



# Freight Study & Action Plan



08/10





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### 1.1 SEStran Freight Study Overview

#### The main objectives of the SEStran Freight Study were:

- To promote efficient and effective distribution of freight movement in the SEStran area
- To support the development of the transport network for the region, for distribution purposes
- To produce tangible outcomes to localised freight transport problems
- To promote sustainable distribution in the SEStran area, including greater use of environmentally friendly modes and development of inter-modal freight facilities
- To promote industry best practice initiatives
- To share information and increase knowledge of freight issues among SEStran local authorities and the freight sector
- To enhance understanding among different stakeholders and help to reach compromise where there are conflicting objectives
- To contribute to a Freight Action Plan for the SEStran area

#### The Study

Faber Maunsell undertook this study in 2007/8 by completing a desk-based review of existing data, undertaking fieldwork to review the current situation and interviewing stakeholders and others who are affected by or involved in the freight industry. Following the many aspects of data collection the project team developed a list of possible actions. A stakeholder workshop was carried out to ascertain opinion on the ideas and issues identified and this feedback helped focus strategy development.

Surveys and interviews were carried out with local authorities, drivers, receivers, operators and members of the general public and a specialised goods vehicle count was carried out on the Forth Bridge.

Most interviewees were positive about freight prospects within their area with over 60% of operators expecting their business to grow. Participants did, however, identify a number of issues in the area which included:

- **Problems with the Forth Bridge** – many respondents commented that weather issues on the Forth Bridge were causing numerous problems with some operators stating that driving around the bridge made operations unviable and FETA raising concerns about HGVs using the bridge in high winds following the closing of the toll booths. Concerns were also raised regarding the upcoming maintenance with many stakeholders feeling that they were not well enough informed on what the impacts were likely to be.
- **Lack of Driver Facilities** – nearly 90% of drivers indicated that there was insufficient parking in the SEStran area and most of the existing services were felt to be of fairly poor quality and poorly signed
- **Lack of Take Up of Multimodal Services** – Operators and local authorities both agreed that more should be made of rail freight opportunities in the area



- **Problems with Deliveries** – many operators, drivers and receivers highlighted problems with deliveries, particularly within Edinburgh. These were mainly caused by congestion, signage problems in Edinburgh, over-zealous parking wardens, loading bays being taken by the general public and confusion over time restrictions. Most of the general public recognised the fact that retailers needed to have goods delivered some suggested, however, that certain times, or days, should be allocated for deliveries.
- **Congestion Hotspots** – congestion hotspots were highlighted in several areas and included the A720, A1, A68, sections of the M8, M9 Junction 6 and the A801.

A stakeholder workshop was also carried out, with 27 delegates covering a wide spectrum of operators, local, regional and national government representatives, academics, key infrastructure management and other interested organisations, in order to:

- Share to knowledge already gathered with stakeholders
- Understand the stakeholder's views on the issues we had found
- Ask the stakeholders for any issues that had not previously been identified
- Gain 'buy-in' from the Stakeholders, for suggested actions that the Freight Study team were suggesting for the SEStran FQP to take forward

Using weighted scoring methods the importance of a wide range of issues and ideas for improvement was assessed from questionnaires filled in at the workshop. The key points taken from the workshop were:

### Multimodal Freight

- Pricing structures are a problem for rail freight in the area as these can sometimes act as a disincentive to modal shift and are particularly prohibitive to smaller flows
- There is currently a lack of inter-modal services in the SEStran area and strong demand for extra passenger services limits the capacity for freight growth due to fierce competition for train paths
- A lack of rail freight to Edinburgh was mentioned as an issue. There are two disused rail terminals in Edinburgh which have potential to run freight traffic.
- There is felt to be sufficient volume for a daily service from Rosyth – Zeebrugge but the operator only has one vessel on the route rather than two which would be needed to run a daily service. Other future opportunities include more ro-ro services to Scandinavia and the Baltic helped by European initiatives like the "Motorways of the Sea"
- There are insufficient good quality multimodal facilities available in the SEStran area to encourage use of other modes
- There are ground access issues to the Edinburgh Airport Freight Terminal, as access is only by road

- There is room to improve the provision of routing information across the SEStran area.
- Heavy goods vehicles using inappropriate roads have the potential to conflict with local residents. Therefore, there is value in providing information to assist HGV drivers in making more appropriate routing choices.
- Parking up in unauthorised locations creates a safety risk to the driver, his vehicle and other road users; a security risk for the goods carried and potential to cause local pollution problems.

