,000; freight has decreased from £185,758 to £155,561 and rail has increased from £75,000 to £83,463. For each of these budget lines, the forecast confidence remains as a 4.

5.6 Forecast expenditure on Electric Vehicle Infrastructure has decreased from £129,319 to £123,002. The forecast confidence rating has decreased from a 4 to a 3, as Midlands Connect have pulled out of a piece of planned joint work, which we will now have to re-frame. We are also changing the scope of the work on cross pavement charging solutions.

5.7 The end of year forecast for the Centre of Excellence has decreased from £251,759 to £200,765, as we have now scoped the costs of delivering the Centre of Excellence Work Plan, that the Board signed off in July. Although we have only spent £3,500 to the end of September, the forecast confidence rating remains as 4, as we have a number of work areas already underway. We expect £61,765 will have been spent by the end of November.

5.8 The end of year forecast for Private Financing has decreased from £104,435 to £50,000, as we are reframing and refocusing the brief for that work, following feedback from TfSE's Funding and Finance Working Group. The forecast confidence rating has

decreased from a 4 to a 3, as this new scope of work will need to be approved by the group, before we proceed.

5.9 The end of year forecast for Other Costs and Technical Support is £114,118, leaving £35,882 for further additional work, should it be required.

6. Other Costs

6.1 End of year forecasts have been completed for TfSE's communication and engagement programme, governance and operational costs. Communication costs are slightly higher, as we've scoped costs for engaging with key partners on TfSE's work. The forecast for operational expenses has also decreased as TfSE do not need to pay towards office costs, as previously projected.

7. Conclusions and Recommendations

7.1 The Partnership Board are recommended to note the financial position to the end of Quarter 2 2025/26.

RUPERT CLUBB

Chief Officer

Transport for the South East

Contact officer: Keir Wilkins

Email: keir.wilkins@transportforthesoutheast.org.uk

Appendix 1 – TfSE Budget Position at end September 2025

	Budget	Actual YTD	Forecast	Forecast Confidence (1-5)	
EXPENDITURE					
Salaries (including on-costs)	1,319,857	507,042	1,195,000	4	▲ 1
Training	20,000	0	10,000	4	
STAFFING	1,339,857	507,042	1,205,000	4	
Transport Strategy	120,737	78,152	120,737	4	▼ 1
SIP Refresh	98,000	0	98,144	4	
SIP implementation	482,473	154,783	405,138	4	
Analytical framework	546,984	72,842	513,833	3	▼ 1
Future mobility	40,000	0	0	5	▲ 1
Active travel	45,000	0	0	5	▲ 1
Decarbonisation	40,000	3,116	25,000	4	
Freight	185,758	49,494	155,561	4	
Rail	75,000	5,702	83,463	4	
Electric Vehicle Infrastructure	129,319	37,593	123,002	3	▼ 1
Centre of Excellence	251,759	3,500	200,765	4	
Private Financing	104,435	0	50,000	3	▼ 1
Other costs/technical support	150,000	52,196	114,118	3	
TECHNICAL PROGRAMME	2,269,465	457,378	1,889,761	4	
Events	40,000	17,325	40,000	4	
Communication (and Media Subscriptions)	14,000	100	24,280	4	
Publications	5,000	0	5,000	4	
Website	21,000	305	10,000	4	
Stakeholder Database	18,000	0	10,000	4	
COMMUNICATIONS/ENGAGEMENT	98,000	17,730	89,280	4	
TfSE Governance	25,000	0	25,000	4	
Operational Expenses	75,000	5,388	25,000	4	
OTHER	100,000	5,388	50,000	4	
TOTAL EXPENDITURE	3,807,322	988,127	3,234,041	4	
MONEY HELD BACK FOR TFSE RESERVE	496,730				
TOTAL BUDGET INCLUDING RESERVE	4,304,052				
FUNDING FOR 2025/26					
Local Contributions	498,000			5	VIRTUALLY CERTAIN
DfT Grant	2,161,666				
Technical Programme Carry Forward from 2024/25	1,237,656			4	HIGLY LIKELY
TOTAL FUNDING EXCLUDING RESERVE	3,897,322				
Carry Forward for TfSE Reserve from 2024/25	406,730			3	MODERATELY LIKELY
TOTAL FUNDING EXCLUDING RESERVE	4,304,052				
				2	UNCERTAIN
				1	HIGHLY UNCERTAIN

Agenda Item 11

Report to: Partnership Board –Transport for the South East

Date of meeting: 27 October 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 number of consultations.

RECOMMENDATIONS:

The members of the Partnership Board are recommended to:

- 1) Agree the draft response to consultation on the Draft South Downs National Park Partnership Management Plan 2026–31;
 - 2) Agree the draft response to the Isle of Wight Council's Consultation on the Draft Island Transport Plan 4; and
 - 3) Agree the draft response to House of Commons Transport Committee Inquiry - "Joined-up journeys: achieving and measuring transport integration"
-

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:

- Draft South Downs National Park Partnership Management Plan 2026–31
- Isle of Wight Council's Draft Island Transport Plan 4;
- House of Commons Transport Committee Inquiry - "Joined-up journeys: achieving and measuring transport integration"

2. Draft South Downs National Park Partnership Management Plan 2026–31

2.1 Between July and August 2025, South Downs National Park Authority (SDNPA) held a public consultation on their Draft Partnership Management Plan 2026-31. The consultation concluded on 1 August 2025. A copy of the draft officer level response that was submitted is contained in **Appendix 1**.

2.2 TfSE noted SDNPA's draft PMP demonstrates strong alignment with TfSE's Draft Transport Strategy, particularly in areas of climate change mitigation and sustainable transport provision. Both share a commitment to achieving net-zero carbon emissions, promoting active travel, and working collaboratively with key

partners to ensure effective delivery. The members of the Partnership Board are recommended to agree the draft response contained in Appendix 1.

3. Isle of Wight Council's Draft Island Transport Plan 4

3.1 The Isle of Wight Council went out to consultation on their Draft Island Transport Plan 4 on 1 September 2025. The consultation closes on 24 November 2025. A draft TfSE response to the consultation, which closes on 24 November 2025, is contained in Appendix 2.

3.2 The Draft Island Transport Plan 4 shows strong alignment with TfSE's Transport Strategy on strategic connectivity issues, decarbonisation, addressing inclusion, and resilience. However, it would benefit from more explicit alignment with TfSE's Mission on Sustainable Growth. In addition, the draft IoW LTP4 should make reference to the TfSE Transport Strategy. Addressing these issues will ensure that the LTP both serves the Island effectively and maximises opportunities for regional support through TfSE. The members of the Partnership Board are recommended to agree the draft response contained in Appendix 2

4. House of Commons Transport Committee Consultation "Joined-up journeys: achieving and measuring transport integration"

4.1 The House of Commons Transport Select Committee are undertaking an inquiry titled "Joined-up journeys: achieving and measuring transport integration". The aim of this inquiry is to investigate the changes government would need to mould transport services, networks and options around the journeys people need and want to make in their daily lives. The closing date for the submission of evidence was 16 October 2025. A draft officer response was submitted, which is contained in **Appendix 3**.

4.2 The draft response highlights how TfSE's Draft Transport Strategy and Strategic Investment Plan both place integration at the heart of TfSE's mission. The submission emphasises the need to design a transport system that works as a whole for people, places and the economy. Integration needs to be embedded in funding, appraisal and design with TfSE ready to help deliver the joined-up journeys that the Committee seeks to achieve. The members of the Partnership Board are recommended to agree the draft response contained in Appendix 3.

5. Conclusions and recommendations

5.1 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

Contact Officer: Peter Buck
Email: peter.buck@transportforthesoutheast.org.uk

Appendix 1 – TfSE response to SDNPA

Consultation on the Draft South Downs National Park Partnership Management Plan 2026–31

Draft response from Transport for the South East

1. Introduction

1.1 Transport for the South East (TfSE) warmly welcomes the opportunity to respond to the South Downs National Park Authority's (SDNPA) draft Partnership Management Plan (PMP) 2026–31. This document constitutes the draft officer response that will be presented to our Partnership Board on 27 October 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, business representatives, Highways England, Network Rail and Transport for London. The SDNPA is a member of our Board, representing the needs of the many and varied protected landscapes in our area.

1.3 We have a vision-led [Transport Strategy](#) in place to influence government decisions about where, when and how to invest in the transport system across our region to 2050. This strategy was agreed in 2020 but is currently in the process of being refreshed. Following a recent public consultation exercise, the Partnership Board agreed a number minor revisions to the wording of the document at their meeting on 21 July 2025. The final version of the strategy is due to be considered by the Board at their meeting in October 2025.

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

1.5 We commend the SDNPA for producing a clear, ambitious, and inclusive strategy that aligns well with our Draft Final Transport Strategy. The draft PMP adopts a 'plan and provide' approach, setting out a Vision setting out where the SDNPA wants the National Park to be in 2060 and a set of priorities for the next five years, to make this vision a reality.

1.6 The draft PMP demonstrates a clear statement of the transport and access challenges in a nationally protected and environmentally sensitive landscape. The challenges presented by climate change, housing demand and affordability, funding availability, public transport and sustainable transport provision, as well as the shifting national policy landscape are common to the PMP and TfSE's Draft Transport Strategy.

1.7 There is considerable overlap between the Priorities identified in the Draft PMP and the five Missions of our Transport Strategy. Our Decarbonisation Mission sets out how we will work to decarbonise the transport sector to reach net zero by 2050. Our

Resilience Mission details how we will ensure that the transport system is resilient to the future impacts of climate change. These Missions align with Aim 2 of the draft PMP on climate action, with the South Downs National Park seeking to become net zero by 2040 by mitigating and adapting to the impacts of climate change.

1.8 Aim 5 of the Draft PMP relates to improving access for all to the National Park. Objective 5.1 emphasises the need to improve access by public transport, active travel and remove the non-physical barriers to make the park more welcoming. One of the underlying principles of TfSE's draft final Transport Strategy is the concept of triple access planning covering physical, digital, and social access to create a more inclusive network. One of the five Missions is to deliver better inclusion and integration. Both documents prioritise improved accessibility for all, encompassing both infrastructure and social inclusion.

1.9 Both documents have a shared ambition to support sustainable travel outcomes. Planning Principle 9 of the Draft PMP supports reducing car dependency, promoting active travel, and enhancing public transport and rights-of-way networks. The TfSE Draft Final Transport Strategy promotes the 'Avoid-Shift-Improve' framework to promote trip reduction and modal shift towards active and public transport.

1.10 On public transport access to the National Park, the Draft PMP highlights the inadequate bus and train access to many areas of the park; identifies "last-mile" gaps and local authority funding limitations and its plans to partner with local authorities for improvements. The Inclusion and Integration Mission in our draft final Transport Strategy seeks to create an inclusive, affordable and integrated transport network across the South East. Consequently, there is a strong focus on improving public transport availability and affordability to increase rail and bus usage and reduce car trips. Both documents also prioritise the development of safe, connected walking and cycling networks. The pivotal role of sustainable transport options in meeting people's access needs is a key component of both documents.

1.11 TfSE's Draft Transport Strategy includes provision for improved transport infrastructure to support sustainable economic growth, including interventions to support the much-needed housing growth in the South East. Planning Principle 15 in the Draft PMP supports development providing affordable housing that will meet the needs of local communities. In providing this, there is the potential for conflict with the SDNPA's conservation objectives. This is best addressed through early engagement on all transport infrastructure proposals to ensure the application of Environmental Net Gain principles and rigorous environmental assessment and sustainable design for any transport infrastructure proposals within or affecting the National Park.

1.12 The draft PMP places a strong emphasis on partnership working. Like the SDNPA, TfSE recognises that meaningful change requires a collaborative approach working with local authorities, transport operators, and other key stakeholders such as the SDNPA. Both documents recognise the importance of balanced economic development that maintains environmental quality while ensuring accessibility for businesses and communities.

1.13 In conclusion, SDNPA's draft PMP demonstrates strong alignment with TfSE's Draft Transport Strategy, particularly in areas of climate change mitigation and sustainable transport provision. Both share a commitment to achieving net-zero carbon emissions, promoting active travel, and working collaboratively with key partners to ensure effective delivery. We look forward to continued collaboration with the SDNPA to support the delivery of this Plan.

[Ends]

Appendix 2 – TfSE consultation response to Isle of Wight

Isle of Wight Fourth Local Transport Plan Consultation 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 consultation on the Isle of Wight Council's Draft Local Transport Plan 4 (IoW LTP4). This is a draft officer response that will be presented to our Partnership Board on 27 October 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. It has been subject to public consultation and the final version is due to be considered by the Partnership Board on 27 October 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. This is also in the process of being refreshed, with development work due to be completed by the end of 2025.

1.5 TfSE welcomes the opportunity to respond to the consultation on the draft IoW LTP4. We trust that our response will provide value to the work of the Isle of Wight Council but also form the basis for further engagement. We are particularly focused on creating a clear 'golden thread' between our Transport Strategy and the Local Transport Plans (LTPs) produced by the Isle of Wight Council and other LTAs, ensuring they can deliver on their local objectives while contributing meaningfully to the wider vision for the South East.

2. Approach

2.1 The draft IoW LTP4 sets out a clear 'Approach' section that frames delivery around principles such as the avoid–shift–improve hierarchy, Triple Access Planning (digital, spatial and transport), a Movement and Place framework, and the need for evidence-based prioritisation. Overall, there is strong consistency between the Isle of Wight's approach and the cross-cutting principles in TfSE's Transport Strategy. Both documents present these principles as the foundation for policy design, scheme appraisal, and investment prioritisation.

3. Vision

3.1 As shown in Table 1, the Vision set out in the draft IoW LTP4 evidences a strong alignment with the 2050 Vision set out in TfSE's Draft Transport Strategy. Both include reference to inclusivity, low-carbon / sustainability, quality of life, protecting environment, and economic prosperity.

Table 1: Alignment between the draft IoW LTP4 Vision and the 2050 vision in TfSE's Draft Transport Strategy.

Isle of Wight LTP4 Vision	TfSE Transport Strategy 2050 Vision
An inclusive transport system that enables a low carbon , safe, prosperous , and healthy future for all residents and visitors; and seeks to protect and enhance the Island's unique local natural and built environment .	Our vision is for the South East to offer the highest quality of life for all and be a global leader in achieving sustainable, net zero carbon growth. To achieve this, we will develop a resilient, reliable, and inclusive transport network that enables seamless journeys and empowers residents, businesses, and visitors to make sustainable choices. We will deliver this vision by driving strategic investment and forging partnerships that deliver sustainable transport, integrated services, digital connectivity, clean energy, and environmental enhancement

4. Alignment between the draft IoW LTP4 Objectives and TfSE's Missions

4.1 Table 2 presents an assessment of the alignment between the objectives of the draft IoW LTP4 and the five Missions of TfSE's Transport Strategy. Overall, this demonstrates a strong alignment, particularly on net zero and resilience (Objective 1), which align well with TfSE's missions on Resilience and Decarbonisation. As shown in Table 2, Objectives 3 and 4 of IOW LTP 4 map across well to TfSE's Inclusion and Integration Mission. . These objectives could be further developed in the LTP to identify how wider social benefits could be delivered. This could be achieved by embedding measures of transport-related social exclusion, setting milestones for integrated ticketing across public transport services, and ensuring services are designed inclusively from the outset. These changes would ensure the LTP will help to reduce barriers to opportunity and provide reliable, affordable transport options for all sections of the community.

4.2 The draft IoW LTP4 approaches the economy primarily from a tourism perspective and emphasises the importance of enabling efficient, sustainable movement to and around the Island to support growth. TfSE's Sustainable Growth Mission highlights the need to strengthen strategic transport corridors, improve access to the South East's international gateways and achieve better alignment between transport and land-use planning. The draft IoW LTP4 would benefit from an expansion of the narrative on growth beyond tourism. It should set out the need for measures and interventions that will strengthen cross-Solent and other strategic corridors, secure reliable connections to ferry terminals, and better align transport investment with housing and industrial development.

Table 2: Alignment between the Isle of Wight LTP4 Vision and the 2050 vision in TfSE's Draft Transport Strategy

Isle of Wight LTP Objectives	TfSE Missions				
	Strategic Connectivity	Resilience	Decarbonisation	Inclusion and Integration	Sustainable Growth
<u>Objective 1.</u> A transport network which produces net zero greenhouse gas emissions and is resilient to the impacts of climate change.		X	X		
<u>Objective 2.</u> People and goods can travel sustainably affordably and efficiently to and from, and around the Island, to help grow the local economy;	X				X
<u>Objective 3.</u> An inclusive, accessible, and affordable transport network for all.				X	
<u>Objective 4.</u> A safe transport network that supports thriving, healthier communities .				X	

4.3 Although the draft IoW LTP4 is closely aligned with the approach and themes of TfSE's five missions, it makes no reference to the TfSE Transport Strategy. This gap needs to be addressed, with the alignment between the two documents explicitly recognised. Doing so would underline the Isle of Wight's role within the wider South East region and strengthen its case for regional funding and partnership support.

5. Conclusion

5.1 The draft IoW LTP4 shows strong alignment with TfSE's Transport Strategy on strategic connectivity issues, decarbonisation, addressing inclusion, and resilience. However, it would benefit from more explicit alignment with TfSE's Mission on Sustainable Growth. In addition, the draft IoW LTP4 should make reference to the TfSE Transport Strategy. Addressing these issues will ensure that the LTP both serves the Island effectively and maximises opportunities for regional support through TfSE.

Appendix 3 – TFSE draft response to HoC

Transport for the South East (TfSE) draft response to the House of Commons Transport Committee Inquiry – ‘Joined-up journeys: achieving and measuring transport integration.’

1. Introduction

1.1 Transport for the South East (TfSE) welcomes the opportunity to contribute to the Committee’s inquiry. This is a draft officer response that will be presented to our Partnership Board on 27 October 2025 for their approval. A further iteration may therefore follow.

1.2 TfSE is the 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. It has been subject to public consultation and the final version is due to be considered by the Partnership Board on 27 October 2025. Integration is one of the five core “missions,” set out in the strategy alongside Strategic Connectivity, Resilience, Decarbonisation and Sustainable Growth.

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. This is also in the process of being refreshed, with development work due to be completed by the end of 2025.

2. Responses to the questions in the call for evidence

2.1 Question 1: What are the key features that make a transport system feel joined up to the user? How would ‘integrated’ transport look different to current services and networks?

2.1.1 TfSE’s mission on Inclusion and Integration defines integration as the creation of “affordable, safe, seamless, door-to-door journeys for all users.” From the user’s perspective, integration is about the whole journey experience rather than the individual elements of it. An integrated system is one where passengers can move easily between

modes, with coordinated timetables that minimise waiting, and where walking, cycling or shared mobility options link them directly to their bus, rail or coach service.

2.1.2 Integrated ticketing and fares are also important elements of an integrated system. A truly joined-up system allows users to buy a single ticket, rather than facing multiple charges for each segment of their trip. Well-designed infrastructure also plays a key role. Transport interchanges must be accessible, safe and welcoming, with step-free access, clear information and offer real-time travel information. This contrasts with the experience that many travelers currently face where inconsistent ticketing, patchy information, and poorly connected hubs inhibit seamless journeys. TfSE's 2025-6 Business Plan reinforces this with a clear call to action, highlighting that "all these challenges need urgent delivery: more transport infrastructure, that's more integrated, and better meets the needs of people."

2.2 Question 2: What stops effective integration happening now, and how can these barriers be overcome?

2.2.1 Several barriers stand in the way of integration. The first is the fragmentation of governance. Different operators and agencies make decisions independently of one another. Short-term and inconsistent funding is another problem as multi-modal schemes need time to be developed and delivered. Current funding cycles are too short and tied to specific modes, undermining the ability to take a package-based approach.

2.2.2 There are a number of technical barriers to integration. Ticketing systems are not interoperable, and data is not shared, limiting our ability to understand and plan journeys as users experience them. Infrastructure shortcomings, particularly at interchanges, create a poor experience for passengers. Finally, social exclusion presents significant challenges, with some groups unable to afford, access or rely on integrated public transport, particularly for journeys early in the morning, or later in the evening.

2.2.3 TfSE's Draft Transport Strategy identifies these barriers explicitly and calls for solutions, including multi-year certainty of funding, common data standards, and inclusive design. The Business Plan describes how TfSE is addressing these issues: for example, our Analytical Framework and Regional Travel Survey are improving our evidence base. Our Strategic Investment Plan provides a framework for delivering investment in an integrated way. It identifies the interventions that are needed, presenting these as multimodal packages that highlight their interdependencies and cumulative benefits, and sets out a clear, holistic framework for investment.

2.3 Question 3: What kinds of interventions and policy decisions are needed to provide joined-up transport, including in areas beyond transport such as planning?

2.3.1 The Policy Route Maps included in TfSE's Draft Transport Strategy identify practical interventions that would help embed integration. Integrated fares and ticketing are central to this, as is investment in mobility hubs where bus, rail, active travel and shared mobility come together. First- and last-mile connections are also a priority as are the direct and safe walking and cycling routes that are needed to make multi-modal journeys viable. Our Strategic Investment Plan identifies multi-modal area-based packages that bring these interventions together in practice.

2.3.2 Policy decisions need to go beyond transport. The draft Transport Strategy emphasises the need for better alignment of housing and employment growth with sustainable transport corridors. Without this, new development risks embedding car dependency. Similarly, transport energy and digital infrastructure need to be planned together, ensuring that the roll-out of electric vehicle charging infrastructure can support and be supported by wider investment in energy infrastructure.

2.4 Question 4: How should transport integration and its benefits be measured and evaluated — including the impact on economic growth, decarbonisation and the Government's other 'missions'?

2.4.1 Evaluation must look at journeys as a whole. The monitoring and evaluation framework set out in our Draft Transport Strategy suggests measuring end-to-end journey times, the number and quality of transfers, user satisfaction and accessibility to jobs, services and education. It also stresses the importance of tracking Transport-Related Social Exclusion, so that integration can be assessed for its impact on equity.

2.4.2 Integration also directly supports wider government missions. Economic growth can be measured by improved access to labour markets and improvements in productivity. Decarbonisation can be evaluated through reductions in emissions, vehicle kilometres travelled, and improvements in air quality. Social missions can be assessed through the reduction of exclusion, affordability of travel and improved perceptions of personal safety. The TfSE Business Plan for 2025-6 commits TfSE to embedding these indicators within its Monitoring and Evaluation Framework, ensuring integration benefits are tracked and reported in line with government priorities. Our State of the Region report, produced every two years, shows where the region is on measures of economy, society and the environment. The affordability of public transport fares is one of the indicators monitored.

2.5 Question 5: How should the cost of interventions needed to deliver transport integration be assessed and appraised? Will proposed changes to methodology in the Treasury's 'Green Book', including the introduction of 'place-based business cases', change this?

2.5.1 Traditional appraisal undervalues integration because it treats benefits such as shorter transfers or improved interchange design as marginal. The TAG appraisal system needs to move away from an overemphasis on car journey time savings, often expressed as thousands of vehicles saving only a few seconds, and instead place greater weight on accessibility and the wider benefits of transport. Accessibility can be measured by the number of jobs, education and healthcare opportunities people can reach within reasonable travel times by public transport, walking or cycling, with distributional analysis to show which groups benefit. Wider benefits can be captured through tools that assess health gains from active travel, reductions in carbon emissions, improvements to place quality and interchange, and the productivity impacts of better connectivity. TAG already provides mechanisms to record these outcomes through the Appraisal Summary Table and value for money statement, but these need to be brought to the forefront of decision making.

2.5.2 Our Draft Transport Strategy argues that schemes should be appraised at a package level, capturing the combined benefits of multiple modes working together. It also stresses the need to quantify wider impacts such as social inclusion and resilience.

2.5.3 The proposed Green Book changes to allow "place-based" business cases are welcomed. They align with TfSE's approach in the Strategic Investment Plan, where interventions are grouped into multi-modal area based packages. The Business Plan highlights how we are developing appraisal tools in our Analytical Framework to better capture these system-wide benefits. This shift will allow integration to be more fully valued in future investment decisions.

2.6 Question 6: Will integration in itself deliver other benefits such as wider transport options in more places, and behaviour changes such as mode shift? What other impacts could it have?

2.6.1 Integration has the potential to change travel behaviour significantly. When interchanges offer seamless journeys and ticketing is simple, people are more likely to combine public transport with walking or cycling, thereby reducing car dependency. The Draft Transport Strategy links integration directly to its Decarbonisation Mission, recognising that mode shift is essential to reducing emissions. Our Strategic Investment

Plan reinforces this by identifying the investment needed in mobility hubs, active travel links and decarbonisation measures that will encourage and sustain mode shift.

2.6.2 Beyond decarbonisation, integration improves resilience by giving travellers more options when disruption occurs. It also strengthens communities by making access to jobs, health and education more reliable.

2.7 Question 7: What is needed to ensure that integration is inclusive and meets the diverse needs of transport users? Will integration necessarily lead to better outcomes for accessibility?

2.7.1 Integration should be developed so that accessibility and inclusion are considered from the outset, rather than being treated as an add-on. The Draft Transport Strategy places reducing Transport-Related Social Exclusion at the centre of its Inclusion and Integration Mission. This means ensuring that interchanges are step-free, information is accessible in multiple formats, and fares do not penalise low-income or those using multiple modes.

2.7.2 Integration does not automatically guarantee accessibility as poorly designed hubs or unaffordable fares can reinforce exclusion. Inclusivity is treated as a core principle in TfSE's Strategy rather than as an add-on.

2.8 Question 8: Will the meaning of integration vary across different kinds of areas and for different kinds of journeys?

2.8.1 TfSE's Draft Transport Strategy makes clear that integration is not one-size-fits-all. In rural areas, integration may involve demand-responsive services linking villages to larger hubs. In urban areas, it may mean prioritising cycling and walking and public transport over other modes. For inter-urban travel, integration means creating reliable interchange across rail, coach, airports and ports, so that people have practical alternatives to car use for longer journeys.

2.8.2 TfSE's Strategic Investment Plan reflects these differences by tailoring packages to different types of journeys including orbital, radial, coastal and cross-boundary ensuring that the form that integration takes reflects local circumstances.

2.9 Question 9: What lessons can be drawn from attempts to integrate transport elsewhere in the UK and around the world? What examples should the Government seek to emulate?

