



STANDING COUNCIL
ON TRANSPORT AND INFRASTRUCTURE

National Land Freight Strategy

A place for freight

The National Land Freight Strategy is a partnership between the Commonwealth, State, Territory, local governments and industry to drive efficient and sustainable freight logistics, balancing the needs of a growing Australian economy, with the quality of life aspirations of the Australian people.



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1 Introduction

The efficient movement of land freight is crucial for Australia's productivity and competitiveness, and affects the lives of every Australian.

About the National Land Freight Strategy

Continued growth in freight volumes is giving rise to a range of increasingly complex challenges for governments, industry and the community. These require a national focus and effort to identify the 'places for freight': the major freight precincts—such as ports, airports, intermodal terminals, collection and distribution centres and industrial precincts—and the road and rail links that connect them.

The **National Land Freight Strategy** is a partnership between the Commonwealth, State, Territory and local governments and industry to deliver a streamlined, integrated and multimodal transport and logistics system, capable of efficiently moving freight throughout Australia. Australian governments have already made significant progress towards a national approach to freight, both through intergovernmental action at the Council of Australian Governments (COAG) and jurisdiction-specific policies and freight plans. This Strategy builds on those efforts—including the National Ports Strategy—and identifies key issues and areas for further action. It is the first time a national approach to planning for freight has been jointly agreed by the Commonwealth, State, Territory and local governments.

The **objective** of this Strategy is to improve the efficiency of freight movements across infrastructure networks, minimise the negative impacts associated with such freight movements and influence policy making relevant to the movement of freight. The Strategy's long term outcomes are to ensure:

- an efficient, productive and competitive national land freight system;
- a sustainable land freight system that responds to growth and change; and
- that policies affecting land freight are aligned and coherent across governments.

This Strategy seeks to direct the efforts of all governments and industry towards the long term vision, objectives and outcomes for freight in Australia. It identifies six major challenges facing freight today that require coordinated policy action and effort by governments and industry to:

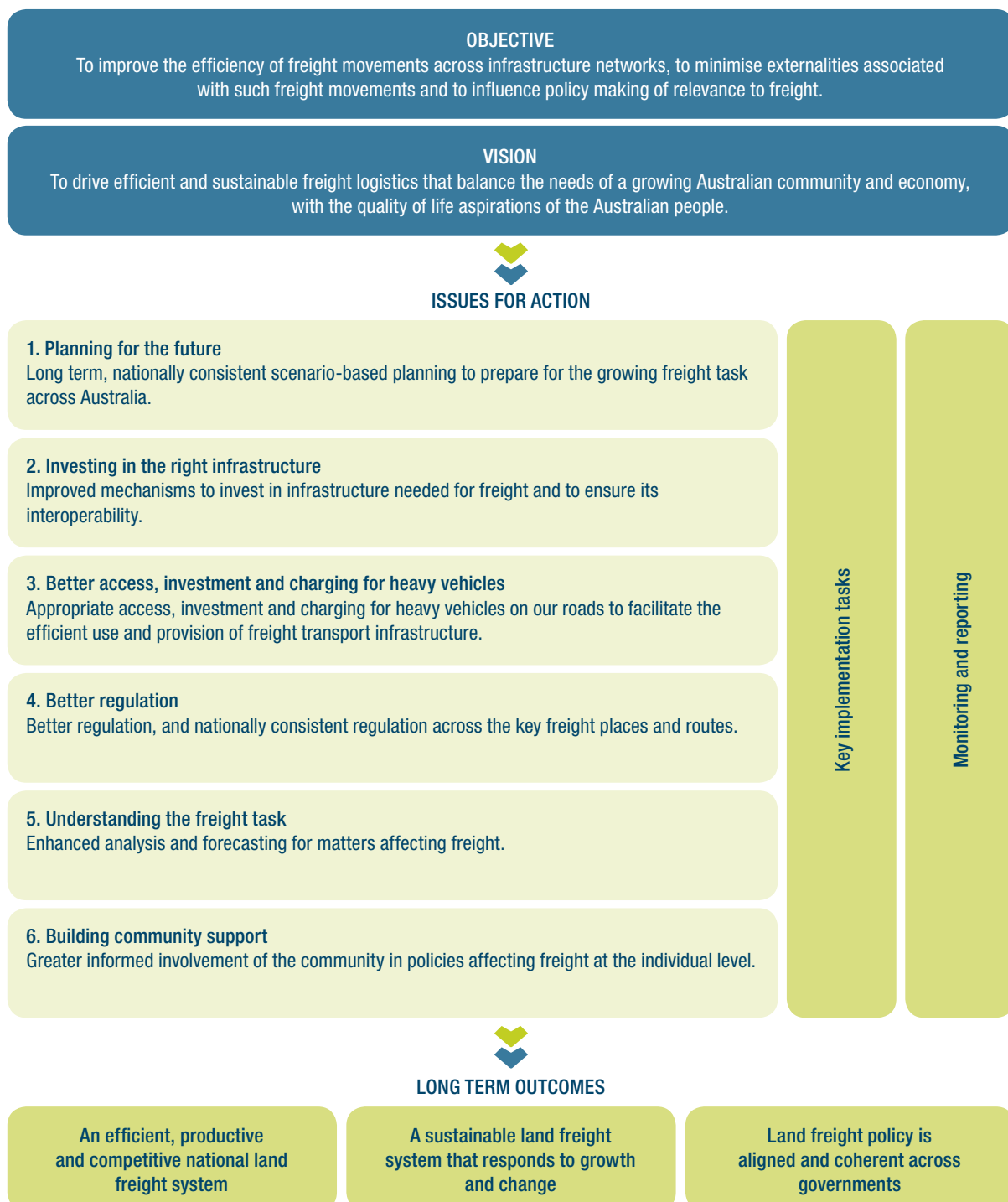
- ensure there are long term and integrated plans in place for freight;
- invest in the right infrastructure at the right time;
- improve access, investment and charging arrangements for heavy vehicles;
- create better and more consistent regulation;
- enhance understanding of the freight task and its associated challenges; and
- build community understanding and support for the role of freight in society.

It also commits governments to a **Workplan (Appendix A)** of practical first steps towards addressing these key challenges. A framework for the Strategy is set out at Figure 1.



National Land Freight Strategy Framework

Figure 1 National Land Freight Strategy Framework



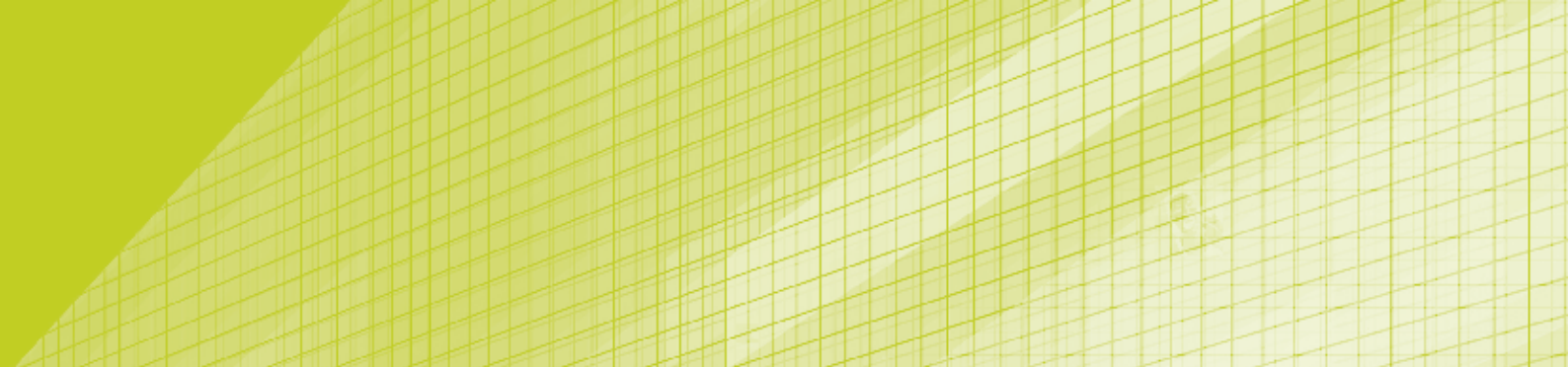
Scope and purpose

The National Land Freight Strategy outlines major issues for action by governments and industry, and points to possible long term solutions and desired outcomes. It represents the critical first steps in a nationally coordinated effort towards more efficient and sustainable freight logistics in Australia. For the purposes of this Strategy, the land freight task refers to the movement of goods from one point to another by road or rail transport infrastructure.