### Driver Experience

- The AA Truckers Atlas and Guide to the UK features the whereabouts of several hundred truckstops, there are none recorded in the SEStran area. Although there are some existing facilities they do not necessarily meet the needs of the driver
- Communication about closures of the Forth Road Bridge, both short term due to adverse conditions and long term closures due to maintenance is a major issue for drivers, the haulage industry and those reliant on the haulage industry
- The recent removal of the tolls has increased the perception by drivers that they do not need to obey the closure guidance signs

### Local Authorities

- A regional approach would have benefit to the Local Authorities, when dealing with freight and its impacts
- Communication strategy between the eight Local Authorities and the freight industry, was felt to be very important and something that a Freight Quality Partnership could assist with

### Urban Transport Capacity

- Edinburgh's hilly topography ensures that each of the radial routes servicing the city centre is highly congested at AM and PM peak hours
- There are some areas of Edinburgh City Centre that have very short delivery windows
- There is insufficient capacity and enforcement for loading bays, these are sometimes inappropriately located to serve the facilities they are supposed to
- A common issue which affects the movement of HGVs and delivery vehicles through urban areas is the lack of appropriate signage and confusion in access to specific destinations
- Hauliers surveyed cited Edinburgh as having the poorest or most inadequate signage of any of the urban areas in South East Scotland. Many visiting drivers feel that they are perpetually at risk of getting lost. Industrial Estate maps provided by developers have also become out of date or inaccurate causing confusion to visiting delivery drivers
- One impact of poor or an inaccurate signage is an increased risk of 'bridge strikes'

### Inter-Urban Transport Capacity

- The SEStran area borders England right from Berwick upon Tweed to South of Hawick, it hosts four major routes to the South; A1, A68, A7 and A720. All of which have capacity issues, which means that they are not optimised for efficient freight movements
- One major bottleneck on these strategic roads is the A720 Sheriffhall Roundabout; this signal controlled roundabout connects the A68 to the South East, the A7 South to the Borders and North into Edinburgh
- Congestion on the A720 can be so significant that drivers with local knowledge re-route through parallel roads within the urban area
- The wider Motorway network faces peak time delay in particular the M9 and M8 approaches to Edinburgh during the morning peak. The recent opening of the M9 Spur taking traffic off the former A8000 towards the Forth Road Bridge has sped up the queuing process on approach to the A8 Newbridge roundabout
- Whilst the A801 (Avon Gorge) is not actually trunk road, it is used by HGVs and the road layout has the potential to create significant dangers for HGVs and other road users
- Closures of the Forth Road Bridge for any reason mean that all HGVs are redirected to Kincardine Bridge via the M9 and A985, a diversionary route of approximately 40 miles and 90 minutes journey time
- Media speculation on the impacts of maintenance of Forth Road Bridge has caused a great deal of concern within the haulage community and the wider community.
- The full report by Faber Maunsell is available on the SEStran website.



### 2.1 Introduction

The primary objectives in identifying the short list of schemes for recommendation were that they must provide; the maximum benefit to the region, be straight forward to implement with manageable costs, provide SEStran with high visibility outputs, promote Local Authority collusion and provide common standards across the SEStran region.

Through the various aspects of this investigation; freight movement, strategic locations, vehicle movement, public perception, economics and consultation short lists were drawn up inside each Section of this document. Faber Maunsell considered the views of Local Authorities, Port and Haulage operators, Public, Retailer and Driver surveys plus the views and opinions of key Stakeholders through a workshop process.

From this process the final options have been generated, these are the following recommendations;

- Freight Quality Partnership Communication Strategy;
- Freight Routing Strategy and Mapping;
- Consolidation Centre Study;
- Sustainable Delivery into Edinburgh (SUDS);
- Regional Guidance on Loading Bays;
- SEStran Truckstop and Parking Analysis;
- Rail Freight Development and Marketing; and
- Expansion of Shipping Services.

### 2.2 Investment implication of improving efficient freight movements in the SEStran area

As highlighted throughout the study, there are many infrastructure capacities improvements that could be undertaken in the SEStran area and would help improve the efficient movement of freight in the SEStran area. These are not within the scale of investment that SEStran can be providing. This is not to suggest that SEStran should not be involved in delivering workable solutions, SEStran should be undertaking a co-ordination role, between the various parties that will be involved. Which depending on the type and level of investment involved, could be national or local government, be from the private sector or involve a mixture of all three.

SEStran could also work with other partners to help identify other sources of funding such as through the European Commission.

The actions suggested in the action plan laid out below, have been identified as being of a scale that SEStran can provide, and either make work directly toward steps and measures that make better use of existing capacity or provide information that can be used to assist other organisations and agencies to make better use of existing infrastructure.