2.9.1 TfSE's Draft Transport Strategy draws on lessons from both the UK and abroad. London's Oyster/contactless system shows the benefits of integrated fares and fare capping. The Dutch OV-chipkaart provides a national model of multi-operator, multi-mode ticketing. Mayoral Strategic Authorities and devolved administrations, such as Greater Manchester and Wales, have demonstrated the value of regional coordination powers. These powers have allowed them to set integrated fares and ticketing, coordinate bus and rail services across operators, and align transport investment more closely with housing and economic development. Internationally, cities like Helsinki and Singapore show how Mobility as a Service (MAAS) and integrated data platforms can transform the user experience. In the TfSE area, we have had the experience of a successful MAAS scheme in the Solent area.

2.9.2 These examples demonstrate that strong governance, consistent funding, and common digital standards are essential to achieving better integration. TfSE is already applying these lessons. Through the Wider South East Rail Partnership we work with other STBs and Transport for London to address cross-boundary rail issues. Through our Centre of Excellence we are embedding best practice and providing authorities with our evidence base and Analytical Framework, to help inform better decisions. Through our cross-STB collaborations on the Carbon Assessment Playbook and EV charging, we are ensuring integration is delivered, whilst also supporting decarbonisation and wider government goals.

3. Conclusion

TfSE's Draft Transport Strategy and Strategic Investment Plan both place integration at the heart of TfSE's mission. They demonstrate that integration is about more than joining up modes. It is also about designing a system that works as a whole for people, places and the economy. By embedding integration in funding, appraisal and design, and by ensuring inclusivity and resilience, TfSE is ready to help deliver the joined-up journeys that the Committee seeks to achieve.

Agenda item 12

Report to: Partnership Board –Transport for the South East

Date of meeting: 27 October 2025

By: Chief Officer, Transport for the South East

Title of report: Analytical Framework

Purpose of report: To provide an update with the development on analytical framework.

RECOMMENDATION:

The Members of the Partnership Board are recommended to comment on the progress with the development of an analytical framework.

1. Introduction

1.1 This report provides an update on the development of an analytical framework to support business cases and the delivery of the schemes within the Strategic Investment Plan (SIP).

2. Background

2.1 The analytical framework route-map was initially approved at the Partnership Board meeting on 23 January 2023, followed by an endorsement of the refreshed route-map on 13 July 2024 to ensure its continued relevance and alignment with local challenges, while also ensuring value for money.

3. Data

3.1 The building of our back office data architecture is underway. The data architecture will consist of a virtual machine hosting a database to store modelling data produced by various TfSE workstreams. Various software tools required to produce, interrogate and visualise the data will also be available on the virtual machine creating a back office solution that will enable efficient sharing amongst our partners.

3.2 The regional travel survey has now been completed, with almost 7,000 responses collected across the region. This provides a statistically robust sample for analysing evolving travel behaviour at the local transport authority level. The data has been validated, and high level analysis carried out to gain insight. The summary report and dashboards will be published via the Centre of Excellence platform, with the raw data will be available upon request.

3.3 The procurement of mobile network data is now complete. This data is a key source of information for understanding travel demand in the region and a critical input

for building transport models. We have also been working closely with consultants responsible for developing models for several LTAs in our area. This collaboration ensures that, once acquired and shared with all LTAs in the region, the data will be robust and fit for supporting their own modelling and strategic planning work.

3.4 We have procured freight origin destination matrices data from MDS Transmodal, the developer of the Great Britain Freight Model. This follows the data gap survey conducted among LTAs earlier this year, which identified freight demand data as a key gap. As with the mobile network data, once the freight data has been acquired, it will be made available to all LTAs in the region to support their work.

3.5 We have contacted all the planning authorities in our geography to refresh our housing and employment site planning dataset. This dataset requires regular updates to ensure the data quality is as reliable as possible. We will be able to share the data with our local transport authorities to be used as an input for transport planning workstreams. This will avoid the requirement for each of our LTA stakeholders to collect the data, duplicating workload, often at cost from consultants time.

4. Analytical tools

4.1 We have made progress on the development of the Travel Market Synthesiser, an analytical tool designed to generate synthetic travel demand for a specified year, tailored to TfSE's area. Once developed, the tool will integrate with mobile network data and enhance data granularity across transport modes, trip purposes, and socio-economic groups. Task One of the project, which involved replicating Transport for the North's (TfN) Travel Market Synthesiser, has been completed. Stage Two, which will create a tool specific to TfSE, is on-going and scheduled for completion in December. Once finalised, the tool and the associated travel demand data will be made available to all LTAs in the region.

4.2 We have completed the development of the South East Highway Assignment Model (SEHAM) 2019 model. Work for Phase Two, which will update the model to a 2024 base year, is currently being scoped with our call-off contract consultants.

4.3 We have procured a network planning tool, Podaris. The proposal negotiated with Podaris gives LTA stakeholders a discounted rate for access to the tool by joining our multi-tenanted workspace.

5. Engagements

5.1 We have supported LTA officers with data and analysis for the MRN schemes to complete the recent questionnaire survey from DfT. We utilised SEHAM, the Development Log, and SIP Story Map to provide analytical support, particularly in assessing the catchment area of each scheme and estimating the number of houses and jobs that will be supported within those areas. We also provided analysis to demonstrate how the schemes will benefit disadvantaged groups of residents, using the national Index of Multiple Deprivation and the Transport Related Social Exclusion (TRSE) datasets developed by STBs.

5.2 We are working with Wokingham Borough Council to develop the next generation of the Wokingham Strategic Transport Model. Our Analysis Manager, Dr

Joshua Jiao, is acting as a technical advisor to council officers throughout the model development process. The project is currently in the stage of defining the technical specification.

5.3 We have delivered an Active Travel Modelling Clinic session in collaboration with Professor Rachel Aldred from the University of Westminster and LTA officer Iain Steane from Southampton City Council. The session builds on the thought piece written by Joshua Jiao ([Forecasting the Impact of Active Travel Interventions](#)), and aims to support LTA officers in estimating demand for active travel as a key component of the appraisal process for active travel schemes.

6. Financial Considerations

6.1 The work set out in this report is being funded from the DfT grant allocation awarded to TfSE for 2025/26.

7. Conclusions and recommendations

7.1 The Partnership Board is recommended to comment on the progress with the development on analytical framework.

RUPERT CLUBB

Chief Officer

Transport for the South East

Contact Officer: Joshua Jiao

Email: joshua.jiao@transportforthesoutheast.org.uk

Report to: Partnership Board –Transport for the South East

Date of meeting: 27 October 2025

By: Co-Chairs, Business Advisory Group

Title of report: Business Advisory Group

Purpose of report: To update the Partnership Board on the progress of TfSE's Business Advisory Group

RECOMMENDATION:

The members of the Partnership Board are recommended to note the progress 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 – Feedback for Partnership Board

2.1 The BAG met on Wednesday 1 October virtually.

2.2 The BAG received an update on key work that will go to TfSE's Partnership Board for approval, including the Transport Strategy and Regional Travel Survey. A number of Group Members had contributed to the Transport Strategy consultation and were supportive of the fact that it will still be submitted to the Department for Transport as the region's formal advice. There was a strong appetite for the data provided by the Regional Travel Survey, which could help to inform businesses' strategic planning.

2.3 The BAG also discussed DfT's decision to cease funding for TfSE, alongside other sub-national transport bodies, following a transition year in 2026/27. The Group asked the Co-Chair to make the case for future funding. It was felt that without TfSE there could be a vacuum, with businesses not brought together at a regional level to work on strategic transport issues.

Business Advisory Group – Progress

3.1 The BAG had a wide-ranging discussion on the challenges and opportunities facing business, and progress that has been made since the last meeting:

- An event hosted by Kent County Council to make the case for re-opening cross-channel rail from Ashford and Ebbsfleet, attended by the BAG Co-Chair.

- The news that the Transport Secretary had approved the Gatwick Airport expansion, with targets for travel to the airport through public transport. TfSE are supporting a Kent-Gatwick Rail Enhancements SOBC that could help meet this.
- Work that the Hampshire Prosperity Board are undertaking on rural isolation, which TfSE will provide evidence for.
- Updates on the Government's plans to bring rail services into public ownership.

3.2 The discussion followed three main themes. The group felt there is a need to make transport investable, affordable, and reliable.

- **The need to make transport schemes investible** – Business Members agreed that the South East needs transport investment now and cannot wait for Government funding. They supported the work being led by TfSE's Funding and Finance Group to develop a mode for funding and finance that could unlock investment. This could lead to the development of investible propositions that could be used to attract private financing of schemes. The BAG will also contribute business views to the SIP Refresh.
- **Affordability is an issue** – All businesses, but particularly smaller businesses, are facing significant cost pressures. The BAG said that the more that could be done to keep the cost of transporting people and goods affordable, the better.
- **Reliability and resilience are key** – Businesses need transport networks which their staff and customers can rely on every day. The BAG supported TfSE Transport Strategy Mission on resilience and asked for TfSE to continue to take a lead in this area, noting work on the SIP Refresh to assess how schemes impact resilience.

3.3 The BAG also reflected on the success of the Business Summit, with over 75% of attendees who responded to the survey calling their overall experience excellent or good. The Group provided initial feedback on the Business Summit report, ahead of further work. This report will be submitted to the Department for Transport, as the advice of TfSE's Business Advisory Group.

3.4 Members of the BAG asked TfSE to organise another Business Summit next Summer. The next Summit could focus on the emerging themes discussed at this meeting, including how to make transport schemes investable, and how to make transport affordable and reliable for the user.

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: Keir Wilkins

Email: Keir.Wilkins@transportforthesoutheast.org.uk

Report to: Partnership Board –Transport for the South East

Date of meeting: 27 October 2025

By: Chief Officer, Transport for the South East

Title of report: Strategic Investment Plan Refresh

Purpose of report: To provide an update on the development of the Strategic Investment Plan Refresh.

RECOMMENDATION:

The Members of the Partnership Board are recommended to comment on the progress of the Strategic Investment Plan Refresh.

1. Introduction

1.1 The purpose of this report is to provide a progress update on the development of the refreshed Strategic Investment Plan (SIP) following the Partnership Board's decision to approve the rationale for and planned methodology proposed to update it. The overall timeline for the delivery of the refresh is shown in Appendix 1. This report is an update of the work that has taken place since July 2025 and a forward look at the work that is due to take place over the next three months.

2. Progress with technical work

2.1 The ongoing technical work is following the overall work programme for the refresh, a copy of which is included in Appendix 1. The activities that have been/are being undertaken to date include the following:

- Inception and mobilisation
- Confirm strategic narrative and structure
- Long-list optioneering
- Analysis, prioritisation and modelling
- Integrated Sustainability Assessment
- SIP drafting

2.2 Updating the long list involved engagement with all delivery partners and a review of the schemes from the previous SIP to ascertain if they are funded, committed, supported or no longer supported. A request was also made to all delivery partners for any new interventions they would like to see considered for inclusion in the SIP. This has included specifically interventions that support the new Transport Strategy missions of inclusion & integration and resilience.

2.3 Having agreed the methodology through the officer working group and Member task and finish group, stratification work is underway to sift longlisted schemes into National Strategic, Regional Strategic, Local Strategic, and Local categories to provide focus for the new SIP and to help define the roles of TfSE and our delivery partners.

2.4 The schemes and interventions long list has been reviewed, and a draft has been shared with the officer working group for discussion before assessment with the updated multi-criteria assessment framework (MCAF) is undertaken.

2.5 SEELUM modelling to forecast the outputs and outcomes the SIP would deliver is underway, the results will be presented by mission across the region and in total. An Integrated Sustainability Appraisal (ISA) is also in progress for the new schemes shortlisted for inclusion within the SIP.

Update on engagement activities

2.1 A programme of targeted stakeholder engagement with our Tier 1 stakeholders at officer and member level is underway, with two meetings of the officer working group taking place and one Member Task and Finish group having taken place. We have also met with both National Highways, Network Rail and the DfT.

2.2 A further update on the ongoing technical work and engagement will be presented to the January 2025 Partnership Board meeting.

4. Financial implications

4.1 The technical work to refresh the SIP has been commissioned through TfSE's Technical Call off Contract at a cost of £98,000. There will also be some proportionate costs in analysing the targeted engagement responses. These amounts are planned for within the TfSE 2025/26 Business Plan.

4.2 A further allocation will be required as part of the 2026/27 Business Planning process to include the graphic design and digital content elements of the proposal. As they draw on the same digital data sources, this would be integrated with work to update the delivery action plan and strategic prioritisation tool to monitor progress with delivery, focus scheme development support and facilitate prioritisation within the SIP schemes.

5. Conclusions and recommendation

5.1 In conclusion, work on the Strategic Investment Plan refresh is now well underway, with progress being made on a number of elements of technical work and engagement activities. Members of the Partnership Board are recommended to note the progress on the Strategic Investment Plan refresh.

RUPERT CLUBB

Chief Officer

Transport for the South East

Contact Officer: Mat Jasper

Email: mat.jasper@transportforthesoutheast.org.uk

Item 14 – Appendix 1 – Timeline for the Strategic Investment Plan (SIP) Refresh

[illegible]

Report to: Partnership Board –Transport for the South East

Date of meeting: 27 October 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 at and the resources available to both TfSE and delivery partners to progress.

2.2 This report provides an update on work that supports delivery of the interventions in the SIP, ensuring our partners have the support they need as they develop and deliver schemes.

3. Scheme Development Work

3.1 This workstream supports delivery partners to progress schemes through the feasibility study or Strategic Outline Business Case (SOBC) stage where they are not able to fund or resource the work themselves.

3.2 The schemes that have been funded across the three financial years since inception are shown in Tables 1, 2 and 3 in Appendix 1. Through this programme TfSE has been able to support 14 schemes, providing over £800,000 in funding which supports the building of a pipeline of schemes ready for delivery in the coming years.

3.3 Work is continuing to review the support provided to date, and to refine and develop a more holistic offer for future financial years, including support that can be provided through the Centre of Excellence.

4. Major Road Network (MRN) and Large Local Majors (LLM)

4.1 TfSE continues to support delivery partners with the Major Road Network (MRN) and Large Local Majors (LLM) programmes for the region, through support to local transport authority promoters and liaison with DfT.

4.2 Following the Secretary of State's road and rail announcement on 8th July 2025, a review of the MRN/LLM programme was announced for 7 schemes in the programme from the TfSE area, to determine which should continue to be supported going forward, with the remainder being cancelled. TfSE met firstly with DfT to gain a greater understanding of the review and then subsequently with the authorities delivering schemes under review to offer advocacy and support whilst also providing an opportunity for officers to meet with counterparts across the region to discuss common issues and their approach.

4.3 Housing and employment development data that we collected at a regional level was made available to scheme promoters and analysis was undertaken to support answers to questions in DfT's review. SEHAM (South East Highway Assignment Model) was utilised to undertake Select Link Analysis to show the origins and destinations of traffic passing through the schemes, from which the extent of the scheme's potential impact and benefits can be determined. TfSE also supported Hampshire CC at a follow-up meeting with DfT to provide clarity on their scheme and discuss next steps.

4.4 Through meeting with all scheme promoters across the region, a number of common issues facing all schemes were apparent, especially around the challenges of providing a local funding contribution, managing risk (and inflationary cost increases in particular), changing technical requirements for the business cases, and very lengthy timescales for both DfT review of business cases and Ministerial decisions. With a picture across the region, TfSE has highlighted these common issues with DfT Officials.

4.5 Scheme promoters were required to submit their responses to DfT's review on 12 September 2025, and it is anticipated that Ministers will make their decision on which schemes will remain in the programme and which are cancelled by the end of the calendar year. DfT Officials have warned that difficult choices will have to be made.

4.6 TfSE will continue to advocate for the schemes in the region, and provide support to our scheme promoters as the review and subsequent revised MRN/LLM programmes' progress. Our Analytical Framework is available to local authorities, and further training and guidance on business case development is available to officers through the Centre of Excellence.

5. Third Road Investment Strategy (RIS3)

5.1 The draft RIS3 was published on the 26th August, this is a key document in the RIS process. It publicly outlines the government goals, and the resources planned for the upcoming RIS period. It does not at this stage provide details of any specific schemes. Following an interim settlement in 2025, RIS3 will now cover the period from 2026 to 2031. TfSE officers attended a DfT external stakeholder engagement workshop in September 2025, where details of the draft RIS were presented and there was the opportunity to ask questions.

5.2 The draft RIS includes the Statement of Funds Available (SoFA), the public funds available to National Highways to deliver the objectives to be set out in RIS3 for the period 1 April 2026 to 31 March 2031. The total funding available to the company, covering both capital and resource expenditure is £24,983 million. There is no annual spending profile, this will be confirmed in the final RIS.

5.3 The draft RIS also confirms the six performance specification areas established in RIS2 will be retained. These are:

- improving safety for all
- fast and reliable journeys
- a well maintained and resilient network
- being environmentally responsible
- meeting the needs of all road users
- achieving efficient delivery

5.4 DfT confirmed that National Highways are to focus on managing, maintaining and renewing their network, alongside delivery of any remaining committed RIS2 enhancement schemes. There will be a programmatic approach to delivering improvements around the environment, safety, tackling pinch points and targeted investment to support Governments housing and growth plans. Designated Funds will continue to support activities beyond National Highways day to day role.

5.5 TfSE officers raised concerns about the absence of plans to develop a pipeline of schemes for delivery in a future RIS period, and also highlighted that several RIS2 schemes have now been cancelled, leaving problems on the SRN in our region unresolved.

5.6 The next stage of the RIS process is for National Highways to produce a draft Strategic Business Plan (draft SBP), indicating whether it believes the Government's objectives can be delivered within the resources available. The ORR must then undertake an efficiency review of National Highways' draft Strategic Business Plan, to confirm the proposals in the Plan are challenging and deliverable. This is expected in November 2025.

5.7 TfSE officers will continue to meet with both DfT and National Highways as the RIS process continues, to ensure the regions needs and priorities are taken into consideration as the final RIS is developed. The final RIS is expected to be published at the end of March 2026.

6. Financial Considerations

6.1 The work set out in this report is being funded from the DfT grant allocation awarded to TfSE for 2025/26.

7. Conclusions and recommendations

7.1 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

Contact Officer: Mat Jasper

Email: mat.jasper@transportforthesoutheast.org.uk

Item 15 – SIP Delivery - Appendix 1

Table 1 - Development support schemes – 2023-24

Promoting Authority	SIP ref	SIP Scheme Name	Status	Support for:	Award
Kent County Council	V2, V3 & V17	Fastrack Optimisation and Extension	Complete	Feasibility Study	£51,297
Medway Council	S16	New Strood Interchange	Complete	Pre-Feasibility Study	£20,000
Portsmouth City Council	B5	Cosham Station Mobility Hub	Complete	SOBC	£30,000
Southampton City Council	I10	West Quay Road Realignment	Complete	SOBC	£100,000
				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)	Finalising Contracts	Feasibility Study	£50,000
East Sussex County Council	N3b & N18	A22 North of Hailsham to Maresfield (MRN Pipeline) Corridor SOBC	Complete	SOBC	£50,000
Berkshire - Wokingham Borough Council	P7, P9, P12, P18, Q1	A4 Berkshire - Quality Bus Corridor and Active Travel Improvements	Complete	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	Underway	Feasibility Study	£50,000
Solent Authorities - NR	G2 & G3	A2 Botley Line Double Tracking & A3 Netley Line Signalling and Rail Service Enhancements	Underway	SOBC	£50,000
Kent County Council	S22	Gatwick-Kent Service Enhancements	Finalising Contracts	SOBC	£30,267
				TOTAL	£455,267

Table 3 - Development support schemes – 2025-26

Leading Authority	SIP ref	SIP Scheme Name	Status	Support for:	Award
Southampton City Council	C1	Southampton Mass Transit	Underway	Feasibility Study	£100,000
Portsmouth City Council	C2	South East Hampshire Rapid Transit Future Phases	Finalising Contracts	Feasibility Study	£50,000
				TOTAL	£150,000

Report to: Partnership Board –Transport for the South East

Date of meeting: 27 October 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 progress with the work to implement the Electric Vehicle Infrastructure Strategy;
 - 2) Comment on the progress with the delivery of the Freight, Logistics and Gateways Strategy;
 - 3) Comment on the progress with the work on rail;
 - 4) Comment on the progress with the 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. Progress update

2.1 A progress update on each of the elements of the technical work programme is set out in **Appendix 1**.

3. Financial considerations

3.1 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 2025/26.

4. Conclusions and recommendations

4.1 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 February 2026.

RUPERT CLUBB

Chief Officer

Transport for the South East

Contact Officer: Mark Valleley

Tel. No. 07720 040787

Email: mark.valleley@transportforthesoutheast.org.uk

Appendix 1 - Technical Programme Progress Update

1. Introduction

1.1 The purpose of this appendix is to provide a progress update on the delivery of a number of elements of the Transport for the South East (TfSE) technical work programme.

2. Electric Vehicle Charging Infrastructure

2.1 As reported to the Partnership Board in July 2025, a pilot project has been undertaken by TfSE to develop a guidance 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. The guidance framework provides local transport authority officers with a step-by-step process to ensure future charging infrastructure is accessible to larger commercial vehicle fleets, such as vans and other LCVs. It draws on specialist datasets, including Field Dynamics' FleetMap data, to create visual maps that highlight potential locations for charging hubs within each local transport authority area. TfSE worked closely with Brighton and Hove City Council and Slough Borough Council throughout the project to develop two case studies. A copy of the guidance framework is contained in Appendix 2.

2.2 As reported to the Partnership Board in July 2025, TfSE completed a project which aimed to understand the impacts of the electrification of commercial vehicle fleets on the demand for publicly available electric vehicle charging infrastructure. As part of this work, TfSE developed a methodology which provided forecasts on the emerging demand for both energy and EVCI arising from the electrification of commercial vehicle fleets. We have recently commenced a follow-on project that will provide an update to this work to take account of the release of the latest government statistics on vehicle registrations across different vehicle classes. The updated forecasts will be made available via TfSE's instance of the EVCI Visualiser tool developed by Transport for the North. This work is due to be completed in October 2025.

3. Freight, Logistics and Gateways Strategy

3.1 Work continues to modify the Alternative Freight Fuel Infrastructure (ALFFI) tool developed by Midlands Connect to enable it to identify potential locations in the TfSE areas for smaller HGV recharging sites. In its current form, the tool is currently focussed on locations in and around the Midlands Connect area and major sites on the SRN. In the future, many of the larger national hauliers will have charging facilities at their depots or use en-route facilities on the SRN. However, smaller hauliers within will not be able to charge at their depots due to either financial, spatial or power supply constraints. They will be more dependent on public charging sites. The ALFFI tool is being adapted to enable the identification of potential sites for smaller, public HGV recharging facilities in peri-urban areas. Once identified, local planning authorities will be able to use the ALFFI tool to rank and evaluate sites as part of local authorities' development planning process should developers submit proposals. Where possible, TfSE will endeavour to ensure that these sites can support other freight-related facilities such as consolidation and diesel to EV vehicle interchange hubs. Once the identification work has been completed, TfSE officers will share the potential locations with our local authority transport and planning officers and demonstrate how the tool works.

3.2 The needs assessment phase of the Freight Awareness Programme has been completed. This has been carried out with input from a working group consisting of

local authority transport and planning officers, a representative from the University of Southampton, representatives from the STBs and the Steer management team. Professional bodies, including, the Chartered Institute of Logistics and Transportation, Chartered Institute of Highways and Transportation and Transport Planning Society, and the Road Haulage Association and Logistics UK were also consulted about how they could contribute to the development of the training. The needs assessment stage has identified:

- that there is a need to improve freight awareness in the public sector, particularly within local authorities;
- freight awareness can be divided into ten practical knowledge areas, including: definitions, operators, sites and infrastructure, data, customers, stakeholder engagement, and deliveries;
- a range of different options for the format of training/tools, including: 'traditional' PowerPoint-based training sessions, eLearning packages, practical guidance and checklists to support embedding freight awareness at a routine and day-to-day level of practice;
- a list of roles and potential audiences concentrated under the policy areas of transport planning, land-use/spatial planning and economic development and regeneration; and
- two potential providers for developing the training, the Chartered Institute of Highways and Transport and the Chartered Institute of Logistics and Transportation.

More detailed information about the needs assessment can be found in Appendix 3.

3.3 The Chartered Institute of Highways and Transport (CIHT) has been chosen to support the development of training modules in conjunction with Steer. Work to develop the course content started in September 2025. The training courses will be delivered through the CIHT website via the TfSE Centre of Excellence. It is anticipated that the courses will be available from April 2026.

3.4 At the last meeting of the Wider South East Freight Forum on 10 June 2025, it was agreed that we should hold a survey of the Forum members. This gave the members an opportunity to provide the STB client team and Steer project managers with feedback on what they valued about the Forum meetings and identified the topics they would like to discuss going forward. This survey has now been completed. The results are as follows:

- The respondents identified a number of benefits being part of the Forum including: sharing and exchanging knowledge, best practice and guidance; opportunities to influence decision-making; networking; receiving updates from public and private sector attendees; and promoting cross-boundary and joined up thinking.
- The most popular suggestions for future discussion topics included: decarbonisation, integration of planning and development policy at the local, regional and national level, freight and logistics in local strategy and policy, kerbside management, DfT's Future of Freight Plan, HGV parking and freight crime.
- The most useful outputs/shared documents that were requested included: case studies and good practice guides, guidance and checklists for local authorities, and public sector/private sector roundtable discussions.

3.5 The next meeting of the freight Forum on 25 November 2025 will include: updates from DfT on the New Plan for Freight (a revision of current Future of Freight Plan) and the Road Haulage Association on the outputs from the DfT's HGV Parking Task and

Finish Group; a presentation from Midlands Connect on their Freight and Superhub Research and a discussion on the macro and micro perspectives of freight consolidation schemes with presentations from Welch's a Cambridgeshire haulier and Rob Gloyn's from Solent Transport's Future Transport Zone project.

4. Rail

4.1 Work on the TfSE **Rail Strategy** is nearing completion. Useful engagement with key stakeholders has taken place to gain evidence, build consensus on corridor priorities and test early findings. Participants included: officers from TfSE's local authority partners; the Department for Transport; Network Rail; train operators Govia Thameslink Railway, Southeastern, Great Western and Cross Country; freight train operators; Heathrow and Gatwick airports; Southampton and Dover ports and the South Downs National Park. The project team has also met with some business end users to understand what employers and the wider economy need from rail in the TfSE area. The meetings with local authority officers have covered both the development of the rail strategy and the ongoing Strategic Infrastructure Plan (SIP) refresh to ensure the best use of officers' time.