This Strategy considers the landside movement of freight to and from major economic nodes of activity, including ports and airports. The Strategy builds upon the *National Land Freight Strategy Update Paper* issued by Infrastructure Australia in 2012. The Standing Council on Transport and Infrastructure (SCOTI) has drawn heavily on the information and recommendations of this Update Paper, in particular, the aims, objectives and principles, underpin the analysis for this Strategy. That Update Paper made a series of recommendations on elements for inclusion in the Strategy, as well as a number of specific projects that could demonstrate the Strategy ‘in action’.

The Strategy:

- complements reforms under COAG’s *National Partnership Agreement to Deliver a Seamless National Economy*, including the National Heavy Vehicle Regulator and the National Rail Safety Regulator and capital city strategic planning reforms;
- considers freight movement to and from ports, and directly builds on COAG’s *National Ports Strategy* and the Commonwealth Government’s *Stronger Shipping for a Stronger Economy*;
- aims to complement the SCOTI broader transport and infrastructure reform agenda and will inform SCOTI’s future work program, in particular, Infrastructure Australia’s upcoming National Urban Transport Infrastructure Strategy and National Corridor Protection Strategy;
- focuses on freight generating locations and the road and rail transport infrastructure that serve them; and
- provides the national context for and complements State, Territory and local government strategies for freight, focusing on nationally significant freight locations, routes and issues.



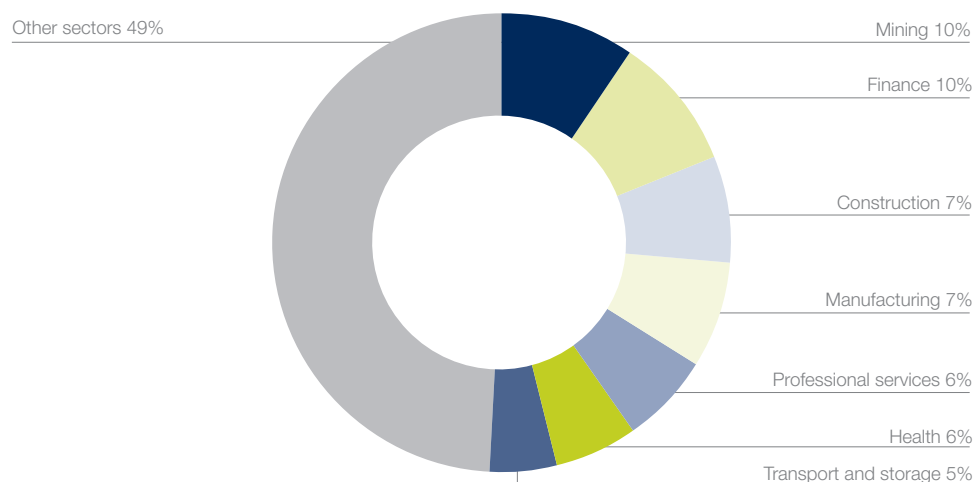
2 Why we need a National Land Freight Strategy

The economic importance, productivity impact and expected growth and change of the freight task all mean that freight must be recognised as a priority issue of national significance, afforded national attention and coordination.

Australia's land freight task—the current picture

Transport and storage services are central to Australia's vibrant and diverse economy, contributing almost 5.0 per cent of Gross Domestic Product (GDP) annually, making it the seventh most significant industry group by value. The sector also provides critical services to three of the top four industries by value in Australia today—mining (9.6 per cent), construction (7.4 per cent) and manufacturing (7.4 per cent). More significantly, transport services reach almost every part of the economy, as consumer products reach our businesses and households through the logistics chain.

Figure 2 Transport and storage sector share of GDP 2011–12



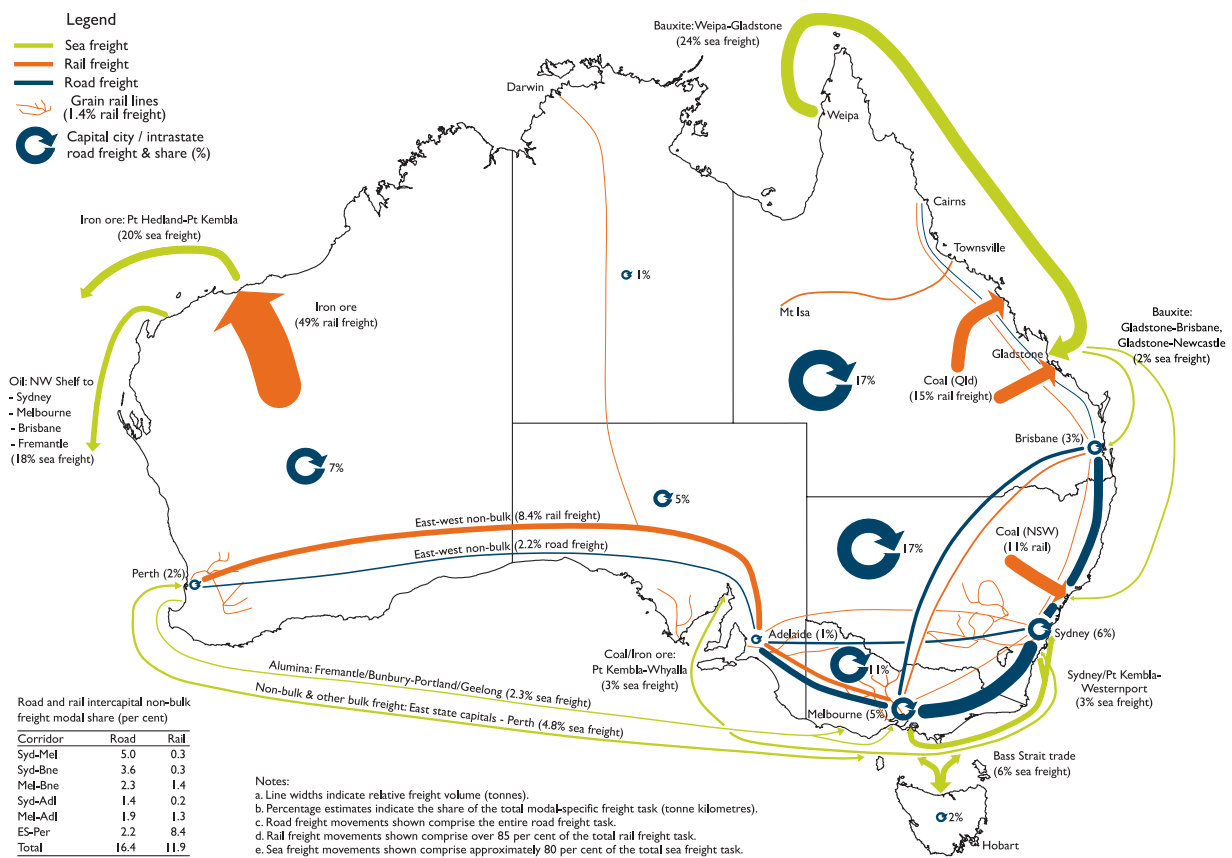
Source: Australian Bureau of Statistics, *Australian National Accounts*, Catalogue no. 5204.0, 2011–12

The proportions in Figure 2 only take into account the contribution of businesses whose main activity is transport. Given that transport is an enabler of the wider economy, estimates suggest that the total transport and logistics share of GDP could be as great as 14 per cent.

Furthermore, in 2011, the transport sector directly employed over half a million people and supported 240 000 transport logistics and freight related businesses.