### 2.3 Freight Quality Partnership Communication Strategy

One of the key recommendations for the FQP is to develop a good communication strategy, encompassing external communication, through newsletters, meetings and websites. These are a vital part of the FQP and are intended to share information with partners and other interested parties.

It is recommended that the FQP would act as a communication 'hub' between all the partners, to ensure that the Local Authorities, freight industry and infrastructure managers have information disseminated to them to ensure that the Freight Industry in the area operates as efficiently as possible. An immediate example of this would be the communication of information pertaining to the closures of the Forth Road Bridge, both planned and ad-hoc because of inclement weather.

It is also recommended that the FQP develops a communication channel for the freight industry to maintain pressure on Transport Scotland and appropriate local authorities on the need for development and maintenance of the infrastructure, where either 'gaps' or lack of capacity in the network are decreasing efficiency in the movement of freight in the SEStran Area.

#### 2.3.1 Benefits of FQP Communication

- Be the 'visible' part of the SEStran FQP organisation;
- Develop a single point of communication on matters relating to Freight in the SEStran FQP Area;
- Dissemination of information gathered and created by all other aspects of the FQP;
- Assist in tackling the perceived information gap between the different stakeholders; and
- Create confidence in SEStran FQP by providing a communication channel, to ensure awareness is maintained of infrastructure gaps.

#### 2.3.2 Recommendation support

Reaction from the Stakeholder Workshop Questionnaire approval on ideas, the scores are ranked and colour coded. Results above 4.0 are positive (amber) and those above 5.0 are very positive (green):

Idea	Average Importance Score (out of 7)
'Strategy for Forth Road Bridge Closure'	6.09
'Adoption by LAs of SEStran Measures'	5.63
'Regional routing strategy'	5.46
'Marketing and increased take up of new rail services'	5.18
'Planning process assistance and guidance for Local Authorities'	5.09



## 2.4 Freight Routing Strategy and Map

SEStran should develop an area-wide Freight Routing Map which would be available both electronically and in paper form. Previous experience with this type of project in the Tyne and Wear area has shown that it has been very well received by local and visiting hauliers. In conjunction with a Signage Strategy, Freight Maps would be made available at garages and major freight attractors across the SEStran area as well as at major service stations approaching the Region.

Freight Route Mapping would allow Local Authorities to prioritise routes for Large or Abnormal loads, as well as approve more suitable radial arteries into town and city centres. Local parking and loading information may be included on the maps allowing drivers to better schedule their deliveries. The location of lorry parks and overnight facilities would help to reduce inappropriate HGV parking in industrial estates and side streets.

This work would be undertaken to develop a preferred routing strategy, where local authorities could outline routes which are most appropriate for HGV traffic to access the various destinations in the SEStran area.

Recently driver reliance on Satellite Navigation (SatNav) technology has taken the emphasis away from paper based mapping, however this technology is not infallible and often HGV drivers will cross reference the dashboard instruction with specific Nationwide HGV driver atlases and mapping showing Low Bridges and Weight restrictions. However these maps tend to be on a scale that fails to show adequate detail on a localised area.

### 2.4.1 *Benefits of a Freight Route Map*

- Provide tangible information for drivers across the SEStran area.
- Large scale showing more specific route information.
- Maps made available to any driver at local services and on major routes in the area.
- Shows locations of key freight attractors and lorry parks in the area.
- Provides reassurance to drivers reliant on SatNav technology.
- Gives Local Authorities a communication channel to visiting HGV drivers.
- Easily updated so changing data and route information can be done quickly for publication.

### 2.4.2 *Recommendation support*

Issues highlighted by the Stakeholder Workshop which were considered to be of extremely high importance were 'Lack of information for Overnight facilities' with a score of 5.63 with 'Lack of information – mapping scoring 4.57. (Where scores over 4.00 are considered positive)

Within Measures for Improvement, 'Adoption by LAs of SEStran measures' had the third highest score of 5.63, suggesting that Local Authorities are willing to accept guidance from SEStran on measures such as Freight mapping and would be open to suggestion on a Regional route strategy including signage and mapping.

Further Measures for Improvement show that the idea for a 'Regional freight map' was considered very important at 5.21, with supporting information from a 'Regional routing strategy' at 5.46.