4.2 The draft rail strategy is to go out for review to the key stakeholders listed above, including the Technical Officers Group, during the week beginning 27 October 2025. The final draft strategy is due to be presented to the Partnership Board at its meeting on 2 February 2026.

4.3 TfSE continues to work with England's Economic Heartland, Transport East, Network Rail, DfT and TfL on the **Wider South East Rail Partnership**. At its meeting in July 2025, the Partnership agreed to develop a Wider South East Rail Plan. The Plan will bring together existing evidence from all the partners to establish issues and opportunities, develop potential solutions and outcomes, and identify key challenges and dependencies for rail in the local and strategic authority areas in the Wider South East. The Partnership will engage with the wider south east's local and newly established mayoral combined county authorities, and national delivery bodies during its development. It will clearly demonstrate how the Plan will support and align with both central government's missions and the area's strategic and local authorities' priorities. The Plan could then be used to inform the new Great British Railways' work programme about the area's priorities from April 2026 onwards.

5. Decarbonisation

5.1 In September 2025, the Department for Transport finally released their Carbon Assessment Guidance setting out when and how carbon analysis should be integrated into strategy and scheme development. However, the guidance did not make reference to the Carbon Assessment Playbook (CAP), jointly created by the seven STBs. This is despite the CAP having been developed with DfT funding and reflects the fact that the DfT does not endorse or recommend any third-party tools or data sets developed outside of the DfT. Whilst the DfT have not endorsed the tool, they have made reference to it at webinars for local transport authorities on carbon assessment.

5.2 As reported previously, the CAP tool 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. The tool therefore allows the LTAs to put key elements of the Carbon Assessment Guidance into practice, in particular the early stage assessment of the potential impact on carbon emissions. No other tool currently exists for this purpose.

5.3 Following the publication of the Carbon Assessment Guidance, all of TfSE's constituent authorities were contacted by email to remind them of the role of the CAP in supporting the practical application of the Carbon Assessment Guidance.

5.4 As reported previously, to help LTAs become more proficient in using the CAP in advance of the long awaited guidance being published, a programme of 1-2-1 support is underway to enable representatives from the LTAs to better understand how to use the tool. Two workshops have been held with LTAs in the TfSE area and a further workshop is planned, following the publication of the guidance.

June 2025

EV Charging Projects for the Electrification of Light Commercial Vehicles

Development Guide for Local
Authorities



Glossary

Acronyms	
CPO	Chargepoint Operator
DNO	Distribution Network Operators
EVI/EVCI	Electric Vehicle (Charging) Infrastructure (i.e. charge points or charging stations)
LA	Local Authority
LCV / LGV	Light Commercial Vehicle / Light Goods Vehicle
MSOA	Middle Layer Super Output Area
PHV	Private Hire Vehicle
SME	Small and Medium sized Enterprise
SSEN	Scottish and Southern Electricity Networks (a DNO serving part of the TfSE region)
STB	Sub-national Transport Body (e.g. TfSE)
TfSE	Transport for South East (an STB)
UKPN	UK Power Networks (a DNO serving part of the TfSE region)
ZEV	Zero Emission Vehicle

Terms	Definition used in this guide
Charging Hub	Ultra-rapid (150 kW plus) charging location with a minimum of four EV bays. This is determined by the project as meeting the requirements of fleets and of CPOs when thinking about public charging infrastructure supporting light commercial vehicle electrification.
Destination charging demand	Based on destinations as identified by trip information data from regional transport model.
En-route charging demand	Based on origin-destination matrices, showing trip routes from regional transport model.
Fleet/Commercial Vehicle	Vans and light commercial vehicles.

The Electrification of Light Commercial Vehicle Fleets Requires Development of a Suitably Robust Public Charging Network

Summary

- The ZEV Mandate increasingly compels the electrification of vans and other light commercial vehicles (LCV) by limiting availability of new diesel vehicles.
- Most commercial fleet operators can't deploy electric LCV without:
 - Suitable EV technology (i.e., range and load capacity, etc.),
 - Affordable total cost of EV operations and
 - The ability to reliably recharge when and where they need.
- The public sector has a role to play in facilitating LCV electrification by mobilising the roll out of vehicle charging infrastructure and attracting private investment to commercially viable charging infrastructure ventures.

Although regulations mandate the increased adoption of electric vehicles (EVs) within new vehicle sales, operators of light commercial vehicles need access to reliable public charging infrastructure to support electric LCV (eLCV) operations during established duty cycles.

Only a small portion of the nation's LCV fleet enjoys access to depot-based charging and drivers are less likely to have access to domestic off-street charging. Public charging infrastructure for eLCVs must accommodate unique charging characteristics that are different from those for cars. In particular:

- LCVs drive higher mileages at lower efficiency, consuming more energy on a daily basis,
- LCV drivers are more time and price sensitive in their energy demand, and,
- LCVs have greater access requirements (e.g. charging bay size and vehicle security).

This guide focuses on the development of ultra-rapid charging hubs to ensure eLCV

drivers can quickly and efficiently recharge during their typical operating schedules.

The public sector's role

Local Authorities (LA) have a role to play in attracting private investment to the development of ultra-rapid charging infrastructure that facilitates the electrification of light commercial vehicles (and cars).

In leveraging their perspective as to where and when EV charging demand will emerge and identification of those sites that best serve that demand, LAs also address their own objectives including:

- Reduction of greenhouse gas emissions, improvement in air quality and other public health issues,
- Levering incremental value from public real estate and other resources,
- Enhancing competitiveness of the local commercial sector, and,
- Electrification of their own public sector fleet.

About this Guide

Background

The Government's [Electric Vehicle Infrastructure Strategy](#) obliges sub-national transport bodies (STB) to “assess charging demand at regional level and develop tools to assist local authorities in developing their own charge point plans”.

Transport for the South East (TfSE) supports this objective with tools and analyses included in its [Centre of Excellence](#). In addition, Transport for the North developed a Charging Infrastructure Visualiser, an interactive map showing forecast EVCI demand that has now been rolled out to all the STB areas. TfSE commissioned the development of the [STB EV Charging Infrastructure Visualiser](#) to include more detailed projections of demand for charging infrastructure as a function of the increasing uptake of commercial vehicles including electric LCV, buses, taxis and private hire vehicles (PHV), in addition to the existing projections for cars and HGVs. These projections are also available in standalone CSV files.

The TfSE instance of the STB EVCI Visualiser includes a pioneering methodology for

estimating where commercial vehicles operate (and therefore where they will require charging infrastructure) as a function of the geographic distribution of business and employees by industry and business size. Further details and assumptions are provided in the [methodology](#) document.

This project

TfSE commissioned Steer to devise a process by which LAs can:

- Identify where and when demand will emerge for charging infrastructure from eLCVs,
- Consider public real estate and other resources that support development of EV charging infrastructure,
- Scope commercially viable EV charging projects to support LCV electrification.

Steer conducted a pilot project to navigate the EVCI project development lifecycle for eLCVs, with the aim of creating practical examples and documenting lessons learned for this guide. The project entailed extensive engagement with various stakeholders across the value chain.

Who the guide is for and how to use it

This guide supports LA staff in facilitating the regional EV transition particularly among LCVs. It has been written with input from

Key lessons learnt

LA's have a role to play in the development of charging infrastructure that facilitates the electrification of LCVs (cars and other modes). However, their ability to fulfil that role relies on engagement with:

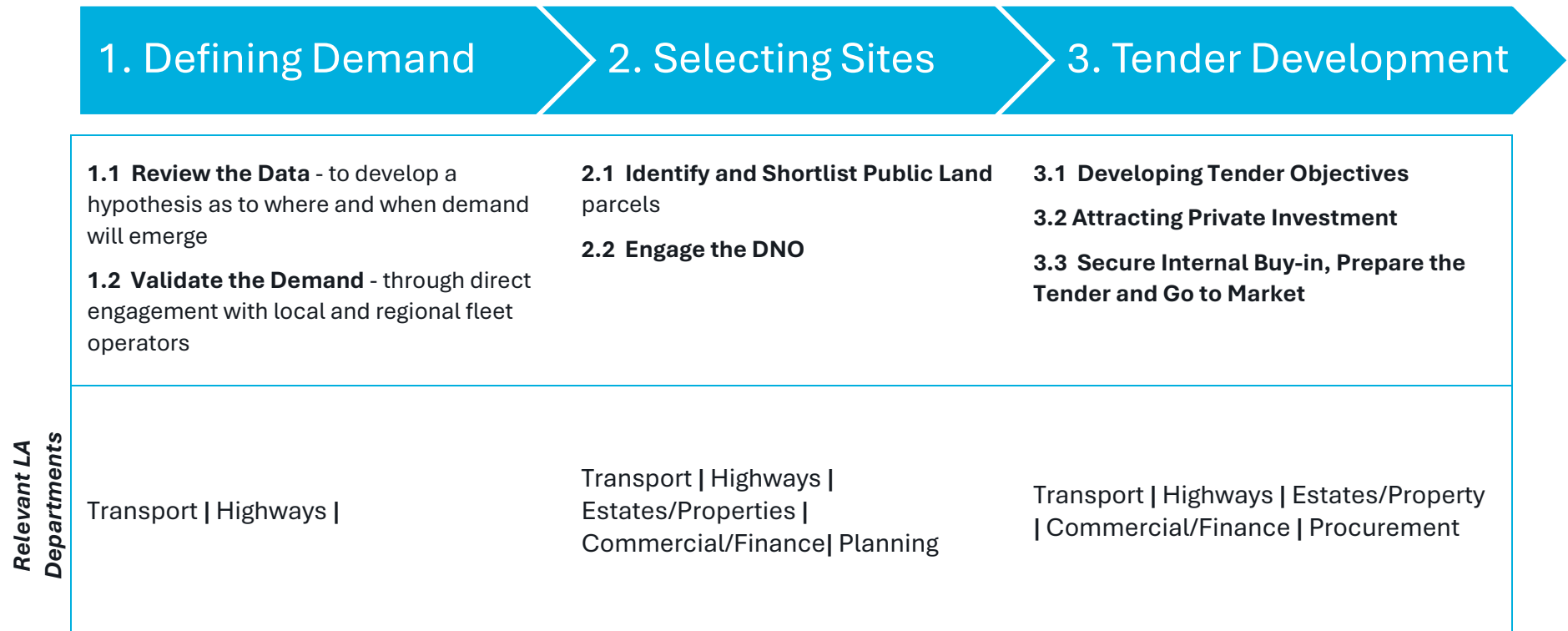
- The local commercial sector to validate where and when demand will emerge, and,
- Private investors (CPOs) seeking opportunity in commercially viable projects.
- Other LA departments more focussed on estate management and stewardship of the region's business community and the attraction of private investment.

Deployment of real estate and other public resources to EV charging can be inhibited by lack of clarity and competing interests within the LA, which must be proactively addressed.

EVI officers in Transport teams as well as others across commercial, property/estates, planning, procurement, highways, and more senior executive roles.

Project Development Cycle - EV Charging Infrastructure

The infographic below lays out the three stages of the project development cycle which make up the major headings and sections of this Guide. The rollout of infrastructure for commercial vehicles doesn't just sit with one team within an LA and should in fact rely on a collaborative approach from across different teams. If desired, this information can be used as a signpost to find the most relevant sections for your role.



1. Defining the Demand

2. Selecting the Sites

3. Tender Development

1.1 Review the Data - Overview

Project development begins with a hypothesis as to where and when demand will emerge for charging infrastructure from the expanding adoption of eLCVs.

The assessment for the hypothesis should consider evidence from widely available data (see blue box to the right and Section 1.1) to assess optimal locations for charging hubs, which will then be validated through direct engagement with fleet operators (Section 1.2) to review:

- Planned eLCV uptake over time,
- Associated energy requirements and
- Operator's duty cycles (i.e., the distances, routes and regions in which they travel and opportunities to accommodate vehicle charging).

A robust perspective on emerging demand will be crucial to attracting private investment.

Initial assessment

Tools like the STB EVCI visualiser are freely accessible and can be referenced by LAs and other stakeholders to foster

collaboration and transparency. Maps on the following pages reflect example outputs for Brighton & Hove including:

- Forecast concentration of electric LCVs by LA (and Middle Layer Super Output Area (MSOA)),
- Forecast eLCV energy demand by MSOA,
- Locations where vehicles frequently stop, and,
- Traffic volumes at select locations.

Next steps

A combination of these maps and available real estate information (as outlined in Section 2) provides initial insight to LAs as to where opportunities exist for development of charging infrastructure that facilitate electrification of LCVs.

Note that due to the current low levels of eLCVs, any public charging infrastructure installed in the next few years would need to be shared with cars to support a base level of asset utilisation. Therefore, the tender or investment prospectus should also lay out

eCar demand for public charging infrastructure (eCar demand is not discussed further in this report but this data is shown in the STB EVCI Visualiser).

Key data sources

[STB EV Charging Infrastructure Visualiser](#)

- Forecasted number of eLCVs (developed accounting for the ZEV Mandate) redistributed as a function of firms & employees by industry and firm size to reflect where eLCV work and will require energy.
- Forecast energy and charger demand derived from LCV telematics data.

[DfT Road Traffic Statistics](#)

- Average daily traffic flow by vehicle type (LCV).

[Field Dynamics - Fleet Map](#)

- Number of vans stopping for 6 hours or more, based on telematics data from Geotab, Webfleet and Lightfoot. (Available via Cenex or in Chargepoint Navigator/ Catchment Modeller tools).

1. Defining the Demand

2. Selecting the Sites

3. Tender Development

1.1 Review the Data – eLCV Uptake Forecast

Accessing the data

The TfSE Fleet EVCI forecast is available as CSV files via the **Centre of Excellence** and also via the [STB EVCI visualiser](#).

In the Visualiser tool the first map(s) of interest are populated by making the following selections in the settings menu (see Figure 1 for screenshot):

- **Year** – it is relevant to review both ‘2030’ and ‘2040’ as these dates represent the start and end of the charger lifecycle assuming installation before 2030 and a circa 12-15 year lifespan.
- **Administrative Boundaries** – ‘MSOA’.
- **Vehicle type** – ‘LGV’.
- **Travel Scenario** - ‘Business as usual’.
- **Behavioural Scenario** - ‘Baseline’.
- **Fuel type** – ensure ‘Battery Electric Vehicle’ is selected.
- **Display values as** – either ‘Per sq km’ or ‘Per 000 vehs’ as required.

Figure 1: Screenshot of the STB EVCI Visualiser tool showing the required settings to display the relevant eLCV forecasts.

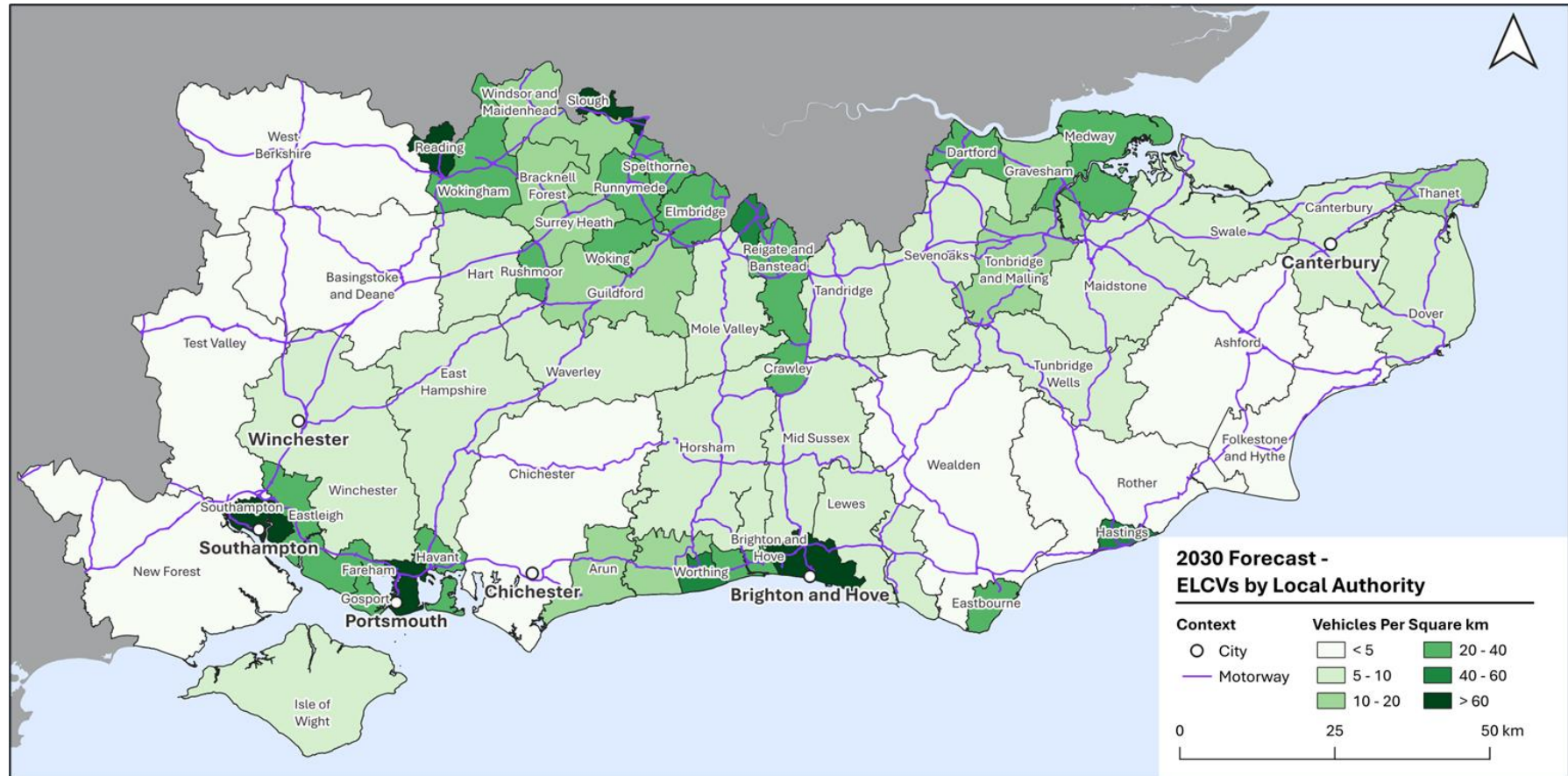
Source: STB EVCI Visualiser

What the data shows

Figure 2 illustrates the LAs likely to have the highest density of eLCVs by 2030. This would be a view that the CPOs would be interested in, therefore it is important for LAs to consider when thinking about the attractiveness of their proposition against other areas.

The TfSE instance of the STB EVCI Visualiser interface also indicates the absolute number of eLCVs projected in five-year increments through to 2050 and at the MSOA level. These numbers provide a basis for anticipating required chargers based on targeted EV/charger ratios which will be different for each LA to account for different levels of off-street parking availability (see Appendix A). The higher the off-street parking availability the higher the EV to public charger ratio can be.

Figure 2: TfSE heatmap showing eLCV forecast in 2030 by LA.



Source: STB EVCI Framework Model.

1. Defining the Demand

2. Selecting the Sites

3. Tender Development

1.1 Review the Data – En-route & Destination Demand Forecast

Overview

Energy demand forecasts incorporate fewer assumptions compared to charger demand forecasts. For specific projects it is relatively easy to translate energy demand to charger demand based on the charging power desired and expected utilisation for the type of site using the following equation:

$$\text{number of chargers} = \frac{\text{annual energy demand}}{\text{charger power} \times \text{hours of operation} \times \text{utilisation}}$$

Remember however that the annual energy demand for that locality could also be met by other chargers in the area.

Accessing the Data

The map in Figure 3 showing charging demand from eLCVs is created using the CSV data from the TfSE fleet forecast, developed using the STB EVCI Framework model. (The STB EVCI Visualiser shows the combined demand from all vehicle classes.)

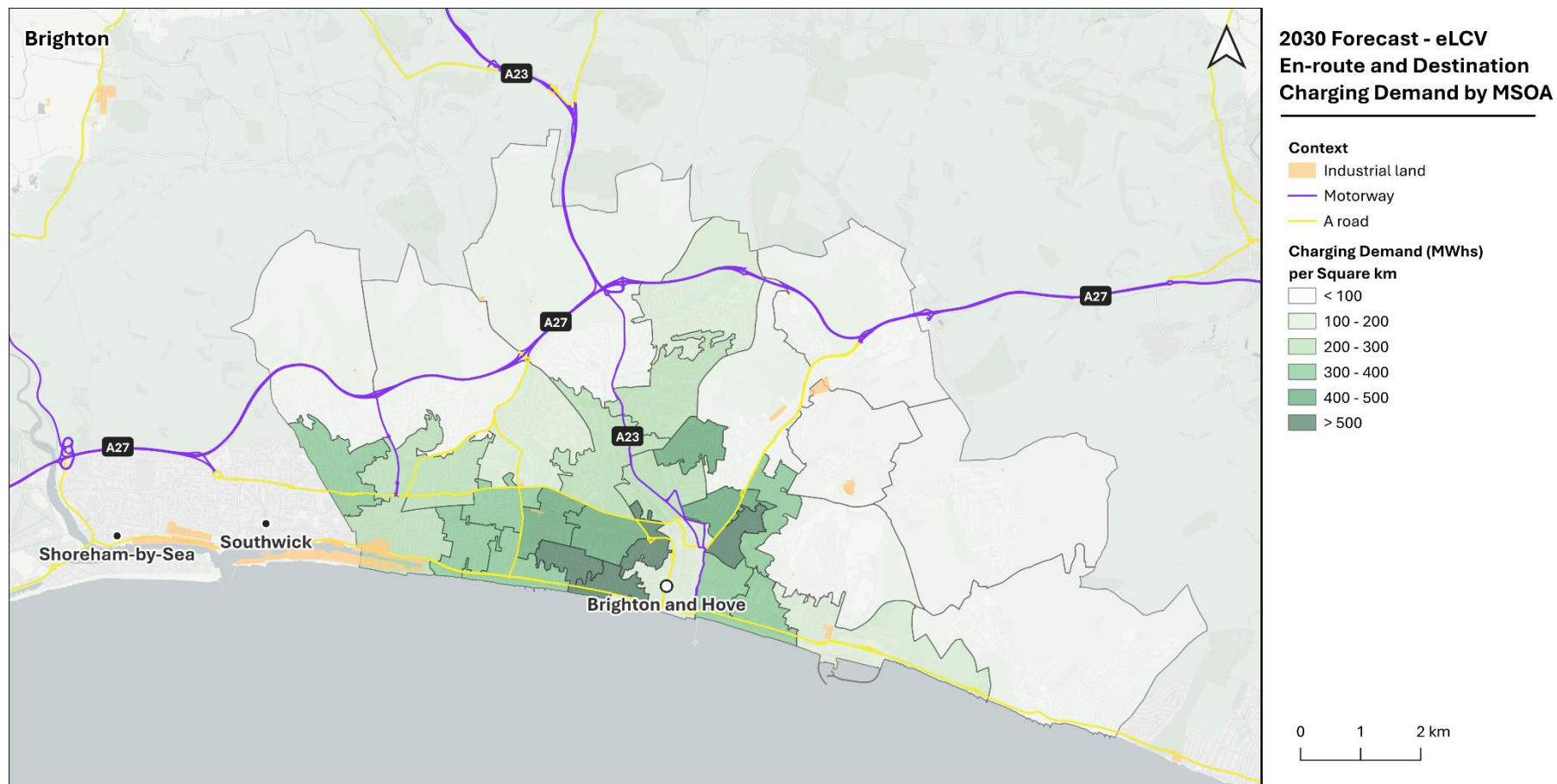
What the data shows

Figure 3 shows the MSOA areas within Brighton & Hove with the highest forecast en-route/destination demand for ultra-rapid charging from eLCVs according to the STB EVCI Framework model (in darkest green).

The model uses inputs from the Regional Transport Model – trip information based on mobile data – to distribute destination-based charging demand to the destination.

The STB EVCI Framework model engine further includes a tool to identify locations on the major road network suitable for en-route rapid chargers, based on the modelled trip routes and trip distances.

Figure 3: Forecast en-route and destination charging demand by MSOA for eLCVs in 2030.



Source: STB EVCI Framework Model.

1. Defining the Demand

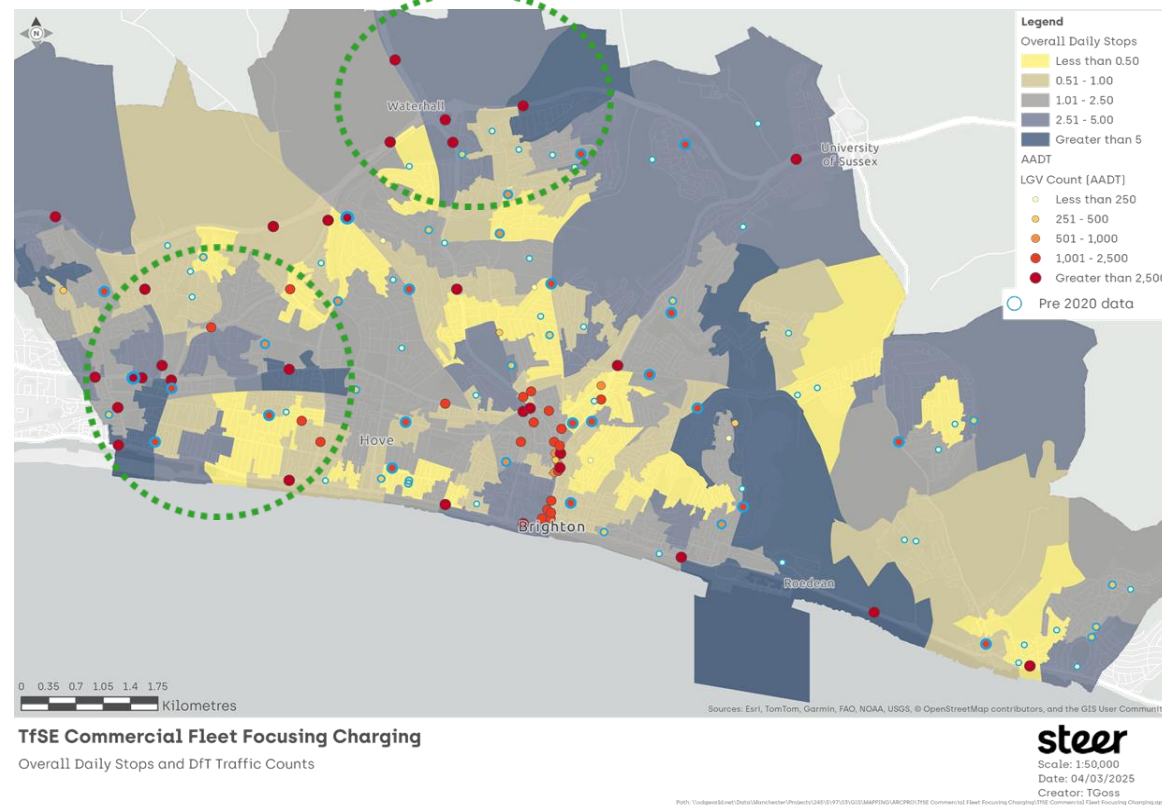
2. Selecting the Sites

3. Tender Development

1.1 Review the Data – Traffic and Telematics Data

Figure 4 shows the FleetMap data (source: Field Dynamics available to purchase through Cenex¹) indicating where vehicles are likely stop overnight, and LGV (i.e. LCV) traffic count data (source: **DfT Annual Average Daily Traffic Count data**) indicating the areas of high-powered, en-route charging demand. Note that both datasets are samples (i.e. the data does not provide full coverage).