In 2009–10, the freight task totalled 520 billion tonne kilometres (tkm). This task is a diverse one, encompassing the movement of bulk export commodities (such as iron ore, coal, Liquefied Natural Gas and grains), the transport of imported motor vehicles; machinery and other manufactured goods, and the transport of domestic produce through distribution centres to the final customer (see Figure 3).

Figure 3 Freight flows

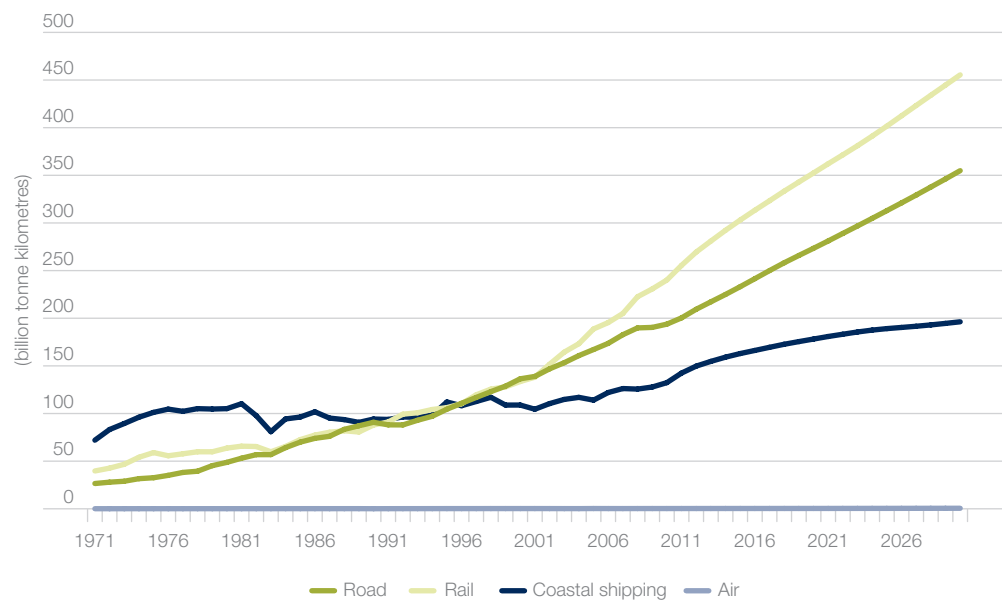


Source: BITRE 2009, *Road and rail freight: competitors or complements?*, Information Sheet 34, BITRE, Canberra.

Over the last four decades, the Australian freight task has quadrupled, with major increases evident in road and rail; a trend that is expected to continue as shown in Figure 4.

While the private sector is largely responsible for the actual freight task, governments also play a crucial role in providing and maintaining the supporting infrastructure. In 2010–11, public sector expenditure on roads, bridges and railways comprised approximately 6 per cent of total government expenditure.

Figure 4 Freight task by transport mode, 1972–2030



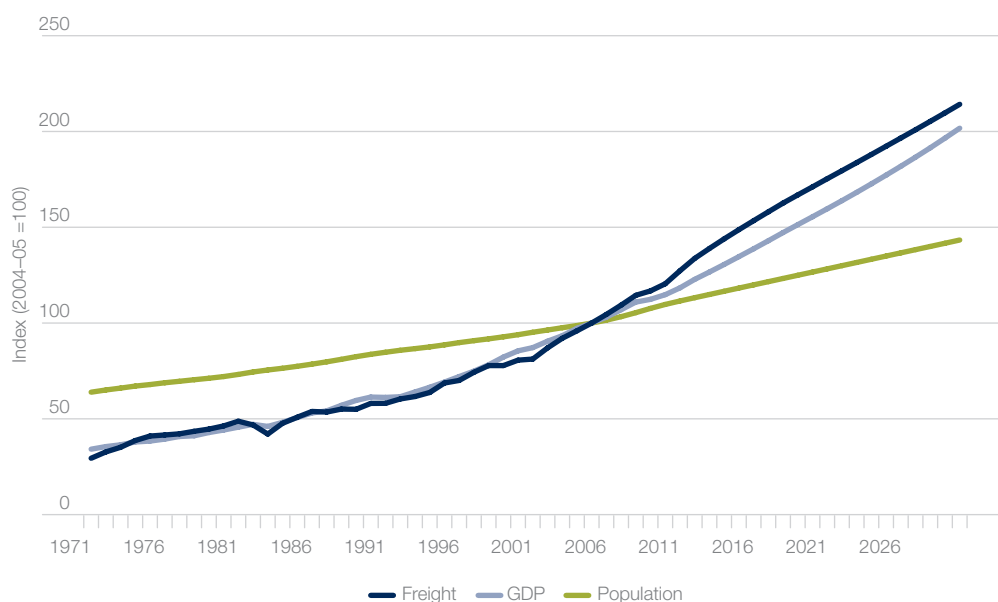
Source: BITRE 2010, *Long term projections of Australian Transport Emissions: Base Case 2010*, Report prepared for Department of Climate Change and Energy Efficiency, BITRE, Canberra.

Australia's land freight task—forecasts and challenges

The current land freight task poses complex planning and infrastructure challenges for governments and industry. With forecasts indicating that the total freight task will continue to grow, estimated to nearly double by 2030 based on 2010 levels, these challenges will continue, having the greatest impact on road and rail transport (Figure 4).

Further, the freight task is predicted to grow in line with GDP and much faster than forecasts for population growth (Figure 5).

Figure 5 Freight task relative to GDP and population growth and forecasts, 1971–2030



Source: BITRE 2010, *Long term projections of Australian Transport Emissions: Base Case 2010*, Report prepared for Department of Climate Change and Energy Efficiency, BITRE, Canberra.

The vast majority of this extra task will be moved as land freight. Accordingly, the supporting land freight infrastructure such as road, rail and ports, must be prepared for this significant growth. Our systems for moving freight also need to take into account the significantly different challenges created by freight growth in urban areas (see Box 1).

Box 1 Managing open supply chains in metropolitan areas

In July 2008, the then Australian Transport Council noted that the challenges around ‘open’ supply chains are greater and more complex than those for ‘closed’ supply chains.

A closed supply chain has characteristics of vertical integration, a defined network and a very small number of operators and owners. Mining operations in the Pilbara are typical of closed supply chains, with private ownership of an integrated chain of mines, rail lines and ports. Capacity increases in these supply chains can be achieved through direct private investment supported by appropriate pricing/access regimes.

Open supply chains do not have exclusive ownership of infrastructure, and access is shared across different modes and by many industries. Open supply chains are more prevalent on the eastern seaboard and in major centres of manufacturing and warehousing activity. Capacity constraints in open supply chains have become particularly acute in Australia’s biggest cities because of urban congestion, population growth and record growth in port container trade.

Melbourne and Sydney’s economies are at the forefront of these challenges, because of the concentration of national manufacturing activity, food processing, retail distribution and international container trade that occurs within and around these cities. These challenges are significant and if left unaddressed have the potential to restrict the productive capacity of the Australian economy. Addressing capacity constraints in and around major metropolitan areas is a priority of the Commonwealth, State, Territory and local governments and it is critical to the successful delivery of this Strategy.

In addition to growth of the freight task, there are a range of other local and global challenges that will impact the land freight task. These are highlighted in Box 2.