Reaction from the Stakeholder Workshop Questionnaire approval on ideas, the scores are ranked and colour coded. Results above 4.0 are positive (amber) and those above 5.0 are very positive (green):

Idea	Average Importance Score (out of 7)
'Adoption by LAs of SEStran measures'	5.63
'Regional freight map'	5.21
Regional routing strategy	5.46

### 2.5 SEStran Area Freight Signage Review

During investigation into the efficient movement of Heavy Goods Vehicles (HGVs) in the eight Local Authorities within the SEStran area, Faber Maunsell discovered inconsistent route signage in urban areas as well as gaps in signage where vehicles exit major routes for local access. The use of Variable Message Signs (VMS) and clear route signage is important to inform visiting drivers quickly and efficiently to enable them to easily reach their destination.

The current inadequate signage can cause visiting drivers to become lost, creating driver frustration, additional wasted mileage for the vehicles, delays to deliveries and higher potential for accidents as vehicles navigate through inappropriate routes

A review of the current Freight Signage on the road networks should take place across the SEStran area to establish where gaps in signage occur, how these gaps impact on the local road network and how new and improved signage can be implemented to increase the efficiency of HGV freight moving through the area.

#### 2.5.1 *Benefits of a review of current Freight Route Signage*

- Establish freight movement patterns on major routes.
- Help Local Authorities prioritise HGV trip generators.
- Encourage efficient freight flow on major routes and in urban areas.
- To bridge Local Authority gaps in route signing strategy.
- Reduction in mis-routed vehicles.
- Reduced potential for accidents such as bridge and building strikes.

#### 2.5.2 *Recommendation support*

Reaction from the Stakeholder Workshop gave the 'Review of Variable Message Signs' the second highest priority in Measures for Improvement at 5.83. This is further enforced by scores of 5.46 for a 'Regional routing strategy' and 5.36 for a 'Review of signage in problem areas'.

Reaction from the Stakeholder Workshop Questionnaire approval on ideas, the scores are ranked and colour coded. Results above 4.0 are positive (amber) and those above 5.0 are very positive (green):

Idea	Average Importance Score (out of 7)
'Review of Variable Message Signs'	5.83
'Regional routing strategy'	5.46
'Review of signage in problem areas'	5.36

The Driver Survey highlighted that the one way system in Edinburgh led to confusion, drivers commenting that it is too easy to get lost, implying a lack of adequate signing. Network Rail report that poor signage and inadequate driver information caused 2000 rail bridge strikes in the UK to February 2007 causing significant delay to passenger and freight services.<sup>1</sup>

## 2.6 Consolidation Centre Study

A study into the possible benefits of Consolidation Centre should be undertaken to serve Edinburgh City Centre. This review would not only outline the potential economic and environmental benefits, but highlight the reduction in vehicle movements and the benefits to the local environment in terms of reduced numbers of vehicles accessing the area served.

The study will further investigate if better use can be made of existing capacity, by operating through the night. The scheme will also outline the economic benefits, of operating a Consolidation Centre, typically, these can include guaranteed delivery time, can free up staff to undertake other activities, reduce delivery costs and allow some value added / processing activities (such as merchandising of goods for sale) which can take place off site, thus freeing up floor space in city centre locations.

It is recommended that the study would also outline how the operation would work, and would identify the financial implications of such a project. Furthermore, it would seek to identify an appropriate partner for the operation as well as potential locations. It could also be used to develop a business case for a consolidation centre.

### 2.6.1 Benefits of a study of the Need for a Consolidation Centre

- Would outline the financial and environmental costs and benefits of a consolidation centre.
- Develop an understanding of whether best demonstrated practice from other parts of the UK can be applied in the SEStran Area.

### 2.6.2 Recommendation Support

A study into the benefit of Consolidation Centres is one of the key action plans sort by the Stakeholders.

<sup>1</sup> <http://www.networkrail.co.uk> – Prevention of Bridge Strikes.

Reaction from the Stakeholder Workshop Questionnaire approval on ideas, the scores are ranked and colour coded. Results above 4.0 are positive (amber) and those above 5.0 are very positive (green):

Idea	Average Importance Score (out of 7)
'Access restrictions for certain vehicles to urban areas'	5.17
'Review of delivery time restriction'	5.14
'Review existing time restrictions'	5.00
'Consolidation Centre for Edinburgh'	4.43

## 2.7 Sustainable Delivery into Edinburgh Study (SUDS)

It is important to maintain a good quality environment to live in, urban areas by there very nature generate traffic through the movement of people. Communities require to be sustained through local businesses providing goods through retail outlets, necessitating the use of delivery vehicles to supply these shops and businesses.

Economies of scale dictate that large Heavy Goods Vehicles (HGVs) are more efficient to operate for supermarkets and major high street retailers. One vehicle with a large payload can service two or three retail outlets; typically an articulated vehicle will have a diesel engine of 10 litres or more with over 300 bhp. The emissions produced by these vehicles contribute to poorer air quality and multiple HGV movements combined with other large vehicles such as buses and coaches in a major city centre can contribute to poor standards of air quality thus reducing the standard of living for residents within the area.