Figure 4: Brighton and Hove, LCV traffic counts and telematics stopping information.



Assessment

Rapid charging hubs should be located near the highest LCV traffic count areas (darker red dots) and adjacent or close to areas where LGVs are kept overnight so that drivers can top-up at the end or start of their day (darker blue areas).

Circled in green are potentially good areas for LCV charging - the western edge of Brighton & Hove and the A23 and A7 intersection in the North.

Tip: Check if your highways department has additional traffic count data to supplement the DfT data.

¹ Contact nevis@cenex.co.uk

Source: Fleet Dynamics and DfT.

1. Defining the Demand

2. Selecting the Sites

3. Tender Development

1.2 Validate the Demand

Validating demand

To attract private investment in charging projects for light commercial fleet vehicles, LAs can significantly contribute by directly engaging with the fleet operators who will drive demand.

This project's engagement with businesses operating fleets of between 6-10 vehicles found that:

- Most vans go home with the driver overnight and most do not have off-street parking/charging.
- Hence, charging preferences are:
 - In the morning at shift start or
 - Over longer mid-shift breaks.
- Drivers prefer locations with amenities (e.g. shops and toilets).
- In considering adoption of EVs, smaller businesses are unlikely to have a defined fleet plan but are likely to be influenced by short-term cash flow and availability of new or used EVs.

- Contactless payment is a key requirement for drivers charging EVs in commercial use.

LAs should conduct further engagement with their local businesses to understand:

- Planned eLCV uptake over time,
- Associated energy requirements (based on daily/annual mileage),
- Operator's duty cycles (i.e. the shift times, routes and regions in which they travel and opportunities to accommodate vehicle charging), and,
- Appetite to commit to obtaining a defined amount of energy from select ultra-rapid charging hubs, and,
- Barriers to electrification.

Recommendation

Transport teams in LAs should consider undertaking dedicated outreach programs with fleet operators and their LCV drivers, perhaps through public sector departments already engaged with local private sector enterprises.

When engaging with representative trade bodies like Chamber of Commerce, AFP, Logistics UK and others, it is recommended that:

- Key messages to LCV operators are repeated across consecutive newsletters to encourage engagement,
- Requests for engagement are based on specific geographic areas of interest, and/or
- Requests for engagement and input are made through live webinars/events.

1. Defining the Demand

2. Selecting the Sites

3. Tender Development

2.1 Identify and Shortlist Public Land Parcels

Key site selection criteria

This project found that sites suitable for eLCV charging are likely to have the following features:

- Space for a minimum of four accessible² parking/charging bays,
- Proximity to amenities (toilets, café/shop),
- Adjacent to high-traffic routes with easy access and
- Proximity to electricity network infrastructure.

LA land parcel data

Availability of land for EVCI development depends on competing interests over the land and, in part, the financial circumstances of the council.

Our engagement with estates/properties departments of local authorities showed that the availability of land data is not necessarily clear. Even in the best cases,

data is unlikely to reflect a complete view of what is available. Smaller land parcels that are still suitable for EV charging may only become known by ‘walk through’ of the area or when someone approaches the LA with a specific query about the land.

In addition, the land parcel inventory is likely to show freehold land only, information on leasehold land is often separate. While sub-leases require negotiations and add complexity leased land may still be considered for EVCI rollout if site fundamentals are strong and the lease term is of sufficient length (15 years plus).

Some local authorities prioritise land for disposal or development, these parcels often cannot be considered for EVCI development by the LA and CPOs are unlikely to be able to bid to purchase this land without information about the local electricity network capacity for connection. While EV charging can be a viable use for public land (often, particularly those smaller

parcels with convenient adjacency to traffic and energy), suitability typically requires long-term availability of the land and timely engagement with the local electricity network operator.

Recommendation

Identifying land for EV charging relies on close collaboration with estates/ property team personnel to assess opportunities that satisfy site selection criteria.

Local authorities should focus on identifying smaller land parcels that are adjacent to key LCV traffic routes that will likely be unsuitable for other uses and hence without or with limited competing interests and perhaps work with other neighbouring LAs to bundle these land parcels into compelling opportunities for CPOs.

² According to PAS 1899 standards, to ensure sufficient space for larger vans.

1. Defining the Demand

2. Selecting the Sites

3. Tender Development

2.2 Engage the DNO

Electricity network connections

Distribution Network Operators (DNO) serving the TfSE area are UK Power Networks (UKPN) and Scottish and Southern Electricity Networks (SSEN). The [ENA tool](#) can indicate the right DNO for any specific site.

The cost of the connection to the electricity network from the identified EV charging sites can vary widely and reflect location of the existing electricity network with reference to the selected site. Grid connections that require cables to cross multiple land parcels from different landowners are expensive and can require time consuming wayleaves and easements.

Both DNOs provide helpful online tools to view the network (and capacity):

- [SSEN's Electric Office Mapping Tool](#)
- [UKPN's Network Infrastructure and Usage Map](#)

Connection size

Connection size (in kVA) roughly reflects the number of chargers multiplied by the

average charger power (1 kW $\approx$ 1 kVA). This guide promotes the installation of chargers with a rating of 150 kW or more because of the importance of charging speed to LCV operators. Current vehicle models however limit the maximum power drawn such that the average charging power is currently around 80 kW. Over the charger lifecycle, vehicle capabilities will continue to improve and need to be supported by the same EVCI.

DNOs offer pre-connection application support to provide guidance on any thresholds for connection that may significantly increase time or costs for connections in specific areas and to talk about solutions, such as flexible or phased connection that may help manage costs and timelines for EVCI rollout through:

- [UKPN's "Ask the expert' surgery"](#) and
- [SSEN's "LA & Community Energy Group"](#)

The size of connections should balance current and anticipated future demand with the cost of connections. In many cases, current grid availability will serve for the

near term. Cost and time for larger connections can present challenge but all chargepoint operators will likely utilise load balancing software to manage power drawn from chargers.

Connection costs estimates and quotes

A high-level budget estimate can cost up to £300. A full connection quote, which includes a full network power study is about £1200. DNOs are bound by Guaranteed Standards of Performance which require them to respond to connection quote requests within 45 working days for low voltage connections and 65 working days for high voltage connections.

Connection costs are made up of a non-contestable component (works which must be carried out by the DNO) and a contestable component that may be completed by an independent connections provider (ICP) registered with the DNO (this may be cheaper). Ultimately, the CPO is best placed to coordinate the connections process.

1. Defining the Demand

2. Selecting the Sites

3. Tender Development

3.1 Developing Tender Objectives

The first task should be defining a set of prioritised objectives. Generally, those objectives include the establishment of EV charging infrastructure funded by private investment that facilitate electrification of light commercial vehicles while:

- Deriving value from the re-deployment of public real estate and other resources to their “highest and best use”,
- Enhancing the economic viability of the region’s transition to eLCVs, and,

- Achieving social objectives around emissions reduction and public health.

Efficient procurement and clear contractual terms ensure that the LA and CPO/investor align in meeting driver demand while satisfying investment goals.

3.2 Attracting Private Investment

A successful tender for a concession where a private investor funds, installs, and operates EV charging infrastructure for eLCVs should align with both the LA’s and the chargepoint operator’s objectives. The ITT including the specification and draft contractual terms should account for the following CPO requirements.

CPO criteria for investing in EVCI

In addition to the site selection criteria in Section 2.1 it is essential for CPOs to secure long-term concessions (i.e. 20 years and up) without exposure to any “no fault” break clause at the discretion of the tenderer that would inhibit their opportunity to secure

return on investment. CPOs also need to have control over the setting or adjusting of their tariffs to reflect changes in their costs.

CPOs also find it desirable to secure:

- Freedom to appropriately design/brand the charging infrastructure,
- No restriction on “change of control” that would inhibit their raising of incremental capital.

Ultimately, investors are compelled by well-developed projects at scale that facilitate return on investment while mitigating exposure to commercial risk.

Observation

CPOs have an appetite to seek explicit supply relationships with LCV fleet operators to mitigate their exposure to commercial risk.

Tendered projects that validate the emergence of demand from these operators will attract full private sector funded offers to support electrification of LCV fleets and secure objectives of the LA and the wider public sector.

1. Defining the Demand

2. Selecting the Sites

3. Tender Development

3.2 Preparing and Running the Tender Exercise

Once demand has been validated and sites have been shortlisted, the LA can engage its procurement resource in preparing the tender, including draft contracts tied to key performance indicators (KPIs), and a go-to-market strategy. The EVI officer should lead in the drafting of the KPIs, the technical and commercial specification (which should not be prescriptive but should set minimum requirements), and a set of clear and transparent evaluation criteria. It may be beneficial to test the evaluation framework to see how different bidder responses would be evaluated, this would also help to develop some worked examples that could be provided by bidders.

EV charging presents opportunity for LAs to engage in a commercial venture securing value for the public sector and service to LCV operators. An effective tender that indicates commercial viability while mitigating commercial risk secures the necessary approvals based on:

- The economic, environmental and public health benefits to be secured by

the public sector, the CPO and local LCV operators, and,

- Mitigated risks reflected in draft contractual terms for this public engagement in a commercial venture.

Procurement approach

Depending on its size, the EV charging project may be subject to public procurement legislation revised in February 2025. The authority's procurement and legal support will confirm the form of process to be engaged in securing a chargepoint operator to fund, install and operate the resource. Formal approval to go to tender should be sought.

Shortlisting CPOs

Particularly if using an open procurement process, the LA may benefit from identifying target CPOs to invite to tender. It is essential that shortlisted CPOs are in the business of providing ultra-rapid charging, this information can be found at [Zap-Map](#) or through [ChargeUK](#), the industry's representative body.

It is also desirable that CPOs demonstrate the following (which can also be assessed through the tender process):

- A track record of having successfully installed projects of comparable scope, preferably with at least some coverage in the region and experience with the relevant DNO,
- A focus on providing a positive experience comprised of reliable availability of chargers at convenient locations and at economical pricing,
- A service offer focussed on serving the relatively more predictable demand of LCV fleets,
- Payment receivable through contactless charging or roaming services such as Allstar, Pawa, Octopus Electroverse or ZapPay.

Running the Tender

The tender process should be more streamlined and faster than for publicly co-funded schemes which have additional requirements.

Appendix A: Households with off-street parking potential by LA.

Table 1: Local Authority proportion of households with off-street parking/parking potential.

LA	Households with access to off-street parking
Bracknell Forest	61%
Brighton and Hove	47%
East Sussex	68%
Hampshire	53%
Isle of Wight	67%
Kent	68%
Medway	70%
Portsmouth	34%
Reading	49%
Slough	58%
Southampton	73%
Surrey	70%
West Berkshire	74%
West Sussex	69%
Windsor and Maidenhead	67%

Source: FieldDynamics. <https://onstreetcharging.acceleratedinsightplatform.com/>. Field Dynamics have determined households that have sufficient space to park and charge within the boundaries of their property using Ordnance Survey's OS MasterMap Topography and AddressBase datasets. Each property has been assessed using Field Dynamics advanced algorithms to provide the parking propensity score of 0, 1 or 2 for each individual UPRN. Any property with a score of 0 is an on-street household.

Appendix B: Slough maps

Figure 5: Forecast en-route and destination charging demand by MSOA for eLCVs in 2030 in Slough.

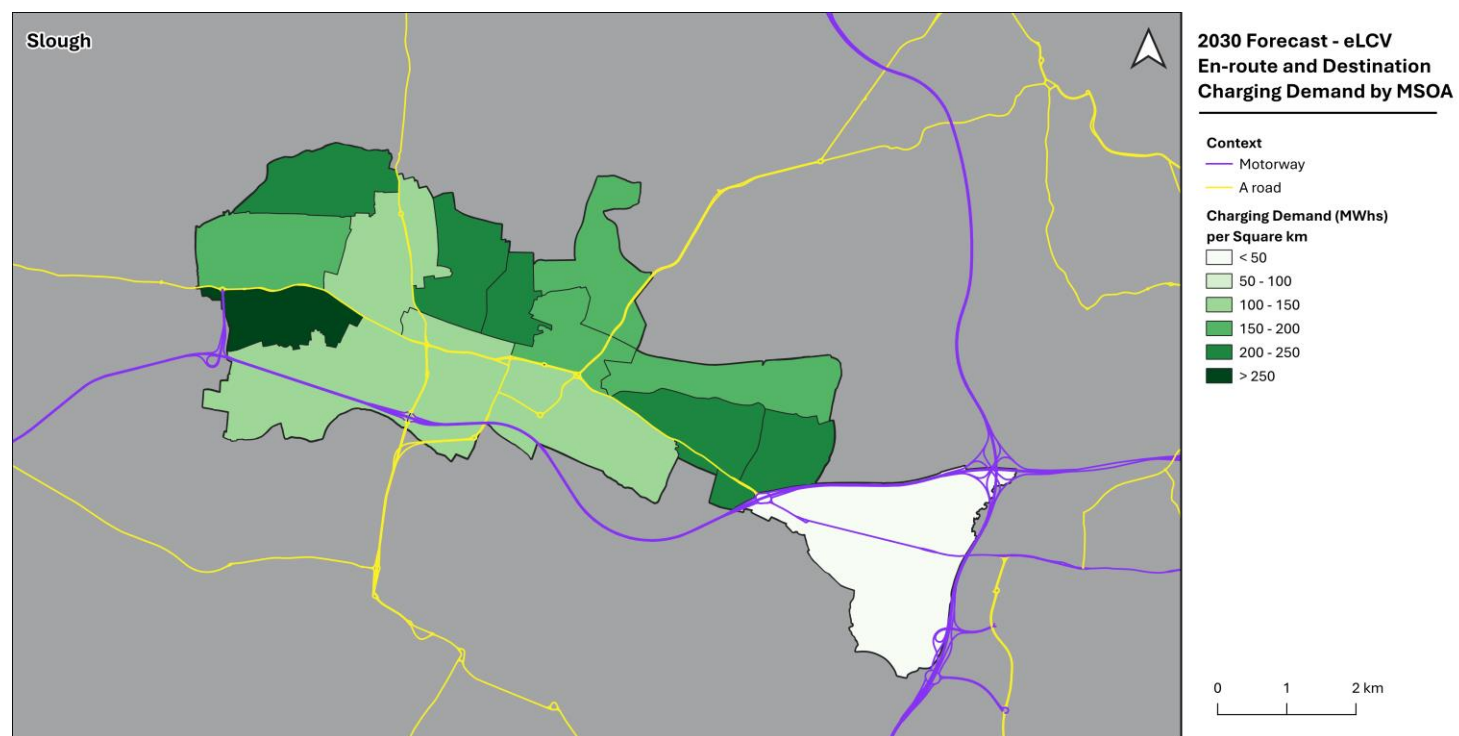
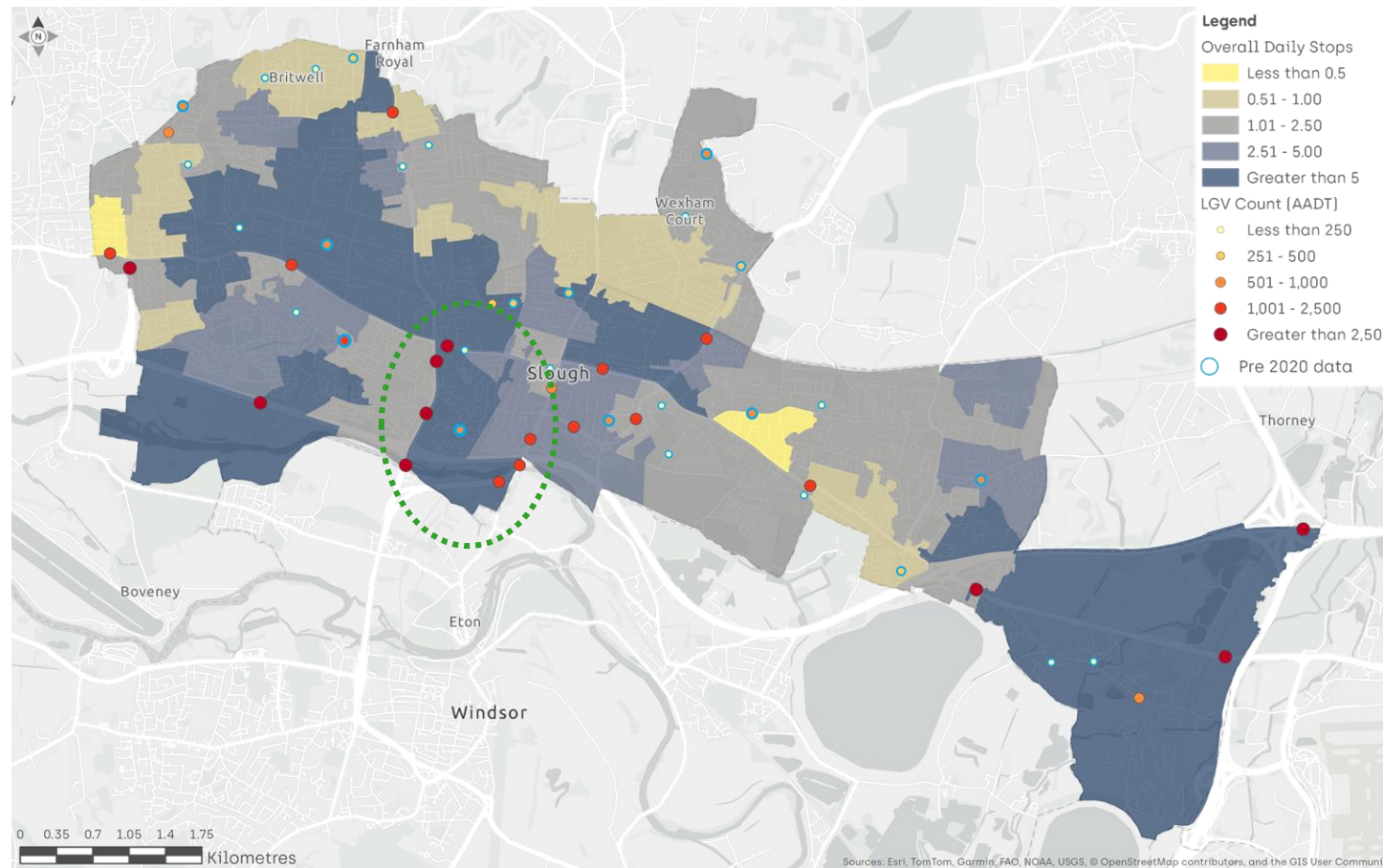


Figure 6: Slough, LCV traffic counts and telematics stopping information.



Assessment

Rapid Charging Hubs should be located near the highest LGV traffic count areas (darker red dots) and adjacent or close to areas where LGVs are kept overnight so that drivers can top-up at the end or start of their day (darker blue areas).

Circled in green a potentially good area for LCV charging - the A4355 has four dark red spots and is adjacent to an area with high-number of overnight stops. But note that the traffic count data is not evenly distributed across the area and the Fleet Map data may also not be representative of the population.

steer

Technical Programme Update
Appendix 3 - Improving public sector freight awareness

Improving public sector freight awareness

Phase 1: Needs assessment report

September 2025 Version 2.0

Prepared by

Steer

14-21 Rushworth Street

London SE1 0RB

+44 20 7910 5000

www.steergroup.com

Prepared for

Transport for the South East, England's Economic Heartland and Transport East

Control Information

Author/originator: FJ (Steer), IW (Future City Logistics), TC (University of Southampton)

Reviewer/approver:

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Executive summary

Context

'Freight awareness' is the understanding required of the freight system's operations, ways of working, constraints, opportunities and needs for informed policy and decision-making across transport, planning and economic development disciplines.

Steer, with Future City Logistics and University of Southampton, has been commissioned by Transport for the South East (TfSE), England's Economic Heartland (EEH) and Transport East (TE) to design a programme to increase awareness of the needs of the freight sector in public sector bodies at regional and local levels; and to provide information to the freight sector to support navigation of the public sector. The sub-national transport bodies have identified the need to "improve capacity, capability, intelligence and expertise in the [regions]" (TE)¹, and specifically to "increase public sector understanding of the freight and logistics industry" (TfSE)², by "providing 'training at a local level for planners'" (EEH)³.

The Freight Awareness project for TfSE, EEH and TE has been designed to develop suitable training, and has two phases of work:

- **Phase 1:** a training needs assessment to build an understanding of the need for freight awareness and determine priorities for the Freight Awareness programme; and
- **Phase 2:** a programme development phase to develop and pilot the tools and training recommended through Phase 1.

This report is the output for Phase 1 and so presents the findings of the training needs assessment and outlines options for the Freight Awareness programme to be developed in Phase 2.

Objectives of the project

The main objectives of the Freight Awareness programme overall are to:

- increase the knowledge and understanding of local authority officers responsible for transport and spatial planning of the needs and impacts of freight and logistics operations in their areas;
- enable better informed decision-making that takes greater account of the needs of the freight and logistics sector; and
- enable the development and implementation of practical solutions that seek to mitigate the impacts of the freight and logistics sector.

¹ Transport East (2023) https://www.transporteast.gov.uk/wp-content/uploads/20230224-TE_Strategy-FINAL.pdf

² TfSE Freight and Logistics and Gateways Strategy
https://transportforthesoutheast.org.uk/app/uploads/2022/05/TfSE_FLAGS_Report_v1.71.pdf

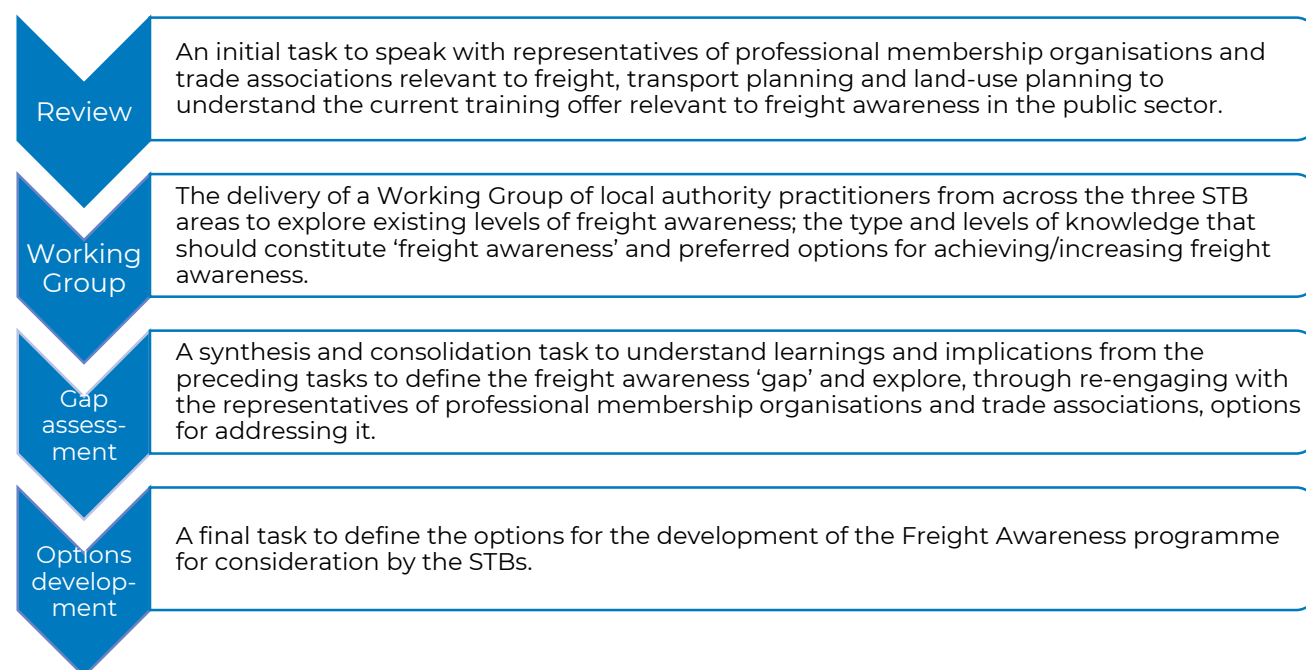
³ England's Economic Heartland's Freight Study (2019) https://eeh-prod-media.s3.amazonaws.com/documents/Freight_Study.pdf

The objectives of Phase 1 of the Freight Awareness project (training needs assessment) are to:

- understand current levels of freight awareness within the public sector, including knowledge areas/topics and level of knowledge held;
- identify where freight awareness is needed and how it is currently deployed in planning and decision-making processes;
- identify the full scope of freight topics that should be covered by the Freight Awareness programme, including the level of detail required for each;
- identify what the freight sector needs to know about how local authorities work in order to navigate it and its processes more effectively, and with better outcomes;
- identify any relevant private sector activity attempting to address freight awareness and any reasons for successes or failures; and
- identify preferred options and associated costs for delivery of the Freight Awareness programme.

Project approach

Phase 1 of the project has comprised four main areas of work:



The need for 'freight awareness'

'Freight awareness' is the opposite of 'freight blindness'. At the most basic level, freight awareness is an understanding that functioning economies and communities (and therefore streets and places) depend upon the efficient, timely and cost-effective movement of goods.