Box 2 Long Term Challenges influencing the land freight task

- **Fast growing economies in Asia** will increase the demand for Australian commodities. By 2030, commodity exports to China are expected to grow by 170 per cent and to India by 140 per cent.
- **Ongoing demand for mining and agricultural products** are expected to generate export earnings of nearly \$30 billion for farm commodities, and \$170 billion for minerals and energy in financial year 2010–11. In 2010–11, mining investment was above 4 per cent of GDP, around eight times its share 50 years ago and it is expected to remain high over the medium term.
- **Depleting local oil reserves, and the volatile price of oil** present both short term business risks and long term energy sourcing challenges. Australia's land transport sector is heavily dependent on crude oil-based energy, with limited alternative energy sources available in the immediate term.
- **Changing climatic conditions** is estimated to cause a further 1°C of warming and up to 24 per cent increase in days of extreme weather by 2030. Long term effects of climate change are already being experienced, and can hinder or halt the movement of freight by compromising critical infrastructure.
- **Concerns about environmental issues** will also impact the sector. Transport's heavy reliance on carbon intensive sources makes it difficult for the sector to decarbonise and meet community concerns and governments' international obligations.
- **Australia's population** is estimated to reach almost 30 million by 2030—with implications both for the freight task and the efficiency with which freight can be moved through urban areas. Australia's larger cities will need new infrastructure corridors that strike a balance between efficiency and associated amenity impacts. Freight infrastructure will need to be integrated into the development of commercial, industrial and residential areas to meet the needs of forecast urban populations.
- **Fiscal constraints** put pressure on budgets as government revenues fall relative to expenditure, particularly as a result of the ageing population. The 2010 Intergenerational Report shows that approximately one quarter of government spending will be allocated to ageing and health expenses, making it tougher for governments to meet other priorities including transport infrastructure.
- **Technological developments and innovation** will continue to create opportunities to drive growth in the efficiency and productivity of freight movements. Governments and industry will need to ensure that policies and regulation encourage take up of these new technologies as they emerge.

These factors, combined with the scope and importance of the current task, underpin the case for affording priority attention and focus to the national freight task.

This Strategy seeks to direct the efforts of all governments and industry towards the long term vision, objectives and outcomes for freight in Australia.

Four key factors inhibit the achievement of the objectives of this Strategy:

1. restricted use of infrastructure by freight vehicles;
2. encroachment on freight activities;
3. uncertainty about capacity for growth; and
4. limited responsiveness of infrastructure to economic demand.

Governments are addressing these issues through agreeing to progress the work outlined in the six Issues for Action that follow in the Strategy.

The current policy context

One of COAG's five themes of strategic importance is to ensure Australia has a national economy driven by its competitive advantages. Since 2009, COAG has identified infrastructure efficiency and investment, including freight, as an integral part of its national reform agenda to improve productivity.

In 2011, COAG tasked SCOTI to complete a national freight strategy as part of its role to 'achieve a coordinated and integrated national transport and infrastructure system that is efficient, safe, sustainable, accessible and competitive...[and will] support and enhance Australia's economic development and social and environmental well-being'.

When work commenced on the Strategy in 2010, Infrastructure Australia stated that:

'Rail and road freight infrastructure planning and investment can no longer be undertaken in isolation from each other, or worse, in competition with each other... A new national freight strategy needs to be developed for our freight networks to improve planning, investment and decision making'

This Strategy aims to ensure all governments' freight planning and policies move beyond being mode-specific and take an integrated approach to freight, national and international supply chains.

The Strategy complements a broad range of existing national reforms that impact on the movement of freight in Australia. In addition to these national reforms, several States and Territories have developed, or are in the process of developing, long term freight plans for their own jurisdiction. These are outlined in Table 1.

Table 1 Summary of State and Territory Activities in Freight Planning

Jurisdiction	Activity	Status
NSW	<ul style="list-style-type: none"> • <i>NSW Long Term Transport Master Plan</i> • <i>Draft NSW Freight and Ports Strategy</i> • <i>Draft Metropolitan Strategy for Sydney</i> 	<ul style="list-style-type: none"> • completed • completed • completed
VIC	<ul style="list-style-type: none"> • <i>Victorian Freight and Logistics Plan</i> 	<ul style="list-style-type: none"> • under development and due for completion in 2013
QLD	<ul style="list-style-type: none"> • <i>Integrated Freight Strategy for Queensland</i> 	<ul style="list-style-type: none"> • currently under review
WA	<ul style="list-style-type: none"> • <i>Western Australia Regional Freight Transport Network Plan</i> • <i>Perth and Peel Regions Freight and Intermodal Network Plan</i> 	<ul style="list-style-type: none"> • completed but not yet publicly released • under development and due for completion by mid-2013
SA	<ul style="list-style-type: none"> • <i>30 Year Plan for Greater Adelaide, Future Directions: Optimising Our Transport Corridors</i> • <i>Freight Strategy and Ports Strategy</i> 	<ul style="list-style-type: none"> • completed • under development
TAS	<ul style="list-style-type: none"> • <i>Long Term Freight Strategy</i> 	<ul style="list-style-type: none"> • under development
ACT	<ul style="list-style-type: none"> • <i>ACT Freight Strategy 2014–2031</i> 	<ul style="list-style-type: none"> • under development. A draft Freight Strategy will be released for public comment in late 2013, and a final Strategy will be released early 2014
NT	<ul style="list-style-type: none"> • <i>East Arm Wharf Facilities Masterplan 2030</i> 	<ul style="list-style-type: none"> • completed

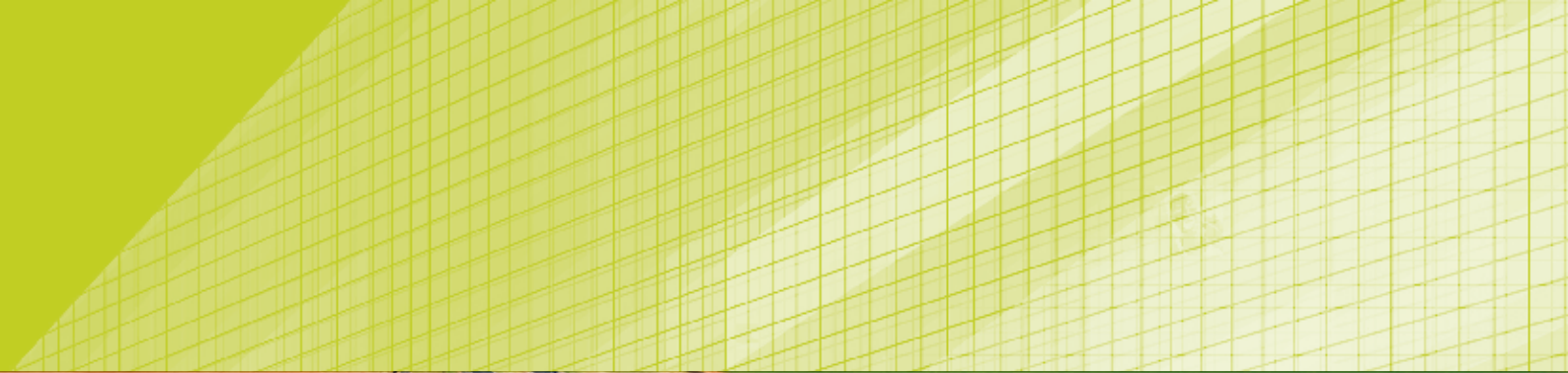
Freight movement is a commercial activity undertaken by transport and logistics industry businesses as carriers of freight. Therefore, the private sector plays a vital role in understanding, planning for and running Australia's freight task. The private sector is also critical in planning for the current and growing freight task by investing in and building land freight infrastructure. Furthermore, industry is essential in communicating the role and significance of the freight task to the Australian community, thereby facilitating implementation of major projects and reforms.

3 Issues for action

This Strategy focuses the efforts of all governments and industry towards the long term vision, objectives and outcomes for freight in Australia.

It identifies the six major challenges facing freight today that require coordinated policy action by Commonwealth, State, Territory, local governments and industry. Importantly, it also commits governments to practical first steps forming the basis of the initial phase of work to deliver the Strategy.





Issue 1: Planning for the future

Integrated, long term planning is essential in ensuring efficient, sustainable freight logistics in Australia. This means close coordination and collaboration between governments and industry. Better planning is achieved through an increased understanding of the freight task and engagement with community on the role and function of freight in society.

Successful planning is delivered in many ways. A clear recognition of the importance of freight is needed, including recognition of its role in national productivity. Governments should make a concerted effort to integrate plans for existing and future places for freight, networks and operations within land use and transport planning frameworks. It then requires governments to commit to basing their decisions on funding new and existing infrastructure to support the freight task on the outcomes of these integrated planning processes.

