



Eastern City Business Improvement District (EC BID): Freight, Servicing and Deliveries (FSD) Consolidation Mapping



Final Report

30 July 2024



Contents

0	Executive Summary	5
1	Introduction and Structure of the Report	1
1.1	Background and Purpose.....	1
1.2	Objectives for This Project.....	2
1.3	Structure of This Report	3
2	Consolidation and Collaboration.....	4
2.1	Consolidation.....	4
2.1.1	Different Forms of Consolidation.....	4
2.1.2	Benefits of Consolidation	5
2.2	Collaboration	6
2.3	Consolidation and Collaboration in London	6
2.4	Consolidation and the City of London	7
2.5	Current Consolidation Activity	9
3	Site Visits and Stakeholder Engagement.....	11
3.1	Site Visits.....	11
3.2	Engagement.....	13
3.3	Consolidation – Current Position.....	14
3.3.1	Consolidation Centre Experience	14
3.4	Key Engagement Findings.....	15
3.4.1	Types of Business	15
3.4.2	Building Managers.....	15
3.4.3	Delivery Bays	16
3.4.4	Delivery Restrictions.....	16
3.4.5	Challenges by Commodity Group.....	17
3.4.6	Willingness to Change	18
4	Assessing Demand.....	19
4.1	Current Land Uses in the EC BID Area	19
4.2	Office Properties.....	20
4.3	Major Planned Developments.....	21
4.4	Current and Future Demand for Deliveries	22
4.4.1	Do these numbers look realistic?.....	23
4.4.2	Impact of Consolidation and Collaboration	23
5	Impediments and Success Factors	26



5.1	Generic Consolidation Impediments and Success Factors	26
5.2	Consolidation Impediments	27
5.3	Collaboration Impediments.....	28
5.4	Other Logistics Challenges.....	28
5.5	Collaboration and Consolidation Benefits.....	29
6	Consolidation Pilot – Framework.....	30
6.1	The Opportunity	30
6.2	Obstacles	30
6.3	Recommendations.....	30
6.4	Proposed Approach – Steering Group.....	31
6.4.1	Steering Group Responsibilities	31
6.5	Steering Group Projects.....	31
6.5.1	Regular Activities.....	31
6.5.2	Promoting Benefits	32
6.5.3	Sharing Best Practice.....	32
6.5.4	Extending Consolidation	32
6.5.5	Area Based Collaboration.....	33
6.5.6	Increased Off Peak Deliveries.....	33
6.5.7	Improving Data.....	33
7	Case Studies	35
7.1	Curb Cargo	35
7.2	Collectiv food.....	38
8	Appendix 1.....	41
9	Appendix 2.....	43

Figures

Figure 1 Key Recommendations	1
Figure 2: Map of the City of London showing BID areas.....	2
Figure 3: Extract from City of London Transport Strategy	4
Figure 4: Map of locations recorded during site visits.....	11
Figure 5: Photographs taken during site visits.....	13
Figure 6: Main uses of buildings in the EC BID area.....	19
Figure 7: Location of large office properties and other properties	20
Figure 8: Map showing major planned new buildings. Publica for EC BID	21
Figure 9: Estimated number of buildings to be completed each year - CoStars data	22
Figure 10: Summary of delivery volume estimates / forecasts per day	23
Figure 11: Summary of trip impact estimates.....	24
Figure 12: Extract from 100 Leadenhall Street Delivery and Servicing Plan, 2018.....	25



Figure 13 Key Benefits	29
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0 EXECUTIVE SUMMARY

EC BID want to explore the potential to pilot an inter-building consolidation scheme within a defined area of the BID footprint, that can be rolled out in 2024 and trialled for approximately a year working collaboratively with the City of London Corporation. This could be for a small number of buildings in a 'cluster', close to each other. If successful, it could then be expanded across the BID footprint and eventually be seen as an exemplar for the rest of the Square Mile and other cities globally, particularly those with 'tall building' clusters.

To help guide pilot implementation, the approach taken emphasised the need for a robust process of engagement, assessment and analysis to understand:

- the feasibility of introducing an area-based FSD consolidation pilot within the EC BID
- existing and proposed consolidation schemes (or lack thereof)
- future servicing demand accounting for the property development pipeline
- the challenges such a trial could face
- a broad framework for the pilot
- best practice examples of schemes in place elsewhere

A key feature of the approach was to undertake a significant amount of site visits and stakeholder interviews. This has resulted in a output that is not only founded on fact but has also been able to establish the level of engagement of the key stakeholders that will ultimately define the success of any action taken on the basis of this report. Not only has this resulted in a thorough understanding of FSD within the study area, it has also highlighted the strong desire of those involved to improve the status quo, which bodes well for the implementation of the recommendations made in this report.

This report clearly defines consolidation and collaboration as these are two of the main, although not only, tools which are available to improve last mile delivery efficiency and reduce the impact of deliveries in urban areas.

There are examples of both of these interventions in London and the City specifically, as a means to address growing challenges. These challenges can be seen as; rapid growth of employment, historic medieval street plan, with pressure on pavement space, made more acute with extremely high commuter volumes, and changing roles for the area.

As part of the methodology used, site visits were an important element of data gathering and the image below shows the locations recorded.

The detailed stakeholder engagement identified a number of issues and challenges that we face to meet our aspirations. Through observation and discussion, the engagement identified themes including on-street problems such as poor parking of delivery vehicles, drivers having to make final stage of trips by foot, and access issues to delivery areas. From both an operational and policy perspective, the engagement also highlighted the challenges of time constraints often imposed, different needs of different sectors and an inconsistent and potentially conflicting approach to planning conditions. As part of the study the Project team reviewed the Public Realm Strategy and identified areas where delivery and servicing and the aspirations for the public realm overlap and potentially conflict, for example, poor pedestrian experience due to congestion or poor access to delivery areas due to street furniture or pedestrianisation.



Understanding the demand is essential to understand the future challenges, constraints and opportunities.

Reviewing CoStar data it can be seen that today there are 18 buildings over 30,000sqm, by 2030 this will be 30. This will result in a 44% increase in office space and 44% more space means 44% more deliveries. We estimate that currently there are between 2,400 to 3,600 deliveries per day: 2,400 to 3,600. By 2030 this will rise to 3,400 to 5,200. Below highlights the proposed new developments.

Taking into account the development pipeline, and assuming a best-case scenario of all major buildings implementing consolidation, there will remain a 22% net increase in deliveries within the Eastern City. This does not take account for smaller developments and thus to meaningfully control and reduce future FSD journeys a programme of collaboration must be implemented as well.

This highlights the burning platform which must drive the approach to delivery and servicing management in the EC BID area and this is reflected in the next steps and recommendations.

The recommendation of the report are focused on four aims

- all consolidation centres to achieve at least 60% reduction in deliveries
- extend consolidation to existing large buildings as well as new
- extend collaboration to clusters of smaller buildings
- shift deliveries to off peak times

The key recommendation is that a Last Mile Improvement Group is established which undertakes a series of activities that will drive improvement in delivery and service in the area:

Action	Scope
Stakeholder Event	Thank you and kick off for Programme
Steering Group	Provision for secretariat support
Promoting Benefits	Communications campaign
Sharing Best Practice	Increase participation in consolidation
Extending Consolidation	Two feasibility studies for existing buildings
Area Based Collaboration	A collaboration tool where users adopt the tool to plan, manage, and monitor their deliveries
Increased Off Peak Deliveries	Identifying all the restrictions in the EC BID area, selecting a pilot locations with benefits
Improving Data	Monitoring and analysing data provided through planning agreements and data within the collaboration tool

Figure 1 Key Recommendations

1 INTRODUCTION AND STRUCTURE OF THE REPORT

1.1 BACKGROUND AND PURPOSE

In February 2022, the Eastern City business community voted to establish a formal Business Improvement District (BID) in the area, after the success of its predecessor – the EC Partnership.

Business Partnerships and Business Improvement Districts give a voice to business communities – championing local priorities and ensuring the right people are at the decision table.



The BID's programme focuses on:

- A Sustainable District: supporting the City of London Corporation's strategy for achieving net zero by 2040.
- An Evolving District: working patterns across the City have undoubtedly changed and in order for the commercial ecosystem to thrive, there is a need to reach new audiences and diversify what this part of the capital has to offer.
- Our Community: enhancing the experience of the Eastern City for businesses, their staff, and customers.
- Promoting the Eastern City: working to position the area as a global pioneer, setting the blueprint for what's needed in a world-leading central business district.

The coverage of the EC BID and other BIDs across the City is shown in map below.

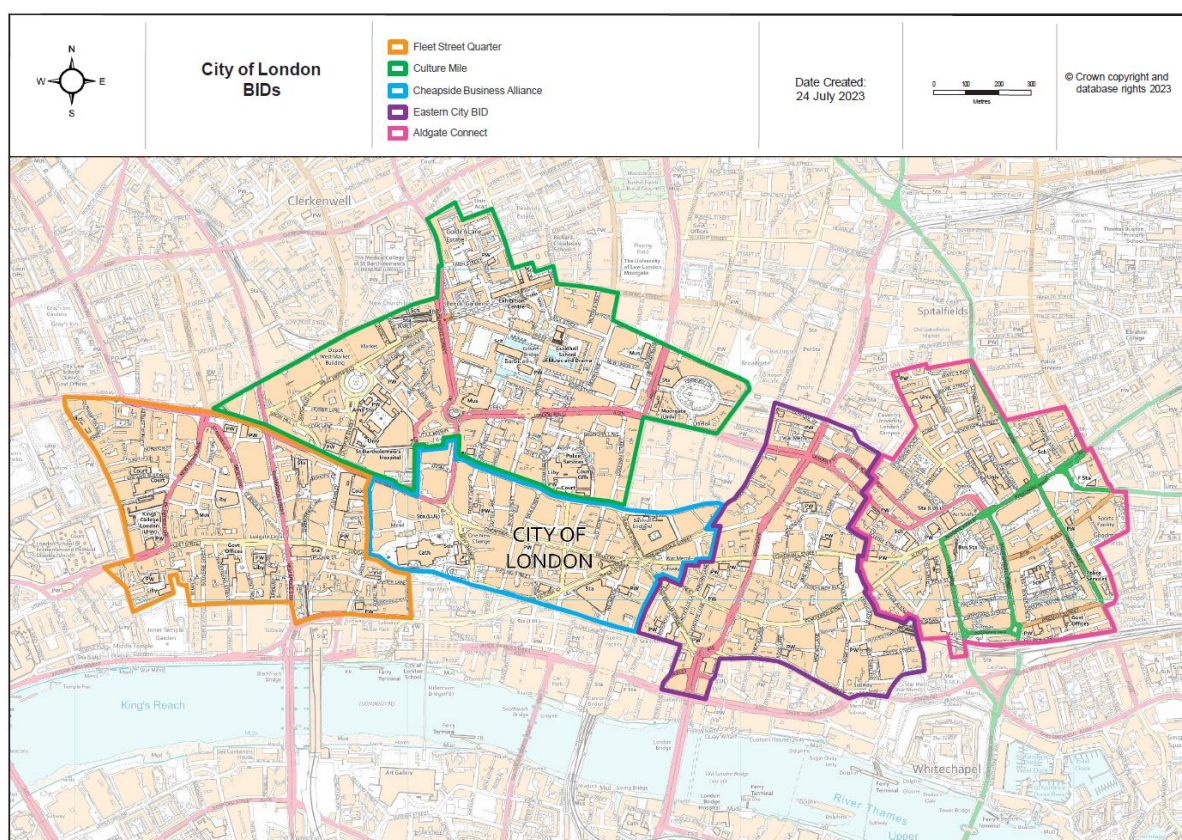


Figure 2: Map of the City of London showing BID areas.

1.2 OBJECTIVES FOR THIS PROJECT

EC BID want to explore the potential to pilot an inter-building consolidation scheme within a defined area of the BID footprint, that can be rolled out in 2024 and trialed for approximately a year. This could be for neighbouring buildings in a cluster. If successful, it could be expanded across the BID footprint and eventually it could be an exemplar for the rest of the Square Mile and other cities globally, particularly those with 'tall building' clusters.