A study into the use of alternative transport modes and low emission vehicles for use in deliveries into Edinburgh City Centre should be carried out. By considering turning parts of Edinburgh into a Low Emission Zone (LEZ) through discouraging the use of large diesel engined vehicles, and encouraging operators to utilise alternative modes of transport or freight vehicles with alternative fuel technology Edinburgh can be turned into a model for sustainable freight distribution.

Suggested modes which will be the focus of a Sustainable Delivery Study will be;

- Low Emissions Zone vehicles, restricted access to the city centre for certain freight vehicles types. Priority could be given to freight carriers who employ technology improvements to freight vehicles such as low emission Euro 5 diesel engines or alternative fuel types and electric vehicles. In conjunction with specific delivery times and curfews low emission vehicles could be given access to city areas when other vehicles are prohibited.
- TramFreight, the use of the forthcoming tram network at off peak hours to deliver freight from a Consolidation Centre, perhaps near the tram depot at Gogar, encouraging major high street retailers to take the lead in sustainable delivery solutions to Scotland's capital. A similar example of this is used in Dresden, Germany.
- Freight Barges operating into the Port of Leith bring containerised goods from Grangemouth and Rosyth container ports. Final mile delivery by road vehicle to city centre locations would be required, but the advantages of reduced HGV mileage would be significantly improved environmental quality.

### 2.7.1 *Benefits of Sustainable Delivery*

- Reduction in vehicles emissions.
- Improved air and environmental quality.
- Forcing increased delivery operator efficiency.
- Integrates well with mapping and signing strategy.
- High profile strategy to template for other towns in the area.

### 2.7.2 *Recommendation support*

In the Issues which Stakeholders considered within the SEStran area 'Air quality issues in urban areas' scored lower at 4.52, this may be due to SEStran having relatively small towns surrounded by miles of countryside. Edinburgh, the largest conurbation in the SEStran area home to approximately 550,000 people, has a geographical boundary which is bordered by the Firth of Forth which provides a sea breeze most of the year keeping Edinburgh relatively pollution free.

However as a Measure for Improvement, 'Access restrictions for certain vehicles to urban areas' scored well at 5.17 and 'Use of planning restrictions with sustainable transport requirements' scores 4.75. Direct Measures for Improvement were scored low at the Stakeholder Workshop, such as 'Encourage the use of Electric Vehicles' and 'Innovative modes of freight transport' both scored less than positive 3.90 and 3.67 respectively. (Where scores over 4, they are considered positive)

This may be reflective of the Stakeholders' view that current HGV movement within urban areas should be controlled more effectively and that alternative fuel types and different modes are unrealistic. By commissioning a study to review alternative transport modes and low emission vehicles for delivery perhaps Stakeholders preconceptions of future vehicle design and sustainable logistics may be addressed.

Reaction from the Stakeholder Workshop Questionnaire approval on ideas, the scores are ranked and colour coded. Results above 4.0 are positive (amber) and those above 5.0 are very positive (green):

Ideas	Average Importance Score (out of 7)
'Access restrictions for certain vehicles to urban areas'	5.17
'Use of planning restrictions with sustainable transport requirements'	4.75
'Air quality issues in urban areas'	4.52
'Encourage the use of Electric Vehicles'	3.90
'Innovative modes of freight transport'	3.67

### 2.8 Regional Guidance on Loading Bays

Without vehicle deliveries the High Street economy would be unsustainable. Throughout this survey, kerbside and Loading Bay parking for access to shops and businesses has been reported to be inadequate and restrictive. Many town centres make little provision for freight delivery in favour of more profitable ticketed parking for private vehicles. This is an issue which affects vendors as much as freight carriers.

A Guidance document to help Local Authorities plan their Delivery and Loading Bay implementation should be produced. This Guidance document would take into account facts regarding the number of retail units in the immediate area, types of business, frequency of deliveries to these businesses and types of vehicles which require a stop in the area. A strategy for Loading Bay size and location would be included in the Guidance document taking into account local planning and capacity requirement.

The use of a consistent approach across the Local Authorities within the SEStran area would run in parallel with other delivery strategy measures recommended in this document, namely signing and mapping, to ensure that regular deliveries are well catered for. It is suggested that shop keepers and freight carriers have input into the delivery strategy scheme.