Freight needs to feature prominently in any outcomes-based national, State, Territory, regional and local policy aimed at improving productivity. It is also essential that the movement of freight receives national attention and focus in planning and investment. Without adequate planning, there is limited opportunity to protect the precincts and corridors needed to meet future freight demand.

Submissions to Infrastructure Australia's 2011 Discussion Paper from the State governments, the freight industry, business and infrastructure groups, Local Government and resident groups demonstrated a strong imperative for long term national freight planning in Australia.

Challenges

There has been much criticism that infrastructure and urban planning as well as investment have had a short term focus, constrained by budget and political cycles. While most governments have long term strategic urban and regional development plans for their jurisdictions, a hierarchy of short (5 years), medium (5–15 years) and long term (30 year) plans are not generally publically available, and where they are, they may not address key issues affecting freight.

Freight planning has generally not been well integrated or described within other land use, transport and strategic planning frameworks. Lack of integration had led to key challenges for all jurisdictions, particularly where freight interacts with the urban environment including 'first and last mile issues', protecting freight corridors and precincts, and considering the amenity impacts for adjoining communities.

Box 3 Case Study: New South Wales Hunter Valley Coal Chain Coordinator

The Hunter region is the largest coal export operation in the world, supporting 40 mines and 11 producers. The Hunter Valley coal supply chain operations include:

- over thirty train loading points;
- three coal terminals at Newcastle, with a fourth in the planning approvals stage;
- up to seventy trains per day, or around 20,000 trips per year;
- coal loading terminals;
- approximately 1,500 shipping movements per annum; and
- facilities to support coal power stations at Eraring, Bayswater, Liddell, Munmorah, Redbank and Vales Point.

Established in 2009, the Hunter Valley Coal Chain Coordinator (HVCCC) is an innovative, industry cooperative model that undertakes end-to-end logistics and capacity planning for the Hunter Valley coal chain.

HVCCC works to maximise coal chain throughput while considering the collective needs and individual contractual entitlements of its member coal producers and service providers.

The value that HVCCC offers its members is that it approaches planning for the coal chain as a system, rather than as individual supply chain participants making their planning decisions in isolation.

HVCCC's key deliverables include the provision of:

- detailed long term coal chain capacity models and master plans, to determine long term contractible capacity and identify capacity constraints;
- coordinated annual coal chain maintenance and capacity planning required to deliver contracted capacity;
- monthly planning and coordinated scheduling of the daily movement of coal to meet forecast demand and contractual entitlements; and
- reporting and performance measurement against coal chain system assumptions and recommendations for operations improvement.

Freight travelling on the first and last mile is generally not being carried on the major national freight routes. First and last mile issues are found where the level of access is restricted, as opposed to what is permitted on major freight routes. These issues are critical to overall freight outcomes and need to be addressed on several levels—ranging from overall recognition and implementation of integrated planning processes, to reforms in charging and access arrangements, and consideration of specific measures on a case-by-case basis to address local issues (see Box 4).

Box 4 The first and last mile challenge

To date, neither transport nor land use planning has delivered complete freight routes that extend from origin to destination. This is exacerbated by roads being under the control of different road managers with different priorities. As a result, local roads that form the first or last section of a freight route are not designed for access by Higher Productivity Vehicles (HPVs).

First and last mile issues can also occur in rail, where freight might move over railway lines that are shared with passenger services, leading to inefficiencies where passenger services have a higher priority. This occurs where rail infrastructure around a port or intermodal terminal is shared with passenger trains.

First and last mile issues manifest where the level of ‘access’ is lower than is available on key freight routes. For example, local governments may refuse to issue permits for HPVs to access their local roads for a number of reasons, including:

- damage caused by heavy vehicles that cannot be repaired without additional funding, and the difficulties involved in obtaining that funding from the usual local government funding sources;
- concerns about the amenity impacts of noise and air pollution, hours of operation, and the general safety of heavy vehicles in residential areas;
- access being limited to off-peak periods which may not meet the supply and demand conditions of deliveries; and
- inability to safely accommodate these vehicles on current road infrastructure.

There are a number of steps that governments are taking to address these issues:

- a greater emphasis is being placed on the integration of planning between the Commonwealth, State, Territory and local governments to ensure consistent outcomes;
- the National Heavy Vehicle Regulator is seeking to make access to roads a more transparent and nationally consistent process. Governments and industry have a shared role in explaining to communities the benefits of allowing HPVs on the roads, including the reduction in freight costs and higher safety outcomes;
- the Heavy Vehicle Charging and Investment (HVCI) reform is highlighting the importance of nation-wide assessments of the medium to long term needs of the freight industry (beyond the current budget cycles) that would put a greater emphasis on road freight investments in road agency planning, including how such planning should be integrated with planning for light vehicle related investments. HVCI is also pursuing mechanisms to ensure that road revenues more closely match road expenditures;

(continued)

Box 4 The first and last mile challenge (*continued*)

- governments are working with industry and communities to address expectations for urban amenity and the management of freight vehicle movements on local roads; and
- governments and industry are working to identify solutions to specific local issues on a case-by-case basis. In this regard a major issue is whether there are appropriate incentives for road managers—including local governments—to meet the needs of freight operators in their areas through funding and access decisions. The findings of the current Commonwealth Grants Commission inquiry into Local Government Financial Assistance Grants may be relevant in this regard. The objective of the inquiry is to identify tangible ways of improving the impact of Financial Assistance Grants on the effectiveness of local governments and their ability to provide services to their residents within the current funding envelope.

Long term directions

The importance of integrated planning

Commonwealth, State and Territory Governments recognise that integrated, long term planning is essential in ensuring efficient, sustainable freight logistics. The actions identified below are all predicated on such integration as fundamental to improved freight outcomes.

Identifying current and future places for freight

Transport infrastructure (more pertinent for roads) in Australia is generally dual purpose—that is, used for movement of freight and passengers. However, some road and rail routes and nodes play a critical role in the national freight task.

Mapping these key places for freight is a core element of this Strategy. This will help focus governments and industry on the measures needed to protect, develop and maintain places for freight. Figure 6 shows the indicative map of key freight routes that Infrastructure Australia provided in its *Freight Strategy Update Paper*.

Figure 6 Indicative map of key freight routes identified by Infrastructure Australia



Source: Infrastructure Australia 2012, *National Land Freight Strategy Update Paper*¹

The Commonwealth, States and Territories will undertake further analyses on the key places for freight that are critical to the national freight task, and identify the criteria for what elements should be included in the national freight map.

¹ Alignment for the inland rail route is currently from Brisbane to Melbourne, via Toowoomba and central west NSW. The inland rail route is only an indicative proposed route, from Infrastructure Australia.

Box 5 Case Study: Moorebank Intermodal Terminal

In the Sydney basin, there are only a few sites capable of operating a large intermodal terminal.

The objective of the Moorebank Intermodal Terminal (IMT) is to provide greater freight container capacity and efficiency, reduce congestion and use rail to transfer goods from Port Botany, given that almost two-thirds of port container freight is transported to or from markets in Western Sydney.

Moorebank IMT will provide capacity to accommodate Port Botany container volumes, which is expected to increase from around two million containers to around seven million a year by 2030.

The Moorebank IMT is expected to deliver \$10 billion in economic benefits including improved productivity, reduced business costs, reduced road congestion and better environmental outcomes.

The Moorebank IMT port shuttle is expected to be operational by 2017. By supporting the relocation of Defence units off this site by mid-2015, the Australian Government has unlocked land of strategic importance to enable the development of the IMT. This means that Sydney will be positioned to handle the growth in the freight task as it occurs, rather than waiting until existing infrastructure has reached capacity.

Precinct and corridor protection

Long term planning allows governments to be clear about the precincts and corridors that require protection from encroachment.

Infrastructure Australia has identified long term precinct and corridor protection as one of the most significant issues across all modes of transport and requires a national approach to provide a long term focus on this issue. Limited efforts to plan, protect and acquire (on a timely basis) land for freight precincts and corridors has the potential to significantly increase the costs of the development and ongoing operation of transport infrastructure. Failure to protect corridors can result in preferred routes being 'built out', by encroaching development, sub-optimal routes being used and diverted or expensive alternatives (such as tunnels) requiring development. There is significant scope to improve planning to protect precincts and corridors, and maximise their use.