Without freight awareness in the public sector, there is a significant risk that the planning and regulatory environment does not take full account of how the freight sector works, and the constraints and opportunities that exist. In general terms, for planning and decision-making to deliver the right outcomes it must be founded upon

an accurate understanding of the issues at play in the locale and the potential consequences of different actions. Without a clear, comprehensive understanding of the broader system that exists, there is the risk that:

- the wrong, or a sub-optimal, solution is developed and implemented;
- the issue is displaced, worsened, and/or there are unintended consequences; and/or
- the sector/actors involved are hindered, or not sufficiently enabled, by the planning and regulatory environment

Key findings from the training needs assessment

The key findings from the discussions with the Working Group and professional membership and trade organisations relevant to the development of the Freight Awareness programme include:



There is currently no 'off-the-shelf' training programme that covers the freight topic for a public sector audience.



With few exceptions, current levels of freight awareness in the public sector are low, and where practitioners do have some proficiency or expertise it is typically limited to one or two sub-themes within the freight area.



Local authority practitioners can be unaware of the extent of their lack of freight awareness and not seek further advice or assistance when working on issues or projects which interact with the freight and logistics. This may result in poor outcomes or further challenges which the freight or public sector must then work to navigate, absorb or try to retrospectively solve.



The 10 knowledge areas (below) identified appear to be a practical segmentation of the freight awareness knowledge required.

1.	Definitions	6.	Outcomes
2.	Operators	7.	Regulations and enforcement
3.	Sites and infrastructure	8.	Data
4.	Customers	9.	Stakeholder engagement
5.	Deliveries	10.	Potential solutions



The Working Group identified a range of different options for the format for training/tools to be developed as part of the Freight Awareness programme, in addition to 'traditional' PowerPoint-based training sessions and eLearning packages. Of particular note was the request for practical guidance and checklists to support embedding freight awareness at a routine and day-to-day level of practice.



Our conversations with the Working Group and external stakeholders identified a long list of roles and potential audiences for which freight awareness was relevant, concentrated under the policy areas of transport planning, land-use/spatial planning and economic development and regeneration.

Freight awareness training delivery options

The project has identified the Chartered Institution of Highways and Transportation (CIHT) and the Chartered Institute of Logistics and Transport (CILT) as suitable training providers as part of the Freight Awareness Phase 1 Needs Assessment in their capacity as professional membership organisations relevant to freight and related disciplines. Both organisations have previous experience in building and delivering training courses and they have expressed interest in developing a freight awareness training solution in Phase 2.

However, both have very different types of solutions and it is not straightforward to compare them on a like-for-like basis. Both organisations' proposals must be discussed with the STB client team before a decision can be made as to what the Freight Awareness programme will comprise.

Next steps

The Freight Awareness Phase 1 training needs assessment identified that the Chartered Institution of Highways and Transportation (CIHT) and the Chartered Institute of Logistics and Transport (CILT) are capable of providing suitable training programmes to respond to the objective of improving public sector freight awareness. Both bodies have provided examples of potential training programmes. The STB client team and the Freight Awareness project team will now ask them to submit formal proposals to which are fully costed and contain delivery outputs, outcomes and timescales. These will be formally assessed by the project team. The one that best aligns with the requirement for the Freight Awareness programme will be taken forward to Phase 2.

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1 Introduction

1.1 Introduction to the project

Steer, with Future City Logistics and University of Southampton, has been commissioned by Transport for the South East (TfSE), England's Economic Heartland (EEH) and Transport East (TE) to design a programme to increase awareness of the needs of the freight sector in public sector bodies at regional and local levels; and to provide information to the freight sector to support navigation of the public sector. The sub-national transport bodies have identified the need to “improve capacity, capability, intelligence and expertise in the [regions]” (TE)⁴, and specifically to “increase public sector understanding of the freight and logistics industry” (TfSE)⁵, by “providing ‘training at a local level for planners’” (EEH)⁶.

The Freight Awareness project for TfSE, EEH and TE has been designed to develop suitable training, and has two phases of work:

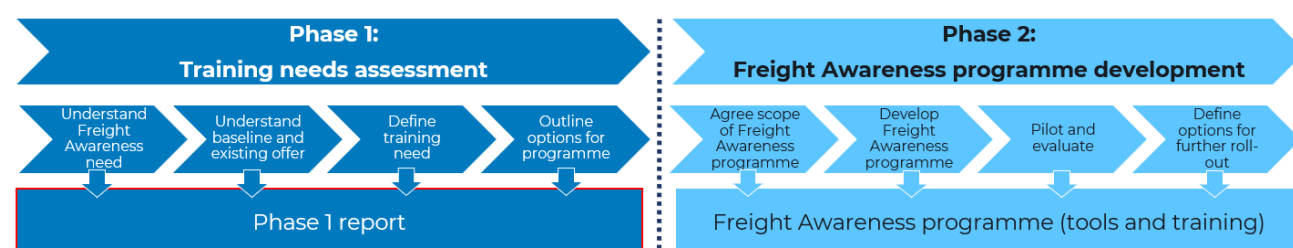
Phase 1 - Training needs assessment: an exploratory phase to understand:

- the key areas of knowledge required to constitute ‘freight awareness’;
- which roles and functions require freight awareness for them to be carried out effectively; and
- the best methods for conveying the knowledge required for ‘freight awareness’.

Phase 2 - Programme development: a second phase which builds on the assessment of the training needs to develop and pilot appropriate and effective tools and training to increase freight awareness in the public sector.

This report is the output for Phase 1 and so outlines the findings of the training needs assessment and outlines options for the Freight Awareness programme to be developed in Phase 2.

Figure 1-1 Freight Awareness project overview



⁴ Transport East (2023) https://www.transporteast.gov.uk/wp-content/uploads/20230224-TE_Strategy-FINAL.pdf

⁵ TfSE Freight and Logistics and Gateways Strategy https://transportforthesoutheast.org.uk/app/uploads/2022/05/TfSE_FLAGS_Report_v1.71.pdf

⁶ England's Economic Heartland's Freight Study (2019) https://eeh-prod-media.s3.amazonaws.com/documents/Freight_Study.pdf

1.2 Project context

1.2.1 The need to improve 'freight awareness'

The National Infrastructure Commission's 2018 interim report on the Future of Freight identified an issue of "freight blindness"⁷; a widespread failure within the UK's planning system to recognise and accommodate the needs and value of freight, leading to sub-optimal outcomes for the freight sector in terms of infrastructure and land-use planning and decision-making.

In 2022, the Department for Transport (DfT) published The Future of Freight: A Long Term Plan. The Plan is currently being updated and a new version is anticipated in late 2025. The 2022 version of the Plan, published under the then Conservative government, set out how government and industry would work together towards a freight sector that is cost-efficient, reliable, resilient, environmentally sustainable and valued by society. The Plan suggests that planners and decision makers need to better understand and value freight in order to better support the sector, in economic and environmental terms.

1.2.2 A recognised need to improve freight awareness by TfSE, EEH and TE

TfSE, EEH and TE have all identified freight and logistics as areas of focus and specifically recognise that the public sector has a gap in its understanding of the freight sector in their freight and/or transport strategies:

- In TfSE's Freight and Logistics Gateways Strategy 'freight blindness', defined here as "where the needs of freight and logistics are not adequately understood and thereby not fully considered by local and regional planning authorities"⁸ is recognised as a factor constraining the growth of the freight and logistics sector. The Strategy includes a strategic action to facilitate better local freight and logistics planning, and an associated measure to raise freight awareness among public sector officers.
- EEH's Freight Action Plan, revised 2025, identifies "freight blindness" as a strategic issue with associated actions including supporting public sector awareness and training.
- In TE's Transport Strategy the value of the freight sector to the area's local economy is demonstrated through the fact that port operations alone contributed over £7.6 billion in GVA in 2015⁹. The strategy's delivery plan includes a commitment to a technical work programme to "improve capacity, capability, intelligence and expertise in the region to drive forward our strategy projects and programmes."¹⁰

Work is underway to address this gap within each of the Sub-national Transport Bodies (STBs) and inform longer-term strategic thinking by increasing engagement with the freight and logistics industry, including through the Wider South East Freight Forum (WSEFF).

⁷ [Future of Freight Interim Report](#), National Infrastructure Commission, 2018, page 32

⁸ [Freight Logistics and Gateways Strategy](#), TfSE, 2022, page 4, paragraph 1.16

⁹ [Transport Strategy 2023-2050](#), Transport East, page 25

¹⁰ [Transport Strategy 2023-2050](#), Transport East, page 105

The Freight Awareness project is designed to help the STBs address more immediate issues, by working collaboratively to increase the awareness and understanding of the needs of the freight and logistics sector in local authorities and by increasing the awareness of the workings of local government amongst freight and logistics operators and associated organisations.

1.3 Objectives of the project

The objectives of the Freight Awareness programme overall are to:

- increase the knowledge and understanding of local authority officers responsible for transport and spatial planning of the needs and impacts of freight and logistics operations in their areas;
- enable better informed decision-making that takes greater account of the needs of the freight and logistics sector;
- enable the development and implementation of practical solutions that seek to mitigate the impacts of the freight and logistics sector; and
- improve the understanding in the private sector (customers, operators and representative groups) of how local policy is developed, planning decisions are taken, and what information local authorities would find useful to have in order to better address industry requirements.

The objectives of Phase 1 of the Freight Awareness project (training needs assessment) are to:

- understand current levels of freight awareness within the public sector, including knowledge areas/topics and level of knowledge held;
- identify where freight awareness is needed and how it is currently deployed in planning and decision-making processes;
- identify the full scope of freight topics that should be covered by the Freight Awareness programme, including the level of detail required for each;
- identify what the freight sector needs to know about how local authorities work in order to navigate it and its processes more effectively, and with better outcomes;
- identify any relevant private sector activity attempting to address freight awareness and any reasons for successes or failures; and
- identify preferred options and associated costs for delivery of the Freight Awareness programme.

1.4 Project approach

Phase 1 of the project has comprised four main areas of work:

1. An initial task to speak with representatives of professional membership organisations and trade associations relevant to freight, transport planning and land-use planning to understand what (if any) training they offered that was relevant to increasing freight awareness in the public sector. We spoke with representatives from:
 - o Chartered Institution of Highways and Transportation (CIHT)
 - o Chartered Institute of Logistics and Transport (CILT)

- o Logistics UK
 - o Road Haulage Association (RHA)
 - o The Royal Town Planning Institute's (RTPI) and Transport Planning Society's (TPS) Transport Planning Network (TPN), a volunteer-led forum for those with an interest in transport issues, run jointly by the RTPI and the TPS. We were directed to this network by the RTPI.
 - o The Transport Planning Society (TPS)
2. The set-up and delivery of a Working Group, a representative group comprising public sector planning and transport planning practitioners from a variety of local authority officers from across the STB regions. Through a combination of presentations, discussions and site visits, the Working Group helped us explore:
- o existing levels of freight awareness;
 - o how existing levels of freight awareness have been achieved;
 - o the different roles and functions within authorities for which freight awareness was needed;
 - o the type and levels of knowledge that should constitute 'freight awareness'; and
 - o preferred options for achieving/increasing freight awareness.

Further information about the composition and activities of the Working Group is provided in Chapter 3.

3. A synthesis and consolidation task to understand learnings and implications from the preceding tasks to define the freight awareness 'gap' and explore, through re-engaging with the representatives of professional membership organisations and trade associations identified above, options for addressing it.
4. A final task to define the options for the development of the Freight Awareness programme for consideration by the STBs.

1.5 Structure of this report

The remainder of the report is structured as follows:

- Chapter 2 is an introduction to the issue of 'freight awareness' including the definition of freight awareness used for the purposes of this project. The challenges associated with low levels of freight awareness in the public sector are outlined.
- Chapter 3 outlines the approach taken to understand the current situation and to define the training need, including the detail of the meetings held with the Working Group.
- Chapter 4 sets out the findings from the training needs assessment, identifying what 'freight awareness' should comprise, the practitioners within the public sector who should have freight awareness and the ways in which levels of freight awareness could be increased.
- Chapter 5 outlines the requirements for the Freight Awareness programme, building on the findings from training needs assessment.
- Chapter 6 identifies the next steps for progression to Phase 2.

2 The need for ‘freight awareness’

‘Freight awareness’ is the understanding required of the freight system’s operations, ways of working, constraints, opportunities and needs for informed policy and decision-making across transport, planning and economic development disciplines. This chapter provides background and context for the term ‘freight awareness’ and outlines why freight awareness in the public sector is important, including examples of the problems that have arisen because of, or have been exacerbated by, low levels of freight awareness.

2.1 An introduction to ‘freight awareness’

2.1.1 A definition of ‘freight awareness’

The issue of ‘freight awareness’ was first raised in the National Infrastructure Commission’s 2018 interim report on the Future of Freight, in which it was stated that:

“...both government and local authorities often have little understanding of why and how to plan for freight, leaving the needs of the freight system far down the priority list. This has resulted in policy makers or planners being unable to take account of, or plan effectively for, the needs of freight.”¹¹

In TfSE’s Freight and Logistics Gateways Strategy ‘freight blindness’ is defined as:

“...where the needs of freight and logistics are not adequately understood and thereby not fully considered by local and regional planning authorities.”¹²

‘Freight awareness’ is the opposite of ‘freight blindness’ and is the term that has been adopted for the purposes of this project to support interpretation of the project’s objectives. At the most basic level, freight awareness is an understanding that functioning economies and communities (and therefore streets and places) depend upon the efficient, timely and cost-effective movement of goods.

For the purposes of this project, ‘freight awareness’ is defined as the understanding required of the freight and logistics system’s operations, ways of working, constraints, opportunities and needs for informed policy and decision-making across transport, planning and economic development disciplines.

2.1.2 Potential reasons for low levels of freight awareness

There are several potential reasons for the low levels of freight awareness that currently exist among planners and policy-makers in the public sector. These include:

- The overall UK planning system ‘guides’ the development of both public and private land and transport infrastructure, but traditionally has only been directly involved in transport provision if that transport is funded from the public purse: road and rail networks are used to move both people and goods and are built by the public sector, but the public sector only directly manages public bus and rail services.

¹¹ [Future of Freight Interim Report](#), National Infrastructure Commission, 2018, page 32

¹² [Freight Logistics and Gateways Strategy](#), TfSE, 2022, page 4, paragraph 1.16

However, the fundamental nature of the freight system is that it is primarily owned, operated by and invested in by the private sector.

- The majority of the UK population has a very low level of visibility and experience of the freight sector beyond seeing HGVs and vans on roads and receiving personal deliveries of parcels and groceries at home. Planners and policy-makers may drive a car or cycle but are unlikely to have any direct experience of warehousing or freight movements or be able to enhance their understanding of the freight system through their day-to-day experience.

However, a home grocery delivery is only the end point of a highly complex, international supply chain, which could consist of Irish beef, potatoes from Devon, Lincolnshire carrots and Scottish raspberries, and a bottle of French red wine. All home deliveries in total only account for approximately ten to fifteen percent of delivered volumes¹³. The vast majority of the freight sector's activity takes place at ports, railheads and distribution centres located in industrial areas, with goods delivered to supermarkets, offices, pubs and restaurants, typically located in town and city centres.

- Freight and logistics are not part of the formal education curriculum and the majority of undergraduate and post-graduate courses in transport, planning and associated disciplines do not typically allocate much, if any, teaching time to the consideration of the freight system. The subject also does not appear to be addressed through professional development activity.

Planners and policy makers must juggle several competing policy priorities, such as the need for more homes versus environmental concerns, and planning departments are often understaffed for the volume of work. There is little time or incentive to consider how the movement of people and goods could be better co-ordinated to address policy priorities; instead, freight is often considered as a problem to be mitigated rather than an essential enabler of everyday activities.

2.2 The impact of low levels of freight awareness

Freight is a derived demand for goods and services, with freight and logistics almost entirely delivered by the private sector. However, private sector operators use publicly owned infrastructure networks and are subject to national and local planning and regulatory policies. In broad terms, national government policy is to support the efficiency and growth of the freight sector as a fundamental enabler of the wider economy, while mitigating the negative impacts of freight on communities and the environment. At a local level, the wider national priorities may not be as clearcut or be seen as quite so relevant.

Without freight awareness in the public sector, there is a significant risk that the planning and regulatory environment does not take full account of how the freight sector works, and the constraints and opportunities that exist. In general terms, for

¹³ Extrapolated from: [The Implications of Internet Shopping Growth on the Van Fleet](#) RAC Foundation 2017

planning and decision-making to deliver the right outcomes it must be founded upon an accurate understanding of the issues at play in the locale and the potential consequences of different actions. Without a clear, comprehensive understanding of the broader situation that exists, there is the risk that:

- the wrong, or a sub-optimal, solution is developed and implemented;
- the issue is displaced, worsened, and/or there are unintended consequences; and/or
- the sector/actors involved are hindered, or not sufficiently enabled, by the planning and regulatory environment set.

Some examples of the impact of low levels of freight awareness in the public sector include:

- A shortage of lorry parking facilities in certain areas of the UK, including areas in TfSE (particularly around the port areas of Dover and Southampton), EEH and TE. TfSE's 2023 Lorry Parking Study¹⁴ identified a shortfall of approximately 1,500 parking spaces in the region. Addressing this issue requires:
 - o co-ordination between local authorities and National Highways;
 - o local planners and policy-makers to understand that HGV drivers are required by law to stop and take regular breaks, and afford the priority to proposals for new lorry parking facilities; and
 - o the ability and will to deal with any potential concerns from local residents.
- An insufficient supply of well-located (i.e. in places near to the point of distribution) warehousing space, which results in freight operators being unable to operate with maximum efficiency in terms of distances travelled, and/or less appropriate sites (on which it is easier to obtain planning permission for distribution activities) being used for distribution purposes. Analysis for TfSE's Warehousing Study¹⁵ identified that between 2012 and 2024 demand for warehousing floorspace in the TfSE area consistently outpaced supply, with rents during this period increasing by 78%. It is calculated that over the next ten years there will be a shortfall in supply of land for warehousing of 426 hectares, an area approximately equivalent to the space required for 950 large supermarkets.
- A lack of Intermodal and Strategic Rail Freight Interchange (IRFI and SRFI) facilities (facilities that enable the transfer of goods from rail to road modes, critical to enabling freight operators to utilise rail for goods movement) in London and the South East. This issue is considered to be a result of several factors including the scarcity of land suitable for large scale interchange developments; the lack of suitable locations where the strategic road and rail networks intersect; and the lack of awareness among local planning authorities about the value of such interchange facilities in enabling efficient supply chains and delivering local employment opportunities¹⁶.

¹⁴ [Lorry Parking Study](#), TfSE, 2023

¹⁵ [Warehousing Provision Study](#), TfSE, 2025

¹⁶ [Intermodal Freight Study (draft), TfSE, 2025] – will update this reference when Intermodal report is approved/published

- Locations where kerbside regulations or new active travel infrastructure (e.g. segregated cycle lanes) have been implemented in such a way as to make access to the kerbside for deliveries less efficient, and potentially unsafe (see the example shown in Figure 4-2 at The Bell Hotel in Aylesbury). In some high streets in London loading areas have been relocated from the adjacent kerbside to across the street or the cycle lane. This results in delivery drivers having to cross active cycle lanes or the main carriageway to make deliveries. This is particularly unsafe for deliveries of beer kegs to pubs and bars and led to a 2015 localised Code of Practice agreement between Transport for London, the British Beer and Pub Association, Brewery Logistics Group and Logistics UK.

Pedestrianisation and placemaking schemes which displace deliveries and servicing traffic by removing adjacent delivery locations and reducing the hours during which deliveries can take place (see the example shown in Figure 4-2 of Tavern Street in Ipswich). Each scheme is designed for the specific location but together create a compound effect. The result can effectively reduce the delivery window for a location to three to four hours a day, creating major cost and productivity issues for freight operators, who have vehicles available for 24 hours a day and drivers typically employed for an eight or nine hour shift.

- The increasing demand for homes, combined with a lack of available development sites has led to a rapid increase in mixed-use developments, particularly in larger towns and cities, and near key transport links. Combining residential with either commercial or retail activity often means that delivery and servicing facilities are shared between the different development uses, with the potential for conflict where the needs of one development use are significantly different to those the other/others.

A mixed use development of 160 residential units and a 4,000m² supermarket was completed in 2003, close to Victoria Station in Central London. A dedicated off-street loading bay was included in the building design and no conditions on delivery times were imposed during planning. However, when the supermarket opened and deliveries occurred 24/7, the local council received noise complaints from residents whose bedrooms were above the loading bay (Figure 2-7). Deliveries now only occur during the daytime when the area is crowded with pedestrians, cyclists and tourists.

Figure 2-1 Supermarket loading bay in Pimlico, London – loading bay below residential bedrooms



Some local examples of low levels of freight awareness were identified during the project and are provided in section 4.4.

2.3 How the public sector interacts with and influences the freight sector

International, national, and local regulations all influence the behaviours of the freight and logistics sector. International regulations control the engineering design of HGVs and vans and national traffic laws underpin most of the signage on the road network, but most of the planning and regulatory context relevant to the movement of goods is set by local planning and transport (highways) authorities at a local level.

Table 2.1 below identifies the range of policy areas that interact with and influence the activities of the freight sector at a local government level and indicates examples of the roles involved in each area. From a policy perspective, it is across these policy areas and roles that freight awareness is required in the public sector.

Table 2-1 How different policy areas/disciplines interact with and influence the freight sector

Policy area/discipline	Relevant policies/plans, regulations and activities	Relevance to the freight sector	Example roles involved
Transport strategy and policy	Transport Strategy/Local Transport Plan (LTP) and investment programmes	- Identify key investment priorities for transport, which may benefit freight (e.g. a travel demand management initiative could support improved journey time reliability on the highway network by encouraging individual users out of cars onto other modes, benefitting road freight). - Set out any specific schemes/initiatives designed to support and manage and enable clean, efficient freight.	- Strategic transport planners - Transport planners - Transport modellers
	Active travel strategies e.g. Local Cycling and Walking Investment Plans (LCWIPs)	Identify and prioritise improvements for cycling and walking, including new and upgraded infrastructure e.g. segregated cycle lanes and modal filters (a road traffic measure to restrict certain modes from passing through a specific point), which may have an impact on the routing of freight through urban areas and the availability of safe and lawful access for loading and unloading at the kerbside.	- Active travel officers - Design engineers
	Road safety strategies (e.g. Vision Zero plans)	Identify and prioritise interventions to reduce road danger, which may include mandating vehicle safety standards for larger and heavier vehicles (for example, the Direct Vision Standard in London) and/or requiring fleets to be part of an accreditation scheme which aims to raise safety and environmental standards (e.g. the Fleet Operator Recognition Scheme (FORS) , and the Driver and Vehicle Standards Agency's (DVSA) Earned Recognition scheme).	- Road safety officers - Transport strategy officers
	Air Quality Management Plan (AQMP) and Clean Air Zones (CAZ)	AQMPs outline a local authority's plan for addressing air quality issues within Air Quality Management Areas (AQMAs). The plan may include measures to reduce emissions from road transport, typically targeting/including diesel-fuelled freight vehicles. Such measures, such as the introduction of Clean Air Zones (CAZ) may require operators to upgrade their fleets to meet Euro VI	Air quality officers

Policy area/discipline	Relevant policies/plans, regulations and activities	Relevance to the freight sector	Example roles involved
		standards sooner than planned, or to switch to zero or low emission modes if possible.	
Highways and kerbside management	Network Management Plan (NMP)	Identify how the road network will be managed to minimise disruption and optimise traffic flow, typically targeting improved journey time reliability. The NMP sets out how the needs of freight users will be balanced with the needs of other road users/general traffic.	- Highway engineers - Network management officers
	Traffic Regulation Orders (TROs)	Identify how the kerbside can be used for loading and servicing, including where, when and for how long (maximum duration) loading can occur.	- Highway engineers - Parking officers - Town centre managers
Strategic land-use planning	Local Plan (local planning strategy)	Mechanism through which land is allocated for freight uses, principally through Use Classes B2, General Industrial, and B8, Storage and Distribution, B8, and lorry parking facilities. The quantity of land to be allocated for this purpose and the location of the land allocated is determined through the Local Plan development process.	- Strategic planners - Planning officers
	Safeguarding	Mechanism for protecting infrastructure or land which is currently or could be used in the future for freight purposes, typically railheads or wharves.	- Strategic planners - Planning officers
Development management	Planning conditions	A planning authority may impose conditions as part of granting consent for a new development in order to mitigate and minimise the impact of the development. For example limiting the number, routing and timing of HGVs visiting a development site. A condition may only allow deliveries during daytime (07:00 and 19:00) or require all delivery and servicing activity to take place off-street (within the footprint of the development) so that there is no additional demand for loading at the kerbside.	- Transport planners - Planning officers - Highway engineers - Planning and parking enforcement officers

Policy area/discipline	Relevant policies/plans, regulations and activities	Relevance to the freight sector	Example roles involved
	Delivery and Servicing Plan (DSP)	A planning authority could require a Delivery and Servicing Plan (DSP) to be developed and implemented as a condition of granting planning consent for a new development. A DSP sets out the likely demand for deliveries and servicing and how building occupiers will manage freight activity to and from the site.	• Transport planners • Planning officers • Highway engineers
	Construction and Logistics Plan (CLP)/ Construction Traffic Management Plan	A planning authority could require a Construction and Logistics Plan (CLP) also called a Construction Traffic Management Plan (CMP) to be developed and implemented as a condition of granting planning consent. These detail the arrangements for freight during the construction stage of a new development including the number of HGVs, timing and routing of deliveries, and the standards of operations and drivers delivering to site to reduce the impact on neighbouring areas and likelihood of road safety incidents.	• Transport planners • Planning officers • Highway engineers • Planning enforcement officers • Section 278¹⁷ officers
Economic development	Local growth strategies/regeneration plans	Identify key measures that the local authority will take in partnership with local business groups (e.g. Chambers of Commerce and Business Improvement Districts (BIDs)) to enable local businesses to grow. For the freight sector relevant measures could include investments in skills, as well as recognition of infrastructure developments needed to support local business function.	• Economic development/regeneration officers • Business Improvement District sustainability roles • Property management officers

¹⁷ A Section 278 agreement is a legal contract under the Highways Act 1980 that allows a developer, as part of their planning permission, to carry out works on a public highway that benefit the development. The developer funds these works, which can include new access points, junctions, cycle lanes, or traffic calming measures.