Delivery strategies require proper enforcement to ensure that private vehicles do not park in Loading Bay areas, Traffic Wardens should be educated in the requirement for efficient goods delivery and the benefit to the local economy of freight movement. Goods vehicles should not be considered 'easy picking' for Traffic Wardens who may benefit from incentives associated with issuing a high level of tickets for illegal parking.

#### 2.8.1 *Benefits of Regional Guidance for Loading Bays*

- Improved delivery access to retailer premises.
- Common design of Loading Bays with appropriate signage.
- Increased communication between High Street retailers, Local Authorities and freight carriers.
- Reduced risks to pedestrians and passers by during deliveries.
- Introduce a common standard for Traffic Wardens enforcement of Loading Bays.

#### 2.8.2 *Recommendation support*

Operator and Retailer surveys both showed that restrictions in Loading Bay access through poor enforcement and restrictive bay size and shape often forced drivers to park outside of specified areas.

Issues highlighted by the Stakeholder Workshop show that 'Congestion caused by urban delivery vehicles during peak hours' scored an average priority at 5.13 out of 7 while 'Inconsistent delivery restrictions' scored slightly lower importance at 4.90.



Measures for improvement by Stakeholders indicated that a 'Review of parking enforcement' was a high priority at 5.42 but 'Better planned approach to delivery bays' was of average priority at 5.05. This may be reflective of certain Stakeholders general dislike of Traffic Wardens rather than a considered approach to the problem of freight access to the High Street. However a 'Review of delivery time restrictions' at 5.14 suggests that Stakeholders considered a more flexible approach to some delivery areas would be more appropriate to solving Loading Bay access.

Reaction from the Stakeholder Workshop Questionnaire approval on ideas, the scores are ranked and colour coded. Results above 4.0 are positive (amber) and those above 5.0 are very positive (green):

Ideas	Average Importance Score (out of 7)
'Review of parking enforcement'	5.42
'Review of delivery time restrictions'	5.14
'Congestion caused by urban delivery vehicles during peak hours'	5.13
'Better planned approach to delivery bays'	5.05
'Inconsistent delivery restrictions'	4.90

## 2.9 SEStran Truck Stop Analysis

SEStran should conduct surveys of HGV parking facilities in the eight local authority areas. An issue raised by a number of Local Authorities during the course of the Study was that of inappropriate HGV parking. This raises concern for Local Authorities with littering, noise pollution from vehicle movement and refrigerated trailers running generators all night plus importantly that of driver and vehicle security.

In HGV driving time the SEStran area can be bridged in less than an hour North to South and approximately 2 hours East to West, drivers passing through the area have options in neighbouring regions to find appropriate facilities. Within the SEStran area there are very few purpose built 'Truckstops' providing food and driver washroom facilities, this may be due to many large industrial estates which exist in West Lothian and the Falkirk areas. Existing Truckstops can charge up to £20 per night for secure vehicle parking plus driver shower and washroom facilities, and most provide café facilities too.

Industrial estates within the SEStran area are close to the motorway network and provide unrestricted access allowing many drivers to 'park up' for the night to sleep. A driver visiting the area for delivery or collection will try to get as close as possible to their point of destination before pulling over for the night.

The study of existing facilities highlighting areas where there is no provision for HGV parking through the use of a Gap Analysis should be undertaken. The study will address low cost initiatives for utilising existing public parking areas within towns during night time hours for Heavy Goods Vehicle parking.

The study will complement a signing and mapping strategy across the region to encompass a full package of measures to accommodate freight vehicle movement.

### 2.9.1 *Benefits of the Truck Stop Analysis*

- Providing secure parking locations for HGVs.
- Reducing noise pollution and vehicle movements at night.
- Providing more hygienic facilities for drivers including washrooms and showers.
- By providing a complete package for road freight facilities, show a lead to other FQPs in Scotland
- Removing inappropriately parked HGVs from Trunk road laybys and Industrial Estates.

### 2.9.2 *Recommendation support*

The Freight Action Plan for Scotland 2006, which makes provision under the Freight Quality Partnerships (FQPs) guidance on the provision of driver's rest areas.<sup>2</sup> SEStran Regional Transport Strategy (RTS) which highlights the provision of overnight parking as a 'High Priority' for the future FQP. An HGV parking plan would be planned regionally and applied locally with regional guidance.<sup>3</sup>

Issues identified at the Stakeholder Workshop identified 'Difficulty finding appropriate parking' as the second highest priority with a score of 5.78 out of 7 and 'Lack of appropriate overnight facilities' at 5.63. As a measure for improvement, 'Development of overnight facilities' scored highly at 5.58 with the 'Provision of information on overnight facilities' scoring 5.50.