Box 6 Case Study: Corridor protection

The benefits of a long term approach to corridor protection will be demonstrated by Melbourne's Outer Metropolitan Ring–E6 Transport Corridor. The corridor will be a 100 kilometre high-speed transport link for freight and people in Melbourne's west and north, creating road and rail links between Werribee, Melton, Craigieburn/Mickleham, Beveridge/Wallan and Epping/Thomastown.

Once complete, it will serve international transport hubs; better link residential and employment growth areas to the north and west of Melbourne; and provide for the development of employment corridors around Werribee, Melton and Mickleham and in precincts around Melbourne and Avalon airports.

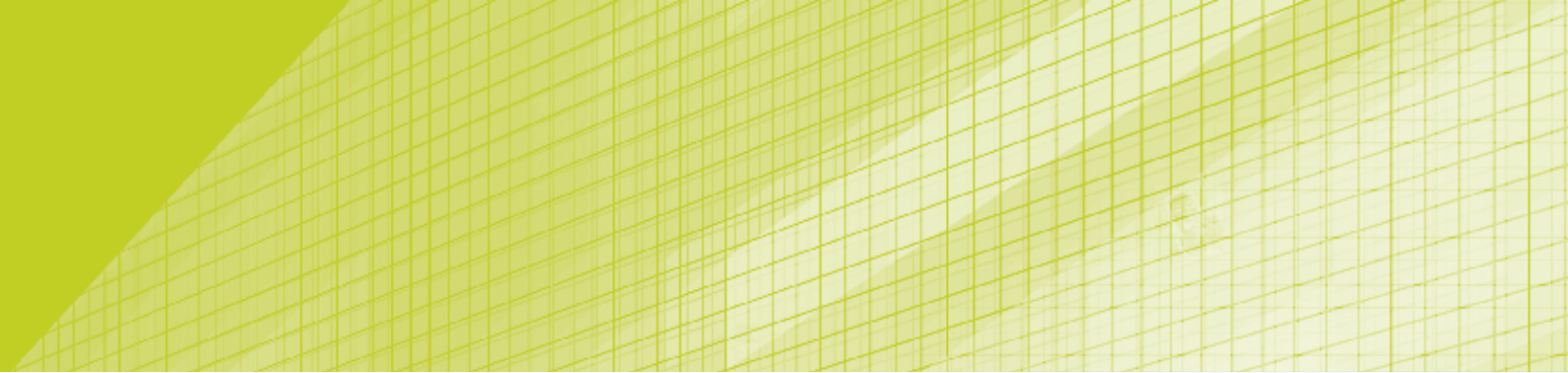
The corridor will also improve freight movements throughout regional Victoria, by linking the nationally significant Princes (west), Western, Calder and Hume Freeways. Interstate and intrastate rail freight will also use the corridor.

Box 7 Case Study: The Brighton Transport Hub Project

The Tasmanian Government will improve the seamless intermodal transfer of freight between the southern and northern ports by progressing the Brighton Transport Hub Project. This is a \$79 million project that has provided a modern road-rail facility and freight distribution hub at Brighton, a significant place for freight. In conjunction with the development of the Hub, the construction of the Brighton Bypass has also enhanced linkages with the State transport network and will further contribute to freight efficiencies.

Practical first steps

- The Commonwealth, States and Territories will map the key freight routes in Australia that connect the nationally significant places for freight.
- States and Territories will identify any funding, regulatory or corridor protection measures required for these key freight routes, including consideration of private sector funding options.
- States and Territories will put in place long term freight plans consistent with the objectives of the Strategy, including mechanisms for protecting freight corridors and precincts for the growing freight task.



Issue 2: Investing in the right infrastructure

While Australia's freight task is predominantly managed and carried out by commercial freight operators, this infrastructure has traditionally been planned and provided by governments. This has had policy implications for:

- funding and financing of freight infrastructure;
- charges and access granted to its users; and the
- efficiency of infrastructure and its capacity to support a productive economy.

Building and maintaining infrastructure used to deliver the freight task is currently a major investment for governments, as a proportion of total expenditure on those assets and as a share of the budget. For example, total road-related expenditure in 2008–09 was \$15.8 billion, 95 per cent of which was Commonwealth, State, Territory and local government funds.

In terms of rail, the growth in minerals operations has significantly assisted in developing or supporting infrastructure investment in rail, namely, the Pilbara region of Western Australia. Similarly, the Australian Rail Track Corporation acts on a commercial basis and has funded significant infrastructure projects, either with its own resources and use of access fees, or with government support; largely being through equity investments through which a commercial return will be made over time.

Challenges

It is critical that there is sufficient capacity to handle the current and growing freight task, however there are a number of challenges that need to be considered, including:

- rapid growth in freight volumes leading to increased landside movement, and uncertainty as to how this rapid growth will evolve;
- encouraging whole of supply chain efficiency by ensuring infrastructure capacity developments on the landside match portside capacity developments (e.g. length of rail sidings at ports and inland IMTs);
- congestion from increasing numbers of passenger vehicles that can adversely impact on freight vehicle movement;
- the priority given to passenger vehicles over freight vehicles in urban transport;
- urban encroachment on freight routes and precincts as cities grow in size and density, and the associated community focus on interface issues;
- demand for larger more productive vehicles balanced against increasing infrastructure maintenance costs; and
- fiscal constraints on governments, meaning more will have to be done with less, and alternative sources of funding need to be found.

COAG has recognised the need for governments to be more strategic and have a longer term view about their infrastructure requirements and investments.

Long term directions

As discussed in Issue 1, better planning for freight is a prerequisite for informed decisions about where and when to invest. Investment can encompass both infrastructure and non-infrastructure projects including technology, research and policy.

Box 8 Case Study: Northern Sydney Freight Corridor

The 155 kilometre Northern Sydney Freight Corridor (NSFC) between Sydney and Newcastle is a shared passenger and freight corridor where passenger rail services currently restrict freight services to train paths, outside of the peak passenger periods. Capacity for freight services are constrained by a lack of passing loops to accommodate 1500 metre trains; junctions at critical locations such as North Strathfield; and steep inclines which slow freight trains and delay following passenger services.

On 7 December 2011, the Australian and NSW Governments agreed to a \$1.1 billion program of works that would address the most pressing needs within the corridor and provide sufficient capacity for both passenger and freight services through to around 2028. The works include the:

- North Strathfield Rail Underpass;
- Epping to Thornleigh Third Track;
- Gosford Passing Loops; and the
- Hexham Passing Loop.

By 2016, the completed program will lift the corridor's freight capacity by 50 per cent from 29 to 44 freight trains per day. This will accommodate the expected threefold increase in interstate freight volumes over the coming years, and ensure more efficient movement for passenger services. For the first time, the two governments agreed on the number of paths available for freight services to ensure benefits of this investment flow onto freight. This has been cemented by a commercial agreement between the Australian Rail Track Corporation and NSW, which also includes performance monitoring to ensure all parties can monitor the results of this investment.


Box 9 Case Study: Current technology initiatives

The New South Wales Government, National ICT Australia and the Heavy Vehicle Safety and Productivity Program (HVSP) are funding the Hume Highway to Port Kembla–Cooperative Intelligent Transport System Initiative Project. The Project will fit dedicated short range communication transceivers into approximately 30 heavy vehicles on the route which will communicate with land-based infrastructure, such as traffic lights and advisory signs. This type of technology is being trialled in large-scale projects in the United States and by European vehicle makers.

The National Smart Managed Motorways program and the investment in the Advanced Train Management System both seek to maximise the use of existing infrastructure. The HVSP is assisting significantly in delivering better safety and productivity outcomes for heavy vehicles through practical and cost-effective projects.