To help guide pilot implementation, there is a need for a thorough understanding of what is currently in place (existing consolidation initiatives); future freight, servicing and deliveries (FSD) demand in the EC BID area; impediments to implementing consolidation and ways to overcome



those; recommendations on the structure and format of the pilot; and any other factors that need to be considered.

In particular, the project needs to:

- Assess the feasibility of introducing an area-based FSD consolidation pilot within the Eastern City Business Improvement District
- Analyse existing and proposed consolidation schemes (or lack thereof)
- Assess future servicing demand, in terms of the property development pipeline
- Identify the challenges such a trial could face
- Recommend a broad framework for the pilot
- Provide best practice examples of schemes in place elsewhere

Consolidation, for the purposes of this project, means both the procurement process (i.e. shared purchasing, common ordering in multi-tenant premises), as well as the logistical movement to and from customers. Specifically, the key objective is to set the context for a pilot, prior to a subsequent piece of work, which would design the solution in detail.

A key factor is that the project will be EC BID-led but be delivered in partnership with the City of London Corporation and involve working closely with the Property Owner Group and managing agents, to ensure alignment with existing and future consolidation plans for premises – so these groups will be key for extensive consultation, to understand what they currently do and what they have planned or could plan for premises.

The project will also engage and work with the team currently developing a public realm strategy for the EC BID area.

1.3 STRUCTURE OF THIS REPORT

Chapter 2 provides a basic description of consolidation and collaboration for urban logistics and summarises experience in London generally and the EC BID area in particular.

Chapter 3 provides the outputs from the site visits and extensive engagement programme.

Chapter 4 provides a forecast of delivery activity to offices in the EC BID area, including some scenarios with implementation of collaboration and consolidation.

Chapter 5 outlines the impediments and success factors for wider implementation of consolidation and consolidation.

Chapter 6 sets out a framework for significant extension of consolidation and consolidation.

Chapter 7 describes in more detail two relevant case studies of innovative urban logistics strategies.



2 CONSOLIDATION AND COLLABORATION

2.1 CONSOLIDATION

It is important to clearly define consolidation and collaboration. These are two of the many tools which are available to improve last mile delivery efficiency and reduce the impact of deliveries in urban areas.

Consolidation means replacing multiple small deliveries to a location with fewer and fuller deliveries, thereby reducing the total number of vehicle trips needed to service premises (covering both inbound and outbound reverse logistics flows). Reduced vehicle trips result in less fuel used per item transported, with corresponding efficiency and cost benefits, as well as reduced emissions and reduced road space demand.

Freight consolidation

Freight consolidation involves routing deliveries to a business, building or area via a warehouse where they are grouped together prior to final delivery. This approach means that the final stage of delivery is made by fewer, fuller vehicles, significantly reducing the number of lorries and vans making deliveries.

Case studies have shown that freight consolidation can reduce the number of delivery trips by 46 – 80%.^{xliv} Enabling freight consolidation is critical to achieving our targets for reducing freight vehicles.

Examples of consolidation include the Bristol and Bath Consolidation Centre, the London Borough Consolidation Centre and Regent Street Clipper Consolidation. The City Corporation already mandates the use of consolidation centres in planning consents, including 22 Bishopsgate and 1 Undershaft, to mitigate the impact of new development on City streets.

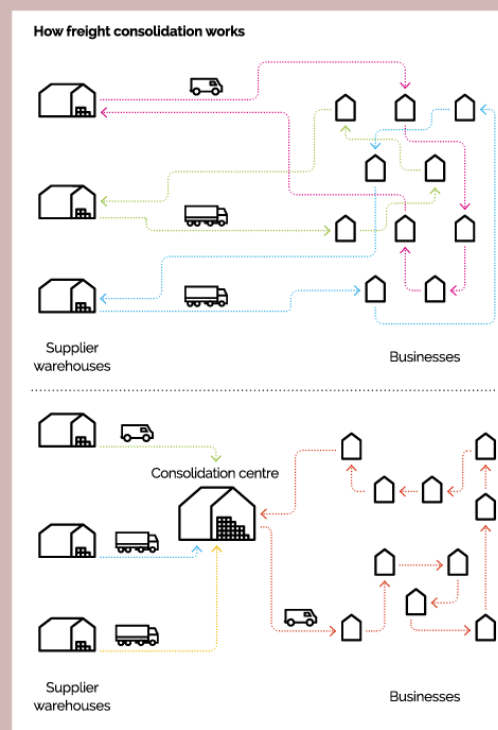


Figure 3: Extract from City of London Transport Strategy

2.1.1 Different Forms of Consolidation

The form of consolidation centre which is the focus for this study is often described as an Urban Consolidation Centre (UCC). Usually located on the outskirts of a city, receiving deliveries in large goods vehicles, and then directly transferring goods onto dedicated vehicles for delivery into the city. The UCC may also store goods and provide other added value services. Currently most UCCs serve retail districts, but they can also serve single organisations (such as local authorities or hospitals) or offices and other businesses.

Construction Consolidation Centres (CCCs) are not covered by this report, but they are an especially important element of building development in the City, not least due to the constrained space of



construction sites which forces developers to carefully control inbound deliveries. The operators of the new generation of UCCs have often evolved from operating successful CCCs, including Wilson James and Clipfine.

Micro Consolidation Centres (MCC) are locations where medium sized delivery trucks transfer goods to smaller zero emission vehicles, such as eCargo bikes and electric-assisted quadricycles, for final delivery. As such they need to be located much closer to the destination delivery rounds, but they can be quite small facilities. They are not covered by this study.

2.1.2 Benefits of Consolidation

The benefits of Urban Consolidation have been well researched over the last 25 years, particularly by European Union funded projects.

According to data in planning applications, UCC projects planned in the City of London aim to reduce the number of deliveries into the City by between 25% and 60% for each project. This fits well with findings for the National Infrastructure Commission in 2019, where a major review of evidence identified reductions in deliveries of between 50% and 75%. The degree of reduction often depends on the extent to which end users are allowed to receive direct deliveries, for example for full loads of furniture.

Urban logistics consolidation, particularly through UCCs, offers several benefits for sustainable and efficient freight management within cities, including:

- **Reduced Congestion and Traffic:** UCCs separate inbound, often long-haul, freight transport from short-haul deliveries within the city. By consolidating orders onto dedicated vehicles, traffic flows can be improved by moving site deliveries to off-peak times, reducing congestion during peak hours.
- **Environmental Benefits:** Improved consolidation is often described as the largest environmental benefit of implementing UCCs. But the most significant benefit can be found in switching to more environmentally friendly vehicles. UCCs contribute to reduced emissions, fewer vehicle kilometres travelled, and a smaller carbon footprint.
- **Community Impact Alleviation:** UCCs enable a high level of serviceability while minimising disruptions to local communities.
- **Improved Efficiency and Fill Rates:** Consolidation centres allow for better utilisation of cargo space. Higher fill rates on urban deliveries lead to fewer sub-optimally loaded, partially filled vehicles and more efficient transportation.
- **Cost Savings and Economies of Scale:** Shared transportation costs result in reduced per item transport costs, however additional handling and processing costs generated by the UCC need to be considered in calculating comparable total operating costs.
- **Safety and Pedestrian/Cyclist Considerations:** UCCs minimise conflicts with pedestrians and cyclists by streamlining delivery operations, using fewer trucks, with drivers trained and accustomed to the routes used.
- **Support for Sustainability Goals:** Organisations can align their sustainability objectives by adopting UCCs. These centres contribute to greener logistics practices and demonstrate commitment to environmental responsibility.

It is important that various benefits in the list are felt by all participants in supply chains as well as local communities and the environment.



A very important benefit of consolidation for the City of London and EC BID area is that it makes timed deliveries much easier to implement. For example, while deliveries can be received at the consolidation centre 24 hours per day without restriction, deliveries into premises within the City can be subject to delivery curfew restrictions. A consolidation centre operation can also open up opportunities to make deliveries into buildings at night, where no time restrictions are in place, using quiet vehicles and trained drivers.

Historically the majority of consolidation projects have covered retail destinations or construction projects. Outside of the City there are few examples of UCCs focussed on major office districts.

The main barriers to and opportunities for consolidation are considered in Chapter 5.

2.2 COLLABORATION

Collaboration covers a range of opportunities for businesses to share resources or information in order to reduce the number of deliveries. This includes procurement and operational collaboration.

Other areas of collaboration include strategic collaboration (for example major companies merging or sharing supply chains), backloading of empty vehicles, or freight exchanges (where systems identify space in vehicles on trunk routes and promote the empty space to shippers).

For urban deliveries, procurement collaboration means companies in a building or neighbourhood sharing procurement of certain products to achieve economies of scale in purchasing and also reducing the number of separate deliveries. Operational collaboration is where businesses share information with neighbours in order to identify opportunities to coordinate suppliers and reduce the number of deliveries. Typical examples of products where collaboration can be achieved include deliveries of office consumables or milk. Research for Transport for London (TfL) suggests that delivery vehicle trip savings of up to 50% may be possible through collaboration approaches.

While collaboration may not achieve the number of reduced trips of consolidation, it is seen as a simple and cost-effective way to reduce deliveries. Delivery Management Systems sometimes provide functions which identify opportunities for collaboration (among other functions). One such system, CurbCargo, is discussed later in this report. Its provider estimates that simple changes in procurement and deliveries can result in a 10% to 30% reduction in delivery trips.

Premises with multiple occupants can offer opportunities for trip reduction through collaboration but require a central coordinator (a managing agent and/or single facility manager) to oversee activity and encourage participation.

2.3 CONSOLIDATION AND COLLABORATION IN LONDON

TfL and other bodies in London have undertaken significant research into the use of consolidation centres to reduce the impact of urban logistics. In 2016 TfL released its Freight Plan, and the GLA included the following requirements in the 2016 London Plan:

“Roll out of Freight Plan initiatives including promotion of collaborative approaches such as consolidation centres and/or break-bulk facilities”.

In 2019 TfL published London’s Freight and Servicing Action Plan. This comprehensive document proposes a range of solutions to address freight impacts and efficiency, including collaboration and consolidation.



Regarding collaboration, which the Action Plan refers to as Collective Procurement, the following case study is referenced:

“For example, in partnership with New West End Company BID, we established preferred suppliers for waste and recycling collection services and promoted their use among businesses on New Bond Street. This reduced the number of vehicle movements from 144 to 9 a day and waste bags on the footways during shopping hours by 67 per cent.”

The Action Plan recommended that Collective Procurement should be a requirement for multi-tenanted buildings, but it is unclear to what extent this has been taken up.

Regarding consolidation, the Action Plan identifies a number of international case studies and also refers to TfL’s programme of Consolidation Demonstrator Projects and the London Freight Consolidation Study published in 2019, which provides useful information on the potential for various consolidation centre models.

In 2019 TfL also produced “Supplementary Guidance on Freight and Servicing: Checklist and Considerations for Streetspace for London Schemes”.

Significant success for the TfL strategy has been the use of CCCs which are now used for most large construction projects across London, as part of a suite of tools covered by Construction Logistics Plans, which are a requirement in most Boroughs and the City.

Outside of construction, take up of consolidation centres has been patchy, with the two key examples being the Grosvenor Regent Street project and the Camden Borough local authority deliveries project. Other examples, outside of London, include the long-established Heathrow Airport Consolidation Centre.

The Regent Street scheme has been successful, driven by a large landlord, with the significant benefit of reducing storage and delivery bay space in valuable retail premises. However, none of these examples are directly relevant to multi-tenanted large office buildings of the type found in the EC BID area.

2.4 CONSOLIDATION AND THE CITY OF LONDON

The challenges facing the City of London and, to a concentrated extent the EC BID area, are specific, including:

- Rapid growth of employment
- Historic medieval street plan, with a number of urban boulevards added later
- Pressure on pavement space, particularly in the morning and evening peaks and at lunchtime
- Extremely high commuter volumes, compared to the number of residents
- Changing roles, including as a destination for recreation and culture

Experience of consolidation in other areas, even within London, may not be directly applicable to the City and the EC BID area. The challenges and opportunities for the EC BID area have been well researched and are set out in documents such as the Eastern Cluster Vision of 2019 and the EC BID Business Plan 2022-2027.