Overall HGV parking and the provision of overnight facilities ranked as one of the highest priority issues highlighted by the Stakeholder workshop. Importantly both vehicles operators and Local Authorities viewed it as a high priority.

Reaction from the Stakeholder Workshop Questionnaire approval on ideas, the scores are ranked and colour coded. Results above 4.0 are positive (amber) and those above 5.0 are very positive (green):

Ideas	Average Importance Score (out of 7)
'Difficulty finding appropriate parking'	5.78
'Lack of appropriate overnight facilities'	5.63
'Development of overnight facilities'	5.58
'Provision of information on overnight facilities'	5.50

<sup>2</sup> Freight Action Plan for Scotland, Scottish Executive, 2006

<sup>3</sup> SEStran Regional Transport Strategy 2008 – 2023, 2007

## 2.10 Rail Freight Development Review and Marketing

Climate change and congestion problems are becoming increasingly important to the UK economy and to the policies of individual companies. Rail freight provides one solution to decreasing the impacts of climate change and congestion – an average freight train can remove 50 HGVs journeys from the roads. Some freight is travelling in the area by rail including coal, cement, intermodal boxes, waste, oil and petrochemicals but it is believed that more could be moved. Improvements to the rail infrastructure such as gauge enhancements, and development work on the Alloa route should be capitalised on.

Road freight operators have known the importance of marketing for a long time and rail freight operating companies are now beginning to realise marketing of rail freight services is very important in improving take-up. EWS has recently appointed a Scottish Sales & Marketing Manager and are planning on embarking on a sales strategy to win more freight business in the area.

It is recommended that a detailed review of existing business plus detailed gap analysis to identify potential growth should be carried out. Following on from this should be the development of a linked and targeted marketing approach to encourage growth of inter-modal services and rail freight in the SEStran area.

### 2.10.1 *Benefits of Rail Freight Development Review and Marketing*

- Provide tangible information on current rail freight use and what has encouraged companies to switch from road;
- Consistent approach to rail freight marketing throughout the region;
- Improved rail freight take-up in the future;
- Reduced external costs associated with transport within the region – carbon, air quality emissions, noise, congestion, infrastructure costs and accident costs; and
- Contribute to meeting government and European climate change objectives.

### 2.10.2 *Recommendation Support*

Within this section, improvements to the rail infrastructure at Grangemouth and Rosyth both ranked highly in the list, falling within the top 8 measures. There was also support for better marketing of rail services (5.18 out of 7), a better pricing strategy for rail (5.19) and promoting better use of inter-modal facilities (5.05).

Reaction from the Stakeholder Workshop Questionnaire approval on ideas, the scores are ranked and colour coded. Results above 4.0 are positive (amber) and those above 5.0 are very positive (green):

Ideas	Average Importance Score (out of 7)
'Marketing and increased take-up of rail services'	5.18
'Grangemouth rail infrastructure improvements'	5.62
'Rosyth rail infrastructure improvements'	5.48
'Improved Rail Pricing Strategy'	5.19
'Promote better use of inter-modal facilities.'	5.05

### 2.11 Expansion of Shipping Services

The Rosyth-Zeebrugge ferry service is currently mainly passenger related and the timing of the services reflect this. In the views of several people there is sufficient volume for a daily service from Rosyth-Zeebrugge but the operator only has one vessel on the route rather than two which would be needed to run a daily service.

A typical alternative to the use of the Rosyth ferry is to drive to the East Coast ports on the Tyne, Tees or Humber. Cost is not the main issue on journeys via England as there are other factors at work including:

- Vessel volume for example there are bigger boats from Hull;
- Number of sailings;
- Timing of sailings;
- Speed; and
- Environmental Agenda.

Short Sea Feeder Ship Container Services do run from Felixstowe and Teesport to Grangemouth. Feeder frequency is important in order to encourage other users.

Future opportunities include more ro-ro services to Scandinavia and the Baltic helped by European initiatives like the "Motorways of the Sea". There may be opportunities to bring in construction material through Leith Docks for new build homes and developments (continuous development along the Waterfront is expected for the next 10 -15 years) and even sand for building the new Forth Bridge. There are other planned developments for an expansion of containers coming into Forth Ports which will bring extra volumes.

The smooth operation of the regions ports is important both in terms of economic benefits (additional jobs and income to the region) and environmental benefits as less lorry miles are carried out if goods are shipped to a port closer to their destination.



A study should be carried out to understand the potential market that could be served by Ports in the SEStran Area, including for Ferry Traffic and if any additional locations could be served. This could be used to inform a strategy for the region to maximise potential traffic through the ports. Funding opportunities such as Marco Polo, for coastal shipping and 'motorways of the sea', should also be reviewed in order to maximise the potential benefit to the region.