Given its growing significance, governments need to critically assess current and planned investments for freight. Some directions include:

- ensuring governments' ongoing role in investing in infrastructure caters for and reflects the importance of freight carried on that infrastructure—including prioritising maintenance on existing infrastructure. For its part the Commonwealth will ensure that its Nation Building 2 Program brings appropriate attention to freight, by including 'Moving Freight' as one of its four core themes;
- enabling jurisdictions to take a more integrated, nationally consistent and multi-modal approach to identifying and evaluating freight projects. Updated National Guidelines for Transport System Management can play an important role by ensuring that freight considerations are appropriately taken into account in identifying and evaluating transport infrastructure projects;
- implementing demonstration projects and initiatives to address specific infrastructure impediments as opportunities arise. For example:
 - the New South Wales and Victorian Governments, with support from Infrastructure Australia, are progressing trialling the use of high productivity vehicles on key freight routes with incremental costs of infrastructure to be financed by industry beneficiaries, including the Hume Highway;
 - the New South Wales Government, with support from Infrastructure Australia, is progressing increased access to the Chullora rail terminal as an access pilot project; and
 - the Commonwealth and New South Wales governments are jointly funding the replacement of Kapooka Rail Bridge, which currently carries approximately 150,000 truck movements each year. Once completed, Kapooka Rail Bridge will open 315 kilometres of road for additional Higher Mass Limit vehicles.

- 
- continued availability of Commonwealth Government funding for first and last mile projects that seek to improve access and productivity for heavy vehicles;
 - recognition that rail will continue to play a significant role in the national freight task, and that growth in rail freight capacity will be necessary;
 - maximising the efficient use of existing infrastructure through enhanced maintenance programs, new technologies or other regulatory mechanisms; and
 - finding alternative ways of financing and funding infrastructure. The Commonwealth has taken a number of steps in this regard:
 - the Foreign Direct Investment Attraction and Promotion Strategy agreed between the Department and Austrade aims to promote, attract, facilitate and retain increased foreign direct investment in the Australian infrastructure construction industry;
 - the National Infrastructure Construction Schedule collates and outlines the national pipeline of existing and upcoming major infrastructure project procured by governments;
 - the Infrastructure Financing Working Group report *Infrastructure Finance and Funding Reform* recommends reform of government financing and funding models. This report explores options to attract greater private sector investment, enhanced long term planning to better articulate infrastructure priorities, and a deeper, more competitive capital market that allocated risk appropriately to assist in the expansion of infrastructure investment pipelines; and
 - the HVCI reform process is also likely to propose the establishment of a national economic regulator to assess the (economic) efficiency of freight related road investments to drive efficiency in project selection and ongoing road asset management.

While this is an ongoing challenge, together these initiatives aim to create and encourage a better regulatory environment to attract private investment in infrastructure.

Box 10 Case Studies: Promoting joint public and private sector investment

Projects Queensland is a unit within Queensland Treasury and Trade established to enhance the Queensland Government's infrastructure delivery capability. It plays a role in actively engaging with the private sector to develop funding models to encourage private investment in infrastructure. Freight-related projects include:

- **Toowoomba Second Range (road) Crossing (TSRC):** The TSRC is a proposed bypass route to the north of Toowoomba, approximately 41 kilometres in length. The TRSC will enhance road freight network capacity, freight connectivity between Western Queensland and the Port of Brisbane, improve road freight travel times and reliability (via the Toowoomba Range), improve heavy freight vehicle operations including vehicle cycle rates, minimise heavy freight vehicle maintenance and operational costs, and minimise freight related congestion within Toowoomba.
- **Proposed Abbott Point Expansion:** This project aims to maximise the export of coal and facilitate the continued economic development of QLD. It will provide direction for the timely development of port infrastructure to support future mining projects and other large-scale industry in the Abbot Point SDA. Registrations of Interest have been sought and proposals are being evaluated in order to progress the project. Information from developers interested in locating at Abbot Point for industries and/or infrastructure associated with the export/import of commodities in addition to coal have been sought. This information will be used to plan and facilitate development within the Abbot Point SDA.

In the **Australian Capital Territory**, the 2010 Pialligo Avenue Upgrade represents a significant private sector contribution to major ACT road infrastructure, in partnership with the ACT Government, to achieve mutually beneficial transport outcomes. The project involved the redevelopment of critical road infrastructure to cut travel times, increase business productivity in the Canberra Airport precinct and improve freight access to and from the Canberra Airport, Monaro Highway, Federal Highway and Fyshwick industrial district.

The ACT Government and Canberra Airport Group collaborated successfully to achieve the upgrade of this key freight corridor (and modal interchange between road and air freight) via a working group that reported to a roundtable of major stakeholders chaired by the, then, ACT Minister for Territory and Municipal Services. In addition to funding the preliminary network study by SMEC, the Canberra Airport Group contributed over 50 per cent of the project funding.

Box 11 Case Study: Wimmera Intermodal Freight Terminal

Horsham is an established regional city in western Victoria's Wimmera Region, with a population of 20,000 people. The Wimmera is one of the world's largest grain, pulse and oilseed growing regions, and exports around 60 per cent of total harvest.

With a capacity-constrained intermodal terminal in the city of Horsham, the construction of a new terminal on the Melbourne-Adelaide interstate freight line was proposed. The Horsham Rural City Council, Victorian and Commonwealth Governments and the private sector contributed \$18 million funding to build the new Wimmera Intermodal Freight Terminal at Dooen, 10 kilometres north east of Horsham.

The new intermodal terminal, opened in August 2012 and delivered:

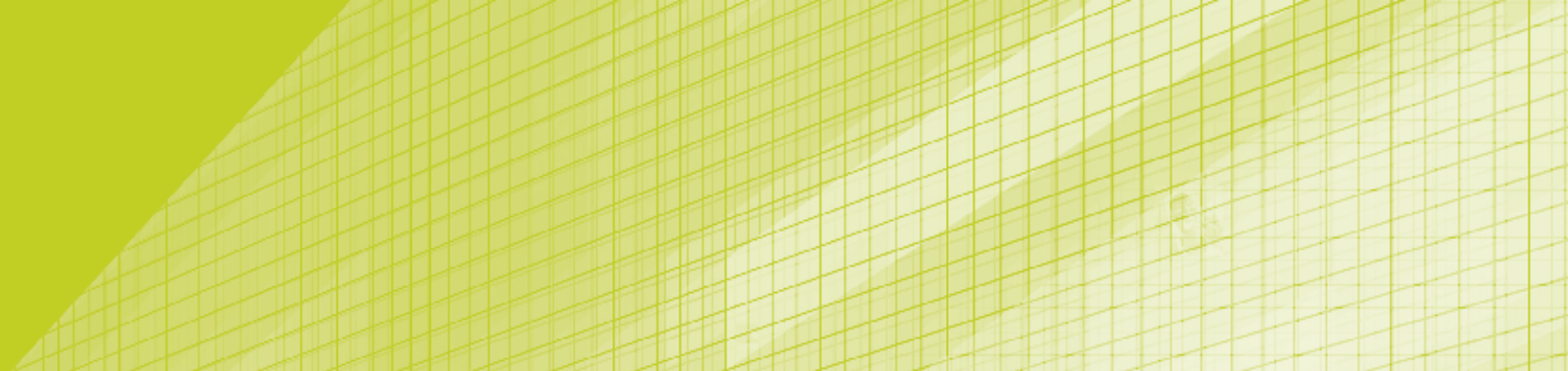
- increased containers being transported by rail from the Wimmera region from 13,500 Twenty Foot Equivalent Units (TEUs) per annum to an expected 22,000 TEUs in 2013–14; and
- reduced truck trips that would otherwise have been required to transport containers to the Port of Melbourne (a 300 kilometre trip); and

To further leverage off this investment, a *Precinct Structure Plan* is being developed to guide future land use activities, development and design of a freight logistics precinct adjacent to the freight terminal.

The delivery of the Wimmera Intermodal Freight Terminal demonstrates an integrated approach to delivering freight network and land use outcomes through a collaborative approach involving all three tiers of government and industry. The new Wimmera Intermodal Terminal is an essential next step in meeting global demand for Victoria's grain products.