The City of London Transport Strategy of 2019 contained a series of ambitious policies and proposals. Key objectives included:

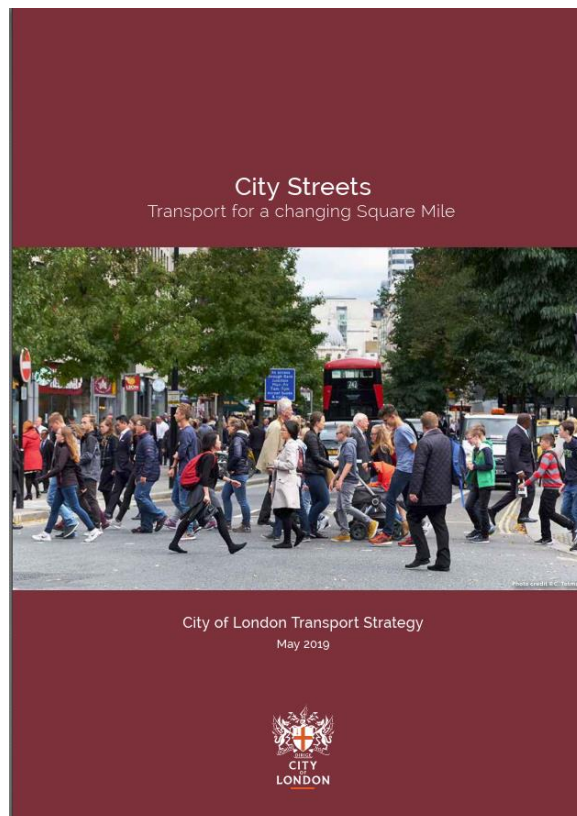


- *Prioritise the needs of people walking; make our streets more accessible; and deliver a public realm that inspires and delights.*
- *Make the most efficient and effective use of street space by reducing motor traffic, including the number of delivery and servicing vehicles in the Square Mile.*

The strategy included a proposal to develop a City of London Consolidation Centre, in addition to mandating the use of consolidation centres for new major developments. The strategy also included a commitment to expanding the use of Collaborative Procurement.

There are now over 125 planned or existing developments in the City that have some requirement to consolidate their deliveries and limit the number of freight trips arriving at their site. Major developments such as 22 Bishopsgate, 55 and 70 Gracechurch Street, and 150 Aldersgate Street will lead by example in reducing freight journeys in the City.

The City is currently consulting on a revised Transport Strategy, which will remove a proposal for the City itself to develop a consolidation centre, putting more onus on building developers and managers to implement delivery efficiencies.





2.5 CURRENT CONSOLIDATION ACTIVITY

As mentioned, the use of CCCs is now routine for buildings in the City. Construction Consolidation has been researched and actively promoted by TfL, including through the CLOCS scheme.

Since the 2019 City of London Transport Strategy, at least 50 planned buildings have some form of Section 106 obligation to either use or develop consolidation centres. For major planned buildings, the allowed size and capacity of delivery bays will be sufficient for consolidated deliveries but would not be sufficient for reversion to direct deliveries. This effectively constrains building managers to significantly reduce deliveries – but also provides significant savings in building cost and maximises the commercially valuable floorspace.

For example, the Section 106 Agreement for 1 Undershaft includes the following:

- Provide and implement a Delivery and Servicing Plan
- The number of deliveries is restricted to 193 per day
- A limit of 20 unconsolidated deliveries per day (other than for facilities management). All other deliveries must be via a consolidation centre.
- All deliveries must be booked into a planned, scheduled slot
- Deliveries and drivers must be security cleared at the consolidation centre
- No goods to be accepted other than through the delivery bays (except for deliveries by solo motorcycles)
- No deliveries during the morning and evening peaks or at lunchtime



The only dedicated consolidation centre operation serving the EC BID area is that for 22 Bishopsgate. This successful operation is described below.

22 BISHOPSGATE CONSOLIDATION OPERATION

The only major building identified in the EC BID area using a consolidation operation presently is 22 Bishopsgate. 1 Leadenhall is due to be completed in 2024 and will also have a consolidation operation from day one. The model proposed for 1 Leadenhall is very similar to the one used for 22 Bishopsgate. The managers of 22 Bishopsgate have been supportive of neighbours planning consolidation facilities, sharing experience.

The basic structure of the operations can be summarised as:

- The consolidation centre operator is Clipfine, with a consolidation centre located in Boreham Wood.
- The running cost of the consolidation centre is added to the service charge for tenants.
- Tenants are required to direct that deliveries are made to the consolidation centre.
- Goods are then consolidated for despatch to the building in the EC BID area
- All deliveries are security screened on arrival at the consolidation centre
- Deliveries take place in dedicated vehicles, currently 2 deliveries per day, leaving at 10:00 and 14:00
- Tenants are charged a fee for each delivery from the consolidation centre to the building based on whether the delivery is a roll cage or a smaller crate
- Tenants may additionally receive loads in large vehicles direct to 22 Bishopsgate. These must be booked in to a limited number of slots (maximum 70 per week) and there is a significant charge per vehicle.
- Postal deliveries by foot, cargo bike, or motorbike can continue to be made direct to the building at no extra cost.
- However, for many deliveries such as Amazon, the delivery companies deliver to the consolidation centre, not direct to 22 Bishopsgate, significantly reducing the number of deliveries
- Consolidation centre delivery trips return with items such as paper and card for recycling.

Nighttime deliveries are permitted but not used from the consolidation centre. This provides valuable additional flexibility. For 22 Bishopsgate the consolidation centre delivers direct to each floor. For some other buildings tenants collect from the loading bay which makes nighttime deliveries more difficult.

There is capacity in the consolidation centre to serve more buildings, and to offer added value services such as storage.



3 SITE VISITS AND STAKEHOLDER ENGAGEMENT

3.1 SITE VISITS

At the start of the project, an inception meeting was held with the EC BID management team to review the approach to the project and to discuss known issues and opportunities. The EC BID team also described the parallel Public Realm Vision being delivered by consultants Publica. Publica have collected a wealth of useful information which is presented in Chapter 4.

After the inception meeting on Friday 15th March the study team undertook one of two site visits. The second site visit started at 0700 on Tuesday 26th March to review delivery issues during the morning peak period.

During the site visits the team used the Epicollect app to record activity type, specific location and supporting photographs.

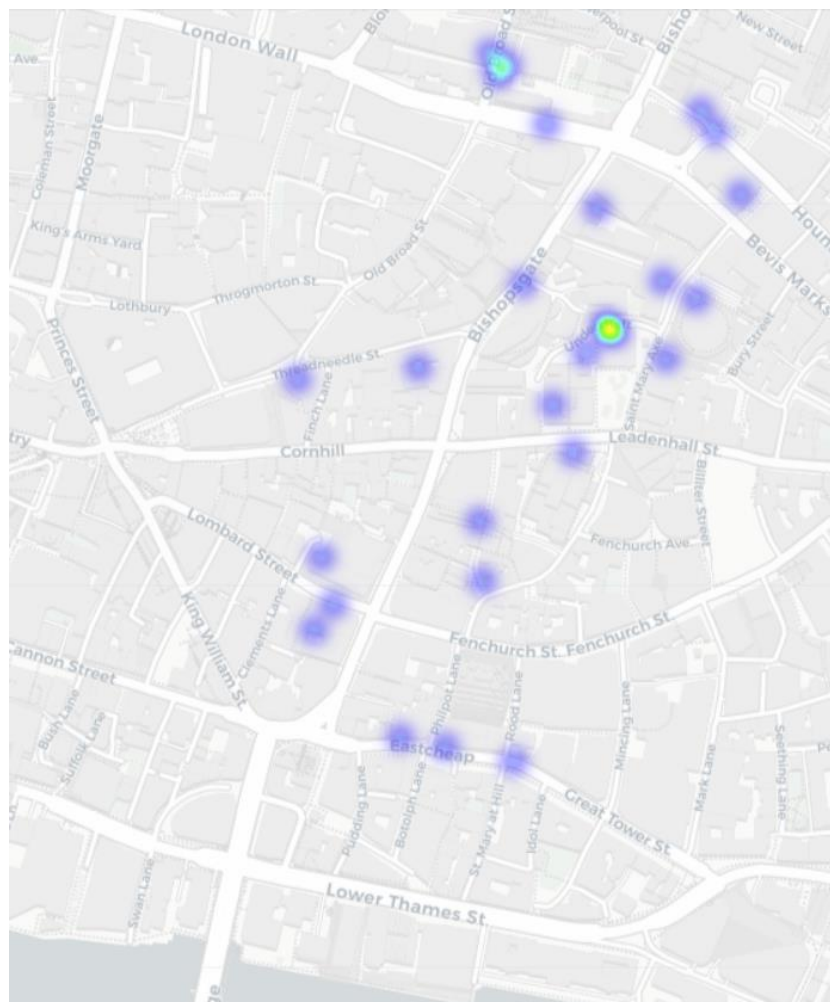


Figure 4: Map of locations recorded during site visits

During the site visits, delivery activity was clearly visible, including delivery vehicles parking and delivery drivers accessing premises via the pavements. Delivery vehicles noted included a broad range from heavy rigid HGVs to 3.5T vans (of which several were electric) to bicycles, eCargo bikes and electric-assisted quadricycles.



During most of the observation time, and across most of the EC BID area, delivery activity was relatively unobtrusive. However, some delivery issues were noted, particularly around Undershaft and St Mary Axe between 10:00 and 12:00.

Issues noted included:

- Delivery vehicles parked up but not using loading bays, particularly when loading bays were already occupied
- Delivery vehicles parked up with drivers having to make the final stage of trips by foot (sometimes using barrows)
- Delivery vehicle parking partially blocking streets, notably causing issues for other goods vehicles
- Some delivery vehicles parked on pavements
- Queuing for major building delivery bays





Figure 5: Photographs taken during site visits

3.2 ENGAGEMENT

The study team undertook a comprehensive stakeholder engagement programme of online and face-to-face interviews using semi-structured discussion guides.

The main aim of the engagement programme was to identify the extent and experience of consolidation and collaboration in the EC BID area. The engagement was also designed to be the key pillar for the rest of the project, providing information on how the various supply chains function, experiences of delivering into the EC BID area, attitudes to improving delivery management including consolidation and willingness to consider adoption of consolidation into existing/planned premises operations.

The study team worked closely with the EC BID team, who made the initial approaches to potential interviewees. This ensured a high response rate and generally very positive meetings with interviewees. Consultees included building owners, management companies, tenants, service providers and logistics companies.



Discussion guides were produced (Appendix 2) and agreed with the EC BID Team. Interviews mainly took place via Microsoft Teams and were recorded, with participants' consent, to assist notetaking. A summary of each interview was written up and recorded in the project's engagement tracker (Appendix 1) spreadsheet, created at the outset of the work, to record attempts to contact agreed consultees and to monitor engagement progress.

As of 06/06/2024 23 interviews had been held with the following organisations:

- 22 Bishopsgate
- Pedal Me
- Markets Development Team for the City of London
- Lloyds of London
- Brookfield Properties
- J Safra Real Estates
- The Leadenhall Building
- 40 Leadenhall London
- BNP Paribas
- Nuveen
- Lexington
- Principle Cleaning Services
- Curb Cargo
- 20 Fenchurch Street
- Devonshire Square
- 70 St Mary's Axe
- Tower 42
- 110 Bishopsgate
- Palo Alto Networks, 22 Bishopsgate
- Landsec
- Wincanton
- CollectivFoods
- Clipfine

Interviews were carried out by experienced logisticians from the study team. The interviews were semi structured, in that guidance notes were prepared, but each interview was adapted to suit the type of business being interviewed and to enable flexibility to follow up particular areas during the discussion.

The main topics covered by the interview included:

- A description of the organisation and activities in the EC BID area
- Challenges regarding freight, servicing & delivery in the area
- The impact of challenges
- Measures taken to counter challenges
- Further measures that could be considered to reduce the number freight, servicing and delivery movements
- How EC BID can help and what actions interviewees would like to see

This chapter summarises the main findings of the engagement process. More detailed findings on barriers to and opportunities for consolidation are discussed in Chapter 5.