#### 2.11.1 *Benefits of a Ferry Strategy Review*

- Provide tangible information to inform the development of a ferry strategy for the regions ports;
- Increased attractiveness of the regions ports compared to journeys via England;
- Economic benefits associated with increased take-up of Scottish ferry services; and
- Environmental benefits as lorries will be travelling shorter distances if cargo is able to travel closer to its destination by ferry.

#### 2.11.2 *Recommendation Support*

Within Measures for Improvement support for expansion of Grangemouth and Rosyth scores highly at 5.5 indicating the important placed on the regions ports by stakeholders. A review of the ferry services from Rosyth to Zeebrugge is supported by most stakeholders (5.18) as is increased provision of shipping services (5.36) and the promotion of better use of intermodal facilities (5.05).

Issue and Idea	Average Importance Score (out of 7)
'Support for expansion of Grangemouth & Rosyth'	5.50
'Review of Ferry Services from Rosyth to Zeebrugge'	5.18
'Increase provision of rail and shipping services'	5.36
'Promote better use of inter-modal facilities.'	5.05

## 2.12 Overview of All proposed Actions in the Action Plan

A table has been created (see following pages) that allows for quick comparison between all the action plans. This provides an indicative overview of all the key benefits as well as the expected deliverables of undertaking these actions.

Recommended Action	Features						Deliverables
	High Visibility	Region-wide Impact	Cost	Endorsed By			
				Stakeholder Workshop	Existing Policy	Key Stakeholders	
Freight Quality Partnership Communication Strategy	✓	✓	✓	✓	✓	✓	<ul style="list-style-type: none"> <li>- Dissemination material creation including Newsletters, Website.</li> <li>- Arrangement of FQP Meetings</li> <li>- Facilitate Flow inflow of information between different groups to encourage good use of transport network</li> <li>- Creation of a communication channel to highlight where infrastructure is working against efficient freight operations</li> </ul>
Freight Routing Strategy and Map	✓	✓	✓	✓	✓	✓	<ul style="list-style-type: none"> <li>- A development of a system of preferred routes accessing the principle HGV destinations.</li> <li>- Creation of dissemination material, for HGV drivers including Website and paper mapping information.</li> </ul>
SEStran Area Freight Signage Review	✓	✓	✓	✓	✓	✓	<ul style="list-style-type: none"> <li>- Report outlining the current signage provision</li> <li>- Recommendations for improving signage to key HGV destinations.</li> </ul>
Consolidation Centre Study	✓	✓	✓	✓	✓	✓	<ul style="list-style-type: none"> <li>- A review of the potential environmental and economic costs and benefits of a Consolidation Centre.</li> <li>- Outlining appropriate information</li> </ul>
Sustainable Delivery into Edinburgh Study (SUDS)	✓	✓	✓	✓	✓	✓	<ul style="list-style-type: none"> <li>- Review of technologies and best practices used in other cities to limit the environmental impacts of deliveries into Edinburgh City Centre.</li> <li>- Including exploration of the benefits of other mode delivery</li> <li>- Development of a plan for way forward</li> </ul>

Recommended Action	Features						Deliverables
	High Visibility	Region-wide Impact	Cost	Endorsed By			
				Stakeholder Workshop	Existing Policy	Key Stakeholders	
Regional Guidance on Loading Bays	✓	✓	✓ ✓	✓			<ul style="list-style-type: none"> <li>- Development of a consistent approach to loading bay design, location and signage.</li> <li>- Exploration of how to ensure enforcement assists efficient freight developments</li> </ul>
SEStran Truck Stop Analysis	✓	✓	✓	✓		✓	<ul style="list-style-type: none"> <li>- Identification of geographical gaps in the parking facilities in the SEStran area.</li> <li>- Development of a strategy, to ensure the provision of secure appropriate parking facilities and the meeting of driver requirements</li> </ul>
Rail Freight Development and Marketing	✓	✓	✓	✓			<ul style="list-style-type: none"> <li>- Detailed review of existing business, plus detailed gap analysis to identify potential growth.</li> <li>- A linked marketing approach to encourage growth of inter-modal and rail freight.</li> </ul>
Expansion of Shipping Services	✓		✓ ✓	✓			<ul style="list-style-type: none"> <li>- A study to understand what the potential market is that could be served by Ports in the SEStran Area, including for Ferry Traffic.</li> <li>- Also reviewing if more locations could be served.</li> <li>- Reviewing funding opportunities such as Marco Polo, for coastal shipping and 'motorways of the sea'.</li> </ul>

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