Policy area/discipline	Relevant policies/plans, regulations and activities	Relevance to the freight sector	Example roles involved
Procurement	Supplier contracts	Public sector procurement of goods and services and be used to influence the timing and routing of deliveries, and the standards of operations and drivers delivering to site to reduce the likelihood of road safety incidents	• Procurement officers

3 Approach to the training needs assessment

The approach taken to understand the current situation and to define the training need had two main aspects:

- Engagement with relevant professional and industry bodies to understand the availability and scope of any existing tools or training packages available which could support improving freight awareness in the public sector, and to explore options for formal support, recognition or accreditation of the Freight Awareness programme that is developed.
- Development of, and discussion with, a Working Group of public sector transport planning practitioners¹⁸ from across the STB regions, supported by the project team.

The subsequent content of this chapter outlines the approach to the engagement with professional and industry bodies and the Working Group.

3.1 Initial engagement with professional and industry bodies

At the outset of the project, members of the project team were aware that previous activity had occurred to address freight awareness involving industry bodies and the public sector. Initial conversations were held with these industry bodies to understand the approach taken and discuss the outputs and outcomes. Conversations were also held with relevant professional organisations to capture anything the project team were not aware of.

All the conversations covered the availability and scope of any existing tools or training packages which could support improving freight awareness in the public sector.

Conversations with representatives from the following organisations:

- Chartered Institution of Highways and Transportation (CIHT)
- Chartered Institute of Logistics and Transport (CILT)
- Logistics UK
- Road Haulage Association (RHA)
- The Transport Planning Society (TPS)

We sought a conversation with a representative from the Royal Town Planning Institute (RTPI) but we could not speak directly to anyone from the Institute itself. Instead, we were referred to and spoke with the Vice Chair of the RTPI-TPS Transport Planning Network (TPN), a volunteer-led forum for those with an interest in transport issues, run jointly between the RTPI and the TPS. The representative we spoke with was himself a consultant transport planner.

¹⁸ The intention was to have planning and economic development practitioners represented on the Working Group in addition to transport planning practitioners, but we were ultimately not successful in recruiting people with this expertise to the Working Group.

3.2 The Working Group

3.2.1 Working Group formation and composition

The Working Group was formed through a general call-out to transport planning and planning practitioners in local authorities in the TfSE, EEH and TE areas, as well as directly inviting some people known to be interested in the project to participate. The Working Group formed had seven members plus a representative from each of the Sub-national Transport Bodies who were invited to participate in each of these events:

- an initial meeting of the Working Group on 4 March 2025;
- high street visits to Ipswich, Aylesbury and Lewes town centres on 14, 22 and 30 April 2025;
- a visit to DP World London Gateway port and UPS's London Gateway depot on 28 April 2025 (facilitated by Logistics UK); and
- a second and final meeting of the Working Group on 15 May 2025.

While the intention was to have all members of the Working Group participate in all of the events, it was not always possible to find dates and times which were suitable for everyone given existing commitments as part of day-to-day roles. Meetings and visits were scheduled to involve as many Working Group members as possible.

3.2.2 Working Group activity

A core aspect of this phase of the project was to work collaboratively with the Working Group to understand from a practical, 'real-world' perspective the type and level of knowledge that was needed to achieve 'freight awareness' across different roles. It was also important to understand the most effective way of providing and instilling this level of knowledge.

The Working Group were involved in four different activities:

- A short questionnaire in SurveyMonkey, which asked Working Group members and others interested in the Freight Awareness project about their current levels of freight awareness, how it was used within their day-to-day roles, and their typical approach to learning and Continuous Professional Development (CPD) for their main role/discipline.
- A first Working Group meeting, where members outlined their experiences and issues around freight and logistics and the project team provided a basic overview of freight and logistics.
- An opportunity for two site visits; an accompanied site visit to a high street in each of the STB areas to consider freight operations at a local level and discuss the on street and kerbside arrangements for deliveries and servicing; and a logistics site visit to DP World's container port at London Gateway and UPS's nearby London Gateway parcel depot to show the size and scale of major freight sites and the volume of goods handled.
- Second and final Working Group meeting, where members provided feedback on what they had learnt, what they thought was important for colleagues to understand, and thoughts on who needs freight awareness and how best to communicate the issues.

Both Working Group meetings were held online and were designed to encourage Working Group members to feel comfortable asking any questions at any point during the session. PowerPoint and MS Whiteboard apps were used and information was presented in a variety of ways, with the focus on clear use of language and self-explanatory images and graphs. The opportunity for an individual follow-up conversation was also offered to Working Group members.

3.2.2.1 Working Group 1 - overview session

The aim of the first Working Group meeting on 4th March 2025 was to provide a basic introduction to the freight and logistics industry for Working Group members. The session needed to balance the amount of information that would be useful, easily understood and absorbed by members, and reflect the diversity of mode, commodity and scale of freight and logistics operations.

A core outline for the two-hour session was identified by Steer, Future City Logistics and the University of Southampton following a discussion about the scope of the content that would be needed to provide public sector practitioners with freight awareness. It was agreed that the freight topic would be divided into 10 sub-topics. The 10 knowledge areas identified were based on:

- the project team's own professional expertise and experience in freight planning and policy-making;
- the project team's own experience in delivering (or receiving/observing) training/learning on freight planning and policy-making;
- reference to the Logistics UK/RHA work with Oxfordshire County Council in September 2022.

This outline was expanded and refined as the PowerPoint slide set was developed.

The PowerPoint overview presented was divided into 10 knowledge areas. In summary these areas are:

1. **Definitions:** freight vs logistics vs supply chain, and the variety of modes and vehicles available.
2. **Operators:** simplified road freight economics and market structure, and an insight to 'day-to-day' operational issues.
3. **Sites:** warehouses/intermodal, variety of scale and issues, planning and land for logistics, HGV parking.
4. **Customers:** the importance of customer satisfaction, increasing customer-centredness, and the size and impact of freight activity, nationally and local impacts.
5. **Deliveries:** what is being delivered and when it happens, and the impacts of routing and commodity.
6. **Outcomes:** how freight can impact the desired outcomes of reducing emissions and congestion, and improving safety, liveability, and the local economy.
7. **Regulations and enforcement:** outline of the regulations controlling many aspects of freight activity, and consideration of how the combination to impact freight activity at the local level.
8. **Data:** why freight data is limited, but what is currently available.

9. **Stakeholders:** the wide range of stakeholders impacting on and impacted by freight activity.
10. **Potential solutions:** accurately define the problem and consider 'avoid/shift/improve', prioritising what good planning and the public sector can do to enable clean and efficient freight, and the potential of new technology.

At the end of the overview session a final section considered individuals preferred learning styles and how Working Group members thought freight awareness could be best delivered. This section was included in the first Working Group discussion to effectively 'plant a seed' that would be discussed further in the second Working Group.

3.2.2.2 *High street and site visits*

One of the potential reasons for low levels of freight awareness mentioned in 2.1.2 is a low level of visibility and direct experience in the freight sector. Steer and Future City Logistics have previously used site visits to discuss freight issues with clients and the University of Southampton's MSc courses on logistics and supply chain management believe it is essential for students to visit operational sites and observe on-street freight activity.

To provide Working Group members with the opportunity to consider the issues and impacts of freight in combination with other traffic, three high street site visits were organised, one in each STB area to maximise attendance. The visits took place in Ipswich (14 April 2025), Aylesbury (22 April 2025) and Lewes (30 April 2025), with a project team facilitator (Ian Wainwright) leading a walking tour of specific locations.

Google maps and Streetview were used by the project team prior to each visit to identify key delivery and servicing streets and any potential issues for review and discussion. Each location was physically checked prior to the Working Group meeting to confirm relevance and complete a health and safety risk assessment.

The logistics site visit to DP World's container port at London Gateway and UPS's London Gateway parcel depot on 28 April 2025 provided Working Group members with the opportunity to experience major freight sites. The visits were helpfully organised by Logistics UK, who have previously used the same combined visit to provide MPs and government officials with an insight into the freight and logistics industry.

Both DP World and UPS site visits followed a similar format, with a PowerPoint overview of the company and their global operations, and a more detailed outline of the specific site operations. This was followed by a question and answer session and a site tour led by operational management. Both companies were very welcoming and happy to answer questions throughout the tour on a more informal basis.

3.2.2.3 *Working Group 2 – Feedback session*

The second and final Working Group meeting was held on 15 May 2025. Anticipating a wide range of comments and feedback the MS Whiteboard app was used to enable members to contribute more fully. The meeting was focused around answering four key questions:

- What freight knowledge have you gained?

- Who needs to have a level of freight awareness?
- Which of the 10 knowledge areas are most important to the different roles?
- How can freight awareness be achieved for these different roles?

The discussion at the meeting was as wide ranging as expected, especially which aspects of freight and logistics activity the Working Group would regard as essential for the public sector to understand better, and the wide range of roles and functions that required this understanding.

Details of the Working Group's feedback are provided in the next chapter.

3.2.2.4 Feedback to the professional and industry bodies

Having engaged with the relevant professional and industry bodies prior to the Working Group activity, the project team provided high-level feedback to the same individuals and organisations, to explore options for Phase 2 of the project.

A variety of options were discussed including: assistance with stakeholder and wider public engagement, developing the outputs for Phase 2 in collaboration with the STBs and the project team, and the potential for formal recognition or accreditation of the developed Freight Awareness programme.

4 Findings

This chapter contains the findings of the training needs assessment; a combination of the outputs from the four Working Group activities outlined in the previous chapter, the conversations with the professional and trade organisations, and other information gained during the programme. A summary of the key findings of the training needs assessment and the implications for the design and implementation of the Freight Awareness programme is provided at the end of the chapter.

4.1 Formal training/skills development packages for freight awareness

Our engagement with the professional and industry bodies at the outset of the project confirmed that they had limited offers in terms of training on freight knowledge and skills and that no 'off-the-shelf' training programme exists.

4.1.1 Logistics UK and RHA's bespoke training

Logistics UK and RHA confirmed that in 2022 they jointly provided bespoke training on the freight system and its needs to officers and members in Oxfordshire County Council in response to specific issues that were being considered at the time. The training consisted of an overview PowerPoint presentation followed by a Q&A with senior managers from the two trade associations. The training was positively received at the time, with an officer stating:

"...the material was useful, particularly for members to understand how the freight system operates and to increase their awareness. From an officer perspective it was helpful to understand the haulage industry's asks of local authorities and to understand opportunities to better support/work with the freight industry."

As a one-off exercise, there was very little formal content and it was very time-intensive for those involved. As such, it is not considered repeatable to any scale. Both trade associations did highlight the usefulness of freight awareness to both officers and councillors.

4.1.2 PTRC's 'Urban Logistics' training

PTRC is part of the Chartered Institute of Logistics and Transport (CILT) and specialises in training and events relating to transport and travel planning. Since 2019 a course on 'Urban Logistics' has been available, delivered by Ian Wainwright from this project's team.

The 'Urban Logistics' training is designed to provide "the essential background to the nature of freight movement in urban areas using real-world case studies"¹⁹, and is a full-day, in-person course that comprises a mixture of MS PowerPoint-based learning and facilitated discussion sessions.

¹⁹ [PTRC website, 'Book a Course' page](#), accessed 20/08/2025

The course is described as being “ideally suited to local authority personnel with responsibilities for urban freight movements and business liaison and engagement (including Transport Planners, Environmental Health Officers, Town Planners, Economic Development Officers, Road Safety Officers, and Sustainable Travel Planners) as well as consultancy staff engaged in urban freight planning”²⁰. The CILT accredit the course as six hours of Continuous Professional Development²¹.

Ian Wainwright states that uptake of this course has been low since its launch in 2019. It is not known whether this is because there are low levels of interest from potential delegates, if potential delegates are unaware the course exists, if there are issues with the promotion of the course, or because of any other, or combination of reasons. None of the Working Group members had participated in this course and none mentioned attending other PTRC/CILT courses or seminars in our discussions with them.

4.1.3 Transport Planning Professional (TPP) qualification

The Transport Planning Professional (TPP) qualification is a professional recognition for transport planners, awarded jointly by the CIHT and TPS. It signifies a high level of competence and expertise in the field, similar to a Chartered Engineer. Successful completion of the TPP qualification allows individuals to become a Chartered Transport Planning Professional (CTPP).

To be awarded the TPP candidates must demonstrate breadth and depth of knowledge and experience in all aspects of the transport planning discipline, most typically through the submission of a Portfolio of Technical Knowledge (PTK). A PTK submission must comprise evidence of knowledge in six core technical skill units and two out of four additional technical skill units. The skill units are shown in Table 4-1.

Table 4-1 Transport Planning Professional Portfolio of Technical Knowledge requirements

Core technical skill units (all required)	Additional technical skill units (two required)
T1 – The policy context	T7 – Developing strategic and master plans for transport
T2 – Laws and regulations	T8 – Applying the principles of transport systems design
T3 - Data	T9 – Changing travel behaviour
T4 – Transport models and forecasting	T10 – Commercial and operational management of systems
T5 – Appraisal and evaluation	
T6 – Stakeholder engagement	

‘Freight’ is only mentioned as one of several ways that knowledge can be evidenced for unit T10, which may not be selected by candidates as one of their two additional technical skill units in which capability must be demonstrated. This means that

²⁰ [PTRC website, ‘Book a Course’ page](#), accessed 20/08/2025

²¹ <https://ciltuk.org.uk/PD/CPD>

knowledge of freight – or ‘freight awareness’ – is not required in order for transport planners to gain the TPP qualification and so achieve chartered status.

Neither RTPI or TPS has any stand-alone training or other publicly accessible content on their website concerning freight or logistics.

4.1.4 Other publicly available sources of information on freight and logistics

Choosing to tackle a low level of freight awareness by searching online would provide content on freight and logistics. Exactly how useful this content would be would depend on the existing level of freight awareness and the exact question asked. The responses are also likely to vary enormously, depending on the search engine used and the quality of the large language model underpinning the search.

For example, hundreds of publicly funded projects have focused on freight and logistics in the UK and elsewhere, looking at ways to reduce emissions, change delivery times, or tackle problems at a specific location. Asking a question on retiming deliveries might lead to previous work in London or elsewhere, but there is a lack of a more structured and complete approach to increasing freight awareness by officers and decision makers.

The websites of the professional and trade associations we spoke to vary in what information is publicly available. CIHT's [website](#) provides access to information on a range of topics, but freight and logistics is a new area for the organisation, with an initial policy paper on [Last Mile Delivery](#) being published in May 2025.

CILT's [website](#) is currently undergoing major redevelopment, but access to the CILT's Knowledge Centre which includes business intelligence and comprehensive library services, is only available to members. RTPI's [website](#) does not contain any specific freight and logistics content.

Logistics UK and RHA websites provide access to some information and research that might be of interest to local officers, but content is focused at the industry rather than the public sector and often only available to members.

4.2 Existing levels of freight awareness in the public sector

"I think freight awareness is something that's clearly lacking within local authorities. Certainly in our local authority members and officers [can have the view] that trucks on the road don't serve a purpose – and we need to help educate them as to why vehicles are there so that we can all manage [freight trips] more effectively."

Working Group member, 1st Working Group meeting, March 2025

Before the first Working Group meeting a short questionnaire was circulated to Working Group members and others working across the STB areas in the public sector interested in the project to understand their current level of freight awareness: how knowledge was gained, maintained and improved, and how they typically deployed their freight knowledge and expertise in their role.

Respondents were asked to self-assess their level of freight knowledge/expertise across nine subject areas on a scale from 'none/limited' through 'basic', 'proficient' and up to

'expert'. The results are shown in Figure 4-1 **Error! Reference source not found.**, with the darker blue areas showing where a greater number of respondents have rated their level of knowledge to be at this level, and lighter blue areas showing where only one or two respondents have rated their knowledge at this level.

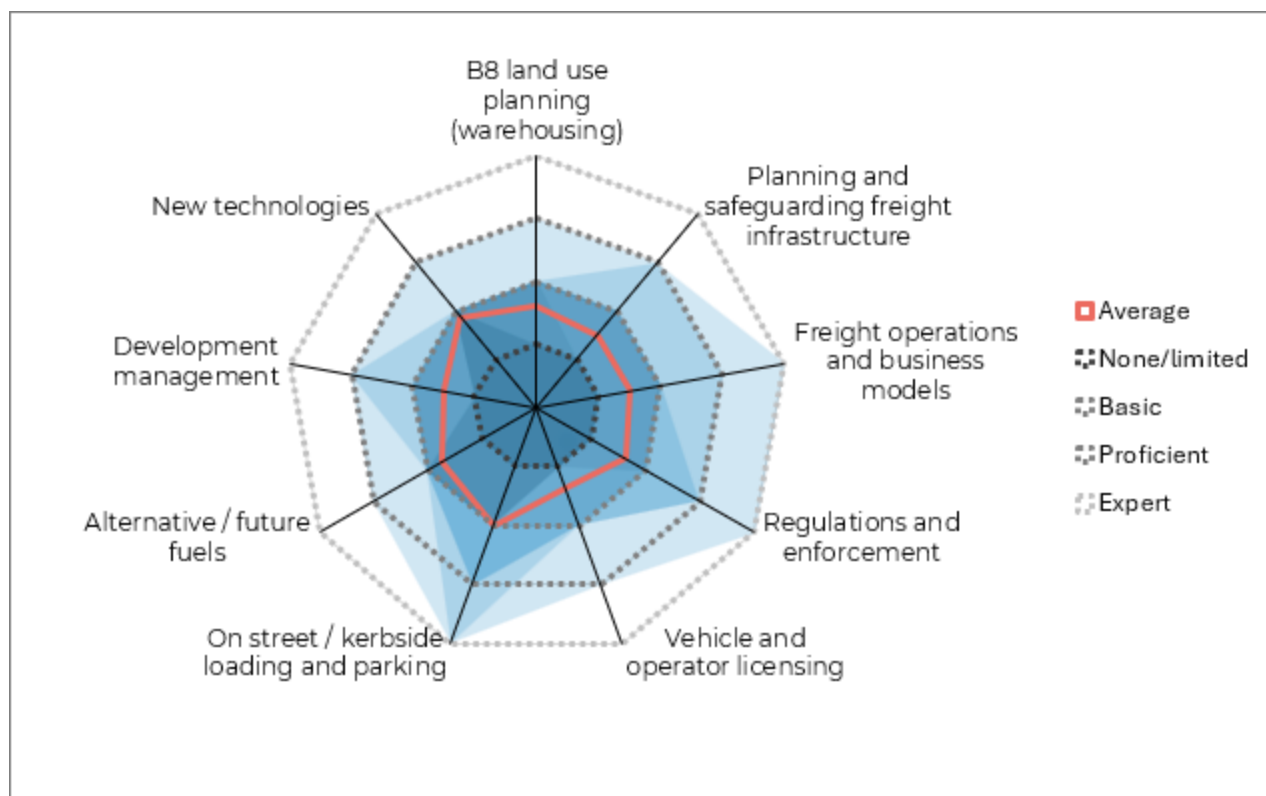
The following observations are made:

- The average level of knowledge across respondents (represented by the blue line in Figure 4-1) was no greater than 'basic' across the nine subject areas and it was between 'none/limited' and 'basic' for seven out of the nine subject areas. The only two subject areas for which the average level of knowledge was 'basic' and above were new technologies and on street/kerbside loading and parking.
- Those respondents who self-assessed their level of knowledge to be 'Expert' only identified that their level of knowledge was 'Expert' in one of the nine subject areas (there were two respondents with 'Expert' levels of knowledge, one for on street/kerbside loading and parking and one respondent with an 'Expert' level of knowledge on freight operations and business models); in the remaining subject areas these respondents rated their knowledge as 'none/limited', 'basic' or 'proficient'.
- The subject areas with the lowest average level of knowledge among respondents were development management, planning and safeguarding freight infrastructure, and freight operations and business models.

"I think from a knowledge of freight point of view, I probably know a little about a lot of things, but not very much about most."

Working Group member, 1st Working Group meeting, March 2025

Figure 4-1 Working Group's level of freight knowledge/expertise across nine freight themes



These results suggest that any Freight Awareness programme for the public sector should aim to increase knowledge to at least a basic level across a range of sub-themes. By doing so, all practitioners would have a holistic understanding of the different aspects and issues of freight, as well as a clear indication of the areas in which they need to increase their knowledge and skill level, commensurate with the specific responsibilities of their role.

4.3 How freight knowledge/expertise is accessed or deployed

At the first Working Group meeting we asked the Working Group members how they accessed freight expertise within their local authority (and where and by whom it was typically held), particularly in situations where they were aware that they did not have a sufficient level of knowledge for the task at hand. The following points were raised in response:

- A Working Group member who is their local authority's designated officer for freight said that colleagues will often go to him to seek advice and information. In some instances they will rely on their own knowledge because they do not recognise that they have not got a comprehensive understanding of all the issues.

"I think that there are a number of people within the organisation who believe they know what freight is, and they believe they have an understanding of it – but it's specifically from their own experiences and angles. Other functions will have a different understanding of what freight is and how it should be managed."

- Two Working Group members raised the point that local authorities should be seeking to engage directly with the freight sector to check understanding and assumptions about the freight sector's needs:

"The planning function are coming to me and saying "the expectations of freight are this." I would have thought it should be the other way around – that I should go to them with what the freight sector needs."

- Another Working Group member said that specific aspects of freight expertise were held within technical teams, but that there was no joined-up conversation on freight, nor a way of looking at freight as an opportunity (rather than as a problem to be solved):

"There's a lot of expertise that sits within technical teams where they're managing freight as a problem ... the traffic management teams are designing for freight but designing to exclude freight. Our economic growth team deal with logistics businesses from a business point of view ... I don't think traffic management and economic growth talk to each other. I'd probably talk to them both, but we wouldn't get that joined-up conversation all together."

4.4 What elements of the freight system should the Freight Awareness programme cover?

At the first Working Group the project team presented an overview of freight and logistics, divided into 10 knowledge areas. Having visited two distribution centres and observed freight activity in their local town centre, Working Group members provided feedback on what knowledge they'd gained and the content of future freight awareness.

While Working Group members had varying levels of knowledge prior to getting involved in the project, all recognised they had a greater understanding of freight and logistics activity than when they started. The general consensus was that the 10 knowledge areas were comprehensive and relevant at an overview level, although some prioritisation might be useful for specific roles or functions (e.g. highways management and deliveries and regulations/enforcement).

Members said they benefited from the site visits, as they provided a window into the volumes of freight moved, the complexity of the tasks involved, and the number of people employed, particularly overnight at the UPS parcel depot. Members also strongly endorsed the benefits of the high street visits, highlighting the benefits of stopping and watching on-street activity.

"We don't usually get the chance to stand and watch the reality of what we've planned in the office, seeing the benefits it brings or the problems we've created"

Working Group member April 2025

Activity varied by location visited but the following issues were observed and identified by members:

- Freight 'invisibility' - pedestrians and cyclists seemingly ignoring freight activity in all its forms (van and HGV delivery, scaffolding for a stage set up, food delivery riders, etc.)
- How the kerbside is used compared to the regulations in place, double and single parallel lines for parking and double and single right angle kerb markings for deliveries.
- Freight vehicles stopping in loading bays provided, and in unlawful locations.
- Loading locations blocked by waste bins or other vehicles.
- Local examples of the impact of low levels of freight awareness as outlined in section 2.2, and:
 - o The Bell Hotel in Aylesbury (Figure 4-2, left image) is an example where the existing kerbside regulation of a dedicated taxi rank conflicts with safe access to the cellar hatch.
 - o Deliveries to premises on Tavern Street in Ipswich are permitted from 4:30pm until 10:30am (see Figure 4-2 right image). An independent retail outlet is unlikely to accept a delivery before 6:30/7:00am or after 5pm, effectively limiting the delivery window to four hours.

Figure 4-2 The Bell Hotel in Aylesbury (left image) – taxi rank restricts access to cellar hatch for beer deliveries and Tavern Street, Ipswich (right image) – access for deliveries only permitted between 4.30pm-10:30am



4.4.1 Examples of problems caused or exacerbated by low levels of freight awareness

In section 2.2 the impact of low levels of freight awareness is discussed. Through the Working Group's activities we explored this issue within members own local authorities through local experiences (as reported) and observations (as observed during visits).

The examples of problems shared fall into three broad categories:

- **where the wrong or sub-optimal solution was implemented:** a lack of freight awareness (both their own and more widely among their colleagues) meant that the plans and strategies that they are responsible for developing might not be comprehensive and/or not arrive at the optimum solutions, or try to address issues the local authority cannot directly influence.

“My freight strategy development work is mostly reliant on my own research, fitted in around existing projects and deadlines, ensuring all relevant topics are covered, understanding the issues, implications and options, which is difficult and stressful as well as potentially limiting the final product.”

Respondent to the Freight Awareness questionnaire, March 2025

- **where an issue was displaced, worsened, or there were unintended consequences:** where a limited level of freight awareness during the design or implementation of changes on the highway or at the kerbside resulted in a poor outcome or a difficult situation for freight operators. Low level examples included the wrong signage at the kerbside, leaving any PCN issued open to challenge, and loading bays too narrow for an HGV to fit in. More serious errors included damage to street furniture and project time and cost overruns.

“I’m aware of a network management project involving roadworks that inadvertently shut off access for lorry and freight drivers, such as rest stops and service areas. Apart from any disruption to supply chains, the project faced delays by having to make adjustments to accommodate the freight sector’s needs. It must have ended up costing more too.”

Respondent to the Freight Awareness questionnaire, March 2025

- **where opportunities were missed, or where the freight sector has not been sufficiently enabled by the planning and regulatory environment set:** such as the challenge for the freight sector in being able to secure planning permission at sites suitable for its operations or how to properly represent the needs of freight through case-making processes (i.e. in business cases), which in turn can make it difficult to secure investment in infrastructure that would benefit the freight system.

“We should be able to put in place more positive plans for future freight movements – rather than treating it as a problem, we should plan better for freight access into the city and any impact on congestion around the district.”

Working Group member, 1st Working Group meeting, March 2025

“We know about the number of trucks on the road, but we don’t really know much about what they’re carrying, where they’re going or why. And I think it’s the economic value of it that is important to understand.”