3.3 CONSOLIDATION – CURRENT POSITION

3.3.1 Consolidation Centre Experience

22 Bishopsgate reported that, for every 96 deliveries into the consolidation centre there are 4 deliveries from the consolidation centre to the building, representing a significant reduction in vehicle movements.

The interviews included users and operators of the 22 Bishopsgate operation (Clipfine, tenants and management company) and also individuals with experience of having used consolidation operations elsewhere. The experience of users of consolidation centres was overwhelmingly positive.



For example, one tenant was able to replace random deliveries, multiple times per day, with one preplanned delivery per week, with the option for adding urgent items on other days, if required. This user reported that deliveries were never late, nor missed and had led to them being able to reduce the resources and effort required to deal with deliveries.

The success of the 22 Bishopsgate consolidation centre has raised interest from other buildings in the area, and the building management team has been active in sharing knowledge and experience.

It is also noteworthy that the 22 Bishopsgate consolidation centre is operated by Clipfine, which is primarily a construction logistics business, and which has built its more general consolidation offer on the back of its construction consolidation operation.

The two main logistics companies currently operating consolidation centres around London are Clipfine and Wilson James, but other operators are keen to enter the market, for example Wincanton who were one of the interviewees, as well as DHL and others.

If each operator is promoting one location for its consolidation centre, potential customers need to make a choice based on price and service, as well as location. **In other words, in selecting a preferred supplier it is accepted that the consolidation centre location may not be optimal.**

3.4 KEY ENGAGEMENT FINDINGS

3.4.1 Types of Business

The cluster of tall buildings in the EC BID area has important differences in the way they are owned and managed. These differences impact approaches to delivery management. Key variations include:

- Buildings which are managed by the owners vs those managed by management companies
- Building owners or managers responsible for several buildings across an estate vs those responsible for one building
- Buildings with large numbers of occupiers vs those with a small number of occupiers
- Buildings with large retail or hospitality space vs those which are mainly offices
- Buildings completed before any Section 106 requirement for consolidation vs those completed more recently that do

When one organisation is responsible for two or more buildings, there may be opportunities to develop joint solutions and share best practice. However, while some organisations have centralised approaches to management, for others each building is more autonomous.

3.4.2 Building Managers

Generally speaking, the task of implementing any changes in delivery management falls on the building managers, working closely with the owners, tenants and possibly other organisations, such as security companies.

Building managers have a wide range of responsibilities, focused on meeting the needs of their tenants and the building owners. Traditionally, for deliveries, their role has been to manage the delivery bay, including any booking system. This is an important service for tenants and a high priority is placed on meeting tenants' needs. For example, many managers are reluctant to turn away unbooked deliveries, despite their inconvenience and effect on schedules, because they know that will impact the tenant's business.



For both consolidation and collaboration solutions, much closer involvement is required from the management company, including talking to tenants, potentially introducing extra costs, understanding the benefits and encouraging tenants to collaborate. This can involve a steep learning curve, something which some individuals are taking on with enthusiasm. Planning for the forthcoming opening of 1 Leadenhall has involved 18 months of researching consolidation, culminating in a tender process. There has been a degree of knowledge and information sharing on a “good neighbour” basis, including through the High-Rise Interactive Group (Hi-Rig), an association of high-rise building managers.

3.4.3 Delivery Bays

Most recent large buildings have basement delivery bays accessed by goods lifts. The lifts have varied capacities and dimensions. Other “internal” delivery bays are accessed by ramps or are on the ground floor. Most of the major buildings have access from side streets rather than directly via main roads. A few buildings have more challenging access, for example via streetside loading bays.

Within the delivery bays capacity varies. Generally, the older buildings have the capacity to handle several deliveries concurrently, whereas the newer buildings, which have been planned to use consolidation, have reduced capacity. While this imposes a constraint on the building, it also significantly reduces the space and cost of the delivery bay.

Example constraints:

- 3-4 vehicles at a time, but maximum 7.5T vehicle access, due to turning constraints
- 30 Fenchurch Street: 9 loading bays
- 1 Leadenhall: 2 loading bays
- 2 vehicle lifts: 10t and 20t capacity
- Accommodate 2 articulated trucks in the delivery bay
- No internal loading bay (Devonshire Square)
- 4.8m tall – 26t weight (largest lift in the City)
- 4.8m tall – 10m long

3.4.4 Delivery Restrictions

In addition to highway restrictions (including the congestion charge, ULEZ, London Lorry Control Scheme, red routes and local delivery and parking restrictions) many buildings have a restriction on delivery times and vehicle numbers imposed as part of the planning process.

Most of these restrictions ban deliveries during the morning, lunch time, and evening peak periods, while some also ban deliveries at night. A few buildings have significantly fewer restrictions. It is not clear how restrictions are set, and inconsistency presents a challenge in that neighbouring premises may have very different conditions imposed, if any. Some of the buildings with fewer restrictions are at the edge of the City and close to trunk roads.

The City of London identifies some locations as “sensitive” for deliveries because of local residents.

Examples of delivery restrictions:

- No deliveries 0600-1000, 1200 to 1400, 1700-1900, open at night but mainly for waste
- Deliveries ONLY Monday to Saturday 0700 – 2300
- Deliveries ONLY 0530 – 1900

In addition, self-imposed time restrictions include:



- No imposed restrictions but deliveries only accepted 0600-1800
- 24/7 servicing permissible but the loading bay is manned only 0700 to 1900

For some businesses night-time deliveries are not desirable and don't fit in with their operation. But for the more recent buildings, with limited delivery bay provision, night-time deliveries could be used to spread demand and reduce daytime impacts.

Also, the varied restrictions make delivery rounds such as milk and other fresh produce convoluted. TfL has published best practice guidance for quiet deliveries, and it may be possible to ease restrictions subject to following this guidance. Combining consolidation with access to a wider delivery window across the 24hour period would improve utilisation of consolidation centre infrastructure and shuttle vehicles, as well as spreading freight traffic volumes more broadly across an extended period.

3.4.5 Challenges by Commodity Group

Delivery challenges and requirements vary significantly across commodity groups.

- **Office supplies:** Most deliveries come under the heading of office supplies and janitorial supplies. These tend to be ordered on a regular and predictable pattern and suit booked delivery or consolidation systems.
- **Food and drink:** These can be aimed at office catering (ranging from Grab and Go to silver service) or restaurants in the building. Several of the buildings have high end restaurants in the upper floors. Food and drink present several challenges, including temperature control and often a wide range of suppliers, including independent specialist food companies. Food needs to be delivered at specific times to suit the pattern of service. As an example, the Section 106 agreement for 22 Bishopsgate has recently been significantly relaxed to allow for the opening of a huge new restaurant.
- **Parcels and post:** All buildings accept deliveries by foot, bicycle, motorbike, or eCargo bike, usually through a separate system to goods vehicles. But when delivery companies use vans or light trucks, many buildings cannot accept them because they are not booked in. In these cases, a typical response is to park the vehicle nearby and make the final delivery by foot.
- **Personal deliveries:** While personal deliveries generate work for post rooms, nearly all of the interviewees allow deliveries, not least as a way of encouraging hybrid workers to spend time in the office.
- **Fit out:** Fitting out of office or changing of furniture is an obvious activity across the area and can involve large numbers of deliveries in short periods. Observation showed that fit out vehicles are frequently parked on pavements for long periods, presumably due to a lack of delivery bay capacity. Fit out deliveries can be made at night, where allowed, and seem particularly suitable for consolidation.
- **Events:** some offices include events space, and the upscale restaurants are also used for events. Events have very particular delivery and servicing requirements that can be difficult to accommodate alongside routine daily deliveries.
- **Waste etc:** waste, recycling and rejected/returned items, as well as handling units (such as roll cages) are import 'reverse' logistics flows and must be given adequate consideration when assessing the potential for consolidation centre use. A number of the estate management companies, with multiple premises within the EC BID area, cited reducing all waste collection to a single contractor as a big improvement in terms of reverse flow management.



3.4.6 Willingness to Change

The vast majority of interviewees would be happy to consider ways of reducing the impact of their deliveries. Barriers and opportunities are discussed in more detail in Chapter 5, but the main barrier for managers and owners was concern about imposing unwelcome constraints or costs on their tenants. Several interviewees would be more willing to make these impositions if they became an obligation imposed externally.

There was a strong consensus that the EC BID would be a good forum to deliver change.



4 ASSESSING DEMAND

This section looks at the range of building uses in the EC BID area and estimates the demand for deliveries to office buildings. The section then reviews the likely impact of various degrees of implementation of collaboration or consolidation and expresses this in terms of trips avoided per day.

There are various useful sources of data concerning property uses and sizes in the City of London. There are differences between the main sources in terms of the values for property size. These are not significant for the forecasting model but explain why there may be different values for the same property in different reports.

For modelling for this report, the main source has been the CoStar database to which the EC BID subscribes. This database provides a wide variety of data covering 397 buildings in the EC BID area. The main data fields used for this report are:

- Postcode, address and name of building
- Property type
- Building status (e.g. existing, proposed, demolished, under construction)
- Net Internal Area (NIA)

4.1 CURRENT LAND USES IN THE EC BID AREA

51 properties were removed from the database as they were classified as “demolished”.

The remaining 346 properties account for 2.2 million square meters of space.

The type of use of the remaining buildings is illustrated below in terms of numbers of properties and building size.

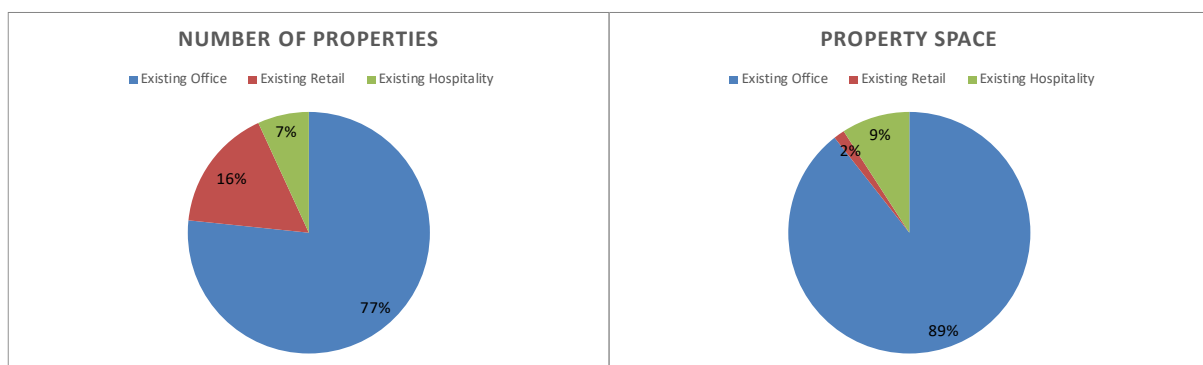


Figure 6: Main uses of buildings in the EC BID area

The dominance of office space is expected, of course. However, the property category relates to the primary use of a property. Most of the major office buildings in the EC BID area include hospitality uses (whether for tenants or the public) and some also include retail units.



4.2 OFFICE PROPERTIES

Buildings which are primarily hospitality or retail are not included in this analysis. Their supply chains are significantly different to those for multi tenanted office buildings which are the main focus for the study.

The City of London requires new developments to use consolidation when the uplift in space in the new property is greater than 10,000 square meters (approximately 100,000 square feet).

For this study, a category of “large office properties” is defined as those with a total building size of approximately 30,000 square meters or more. This is felt to represent the type of building that could potentially justify its own consolidation centre, whereas smaller buildings might make more use of collaboration or feed into larger buildings’ consolidation centres.

The 18 existing buildings over 30,000 square meters make up 50% of the total office building space in the EC BID area.

The map below, provided by Publica for the EC BID, shows the distribution of existing large and other office buildings.

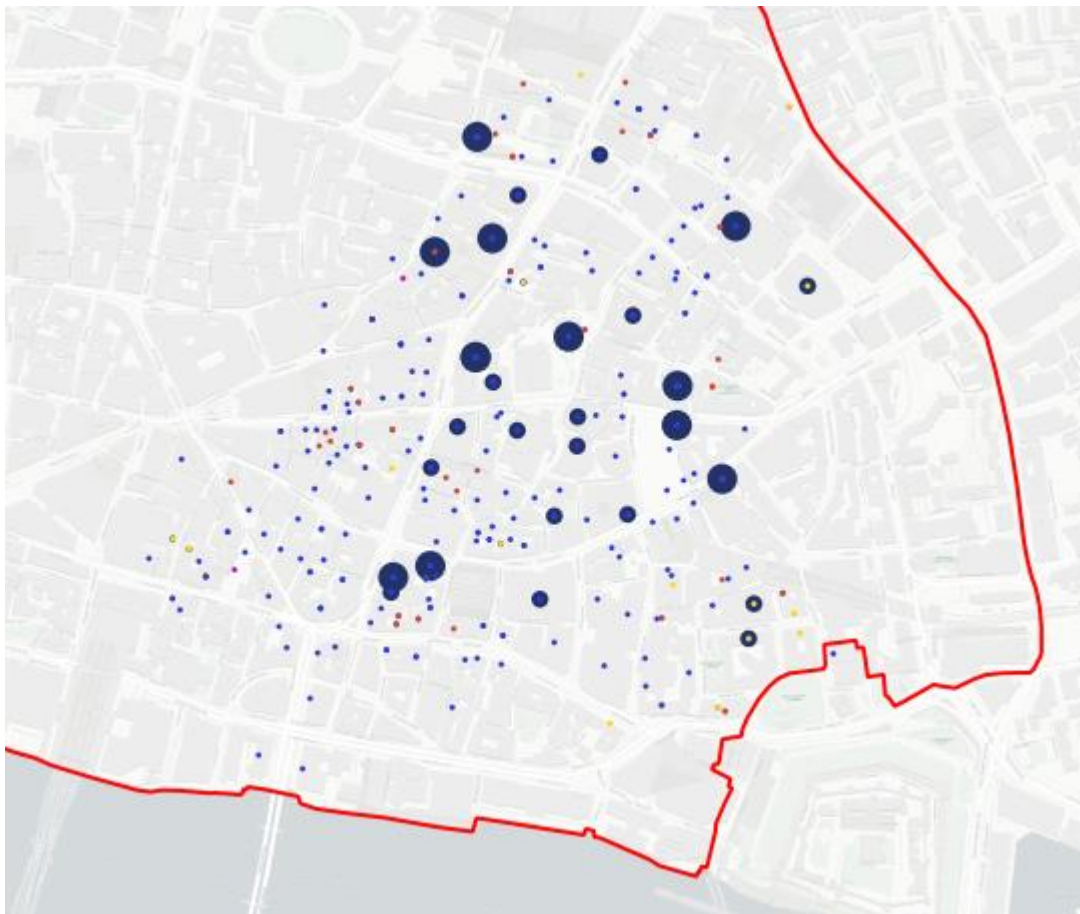


Figure 7: Location of large office properties and other properties



4.3 MAJOR PLANNED DEVELOPMENTS

There is a significant number of new buildings planned or under construction in the EC BID area. 16 planned buildings are identified in the CoStar data and, of these, 12 are “large” – over 30,000 square meters.

This means that the total number of large office buildings in the EC BID area will grow from 18 to 20. In terms of space, the new buildings will increase office building space in the EC BID area by 44%, which is an increase of 81% in the floor space for large buildings.

The plan below was provided by Publica for the EC BID Public Realm Strategy. It shows the major new buildings that they have identified.

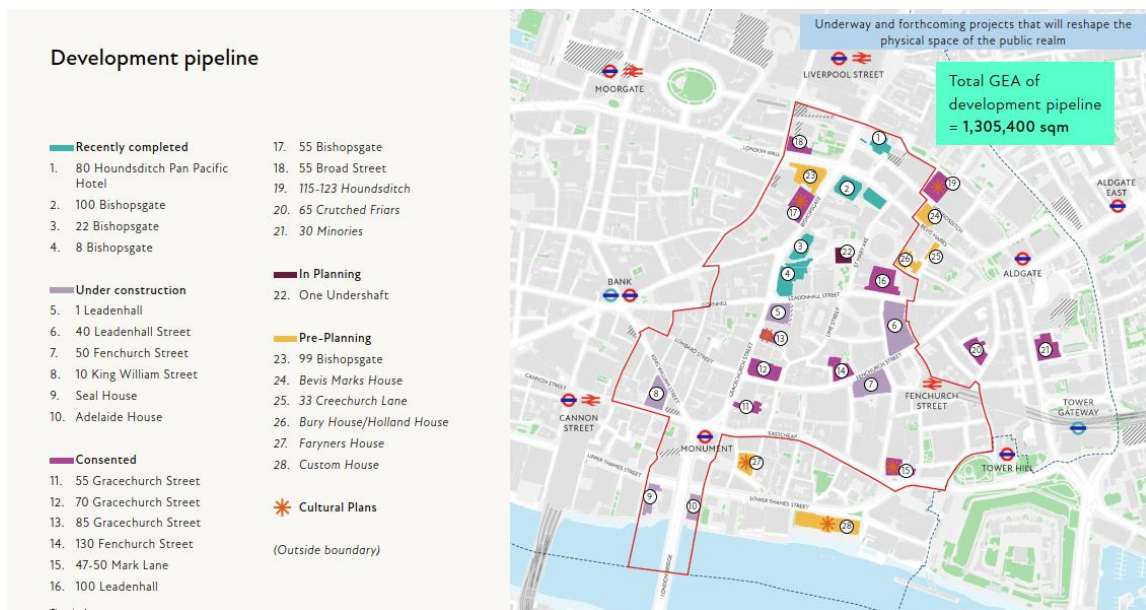


Figure 8: Map showing major planned new buildings. Publica for EC BID

This shows some planned buildings which were not on the CoStar database and also suggests that the total GEA for the development pipeline would be 1.3 million sqm. This contrasts with 0.85million sqm NIA in the CoStar data. Partly this is the difference between gross external and net internal areas. It also shows that the forecast space of planned buildings inevitably changes as plans develop.

The chart below illustrates the CoStar forecast for the years that the main planned office buildings will be completed.

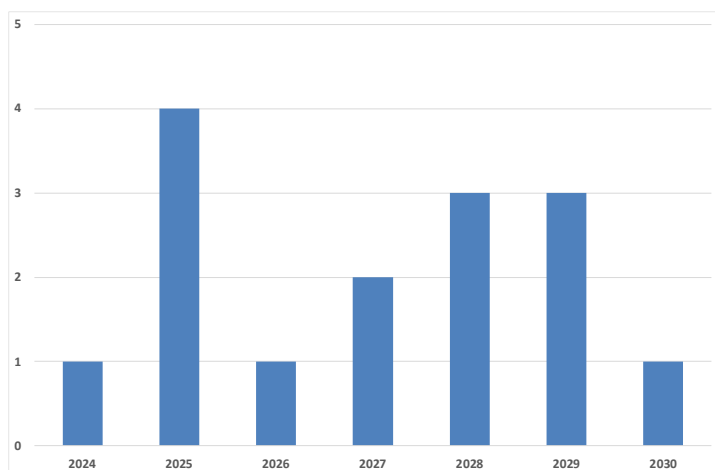


Figure 9: Estimated number of buildings to be completed each year - CoStars data

4.4 CURRENT AND FUTURE DEMAND FOR DELIVERIES

There is very little useful published data worldwide on the volumes of deliveries to large office buildings of the type found in the EC BID area. For this study we have used two sources:

- Data provided in the engagement interviews
- Data provided by developers in the area for recent planning applications

These two sets of data provide a valuable real world data set – for example some of the planning applicants undertook surveys of similar buildings. Surveys of delivery activity prepared for three planning applications (40 Leadenhall, 1 Undershaft, and 100 Leadenhall) averaged 1.8 deliveries per 1,000m² of space per day. This was broadly in line with numbers calculated from the interviews.

The planning application surveys were undertaken before the Covid pandemic. Post Covid interviewees reported smaller numbers of deliveries due to the smaller number of staff in the offices each day.

Therefore, for the model a range of values was used from 1.25 to 1.8 deliveries per 1,000m² of space per day.

There is significant variation in daily volume between types of business/occupier. For example, forecasts for 40 Leadenhall include a range of between 1.8 deliveries per day per thousand square meters for offices, to 5 deliveries per day for retail, and up to 18 deliveries per day for hospitality. Because the mix of occupiers is not known accurately for each property, the model focuses on the overall average of 1.25 to 1.8 deliveries per day per 1,000m².

The planning forecasts do not distinguish between vehicle types, other than that the delivery forecasts are for LGVs and HGVs and do not include deliveries by eCargo bikes, bicycles etc...

The results of the forecast are summarised in the table below, for large office properties and for all office properties.



Large Offices	Number of Props.	Sq M	Deliveries @1.2	Deliveries @ 1.8
Existing	18	948,295	1,185	1,778
Planned	12	772,363	965	1,448
Total		1,720,658	2,151	3,226
Increase	67%	81%		
All Offices				
Existing	246	1,925,540	2,407	3,610
Planned	16	847,592	1,059	1,589
Total		2,773,133	3,466	5,200
Increase	7%	44%		

Figure 10: Summary of delivery volume estimates / forecasts per day

NB The volume forecasts all exclude any impact of consolidation – this is the DO-NOTHING scenario.

4.4.1 Do these numbers look realistic?

There is no definitive number available for the volume of goods vehicles destined for the City each day. Traffic count data for Bishopsgate, as an example, shows around 3,000 goods vehicle trips each day – that is for both directions combined, so would equate to 1,500 one-way trips. Total delivery volume estimates for the existing office buildings amount to 2,400 to 3,600 deliveries per day. Taking into account the range of entry points to the EC BID (Bishopsgate is only one) but also that some goods traffic in the City is through traffic or other commodities (such as construction traffic), the estimate of 2,400 to 3,600 deliveries per day to offices in the EC BID area appears reasonable.

4.4.2 Impact of Consolidation and Collaboration

CONSOLIDATION

Following a literature review, it was found that most academic research focuses on the role of consolidation centres for retail use or for construction. Data on the reduction of trips in this research is not particularly helpful for the specific case of large office buildings in the City.

However, a useful indication of the potential level of trip reduction has been obtained from the stakeholder interviews, the real-world experience of 22 Bishopsgate, and from a review of Delivery and Service Plans and Section 106 Agreements for buildings planned in the EC BID area. The Section 106 agreements commit the building owners to achieve a percentage reduction in deliveries due to consolidation of between 50% and 65%. This is in line with experience of the existing consolidation centre. For forecasting purposes, it has been assumed that use of a consolidation centre reduces the number of delivery trips by 50%.

COLLABORATION

There is less evidence about the potential impact of collaboration on urban deliveries to major office buildings (including shared procurement etc.). Early work by an interviewer researching collaboration has suggested a potential reduction of 25% in deliveries. In contrast, the Delivery and Service Plan for 40 Leadenhall commits to a 50% reduction in deliveries resulting from “virtual consolidation” which is another term for collaboration.

Later sections discuss the barriers to greater collaboration, and, for forecasting, it has therefore been assumed that implementation of collaboration could achieve a reduction in deliveries of 25%.



SUMMARY

	Daily Trips				Reduction Over Base		
	Number of Properties.	Sq M	Do Nothing Forecast	With Collaboration	With Consolidation	With Collaboration	With Consolidation
Large Offices							
Existing	18	948,295	1,185	889	593	296	593
Planned	12	772,363	965		483		483
Total		1,720,658	2,151	889	1,075	296	1,075
Offices Below 30,000 Sqm							
Existing	228	977,245	1,222	916	611	305	611
Planned	4	75,230	94	71	47	24	47
Total		1,052,475	1,316	987	658	329	658

Figure 11: Summary of trip impact estimates

The table provides estimates for the reduction in trips due to implementation of delivery efficiencies. The total number of deliveries is based on 1.25 deliveries per day per 1,000 square metres of building space. This is therefore a conservative number.