Working Group member, 1st Working Group meeting, March 2025

4.5 How knowledge and expertise can be gained

4.5.1 How current levels of knowledge and expertise were gained

Discussions with the Working Group provided more detail on the reasons for their overall lack of freight awareness, or the limited nature of their knowledge. No-one had any freight qualification or any memory of formal education about freight and logistics beyond a school project on the local high street where lorries had been talked about as an issue. The two members of the Working Group who described themselves as most 'freight aware' had either worked directly in the logistics industry prior to working in the public sector or been responsible for implementing the Traffic Signs Regulations and General Directions²² in a previous role.

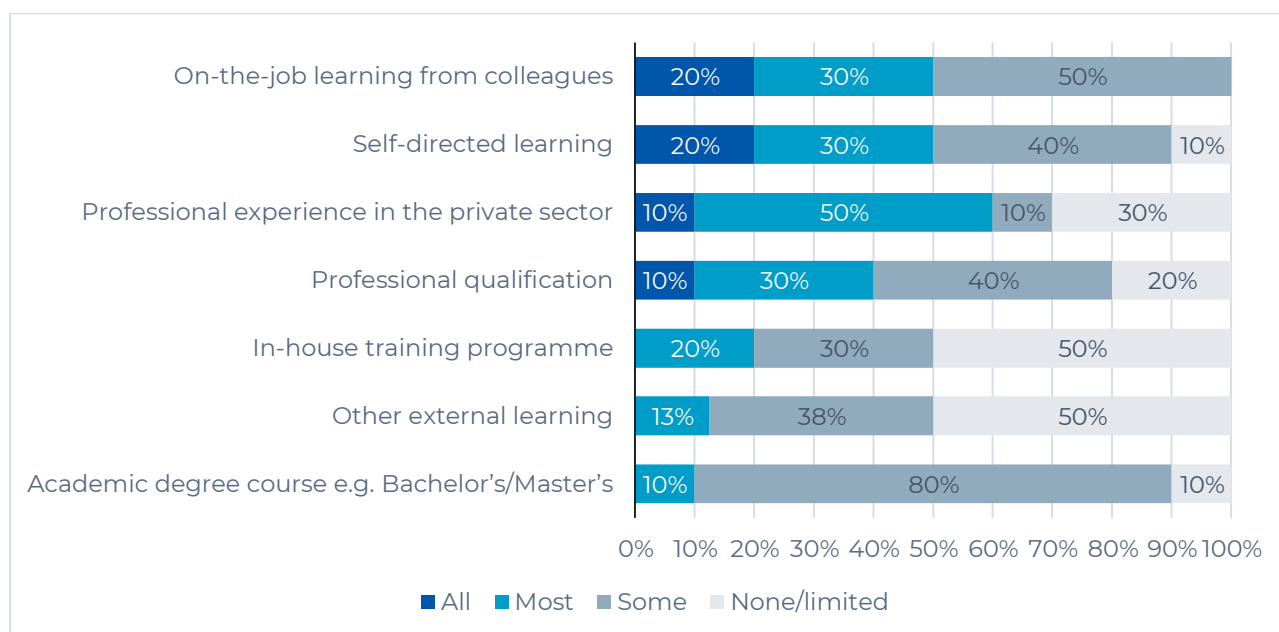
As outlined in 4-1 above, we have been unable to identify recognised professional development on freight and logistics from trade associations or professional membership organisations, with only the PTRC Urban Logistics training appearing to provide Continuing Professional Development (CPD) accreditation.

The Working Group survey identifies how members gained the level of knowledge or expertise used in their current role (i.e. not specific to freight). **Error! Reference source not found.** presents the results, which show:

- On-the-job learning from colleagues and self-directed learning are important avenues for gaining the knowledge and expertise necessary for the performance of a day-to-day role. A small number of respondents stated that it is through these avenues that they gained all the knowledge and expertise necessary for their current role.
- In-house training programmes and other external learning opportunities seem to be less significant in terms of gaining relevant knowledge and expertise: in both cases half of the respondents to this question said that none, or a limited amount of their current knowledge came from these sources.
- Academic degree courses provide a foundation of knowledge and capability upon which subject-matter expertise can be further developed: the majority of respondents to this question stated that some of their current knowledge and expertise was gained through an academic degree course.
- Overall, the knowledge and expertise required for the respondent's roles was gained through a mix of different learning opportunities, without there being one single source of information or skills development channel.

²² [Traffic Signs Manual – Chapter 3 - Regulatory Signs](#) DfT 2016

Figure 4-3 How knowledge and expertise used in current role was gained



4.5.2 Other suggestions for increasing knowledge and expertise

As part of the discussion in the second Working Group meeting members identified the ways in which they could envisage themselves increasing their level of freight awareness. Suggestions included:

- Dedicated day courses
- Case studies
- Narrated PowerPoint presentations
- Video shorts of visits to freight sites/high streets
- Freight 'games' to help experience an operator's point of view
- eLearning with knowledge checks
- In-the-round conversations with colleagues from different policy areas/disciplines
- Facilitated engagement with local operators
- 'Freight awareness' checklists i.e. a series of 'how to' guides and/or checklists to ensure freight needs have been considered.

4.6 Roles and audiences who require freight awareness

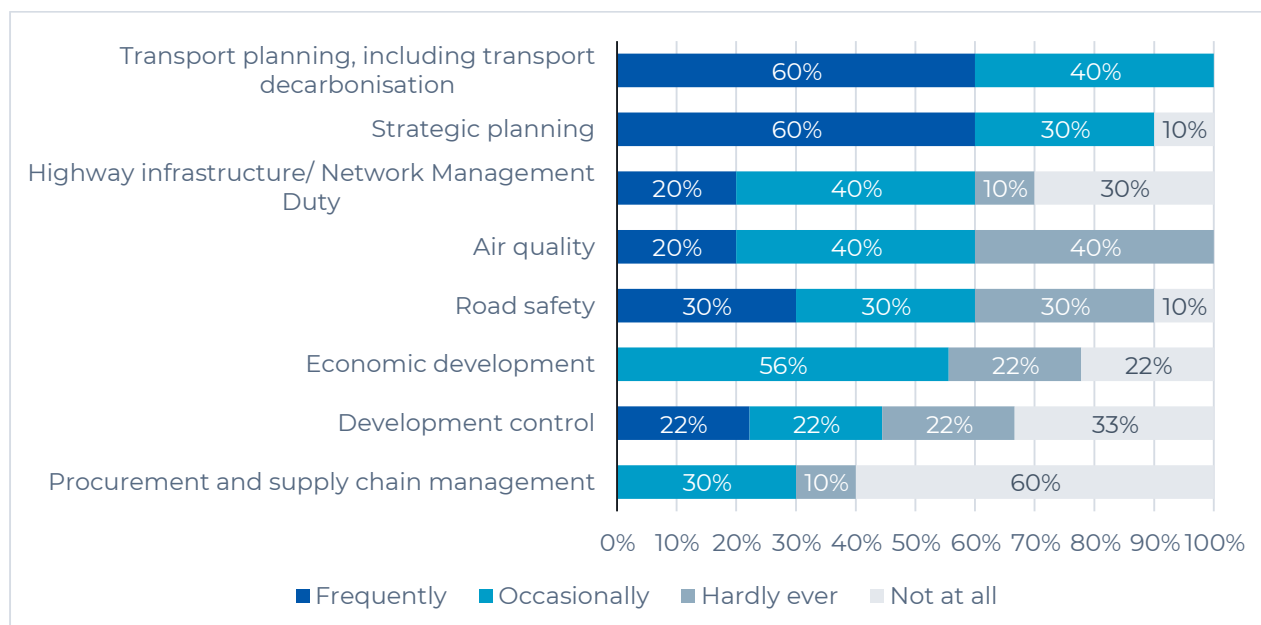
The Working Group survey identifies how members utilised their current level of freight knowledge or expertise, with reference to their current role and responsibilities in the public sector. The results are shown in Figure 4-4 **Error! Reference source not found..**

- The two areas in which the highest number of respondents said that they 'frequently' utilised their freight knowledge or expertise were strategic planning and transport planning, including transport decarbonisation.
- All respondents said that they utilised their freight knowledge or expertise frequently or occasionally for the purpose of transport planning, including decarbonisation, and the majority used their freight knowledge either frequently or

occasionally for strategic planning, highway infrastructure/Network Management Duty functions, economic development, air quality and road safety.

- Most respondents reported using their freight knowledge or expertise 'not at all' or 'hardly ever' for the purpose of procurement and supply chain management.

Figure 4-4 How freight knowledge and expertise is utilised by the Working Group



While this response helps to demonstrate the critical need for freight awareness in the context of transport planning and strategic planning functions, it is important to note that this result reflects the profile of the respondent group, which mostly comprised transport planners. It is not accurate to conclude that there is less need for freight awareness in other roles or functions, for example performing development control or procurement and supply chain management roles.

In the second Working Group meeting we asked members to identify the range of roles that they considered freight awareness was needed, given their knowledge of their local authority and the duties and functions it has and their experience of participating in the Working Group. A long list of roles was identified, and these have been grouped into policy areas/disciplines as shown in Table 4-2. In some cases the area of responsibility or aspect of the role is described as a job title although the scope of different policy areas/disciplines vary across local authorities.

Table 4-2 Roles and responsibilities that require freight awareness

Policy area/discipline	Role/responsibility
Direction-setting and decision-making	• Elected members, especially cabinet portfolio holders for policy areas that interact strongly with freight e.g. transport, planning, environment, growth and development. • Senior members of the council, including Heads of Service/Department for policy areas that interact strongly with freight.

Policy area/discipline	Role/responsibility
Transport	• Transport strategy and policy • Scheme development • Public realm and streetscape • Air quality officers • Road safety officers • Active travel officers
Planning	• Strategic planners • Masterplanners • Development control
Highways	• Highway designers • Parking policy and enforcement • Operational highways officers
Economic development	• Economic development officers
Other	• Management of contracted services with vehicle fleets • Management of highway works teams and contractors who install signage

Both Logistics UK and RHA raised that they felt it was particularly important that politicians e.g. elected members in local authorities were equipped with a level of freight awareness given their important role in setting priorities and decision-making in local authorities.

4.7 Strategic considerations beyond freight awareness training

The freight awareness training designed and developed in Phase 2 of this project will work within the planning and regulatory framework that exists and respond to the freight challenges and issues officers face in the local area. During the project some issues have been identified that are important to planning and the effective management of freight which are difficult to solve at a local level. They may require more funding or resource than is available, or require more specialist knowledge than could be easily provided through training or reasonably be expected for someone who is not an industry specialist.

These issues will be addressed in the freight awareness training developed during phase 2. They are outlined here for information, along with a suggestion of action which could result in the planning and regulatory framework being easier to navigate for public sector practitioners, developers, stakeholders and the freight sector.

- There is little in common between a national distribution centre and a last mile logistics hub; the land and access requirements, and the huge variations in the impact on local transport, job numbers and skills required, make it difficult to compare or treat consistently. Both sites would be classified as land use class B8 in planning applications or change of use. Officers have little time to investigate the details of each individual scheme if they receive pushback from councillors or members of the public, especially if they are unsure of what questions to ask of the developer or what answers are reasonable to expect. Increasing freight awareness

will help individual officers and potentially councillors over time, but changes to land use classifications could make the topic more accessible in general.

Changes or amendments to the B8 classification and/or guidance on the variety of logistics premise requirements and impacts could provide assistance for both planning officers and applicants, and achieve a quicker and more substantial level of change.

- There is increasing competition for space at the kerbspace with new active travel and placemaking schemes. Many streets also have narrow pavements, inadequate pedestrian crossings or blue badge parking, causing issues for anyone with mobility or visual impairment. Delivery activity is also continuing to increase and there is a need to plan effectively for when and where delivery and servicing activity occurs. Freight awareness will help officers identify the issues, but identifying the right solutions is likely to require much greater understanding of both freight and business behaviours and a much better coordination of traffic regulations with land use controls/planning conditions. The amount of time and resource needed may be difficult to commit at a local level.

Design guidance could provide assistance for both planning officers and stakeholders and ensure that current spending on new active travel and highway schemes aren't immediately compromised through a serious injury or fatality or through ongoing physical damage to new street furniture.

- All Working Group members mentioned a lack of data on freight activity and the impact this has on their ability to plan well for freight. Several attempts have been made by DfT and others to increase the pool of publicly available freight data, with little success. This is often explained by commercial confidentiality, but operators may be willing to share more information if they know why the public sector need it, and specifically what questions are trying to be answered. The digitisation of tachographs and mobile phone technology suggest future developments in this area are possible but may require national consideration and potentially regulation.

Greater engagement with freight and business stakeholders may improve the local understanding of particular issues in the absence of other freight data.

- Greater awareness and coordination of publicly-held data could be useful, although likely to be expensive. At a national level, approximately £400 billion is spent by the public sector annually, and local authorities manage and contract freight operations and often control freight vehicles directly (e.g. residential waste collection, park maintenance etc.).

At a local level, collation of STATS19 casualty reporting data and Penalty Charge Notices has been used in London to identify HGV 'hotspots' in the development of cycle routes. Greater awareness and consideration of the freight and logistics impacts in procurement processes could substantially improve air quality and road safety outcomes and help to reduce future costs.

Options for recording and collating locally-held freight data should be examined in more detail.

4.8 Key findings and implications for the Freight Awareness programme

The key findings from the discussions with the Working Group and professional membership and trade organisations relevant to the development of the Freight Awareness programme are:

- There is currently no 'off-the-shelf' training programme that covers freight issues for a public sector audience. PTRC's course on 'Urban Logistics' is suitable for a range of public sector practitioners however, as the title suggests, it is focused on delivery and servicing issues in urban contexts.
- Based on discussions with the Working Group and on findings from the survey, current levels of freight awareness in the public sector are low (with few exceptions), and where practitioners do have some proficiency or expertise it is typically limited to one or two sub-themes within the freight area. The subject areas with the lowest average level of knowledge among respondents to our survey were development management, planning and safeguarding freight infrastructure, and freight operations and business models. The implication of this finding is that the Freight Awareness programme should aim to increase knowledge to at least a basic level across a range of sub-themes.
- As reported by the Working Group, local authority practitioners can be unaware of the extent of their lack of freight awareness and not seek further advice or assistance when working on issues or projects which interact with the freight system. This may result in poor outcomes or further challenges which the freight or public sector must then work to navigate, absorb or try to solve again. The Freight Awareness programme developed must therefore be designed to have a high level of uptake. Careful thought must be given to how to ensure the Freight Awareness programme seems relevant and important to a range of different audiences with different levels of seniority and expertise: in other words, the Freight Awareness programme must be designed to reach practitioners at all career stages, regardless of their experience and expertise in other areas.
- The 10 knowledge areas identified appear to be a practical segmentation of the freight awareness knowledge required:
 1. **Definitions:** freight vs logistics vs supply chain, and the variety of modes and vehicles available.
 2. **Operators:** simplified road freight economics and market structure, and an insight to 'day-to-day' operational issues.
 3. **Sites and infrastructure:** warehouses/intermodal, variety of scale and issues, planning and land for logistics, HGV parking.
 4. **Customers:** the importance of customer satisfaction, increasing customer-centredness, and the size and impact of freight activity, nationally and local impacts.
 5. **Deliveries:** what is being delivered and when it happens, and the impacts of routing and commodity.
 6. **Outcomes:** how freight can impact the desired outcomes of reducing emissions and congestion, and improving safety, liveability, and the local economy.

7. **Regulations and enforcement:** outline of the regulations controlling many aspects of freight activity, and consideration of how the combination to impact freight activity at the local level.
 8. **Data:** why freight data is limited, but what is currently available.
 9. **Stakeholders:** the wide range of stakeholders impacting on and impacted by freight activity.
 10. **Potential solutions:** accurately define the problem and consider 'avoid/shift/improve', prioritising what good planning and the public sector can do to enable clean and efficient freight, and the potential of new technology.
- While it may be possible to identify some priority knowledge areas for specific roles, a general awareness of freight and logistics combined with the opportunity to observe activity, particularly on-street, appears to be the overall priority target for freight awareness training. In addition:
 - o there is a need for freight awareness to be widespread, across different teams/policy areas within local authorities;
 - o there is a need for freight awareness across all aspects of a project's lifecycle, from planning and development to case-making, design and implementation, with follow up observations of use (where relevant); and
 - o there is a specific need to understand – or have a basic appreciation of – freight operating models and day-to-day operations, and the opportunities and constraints arising as a result.
 - The practical elements of the Working Group's activities (high street visits and the site visit to London Gateway) were said to have been effective in terms of bringing freight issues 'to life' for those involved. Consideration should be given to how to incorporate practical and 'real-world' elements to the Freight Awareness programme, acknowledging that local authority practitioners are significantly time and resource constrained and may not have the opportunity to take part in site visits. A practical element could be introduced through the use of video shorts in the training material.
 - The Working Group identified a range of different options for the format for training/tools to be developed as part of the Freight Awareness programme, in addition to 'traditional' PowerPoint-based training sessions and eLearning packages. Of particular note was the request for practical guidance and checklists to support embedding freight awareness at a routine and day-to-day level of practice.
 - Our conversations with the Working Group and external stakeholders identified a long list of roles and potential audiences for which freight awareness was relevant, concentrated under the policy areas of transport planning, land-use/spatial planning and economic development. Despite concerted efforts to try to engage with the planning community for the purposes of this project (either through local authority practitioners or via RTPI) we were not successful. Similarly to the point above about designing and promoting the Freight Awareness programme to practitioners at all levels of seniority, we must consider how the Freight Awareness programme will reach – and be effective for – all practitioners whose role interacts with freight, not only transport planners.

5 Requirements of the Freight Awareness programme

This chapter builds on the findings from the training needs assessment to outline the training need that can be addressed through the Freight Awareness programme. The requirements of the Freight Awareness programme are defined in terms of audiences, training topics and training formats and associated tools.

5.1 Overview of the requirement

The general requirement is for a programme of training to be made available to local authority officers and decision-makers that provides them with the knowledge and understanding of the freight and logistics requirements. This includes its operations, ways of working, constraints and opportunities. In particular, the training needs to inform better policy and decision-making in relation to freight across the transport, planning and economic development disciplines within local authorities.

There is currently no 'off-the-shelf' training package offered by the professional membership organisations or trade associations that is suitable for this purpose: the Freight Awareness programme must be developed from first principles.

Overall, with few exceptions, existing levels of freight awareness among public sector practitioners are low. Even those with some knowledge or proficiency in one aspect of freight planning do not necessarily have a holistic knowledge-base across different aspects of freight. The requirement for the training programme is therefore to improve levels of 'Freight Awareness' to at least a basic or 'aware' level across a range of subject areas. This will ensure that public sector practitioners understand the relevant issues and, critically, are aware of their own level of proficiency in each area.

5.2 Training topics and learning outcomes

The basic freight awareness training provided to the Working Group during the first meeting, comprising 10 knowledge areas, was considered to be comprehensive in terms of providing a general overview of the freight system and sector and the pertinent issues. Therefore, it is recommended that the 10 knowledge areas and associated draft learning objectives form the basis for the training developed. These are shown in

Table 5-7.

Table 5-1 Freight Awareness training topics and draft learning outcomes

Training topic	Learning outcomes (draft)
	Following completion of the training, participants will recognise:
Definitions	The difference between supply chain, logistics and freight terms, and the overall range of modes and vehicle options.
Operators	- That operators' central focus is on costs and customer service. The main cost drivers are variable (labour and fuel) along with fixed site/vehicle ownership costs. - The industry is heavily regulated (vehicles, drivers and operations), has low barriers to entry and low profit margins.
Sites and infrastructure	- The sites and infrastructure used and needed by the freight sector for efficient operations. - The single B8 land use class hides significant variation in size (National Distribution Centre to microhubs) and local employment opportunities (skills and numbers). - A rapid decline in logistics land availability in towns and cities, coupled with rising rents for what remains, impacts operators' efficiency for the 'last mile' or the final distribution part of the supply chain.
Customers	- Supply chains are global and complex. Freight and logistics is a commercial business that is customer-driven. - With little direct control and no single policy lever, authorities need to maximise local freight benefits arising from behaviour change and procurement.
Deliveries	- The time and location of a delivery is designed to suit a customer. - Without dedicated off-street space, delivery across the kerbside is standard for 90% of deliveries and, where regulations prevent this, they may be ignored for health and safety reasons or for particularly high value commodities (e.g. Cash in Transit). - The delivery of specific commodities should be planned for (e.g. beer, construction materials, medical products) on a site-specific basis.
Outcomes	- The need to understand the problem before picking a solution, as the reverse could have unintended consequences and lead to adverse impacts for the local authority, the local community and/or freight operators. - That managing freight activity can result in positive impacts across several outcomes including: reducing congestion and emissions, and improving road safety and the local economy.
Regulations and enforcement	There is a need to understand the impacts of current authority policy levers including current traffic regulations, planning conditions and enforcement activity on local businesses and how local streets function, before considering new regulations or permitting new developments.
Data	- There is a need to maximise internal sources of data e.g. traffic counts, commercial Penalty Charge Notices (PCNs) and incident hotspots. - There is a need to ensure there is a clear question to answer and an ongoing two-way benefit before pursuing data collection from operators.
Stakeholder engagement	Engaging with stakeholders is critical: freight is complex and stakeholders have competing needs.

Training topic	Learning outcomes (draft)
	Following completion of the training, participants will recognise:
	• The principle for engagement should be to 'talk to one to influence many'. • Internal fleets (both directly managed or contracted) could help to provide data and shape a local solution/response.
Potential solutions	The 'Avoid/Shift/Improve' hierarchy of potential solutions for freight and how solutions can be delivered via Local Transport Plans, Local Plans, development management, local partnerships, and directly by the local authority as a 'first mover'. • Avoid road freight trips through modal shift (rail, water, bike, foot), land use planning and consolidation. • Shift time and location of a delivery: retime, reroute, change delivery location. • Improve delivery: safer, cleaner, quicker (vehicle, operation, driver)

5.3 Audiences for Freight Awareness training

The work undertaken for the training needs assessment identified a diverse range of policy areas, disciplines and role-types in the public sector for which freight awareness is important.

The recommended starting point for the development of the Freight Awareness programme is that all roles identified should participate in the training that is developed for each of the 10 training topic areas (i.e. everyone participates in the same training, with everyone achieving a basic yet comprehensive level of freight awareness). However, should pushback be anticipated on the total time involved, some targeting may be appropriate. Table 5-2 shows how the training could be targeted by showing the essential topics for each of the policy areas, disciplines and role-types which should receive freight awareness training.

Table 5-2 An option for targeting the freight awareness training by policy area/discipline

Policy area/discipline	Training topic									
	Definitions	Operators	Sites and infrastructure	Customers	Deliveries	Outcomes	Regulations and enforcement	Data	Stakeholder engagement	Potential solutions
Direction-setting and decision-making e.g. elected members, especially portfolio holders for transport, planning etc., senior members of the council	✓	✓	✓	✓	✓					✓
Transport e.g. transport strategy and policy, scheme development, streetscape, air quality, road safety and active travel officers	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Planning e.g. strategic planners, masterplanners, development control officers	✓	✓	✓	✓	✓	✓	✓			✓
Highways e.g. highway designers and engineers, parking policy and enforcement, operational highways officers	✓	✓		✓	✓	✓	✓			✓
Economic development	✓	✓	✓	✓	✓	✓	✓		✓	✓
Other e.g. procurement, management of contracted services, contractors installing signage	✓	✓		✓	✓		✓			✓

A ✓ denotes essential learning for the policy area/discipline.

5.4 Formats for the Freight Awareness programme

Through our activities and discussions with the Working Group there were several points noted with regards to what the Freight Awareness programme would comprise in terms of training and tools, and how the programme would be delivered.

5.4.1 The core programme

5.4.1.1 E-learning

Undertaking e-learning is a common and trusted way for local authority practitioners to complete on-the-job learning. This format lends itself well to completing training which is organised into discrete topics or modules, and it can build-in a monitoring and evaluation function through the use of pre- and post-learning knowledge checks and/or quizzes. E-learning also works well when time is at a premium as it can be accessed at any time and stopped and started as other priorities arise. It is recommended that an e-learning package forms the core of the Freight Awareness programme. We understand that TfSE's Centre for Excellence platform is capable of hosting e-learning.

5.4.1.2 Site visits/observations

Working Group participants spoke highly of the value of the site visits in terms of improving their own level of freight awareness. Part of the value of the site visits may have been inherent in taking the Working Group away from their desks and affording them dedicated time and thinking to the topic, however it is also suggested that there is value in 'seeing' some of the topics, concepts and issues that form the basis of the training first hand. It is recommended that options are explored to support the use of short videos as part of the core training (e-learning modules).

Logistics UK have offered to further support future site visits that would take place as part of a Freight Awareness programme and RHA can facilitate access for the public sector to some of its local members for the purposes of developing relationships and supporting a deeper understanding of specific challenges.

5.4.2 Additional elements – information library

Several of the Working Group members identified that they did not have a robust source of information to help inform their understanding of "the right answer" regarding planning and decision-making for freight, commenting that for other policy areas and disciplines there were checklists, case studies and other reference materials available. It is recommended that the Freight Awareness programme also includes the development of a reference 'library' which could be accessed and referred to by practitioners as specific issues arise.

5.5 Training providers/hosts

As part of the delivery of this project, the training needs assessment, we outlined interim findings from the project through separate conversations with the professional membership organisations and the trade associations to discuss ways in which they may be interested in supporting the development of the Freight Awareness programme in Phase 2. All discussions highlighted that the current Intellectual Property Rights (IPR)

belong to TfSE, EEH and TE and the importance of delivering a solution which could be hosted on TfSE's Centre of Excellence programme in the first instance.

Both Logistics UK and RHA were complementary of the work undertaken and would like to receive a copy of the final Phase 1 report and to be kept informed as Phase 2 is delivered. They offered to support the delivery of the Freight Awareness programme through facilitating site visits to operational freight sites in the future. The RHA are also keen to highlight any outputs and outcomes of the work to the DfT, with a view to encouraging action from government on freight awareness at a national level.

CIHT and CILT expressed interest in supporting the development of a Freight Awareness programme and were invited to submit outline proposals to the project team, for further consideration by the STB client team.

6 Summary

6.1 Key findings

The key findings from the discussions with the Working Group and professional membership and trade organisations relevant to the development of the Freight Awareness programme include:

- There is currently no 'off-the-shelf' training programme that covers the freight topic for a public sector audience.
- With few exceptions, current levels of freight awareness in the public sector are low, and where practitioners do have some proficiency or expertise it is typically limited to one or two sub-themes within the freight area.
- Local authority practitioners can be unaware of the extent of their lack of freight awareness and not seek further advice or assistance when working on issues or projects which interact with the freight and logistics. This may result in poor outcomes or further challenges which the freight or public sector must then work to navigate, absorb or try to retrospectively solve.
- The 10 knowledge areas identified (see below) appear to be a practical segmentation of the freight awareness knowledge required.