Large offices are dealt with separately to smaller office buildings. For each group the Base Forecast of daily trips is compared to the forecast number of trips if collaboration or consolidation solutions were implemented across the entire group. The exception is that for planned large offices it is assumed that consolidation is the only solution available, as this is a requirement.

LARGE OFFICE BUILDINGS

Looking at large buildings, the data suggests that, without consolidation, the number of daily deliveries could almost double to 2,151. Implementation of consolidation in the 12 planned large office buildings could reduce future deliveries by 483 per day but the total number of deliveries would still be 483 higher than at present (if consolidation reduces deliveries by 50%).

If the remaining large buildings introduced collaboration schemes, deliveries could be further reduced by 296 per day and if they introduced consolidation schemes then deliveries could be reduced by 593 per day.

Full implementation of consolidation across all large office buildings would lead to a small reduction in total deliveries to those buildings despite the area of floorspace increasing by 81%.

OTHER OFFICE BUILDINGS

Rolling out delivery solutions to all office buildings in the EC BID area would reduce deliveries by a further 329 (for collaboration) to 658 (for consolidation) per day. Both of these would be significant reductions on present delivery volumes, as the floor space in smaller buildings will not increase significantly.

POTENTIAL IMPACT

If consolidation were introduced for all large buildings and collaboration for the remaining buildings, the total volume of daily deliveries would reduce by 15%, despite the volume of office space increasing by over 40%.



COMBINING CONSOLIDATION AND COLLABORATION

The analysis looks at the potential impact of introducing consolidation **or** collaboration (aka procurement consolidation) to each building. There is a further alternative which would be to introduce consolidation together with collaboration where possible. To an extent this already happens, with consolidation centre operators encouraging collaboration to reduce the number of deliveries into their facilities, driving benefits up the supply chain.

However, there is no basis to forecast the impact of such combined operations, except to say that a combined approach would be likely to generate further reductions in delivery numbers above consolidation. The combined approach should be encouraged, and perhaps its impacts researched further.

NIGHT DELIVERIES

Additionally, a very important aspect of consolidation centres is that they make it easier to spread deliveries across the day, particularly into the night-time. This is because the consolidation centre shuttle delivery drivers unload their vehicles at the loading bay and often then transport cages to each floor. Several of the planned major office buildings in the EC BID area make this point – that deliveries will be spread across the day. This, combined with an overall reduction in deliveries, could lead to a significant fall in the number of deliveries into the area during the busiest periods of the day.

Figure 3: Daily Servicing Demand and Consolidation Profile

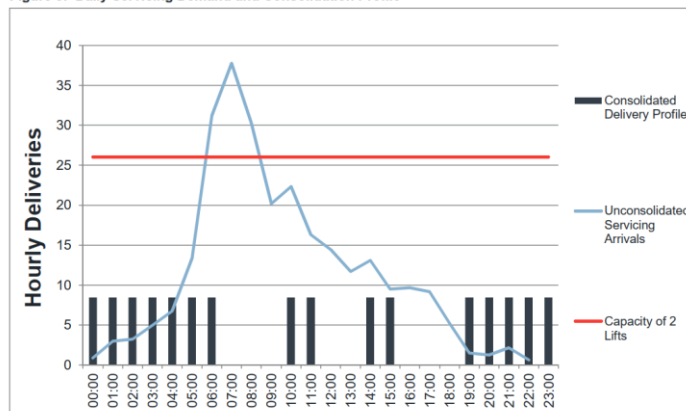


Figure 12: Extract from 100 Leadenhall Street Delivery and Servicing Plan, 2018



5 IMPEDIMENTS AND SUCCESS FACTORS

5.1 GENERIC CONSOLIDATION IMPEDIMENTS AND SUCCESS FACTORS

There is a wide range of academic research and real-life experience of the economics and operations of Urban Consolidation Centres (UCC). While none of the research concerns large office type buildings in major cities, the generic issues and opportunities found are relevant. Two research reports in particular provide a useful summary.

“A review of urban consolidation centres in the supply chain based on a case study approach” by Allen J, Browne M, Woodburn A and Leonardi J, 2014.

The study found that UCCs lead to potential overall costs savings and a wide range of operational benefits, including reductions in delivery lead times, improvements in product availability and customer service, improvements in the visibility of the supply chain, reductions in stock losses and the ability to maximise retailing space and hence increase sales. All supply chain partners can potentially benefit from the introduction of a UCC.

The case studies identified two factors that are likely to be critical to the success of a UCC scheme.

- The first is the level of demand. Sufficient UCC users and product throughput is required to drive down the costs per unit handled, thereby making the UCC competitive with traditional urban distribution systems.
- The second is the sharing of UCC costs and benefits between the various supply chain parties involved in the scheme. Although the UCC may result in total benefits that outweigh total costs (taking into account commercial, traffic, social and environmental impacts), each party must be prepared to share these costs and benefits fairly, if the scheme is to succeed.

“Future Public Sector Logistics Consolidation Report” for Transport Systems Catapult, 2018

This report identified three main reasons for the low uptake of UCCs:

- Long term viability: use of a UCC adds an additional leg into the supply chain. In the past this cost was often offset by public sector subsidies that were unsustainable in the long term.
- Poor selection of location, meaning long stem mileages from consolidation centre to target delivery area, reducing efficiency and environmental benefits
- Controlled environments: UCCs often require support through enforcement of controls such as Clean Air Zones.

The paper developed a tool for assessing the costs and benefits of consolidation centres which demonstrates that the economic and financial benefits significantly outweighed the costs of a UCC. Their thesis was that if stakeholders had visibility of all of the benefits, they would be more likely to support a UCC rather than the normal focus on up-front costs.

SUMMARY

The overall operational and economic benefits of UCCs are proven, but up-front costs, lack of visibility of benefits and uneven sharing of costs and benefits make it challenging to start a UCC, unless there are controls forcing users to comply, or a strong central role for a single business (such as Heathrow Airport).



5.2 CONSOLIDATION IMPEDIMENTS

ABSENCE OF SECTION 106 REQUIREMENT

Frequently, property businesses which are not required to use consolidation are reluctant to “impose” consolidation on their tenants. Not least, this is due to strong competition between premises within the City, at Canary Wharf and internationally. Several interviewees said that if consolidation was required by the City, then they would be happy to implement it because they could see the benefits and would feel more confident about the issue of costs.

SET UP AND OPERATING COSTS

There is a perception among building owners and managers that consolidation is a significant additional cost to doing business. Initial discussions inevitably focus on cost and how it can be applied. This fits with widespread experience of consolidation centres – that the costs and benefits of consolidation do not fall in a balanced way. For example, building managers and tenants are faced with a logistics cost that has never had to be applied in the past, whereas the logistics operators / suppliers to the building benefit from reduced delivery costs, as they no longer have to deliver into the City.

LACK OF AWARENESS OF BENEFITS

Related to the perception of high costs, building managers and tenants may not be aware of the full range of benefits of consolidation – many of which actually lead to reduced costs. In contrast, businesses which already use consolidation centres are enthusiastic about the benefits and would be reluctant to revert to traditional supply chains.

LACK OF SECTOR EXPERIENCE

Building managers, real estate companies, and property owners have not traditionally had to become involved in the detail of logistics. Often the receipt of deliveries and management of loadings bays is sub-contracted to a security or similar services company. Building managers do realise that they now need to understand supply chains, to improve customer service and reduce delivery volumes but there is a steep learning curve and no formal source of information or experience. Without being armed with this knowledge, it is more difficult to justify changing the status quo.

LACK OF VISIBILITY OF WHAT CURRENTLY HAPPENS WITH NEIGHBOURS

Consolidation activities currently underway within the EC BID area appear to have little visibility other than to those currently serviced by the operations. Sharing information between premises and raising awareness of the nature and availability of existing services could benefit premises within local building clusters.

COMMODITY SPECIFIC CHALLENGES

Food deliveries are seen as being difficult to consolidate, due to challenges of maintaining temperature control, the need to for rapid deliveries and the wide range of specialist suppliers, many of which operate from hubs close to the City.

Businesses are sometimes reluctant to divert package deliveries via consolidation centres, due to the urgent nature of their contents and the premium rates paid for varying service levels (pre-9am, pre-



10am, by noon etc). Parcel carriers are also reluctant to introduce others into their closed supply chains, or to rely on third parties for legs within their movements unless the operational and commercial benefits are clear.

Fit out deliveries often require vehicles to remain on site for longer than normal and can occur in strong peaks.

5.3 COLLABORATION IMPEDIMENTS

Collaborative procurement is a major step for many businesses because it involves making changes to established procurement processes and suppliers, For some companies this may not be possible at all, for example where the company uses a central procurement function.

Nonetheless collaboration at the procurement stage offers the highest level of potential benefits, including costs savings through larger orders.

This impediment can be mitigated by ordering products from a common building supplier, but this will still present challenges for many businesses. An easier step is a form of light touch collaboration, where a Delivery Management System such as CurbCargo compares delivery records for each user and then makes recommendations for improvements. This might include, for example, suggesting that businesses having the same suppliers coordinate delivery days and times.

5.4 OTHER LOGISTICS CHALLENGES

TIME RESTRICTIONS

For the EC BID area in particular, restricting time is an important tool to ensure that deliveries do not take place during the very intense peaks in demand for pavement space – the morning and evening peaks and at lunchtime. Delivery restrictions can also be imposed in sensitive locations at night.

Businesses impose their own restrictions, of course, whether it's a requirement for early deliveries to catering services, or to suit the working hours of delivery bays.

In combination, the variety of delivery restrictions concentrates deliveries into shorter periods, increasing congestion and other impacts. It can also lead to inefficiencies in delivery rounds, as logistics companies schedule convoluted routes to fit customer needs and local restrictions.

Making more deliveries at night has obvious benefits in reducing daytime traffic and also reducing delivery costs by avoiding driving during peak hours. TfL has developed a highly regarded Quiet Deliveries toolkit which is aimed at eliminating negative impacts on residents at night.

FOOD SERVICE

Food service poses particular challenges for urban logistics. This is due to the combination of a wide range of often small suppliers, very specific needs for timing of deliveries, and the range of requirements for perishability, temperature control, and cross contamination.

The result is that most consolidation centres do not handle perishable or temperature-controlled products, and that food deliveries account for a disproportionate number of direct deliveries to mixed use buildings.

Using major catering suppliers can mitigate these challenges, but many food businesses in the EC BID area need to use niche providers for high end products.



In mitigation, many of the suppliers operate from hubs close to the City, and therefore there is potential to use zero emission delivery vehicles including eCargo bikes.

FIT OUT

Another delivery intensive activity is fit out and office furnishing. This is required every time an occupier moves into a location, but also at regular points during their occupation.

Fit out logistics can involve large numbers of vehicles which may have to stay on site for extended periods. During the site visits several examples were seen of fit out vehicles parked on pavements for long periods.

Consolidation can provide a solution for some fit out operations, including shifting as much activity as possible to the night-time.

5.5 COLLABORATION AND CONSOLIDATION BENEFITS

As identified in the research summarised in Chapter 2 and engagement with businesses who are using or have looked at using consolidation or collaboration, the range of benefits of improved last mile logistics is significant and accrues to both businesses and the wider community and environment.

The table below summarises the key benefits.

Benefit	Consolidation	Collaboration
Overall supply chain cost reductions	✓✓	✓✓
Better visibility of CO2 through the supply chain	✓✓	✓
Reduced workload for tenants	✓✓	✓
Reliable predictable deliveries	✓✓	
Reduced need for storage in the City premises	✓✓	
Improved security managed off site	✓✓	
Reduced urban traffic	✓✓	✓✓
Potential for zero emissions vehicles on last mile	✓✓	
Improved safety	✓✓	✓

Figure 13 Key Benefits

For the EC BID area and the City of London the most direct benefit is to reduce traffic, particularly at peak hours. Consolidation also improves the potential to use zero emission vehicles and to improve road safety.



6 CONSOLIDATION PILOT – FRAMEWORK

6.1 THE OPPORTUNITY

22 Bishopsgate and other projects have shown that consolidation can significantly reduce deliveries into the City at reasonable cost. The tenants and other users report significant benefits of the system, and that deliveries are reliable and flexible.

When rolled out to the 12 or so planned new buildings, the EC BID area will benefit from the largest urban consolidation programme in the world.

However, even with consolidation implemented for all new buildings, the number of deliveries into the EC BID area is set to grow by at least 25% due to planned expansion of office space (consolidation reduces deliveries it doesn't eliminate them).

This suggests that to meaningfully reduce the volume of deliveries on the EC BID area streets, it will be necessary to extend delivery improvements from new and planned buildings to existing buildings. Three significant improvements would be:

- Roll out consolidation to more large buildings or clusters of buildings and maximise delivery reductions from consolidation centres.
- Use collaboration tools, which includes procurement, across clusters of buildings and to large buildings as a step towards consolidation and also in conjunction with consolidation to maximise delivery reductions.
- Where possible shift more deliveries to night times making use of established quiet delivery protocols.

To maximise the potential to reduce deliveries it will be necessary to quickly engage with building owners and operators who are already considering or planning implementation – to share best practice and maximise opportunities to share resources.

6.2 OBSTACLES

The key obstacles to achieving these objectives are:

- The perceived cost of collaboration rather than an understanding of the benefits
- Lack of knowledge of the practicalities of consolidation and collaboration
- A variety of delivery restrictions forcing more deliveries in the daytime
- Lack of data including data on best practice and data required to measure the success of measures
- Lack of awareness of services already in existence, with capacity for expansion to accommodate additional flows for neighbouring premises

6.3 RECOMMENDATIONS

The recommendation of the report are focused on four aims:

- all consolidation centres to achieve at least 60% reduction in deliveries
- extend consolidation to existing large buildings as well as new
- extend collaboration to clusters of smaller buildings
- shift deliveries to off peak times



The key recommendation is that a Last Mile Improvement Group is established which undertakes a series of activities that will drive improvement in delivery and service in the area:

Action	Scope
Stakeholder Event	Thank you and kick off for Programme
Steering Group	Provision for secretariat support
Promoting Benefits	Communications campaign
Sharing Best Practice	Increase participation in consolidation
Extending Consolidation	Two feasibility studies for existing buildings
Area Based Collaboration	A collaboration tool where users adopt the tool to plan, manage, and monitor their deliveries
Increased Off Peak Deliveries	Identifying restrictions in the EC BID area, selecting a pilot locations with benefits
Improving Data	Monitoring and analysing data provided through planning agreements and data within the collaboration tool

6.4 PROPOSED APPROACH – STEERING GROUP

The approach proposed is based firmly on close working between key stakeholders, with EC BID leading and coordinating.

An established approach to delivering logistics improvements is to create an owning Steering Group responsible for delivering projects. The group – potentially called the EC BID Delivery Improvement Forum or similar – would include:

- EC BID
- City of London
- Property Owners Group
- Representatives of property managers and key tenants
- Representatives of logistics companies including consolidation centre operators

6.4.1 Steering Group Responsibilities

Responsibilities would include:

- Accountable to the EC BID
- Coordinate delivery improvements between stakeholders
- Promote the need for and benefits of reducing deliveries
- Propose, fund, and manage delivery improvement projects

The Steering Group would initially meet every two months.

The Steering Group would require a budget for meetings and routine activities, plus funding for delivery improvement projects where required.

6.5 STEERING GROUP PROJECTS

6.5.1 Regular Activities

It is suggested that the Steering Group would meet every second month. Funding would include for arranging and chairing meetings and to provide secretariat services as required.



Timescale: Immediate

Initial Term: 3 years

6.5.2 Promoting Benefits

Research and our engagement suggest that often businesses are deterred from implementing improvements because they can see the costs but not the full range of benefits.

The best way to inform businesses of the benefits of consolidation and collaboration is to hear this first hand from other businesses. The Steering Group could initiate a campaign to include:

- Workshops and events
- Site visits
- A promotional web site
- Promotional materials such as case studies or a video

Timescale: 3 months to prepare.

Initial Term: Programme of 18 months

6.5.3 Sharing Best Practice

This activity would involve a subgroup of organisations involved in planning or operating consolidation centres. The objective would be to increase participation (to maximise the reduction in deliveries) and share best practice in operations. It would operate as a subgroup of the Steering Group. This activity is reasonably urgent as several businesses are actively planning consolidation centre implementation.

Timescale: Immediate

Initial Term: Meetings initially every 4 months

6.5.4 Extending Consolidation

The volume of delivery vehicles will only start to reduce if existing buildings implement consolidation or collaboration. Several buildings are investigating this possibility but are deterred by set up costs and the complexity of changing existing arrangements.

It is not proposed that EC BID should participate in consolidation operations or sponsor pilot schemes. The evidence is that consolidation can be affordable, with direct benefits exceeding costs, even before indirect benefits are considered (such as reduced collisions or congestion).

EC BID can, however, help businesses to look more closely at the costs and benefits of consolidation, including understanding impacts on activities such as post rooms, loading bays, and delivery management systems.

It is suggested that EC BID / the Steering Group undertakes two feasibility studies for new consolidation services for existing buildings – one of these could be a cluster of buildings. The feasibility study would include reviewing delivery demand, the existing operation and its costs, and the potential costs of a consolidation service.

Timescale: 6 months to identify 2 potential studies and detailed project plan

Term: up to 12 months for the studies



6.5.5 Area Based Collaboration

Collaboration for supplies can reduce the number of deliveries – including working alongside consolidation. There are various ways to improve collaboration including voluntary ad hoc projects or developing area wide procurement projects for goods such as stationery. The record of such projects is not clear – but they often suffer from the constraints of potential users who must use their own procurement systems.

A lighter touch approach is recommended, with the focus on identifying opportunities, supporting users to implement improvements, and monitoring the impact on deliveries.

This could be based on EC BID managing a collaboration tool, with free use offered to members for an initial period, potentially for a selected sub area.

Users would adopt the EC BID tool to plan, manage, and monitor their deliveries. Where opportunities for improvement are identified, users could agree to implement changes, or EC BID could offer resources to plan and implement changes in collaboration with the users.

For businesses already using a delivery management system, the EC BID tool may need to be adapted to share data with those systems.

Timescale: 6 months to prepare.

Initial Term: Programme of 24 months

6.5.6 Increased Off Peak Deliveries

While widespread use of collaboration and / or consolidation will reduce the volume of deliveries into the EC BID area, to make a significant impact on peak time deliveries, and to optimise supply chain efficiency, it would be desirable to make more deliveries at night or just before the morning peak. This is possible for some of the major buildings in the area, but others have restrictions that force deliveries to be concentrated into tight daytime slots. These restrictions include agreements in planning consents, restrictions on certain roads, and the London Lorry Control Scheme.

It must be recognised that night-time deliveries can be intrusive, particularly where there are residential buildings. However, significant progress has been made in planning and managing near silent deliveries using the TfL Code of Practice for Quiet Deliveries. Use of the code has resulted in restrictions being lifted for a variety of premises, with no adverse impact on residents.

The Steering Group could take a lead on this by identifying and listing all of the restrictions in place in the EC BID area and selecting a small number of pilot locations where the potential to lift restrictions could be investigated – including identifying benefits.

Timescale: 3 months to prepare.

Initial Term: Programme of 12 months

6.5.7 Improving Data

Common to all road-based transport systems in the UK, there is a lack of useful data on deliveries. The only useable public sector data is traffic counts. Businesses have more data available, for example by recording deliveries, but the quality is variable.

Actually, a number of businesses in the EC BID area have Section 106 or other planning agreements that require them to provide delivery data to the City of London, but this is generally only examined when there is suspicion of noncompliance.



Better data would be useful for a number of purposes:

- To identify opportunities to reduce deliveries (hot spots)
- To estimate the impacts of deliveries, including carbon impacts higher up the supply chain
- To monitor implementation of improvements to ensure that objectives have been delivered.

The Steering Group could coordinate efforts to improve data, focussing on two approaches initially:

- Working with the City of London to monitor and analyse data provided by businesses through planning agreements
- Using the EC BID Collaboration Tool to collect high level data on deliveries

Timescale: 3 months to prepare.

Initial Term: Programme of 18 months



7 CASE STUDIES

7.1 CURB CARGO



What is it

A platform that allows for capturing loading bay and kerbside information that can then be used to identify improvements to the management of deliveries and collections into a single building, group of buildings or an entire district.

The platform takes customers through a number of steps:

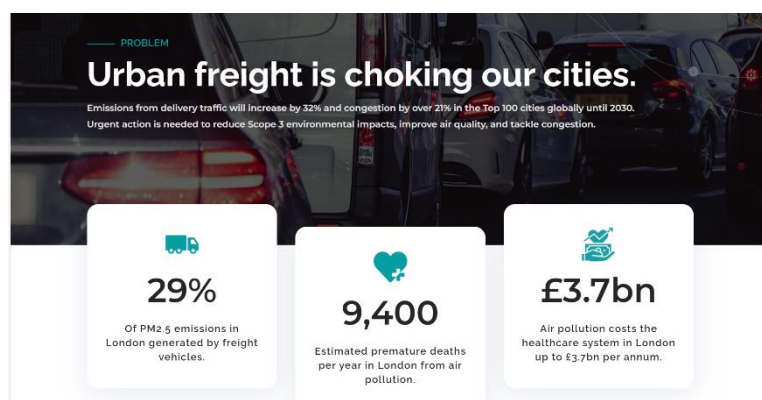
- Manage delivery/collection bookings into buildings, campuses, and districts to build the freight vehicle movement data bottom up
- Understand the impact & gain insights by estimating the impact of these deliveries on the environment and health using methodology developed in partnership with Imperial Consulting (Imperial College)
- Prompt interventions to make a difference through providing data and insights to prompt changes in how businesses order goods, for example, reduce the delivery frequency, ask suppliers to change the type of vehicle
- Monitor the impact of interventions through simple KPIs
- Foster collaboration—with neighbouring businesses by for example, combining deliveries, joint ordering and in some cases moving to common suppliers

What problem does it solve?

Retailers and B2B suppliers have built competing supply chains, the result of which is a growth in HGV and van traffic, for example there has been a significant increase in vans in London with 3.7bn van miles (Light Commercial Vehicles) in 2019.

For the City it has the ability to identify opportunities to reduce the impact of deliveries, reducing carbon and air pollution through less vehicle movements, at less congested times and on less impacting vehicles.

For businesses that use the platform has the ability to identify opportunities to reduce costs, improve efficiency of deliveries, and help business meet their Environmental, Social, and Governance compliance and reporting.





What makes it unique?

Lack of data on B2B freight vehicle movements in cities is hampering policy planning and suppressing the 'call to action' to tackle the environmental impacts and the data gathered will allow for informed decision making, both for the businesses but also the City and its policy makers.

Other Delivery Management Systems, which most businesses use to manage deliveries, do not automatically identify potential improvements. This has to be done by manually analysing data.

Recommendations go beyond potential collaboration and include, for example, identifying opportunities to use EVs for deliveries or to increase utilisation of FORS members for deliveries.

CurbCargo promotes voluntary implementation of solutions – this is much easier to implement than, for example, common procurement portals which require businesses to replace or modify their procurement processes.

CurbCargo produces clear, but simple, KPIs illustrating the benefits of improvements.

Relevance to EC BID

The density of the City makes the challenge of growth traffic more impactful but also the opportunities to be more easily exploited. With planned and predicted City growth the challenge of traffic congestion remains, even with the improvements that have already been made.

Where has it been used before?

The Platform has been used in two reference sites (confidential) in the EC BID area and demonstrated potential to reduce deliveries by at least 25% as well as other benefits. Feedback from the companies that used CurbCargo was very positive.

Cost of implementation

There is a cost to use the platform, which is likely to be offset by operational improvements, but this cannot be confirmed at this stage.

Benefits

There are a number of benefits, but the key ones can be evidence in the work already undertaken by Curb Cargo as:

- Potential in savings from shared procurement, shared deliveries, improved delivery frequency
- At least 25% reduction in last-mile deliveries compared to existing practices
- Less congested delivery areas – improving turnaround
- Improved safety and reduced emissions
- Provides valuable data that can be used to build collaboration or consolidation projects
- Monitors the impact of proposed improvements





Challenges

The present implementation effectively replaces existing Delivery Management Systems for users. However, alternative implementations will be available which work together with other DMS for example as an integrated add in.