1.	Definitions	6.	Outcomes
2.	Operators	7.	Regulations and enforcement
3.	Sites and infrastructure	8.	Data
4.	Customers	9.	Stakeholder engagement
5.	Deliveries	10.	Potential solutions

- The Working Group identified a range of different options for the format for training/tools to be developed as part of the Freight Awareness programme, in addition to 'traditional' PowerPoint-based training sessions and eLearning packages. Of particular note was the request for practical guidance and checklists to support embedding freight awareness at a routine and day-to-day level of practice.
- Our conversations with the Working Group and external stakeholders identified a long list of roles and potential audiences for which freight awareness was relevant, concentrated under the policy areas of transport planning, land-use/spatial planning and economic development and regeneration.

6.2 Freight awareness training delivery options

The project has identified the Chartered Institution of Highways and Transportation (CIHT) and the Chartered Institute of Logistics and Transport (CILT) as suitable training providers as part of the Freight Awareness Phase 1 Needs Assessment in their capacity as professional membership organisations relevant to freight and related disciplines. Both organisations have previous experience in building and delivering training courses and they have expressed interest in developing a freight awareness training solution in Phase 2.

However, both have very different types of solutions and it is not straightforward to compare them on a like-for-like basis. Both organisations' proposals must be discussed

with the STB client team before a decision can be made as to what the Freight Awareness programme will comprise.

6.3 Next steps

The Freight Awareness Phase 1 training needs assessment identified that the Chartered Institution of Highways and Transportation (CIHT) and the Chartered Institute of Logistics and Transport (CILT) are capable of providing suitable training programmes to respond to the objective of improving public sector freight awareness. Both bodies have provided examples of potential training programmes. The STB client team and the Freight Awareness project team will now ask them to submit formal proposals to which are fully costed and contain delivery outputs, outcomes and timescales. These will be formally assessed by the project team. The one that best aligns with the requirement for the Freight Awareness programme will be taken forward to Phase 2.

Report to: Partnership Board –Transport for the South East

Date of meeting: 27 October 2025

By: Chief Officer, Transport for the South East

Title of report: Centre of Excellence Progress Update

Purpose of report: To provide a progress update on the Centre of Excellence

RECOMMENDATION:

The members of the Partnership Board are recommended to comment on the progress being made with the delivery of the Centre of Excellence.

1. Introduction

1.1 At the Partnership Board meeting in July 2025, Members endorsed the 2025/26 Centre of Excellence (CoE) Work Plan. The purpose of the report is to provide a progress update on the delivery of the ongoing Centre of Excellence

2. Progress update

2.1 Since July 2025, significant progress has been made in delivering the CoE Work Plan. A number of webinars have been held, responding directly to officers' needs identified through the 2025 Capability Survey, and engagement. This includes:

- A joint webinar with Eleven exploring barriers to Gen Z participation in consultations, techniques to improve communication and reach, and examples of best practice, which attracted over 80 attendees.
- A further clinic on active travel modelling, delivered by TfSE's Analysis Manager. This showcased good practice and was supported by a blog that has since become the most visited resource on the CoE.
- A report and a presentation to TfSE's Regional Bus Forum, delivered by Arup, on impacts of devolution on buses. The report also explores cross-subsidy and cross-boundary infrastructure issues.

3. Forthcoming Activity

3.1 Looking ahead, support on the application of artificial intelligence in transport planning has been identified by local authority officers as the highest priority area. A comprehensive package has been developed, including introductory and applied webinars, a deep-dive workshop, and a full-day training course with the University of Leeds, to ensure accessibility and practical application.

3.2 A programme on modelling and forecasting is being delivered covering environmental assessments, the use of transport analysis in spatial planning, the

Regional Travel Survey, a roundtable on applying new technologies, and support on transport assessments. Work is also underway to develop a programme raising awareness of emerging transport technologies, covering the rationale for new technologies and mobility initiatives, current trends and digital solutions, forecasts and trajectories, and real-world applications. These activities will run through to the end of the financial year, enabling regular updates on new and emerging topics.

3.3 The CoE continues to respond to requests for support made through the 2024 Pulse Check survey, which identified needs including bus franchising, carbon assessment techniques, active travel forecasting, planning assessment management, managing supported bus networks, and the use of mobile network data. By the end of 2025, all of these requests will have been met, demonstrating TfSE's ongoing commitment to delivering a resource that responds to officer needs.

4. Engagement activity

4.1 A Centre of Excellence Steering Group meeting was convened on 2 October to further develop the scope for work on emerging technologies. Officers contributed views on content priorities and shared perspectives on how the CoE should evolve for 2026/27 and beyond. Colleagues from the Future Transport Zone presented their project areas and sought feedback on dissemination through the CoE.

4.2 We have had strong engagement with universities, with two sessions exploring opportunities for collaboration and sharing assets. Work is progressing on case studies relating to digital twins and resilience, with further sessions to follow.

5. Monitoring and evaluation

5.1 Monitoring and evaluation remain central to the CoE. To date, webinars and resources have consistently achieved high satisfaction ratings, and membership continues to grow, with 366 registered users, including 280 from local transport authorities. While engagement from partners such as Network Rail, National Highways, Active Travel England and DfT has dipped slightly, a targeted programme of activity is being implemented to encourage greater involvement. The Carbon Assessment Playbook remains the most visited resource on the site, reflecting strong demand following the publication of the Quantifiable Carbon Guidance (QCG).

6. Conclusion and Recommendations

6.1 The Members of the Partnership Board are recommended to comment on the progress being made with the delivery of the Centre of Excellence.

RUPERT CLUBB

Chief Officer

Transport for the South East

Contact Officer: Emily Bailey

Email: Emily.bailey@transportforthesoutheast.org.uk

Monitoring and Evaluation Summary

Reporting period Jun – Sept

This appendix provides a summary of the key performance metrics from the Centre of Excellence (CoE) Monitoring and Evaluation Dashboard, covering the period June to September 2025. The data demonstrates continuous growth, and impact across Local Transport Authorities (LTAs) in the South East.

Total Sign Ups:

- During this reporting period, 44 new users registered with the CoE platform, demonstrating continued commitment and interest across LTAs. This growth indicates that the CoE continues to reach new areas and audiences, maintaining relevance and value.
- This brings the total number of sign-ups to 371, which is a strong indicator of reach and influence. This data is being used to demonstrate to national agencies the value of the CoE as an established and growing network, capable of supporting widespread dissemination of resources, updates, and events. Through the platform's Chat Forum, webinars, and promotional tools, national partners can engage directly with local officers, reaching a wide audience efficiently.

Content Development and Curation

- During this period, 81 new pieces of content were uploaded to the CoE website. These include both bespoke materials developed in response to identified needs and research and guidance shared by partners, such as the Blended Finance Approach provided by UKRI, which was specifically requested by LTAs as a support topic.
- This brings the total content library to 368 resources. There has been a slight reduction in total numbers, as a recent site archive and content review to ensure all materials remain current, relevant, and aligned with government policy and guidance.



44 new users = 13% increase.



81 new pieces of content = 30% increase



893 site sessions, 158 more than the previous four months (21.5% increase)

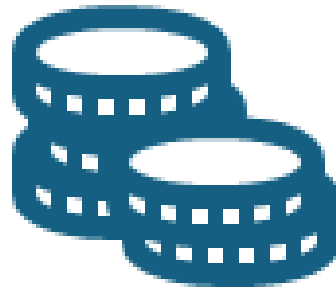
Monitoring and Evaluation Summary

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Estimated Cost Savings

- The estimated cost savings for LTAs during this period is £280,000. This figure is based on the market value of commissioned work provided directly by the CoE (excluding signposted materials, which have no direct cost or time association for TfSE).
- For example, market analysis shows that commissioning a subject matter expert to deliver a technical webinar typically costs around £2,500. If each of the 16 LTAs were to procure this independently, the total cost would be £40,000. While not all LTAs would necessarily commission each session, feedback consistently demonstrates that the CoE's webinars and clinics deliver tangible value, improving officers' skills and capability across key areas of expertise.

The data from June to September confirms that the Centre of Excellence continues to deliver measurable value, increase engagement, and strengthen capability across LTAs. Growth in user activity, consistently high feedback scores, and significant cost savings together highlight that the CoE is an effective and evolving mechanism for supporting the region, and a valuable model for wider national application.

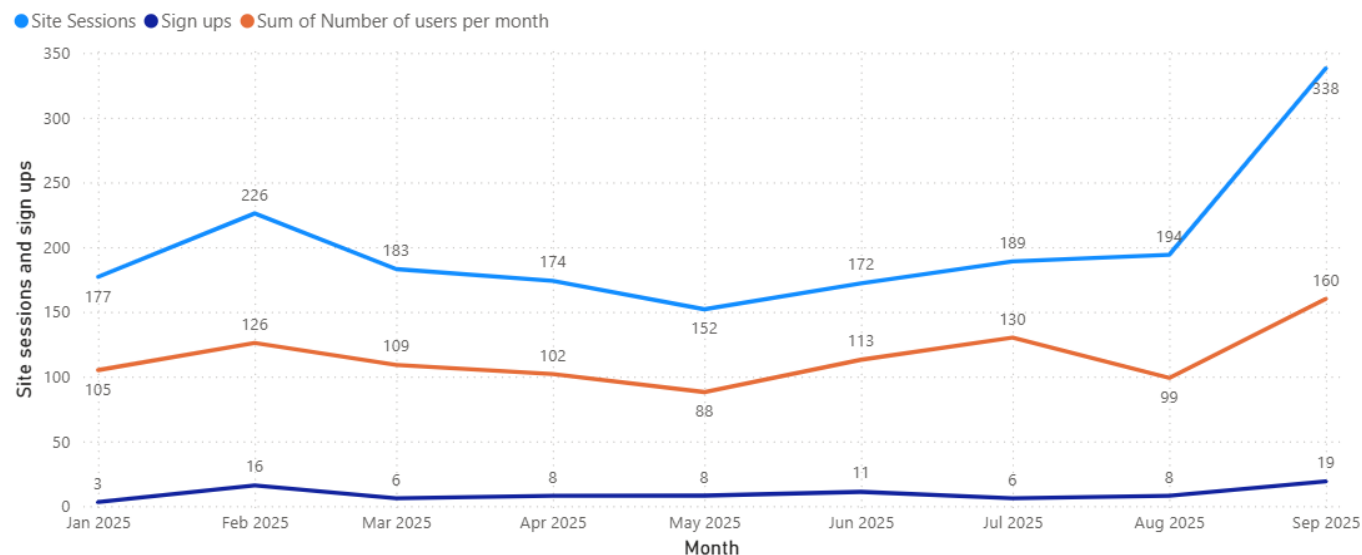


Estimated £280,000 saved for local transport
authorities

Site Sessions and sign ups

- Site sessions represent the total number of visits to the CoE platform. September recorded 338 sessions, the highest since launch, showing that interest in the site is not only sustained, but increasing.
- This growth is largely driven by the promotion of new content through the Chat Forum, newsletters, and direct engagement, where users are notified of upcoming webinars and events, and recently published content.
- In September, these 338 visits were made by 160 individual users, meaning each user visited the site more than twice per month on average. The dark blue line on the dashboard represents new sign-ups, which have remained steady, indicating sustained and consistent engagement.
- The CoE is increasingly being integrated into local authorities as a source of support, providing a practical space for collaboration, peer support, and shared learning.

Site sessions and sign ups by month



Unique visitors

Per Component

- This table highlights the most visited components across the CoE platform, helping identify where users find the most value and where further development may be needed.
- Webinars consistently attract the highest number of visits. However, these figures likely underrepresent true engagement, as many users access materials directly through newsletter links, bypassing the main site navigation.
- Encouragingly, the Webinars, Events, and Forums sections remain among the most frequently accessed pages, demonstrating that commissioned work and interactive opportunities are well utilised by users.

Specific Pages

- The Carbon Assessment Playbook (CAP) remains the most visited page on the site, receiving 71 visits over the reporting period. This high level of interest pre-dates the publication of the Department for Transport's Quantifiable Carbon Guidance (QCG). Since the QCG was launched, the Playbook has been further promoted as a key implementation tool, and usage is expected to remain strong.
- While this was one of the more costly commissions, it continues to demonstrate clear value for money and measurable impact. LTAs have provided case studies describing how the tool has directly supported the development of their Local Transport Plans (LTPs).

Number of unique visitors per component home page

Title	Jun 25	Jul 25	Aug 25	Sep 25	Total
webinars	15	8	8	19	50
events	17	5	7	17	46
resources	7	11	5	11	34
case-study	3	16	4	7	30
forum	7	15	3	5	30
key-tools	6	9	5	10	30
qualifications-and-courses	7	8	6	9	30
data	4	6	1	2	13
funding	2	4	3	2	11
consultations	1	8	0	0	9
contact	1	4	0	1	6
new-to-the-sector	2	4	0	0	6
procurement	0	5	0	0	5

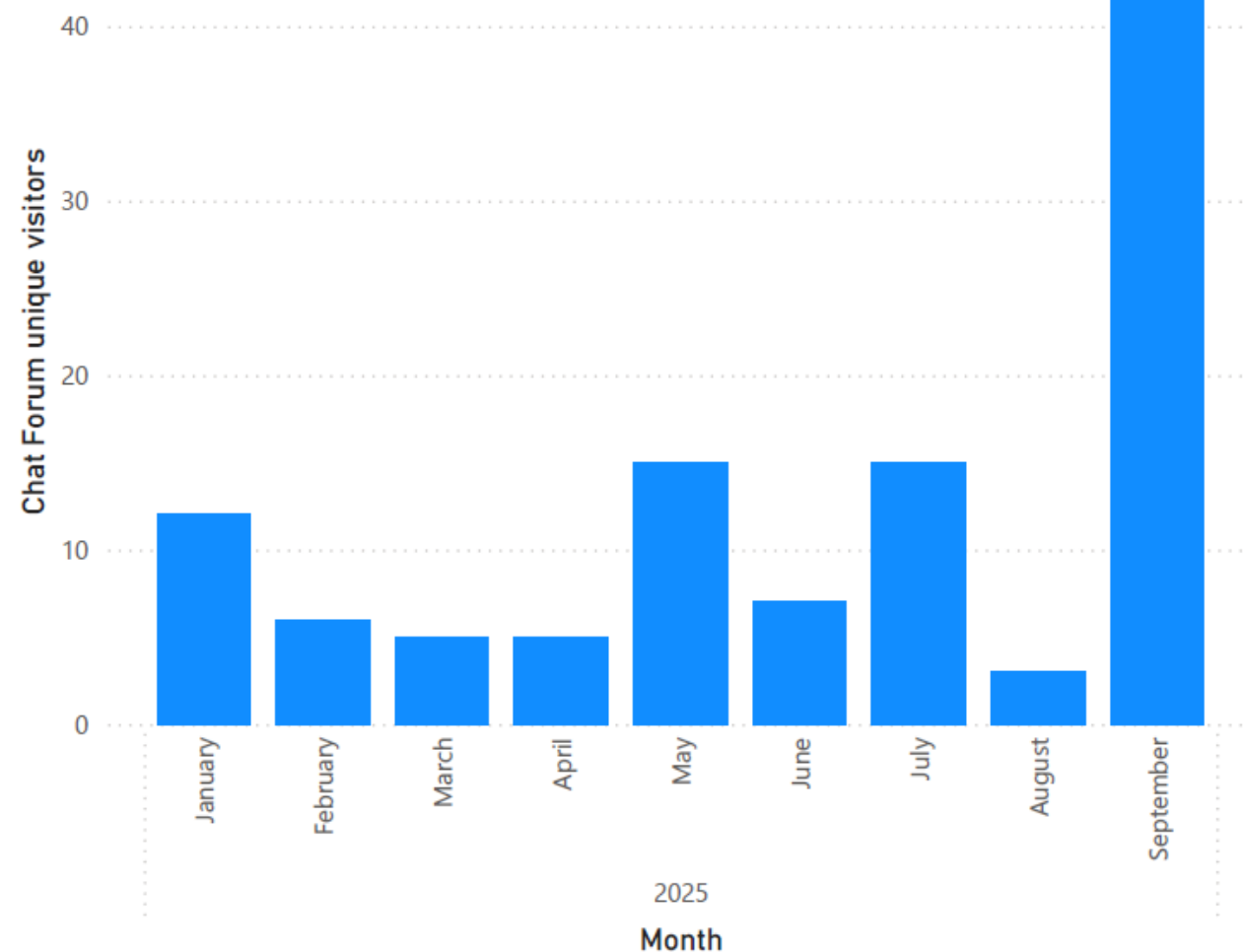
Number of unique visitors for specific pages

Title	Jun 25	Jul 25	Aug 25	Sep 25	Total
key-tools- carbon-assessment-playbook	21	10	24	16	71
forumlocal-transport-authoritiesregister-your-interest-data-science-for-transport-planners-full-day-training-course-offer	0	0	0	42	42
blog-postsforecasting-the-impact-of-active-travel-interventions	5	0	2	18	25
blog-poststransport-modelling	3	4	4	6	17
data- datashine-census-data	2	0	7	6	15
forumnew-to-the-sectortransport-planner-technician-apprenticeship	0	0	12	0	12
guidance	4	0	4	4	12
forumpublic-transportfree-bus-networks-offer	0	0	0	11	11
webinars- tfse-centre-of-excellence- carbon-assessment-playbook-introduction	0	0	5	6	11

Chat Forum Interaction

- This graph tracks the number of unique users accessing the Chat Forum each month.
- The Chat Forum was identified as one of the most valuable components during the CoE's development. While engagement has been modest to date, interaction is now increasing, with September recording a high of 42 unique visitors.
- This growth aligns with the overall rise in activity across the site and suggests that ongoing promotion by TfSE and partner authorities is working.

Chat Forum interaction



Content Feedback Scores

- After each webinar or event, attendees are invited to complete a short feedback survey. This ensures commissioned work meets expectations, delivers quality and value, and enhances capability in the chosen topic area.
- The usefulness scores, calculated as an average of survey responses, have remained consistently high, with none falling below 3.33, with most achieving ratings in the high 4s.
- This demonstrates that CoE outputs continue to provide high-quality, relevant support that is valued by LTAs and that the COE commissioned activities are improving capability and confidence across the region.

Content Feedback Scores

Content	Satisfaction Score	Usefulness Score
Behaviour Change Webinar		4.50
Deep Dive Decarbonisation and climate resilience (Business Case Development Series)	4.25	4.67
Engaging Gen Z		4.60
Funding & Financing Webinar (Business Case Development Series)	4.63	4.50
How to review a business case webinar (Business Case Development Series)	4.33	4.11
Hydrogen Buses Case Study		5.00
Impacts of Devolution on Buses		4.50
Modelling Approaches Webinar (Business Case Development Series)	4.00	3.33
Strood Risk Approach Webinar	4.50	4.00
TfSE Transport related social exclusion #1		4.20
TfSE Transport related social exclusion #2		4.00
TfSE Transport related social exclusion #3		5.00
Average	4.34	4.37

Report to: Partnership Board –Transport for the South East

Date of meeting: 27 October 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 This paper provides an update on plans for the next meeting of TfSE's Transport Forum, as well as an update on the activity of TfSE's Advisory Panel, which brings together representatives of TfSE's thematic groups.

2. Transport Forum

2.1 The Transport Forum is TfSE's wider stakeholder group. It meets in person approximately twice a year, as and when there is a need to capture the views of stakeholders to support the delivery of a piece of TfSE's work.

2.2 The Transport Forum last met earlier this year, to feed into the Transport Strategy Consultation. Officers are currently planning another meeting of the Transport Forum, focused on TfSE's SIP Refresh.

3. Advisory Panel

3.1 TfSE's Advisory Panel brings together representatives of TfSE's thematic groups, giving them the opportunity to update each other on their group's work, and feed into the business of the Partnership Board. TfSE is currently rationalising the scope and activities of its thematic groups, as its work programme evolves.

3.2 Alongside this review, the Chair of the Advisory Panel will review whether TfSE retains its Advisory Panel, and what form it takes, ahead of the next Partnership Board. In advance of the October Board, the Advisory Panel agreed not to meet. Instead, group representatives received a written update on the work of other groups.

3.2 TfSE's Funding and Finance Group met on 16 September. The group discussed the Transport Secretary's decision to TfSE's funding will be devolved to local transport

authorities via the Local Transport Grant, leaving it to local leaders to determine future contributions to TfSE. Group members discussed implications for regional collaboration, with consensus that continued coordination will be essential across strategic corridors such as the A27/M27, despite emerging mayoral authorities.

3.3 The Funding and Finance Group also discussed TfSE's planned work on private funding and financing. The group felt the work was still critical, emphasising the importance of attracting private finance into transport infrastructure amid reduced public funding and uncertainty over national financing models. TfSE's 2025/26 work will focus on developing a private funding and finance model for the A27/M27 corridor, including stakeholder engagement, legal and technical scoping, and stress testing financing options, with support from Members of the Funding and Finance Group, including UKIB and industry partners.

3.4 TfSE's Bus Forum met on 8 September, bringing together representatives from local transport authorities, bus operators, and other key stakeholders. Attendees received a presentation on the Impacts of Devolution on Governance for Buses report and were invited to provide feedback and comments to help shape the final published version. The forum also heard updates from Community Transport Association (CTA) and the Bus Centre of Excellence on their forthcoming programmes of work.

3.5 The TfSE universities group met on 9 October, with representatives from University of Southampton, University of Chichester, University of Kent, and University of Surrey. A progress update was provided on the Centre of Excellence, with a presentation on how universities could help shape the two upcoming support packages that are currently being developed. These are:

- Prioritisation of transport schemes
- Improving sustainability and lowering carbon

3.6 Universities shared ongoing and emerging research that could help address these skills needs, and there was a strong interest in exploring bespoke collaboration aligned to problem statements.

3.7 Recent and forthcoming collaboration between universities and TfSE was also highlighted:

- Active travel clinic: presentation from Rachel Aldred (University of Westminster) on best practice and application of the Propensity to Cycle tool developed for West Sussex.
- AI in Transport planning: University of Leeds will deliver a training day for officers on 1 December.
- Master's Student Scheme: Data analysis has now concluded.

3.8 TfSE will work internally to define problem statements across its workstreams, with a view to hosting a university workshop to match academic expertise with specific challenges and identify opportunities for future webinars and commissioned research.

3.9 It was agreed to hold a further universities meeting in early 2026, with potential for a wider stakeholder event bringing together academics, university planning teams, and LTA officers to share problems, opportunities, and potential solutions. Further updates will be provided to members as this collaboration develops

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

Contact Officer: Jaimie McSorley
Email: Jaimie.McSorley@transportforthesoutheast.org.uk

Report to: Partnership Board –Transport for the South East

Date of meeting: 27 October 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 communications and engagement activity that undertaken since the last 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, and recent and upcoming events.

2. Recent communications and engagement activity

2.1 Transport for the South East (TfSE) continues to use communication and engagement activity to support the implementation of our technical work programme and the promotion of the organisation with our audiences.

2.2 We are delivering against the objectives set in the 2025/26 Communications and Engagement Plan, with activity supported by website updates, social media coverage, and our monthly *Connections* newsletter.

2.3 The team has played a central role in supporting colleagues with the SIP refresh and development of the rail strategy, through combined engagement plans and the co-ordination of meetings for multiple officer groups and partnership board representatives.

3. Transport Strategy Refresh stakeholder engagement

3.1 We have supported colleagues over the summer on the refreshed Transport Strategy, developing a production timetable, proofing both the updated strategy and summary documents and liaising with the consultants who are producing it.

3.2 We have produced a communications plan for the launch of the strategy, should the board agree to adopt it. Plans include a social-media campaign, using examples of work and projects to illustrate each of the five missions, due to start in November.

4. Events and speaker slotsPast Events

4.1 In July, we hosted the first TfSE Business Advisory Group (BAG) summit in Guildford. Hosted by BAG reps Daniel Ruiz and Vince Lucas, the summit was an opportunity to bring together regional representatives from business and commerce.

4.2 The day focused around delegate discussions on three transport-related current and future challenges identified by the Business Advisory Group: access to international connectivity; energy availability; and rural transport.

4.3 TfSE is producing a report based on the feedback received from delegates and is producing a report to present to the DfT during the autumn.

Future events/speaker slots

4.2.1 In October, Rupert Clubb will deliver the keynote speech at the Transport Smart Class conference in London about devolution and the impact on local bus services.

5. MP engagement and public affairs

5.1 We met Sojan Joseph, MP for Ashford, in Westminster to introduce TfSE and discuss key issues within his constituency including the international rail link.

5.2 MP engagement was lower than usual due to Parliament's summer recess. In Autumn we will look to engage all our region's MPs on the refreshed Transport Strategy, should the Board agree to adopt it, which will help to raise our profile.

6. Delivering against our Communications and Engagement Plan

6.1 Following the approval of the 2025/26 Communications and Engagement Plan in the July board meeting, we will follow the priorities and objectives outlined and monitor outcomes and progress of our communications and engagement activities.

6.2 We are monitoring devolution and local government reorganisation, and the impacts that may have on our region. We are planning to produce a document that sets out TfSE's role, impact and how our work helps to support local authorities.

6.3 Over the months ahead, we will engage with local authority officers on plans for the Centre of Excellence, in line with successful engagement earlier this year, to give us a better understanding of the ways we can support them in 2026-27.

6.3 We are looking at ways we can utilise our social media channels over the autumn, particularly supporting the Transport Strategy. Since March, we have seen a 2.9% increase in followers on LinkedIn, which stands at 1410 against our 2025/26 target of 1500. This is our primary social media channel. We have seen a small 0.7% increase of followers on Facebook and a fall of 0.6% on X.

6.4 Our Connections newsletter subscriber base has fallen slightly this quarter, but we will actively increase promotional activity and post articles from Connections onto social media more regularly, with sign-up prompts.

7. Conclusion and Recommendation

7.1 The Partnership Board are recommended to comment on the communication and engagement activity undertaken since the last Partnership Board meeting.

RUPERT CLUBB

Chief Officer

Transport for the South East

Contact Officer: James Boyes

Email: James.Boyes@transportforthesoutheast.org.uk