The Platform provides data and potential solutions to improve delivery management, in itself does not deliver the benefits, this requires action to be taken where there are inherent risks:

- Potential users need to feel there is a problem that needs to be solved, gaining buy in to the wider issues will be required, particularly if they are a small part of a bigger problem
- Some of the solutions require multiple stakeholders to agree and therefore requires their investment in the solutions, this could be within a building of multiple tenants or between different buildings
- There is a cost of implementation, which whilst could be offset by implementing the solutions, may make sign up more difficult

Testimonials

There are a number of existing users within the City and there is positive feedback, although this cannot be documented at this stage.

Next steps and opportunities

Consider the development of a strategic partnership between CurbCargo and EC BID. EC BID role is to act as a conduit to members and others, Curb have the product and do the demos. Support should also be given to businesses to implement and monitor solutions as CurbCargo does not provide this service.



7.2 COLLECTIV FOOD



What is it?

A new food procurement and distribution model that takes the hassle of food supply and delivery by procuring and delivering food products to the restaurant and food service sector. They do this in four key steps:

- Understand the customers product specifications, including volumes, price targets and provenance requirement
- Identify the best possible options from their global network of vetted producers. The customer picks the products they would like to sample which are then delivered and tested
- Once approved, Collectiv Food then buy the products on the customers behalf, deliver them when and where needed
- Collectiv Food uses its unique supply chain solution to undertake last mile deliveries in zero emission vehicles at times to suit customers

What problem does it solve

A restaurant/food service operator might deal with 5-20 distributors and every morning there will be issues to deal with such as late deliveries, invoices not matching POs, and other problems with procurement. This creates more time and effort for the restaurant operators and takes the focus away from the food and customers. Collectiv Food creates a single point of contact for the customer. The concept helps to reduce the number of deliveries per day and converting these to low/zero emission vehicles reducing traffic and air pollution. It helps the customer receiving process and reduces waste.

What makes it unique

The food industry is a notoriously difficult sector to consolidate, given the specific hygiene, temperature control requirements, product life and in some cases product fragility. Collectiv Food have a consolidation centre outside of London where all the products from the farms across the UK and Europe are delivered every morning. This includes vegetables, meat, dry food and beverages. Quality control, preparation and dispatch are all done from the consolidation centre.

All the orders are prepped in the warehouse/consolidation centre overnight and a fully loaded truck does round trips to replenish all their Point of Distribution (PODs) located in the heart of the city.

The patented PODs are multi compartmented, refrigerated, 40 feet containers with a lot of innovative equipment such as remote access system, temperature sensors and ramps. These PODs are





located in unused spaces close to or within the City e.g. next to a train station, or a big parking space.

As a result of location of the PODS the orders are within 15 to 20 minutes reach to any commercial kitchen in the City by 5:00am each morning. Delivery to the customer is done using the existing methods already operating in the City using cargo bikes, e-quads, electric vans. Currently Collectiv Food work with 5 to 8 of these delivery operators.

Relevance to EC BID

The PODs are deployed across the London. The closest POD to Bishopsgate is in Chadwell. The concept could be encouraged to reduce traffic and improve operational efficiency.

Where has it been used before

Collectiv Food work with professional kitchens across a diverse set of verticals, including restaurant groups, dark kitchens, meal-kit companies, catering companies, and hotel chains.

They have over 2,000 suppliers are engaged, and their customers already cover chains in the City including Dirty Bones, Butchies, Tossed, Wingmans, Hutong, The Salad Project.

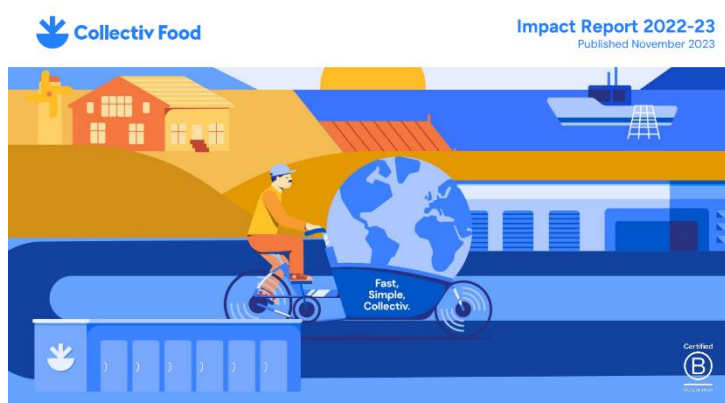
Cost of implementation

Collectiv Food is different from procurement consultancies because they own their supply chain and logistics. They take title of products at the source and handle all deliveries from the producer through to the customer. They do the work of a typical procurement consultancy, but we will do it free of charge in return for customers buying products through Collectiv Food.

Benefits

There are a number of benefits, but the key ones can be evidence in the work already undertaken by Collectiv Food as:

- 5 - 20% in savings - the perks of innovative logistics and going direct to source
- 75% reduction in last-mile delivery emissions vs competitors with the patented POD deliveries
- 2000+Quality, vetted producers in their global network
- The Collective PODs are mainly used at night / early hours. They have the potential to be used for other products and services during the day. Effectively operating as a low-cost Last Mile Delivery Hub for interchange between goods vehicles and last mile delivery vehicles.



Challenges

The main challenge will be for restaurants and food service providers converting from their current procurement models where they may be tied in. This may not suit some providers.



Testimonials

Director of Food Production and Development, Chicken George

"The fact that Collectiv Food looks after you, we don't feel like just a number," Some of the team's favourite things about Collectiv Food's service include consistency of products, deliveries being on time, and taking on any challenge - for example a procurement project worked on in 2023 to source the perfect fries. Chicken George also highlighted that when there is a problem, Collectiv Food always try and sort it out, and that "communication is brilliant."

"Collectiv Food make sure the delivery happens, even when it's going to a strange place, you make sure it gets to us."

Next steps and opportunities

Consider the development of a strategic partnership between Collectiv Food and EC BID. EC BID role is to act as a conduit to members and others providing an introduction to Collectiv Food.



8 APPENDIX 1

STAKEHOLDER TRACKER (REDACTED FOR GDPR)

Organisation	Job Title	Status/Action
110 Bishopsgate	Operations Manager	Met
20 Fenchurch Street	Senior Associate - Community & Marketing Asset Manager	Met
22 Bishopsgate	Head of Operations Head of Security	Met
40 Leadenhall London	Head of Operations	Met
52 Lime Street	Operations Manager	Unable to arrange meeting
70 St Mary's Axe		Met
BNP Paribas Real Estate	Head of Sustainability	Unable to arrange meeting
BNP Paribas Real Estate	Associate Director	Met
Brookfield Properties	Vice President, Operations	Met
Clip Fine		Met
CollectivFoods	Founder & CEO	Met
Curb Cargo	Founder	Met
DSQ		Met
High-Rise Interactive Group (Hi-Rig) forum		After email dialogue decided no value so did not pursue.
J Safra Real Estates		Met
Landsec		Met
Lexington	General Manager for Lloyd's Building (Catering)	Met
Lloyds	Senior Facilities & Stakeholder Manager	Met



Markets Development for the City of London		Met
Nuveen	Director, Offices, Europe	Met
Palo Alto Networks, 22 Bishopsgate	Places Manager UK	Met
Pedal Me	CEO	Met
Principle Cleaning Services	Site Manager for Lloyd's Building (Cleaning)	Met
Stanhope plc	Project Manager	Unable to arrange meeting
The Leadenhall Building	Client Services Director	Met
Tower 42	General Manager	Met
Wells Fargo	Property Management Senior Manager	Unable to arrange meeting
Wincanton		Met



9 APPENDIX 2

Discussion Guide

EC BID: DELIVERY, SERVICING AND FREIGHT CONSOLIDATION STAKEHOLDER ENGAGEMENT – TASK 1

Purpose of this Document

This Discussion Guide is intended to help steer conversations during the one-to-one calls with key stakeholders, selected for more in-depth discussions.

The aim of the one-to-one calls is to dig deep with key stakeholders.

Each question has a set of prompt words to help focus the conversation, if necessary. These are not exhaustive and are included to keep discussion flowing.

The document is also to be used to make a summary of the response from each of the stakeholders selected for the in-depth calls.

Respondent (to be used to populate the tracker)

Name:

Title:

Organisation:

Contact details:

Date and time of discussion:

Questions

Remember – ask if the call can be recorded for the purpose of review by the wider project team but confirm it will not be used for any purpose other than for this project. Ask if that's acceptable.

Please describe your organisation, its activities and interests, specifically relating to freight, servicing and delivery in the EC BID area:

Response

***Prompts: what do you do and where? How long have you done that?
Are your activities EC BID area specific or elsewhere too? What types of
goods do you receive and despatch? How often? In what quantities?
How are they presented (pallets, tote boxes, loose cartons, gas
cylinders...etc)? Where are they handled? Who delivers or collects?***

Considering freight, servicing and delivery activity within the EC BID area, what challenges do you encounter and where?



Response

Prompts: what issues have you encountered? How regularly? Which specific locations? Are these self-created or as a result of others? Are any parts of the EC BID area better/more challenging than others?

How do those challenges impact your organisation, negatively and even positively?

Response

Prompts: do they impact on efficiency, safety? Do they have an impact on local amenity? Do they have a financial impact? Environmental? Other?

Do they also offer an opportunity for efficiency improvements? How? What would you do to exploit those opportunities?

What measures do you take to counter those challenges and how effective are they?

Response

Prompts: Do they make you operate in a particular way to accommodate? Adopt alternative approaches? How do you reduce total trips? Do you reduce, retime, remode, re-route trips?

What measures would you consider to reduce the number of freight, servicing and delivery movements within the EC BID area?

Have you specifically considered shared purchasing? What about consolidating deliveries?



Response

Prompts: Sharing procurement of, for example, office consumables and similar? Consolidation off-site and then delivering aggregated load on single vehicle, avoiding more frequent trips in smaller vehicles? Consider use of local micro-distribution hubs for the 'last mile'? Consider operating in alternative locations? Shared suppliers and purchasing options with other occupants of same buildings? Delivery and Servicing Plan to minimise trips generated?

If shared purchasing was used, how? If consolidation of deliveries has been used, how and who provided the service? Can we speak with them?

How effective do you think using alternative modes (like eCargo bike) would be in tackling the challenges you identified above?

Response

Prompts: describe nature of goods moved and potential suitability of alternatives. Could you use a third party to cover first mile/last mile? Could you drop off outside of EC BID area?

What role could retiming of freight, servicing and delivery activity play within the EC BID area in the future?

Response

Prompts: is your operation suitable for out-of-hours/shoulder deliveries? Have you tried before? Driver controlled delivery possible? How would you mitigate against noise and disruption to neighbouring properties and residents?

How can EC BID help in accommodating more efficient, economic, safe and sustainable freight, servicing and delivery, now and in the future?



Response

Prompts: what is EC BID's role in your view? How can they accommodate and facilitate what you need? Who else needs to be involved?

What actions would you like to see in the outputs from this work?

Response

Prompts: reduce, remode, retime, re-route? What measures in practice? Which could you contribute to and help implement?

In particular, what are your views on shared procurement? And freight consolidation opportunities? What best practice examples have you seen elsewhere? Other premises nearby? In other London locations? Internationally?

What plans do you have for expansion/development/relocation of premises in the coming years?

What, where and when? Who can we speak to for more details?

Would you be interested in participating in future EC BID freight management initiatives, such as shared procurement/freight consolidation? – that could include participating in operational schemes, with partner organisations, coordinated by EC BID...?



Response

Prompts:...?

Willingness and interest in follow-up? Gauge level?

Anything we've missed?

Remember:

Thank you for taking the time to discuss all of this with us.

Your input is much appreciated.

We may like to engage with you again – would you be willing to talk to us again if we have further queries?

Remember:

Ask if aware of the work of EC BID and whether they would like an Ambassador or EC BID staff member to make contact to explain more about what's offered and benefits of membership/participation.