Practical first steps

- The Commonwealth will ensure that its Nation Building 2 Program brings appropriate attention to freight through the inclusion of 'Moving Freight' as one of the four core themes of the Nation Building 2 Program to be implemented by the Commonwealth from July 2014.
- Government investments in freight infrastructure will be made in line with the priorities identified in the long term freight plans developed outlined in 'Planning for the Future'.
- A review of the National Guidelines for Transport System Management will be undertaken to ensure that a fully integrated approach is taken to project identification and evaluation, with freight being fully taken into account through the use of appropriate tools and approaches.
- On an ongoing basis, governments will progress demonstration projects and initiatives to address specific infrastructure impediments, including:
 - trialling the use of high productivity vehicles on the Hume Highway;
 - increasing high productivity vehicle access to the Chullora rail terminal; and
 - replacing the Kapooka Rail Bridge along the Olympic Highway in New South Wales.
- The Commonwealth Government's existing funding programs allow for the funding of first and last mile projects with State or Territory government and industry contributions to improve access by high productivity vehicles, and this priority will continue with the implementation of the Nation Building 2 Program from 1 July 2014.



Issue 3: Better access, investment and charging for heavy vehicles

Australia has made substantial efficiency gains through reforming the access, investment and charging arrangements of significant infrastructure. At the national level, Australia's major airports were privatised as part of the micro-economic reforms of the late 1990s. Similarly, many of Australia's key seaports have been corporatised and/or privatised by State Governments.

Rail transport has also been corporatised and access regimes put in place to regulate access for third parties for rail infrastructure. However, many rail networks still require support from governments to remain operational, and decisions about when and in what circumstances governments should invest in freight rail networks remain challenging.

The reforms in airports, seaports and rail infrastructure have seen increased private sector investment, encouraging access by newer, more productive vehicles, while encouraging competition and reducing prices for users.

To date, roads have not been subject to such changes and this may be the next major area for comprehensive reform. This section focuses on issues relating to road access, investment and charging for heavy vehicles. The principles discussed are applicable to Australia's freight infrastructure more broadly.


Challenges

The issues of access, investment and charging for heavy vehicles on the road network are intertwined. The current charging system creates disincentives to provide access to more productive vehicles, as well as problems with accessing alternative sources of finance to enable network expansion. Poor data on road use and truck movement (discussed at Issue 5) further complicates this picture.

Road access

Permission for HPVs, including B-doubles, B-triples and larger combinations to access the road network is granted by road owners; in most cases State, Territory or local governments. There are generally three reasons why such access is denied.

- Higher-productivity vehicles pose engineering challenges for the network, and can necessitate improvements to a route. For example, strengthening pavements or bridges to carry extra weight, widening intersections to allow for larger vehicle swept paths, or installing additional signage. In the absence of investments in such improvements, access to these vehicles cannot be safely provided.
- Road owners are generally reluctant to allow HPV access due to subsequent road maintenance expenses. The current way road charges are collected and distributed does not usually allocate additional funding to pay for future maintenance. Governments therefore seek to protect their road assets by denying access to larger and heavier vehicles.
- Community concerns over the amenity impacts of heavy vehicles on the road and near their homes (Issue 6) mean that gaining support to implement productivity-enhancing reforms is difficult.



To assist local governments make informed decisions about high productivity vehicle access the Australian Local Government Association (ALGA), in collaboration with a number of other government and non-government organisations, is developing an improved approach to making access decisions (see Box 12).

Box 12 Case Study: The Performance Based Standards Route Assessment Tool (PBS RAT)

In 2012, the Municipal Association of Victoria, Port of Melbourne Corporation, Commonwealth Department of Infrastructure and Transport, the then Victorian Department of Transport, VicRoads and the National Transport Commission funded the PBS RAT. It is an online tool designed exclusively for local governments to assess heavy vehicle routes according to the PBS Infrastructure Assessment guidelines for local government. It allows engineers to assess the infrastructure's ability to facilitate the safe operation of HPVs, and subsequently local governments to clearly identify the most restrictive elements of the route according to the guidelines. This may mean an alternate route could be considered, or a decision could be made to address the specific issues that may be limiting access.

The PBS RAT is already available for use by all Victorian Local governments as part of a state-wide trial and there are already over 120 registered users utilising the tool. ARRB Group Ltd, in collaboration with the NHVR, ALGA and associated state-based local government associations are embarking on a national trial of the tool. By simplifying the route assessment process, it is expected that all local governments will be able to adopt a consistent approach to route assessment. This will ultimately result in increased 'certainty of operations' for road asset owners, transport operators, freight customers and the community. The result of this national trial is expected to be completed by August 2013, with the outcome announced at ALGA's National Local Roads and Transport Congress in mid-November 2013.

Box 13 Case Study: Queensland Higher Productivity Road Vehicle Initiatives

In 2009–10, Queensland undertook a project to assess a strategic road freight route between Toowoomba and the Port of Brisbane for larger Performance Based Standards (PBS) combinations such as A-Doubles that would provide significant productivity increases, particularly for containerised grain for export markets.

The project involved a desktop assessment followed by a practical in-field validation of the route. The desktop assessment considered digital road video information, signal timing and intersection plans. Road environment considerations included stacking distances at intersections and railway level crossings, storage lane length at intersections, road grades, vehicle swept path envelopes, overtaking provisions, enforcement bays, decoupling areas and rest area sizes. Concurrent with the route assessment, vehicle designs were also assessed in relation to bridges and structures along the route.

Project benefits from October 2010 to July 2011 included reductions of:

- 50 per cent of truck trips ;
- 1.8m vehicle kilometres travelled;
- 650,000 litres of diesel;
- 1,700 tonnes of greenhouse gas emissions; and
- 21 per cent in equivalent standard axles for same freight task (i.e. less road wear)

All achieved without any road upgrades.

Queensland is liaising with local road network owners to improve heavy vehicle access.

In particular, the State is assessing its road freight network for PBS Level 2B vehicles.

Since 2010, approximately 468 kilometres of strategic roads have been assessed and approved for PBS Level 2B access in South-East Queensland and the broader Townsville area, with a further 2,600 kilometres of state controlled and local government being considered.

Key Priorities to June 2013 include routes in:

- routes around Lytton and Hemmant (Brisbane);
- Cunningham Highway from Warwick to the Ipswich Motorway; and
- Barwon Highway to Francis Street/Russell Street, Goondiwindi.

Road funding and financing

Governments are responsible for maintenance and capital expenditure on Australia's road network. As mentioned, road charges collected by governments are not dedicated to future road investment, and may become consolidated revenue. Despite some limited private financing of toll roads, a lack of secure funding streams (either hypothecation of registration charges and fuel taxes, or direct user charging) is a major impediment to the ability of governments to negotiate private financing of road investment and is likely to have resulted in a sub-optimal rate of network expansion and upgrade.

Road pricing

Australia's current system of charging for freight access on the road network creates numerous challenges.

Although operators are charged for their access to the road network, the revenue is not necessarily reinvested in the road network, and may become consolidated revenue. Road agencies are then subject to the normal vagaries of budget cycles, which in turn determine the prescribed level of access on particular routes, rather than more market-oriented drivers such as direct demand or users' willingness to pay.

The current system seeks to recover historic expenditure on roads from heavy vehicle operators, rather than charging users the 'economic cost' of road provision. This means freight operators do not receive appropriate price signals about the costs they impose on road operators and other users when using the road network. Furthermore, externalities such as congestion, noise and air quality are not captured in prices.

Moreover, the current charging system involves significant cross-subsidisation between, and within, vehicle combinations and freight travel locations.

Long term directions

In its 2006 inquiry *Road and Rail Freight Infrastructure Pricing*, the Productivity Commission found that the current road pricing system had major shortcomings, and recommended that Commonwealth, State, Territory, and local governments investigate the potential for more commercially-oriented road infrastructure provision. The COAG Road Reform Plan (now known as the Heavy Vehicle Charging and Investment (HVCI) reforms) was agreed by COAG in 2007 and again supported in the *Seamless National Economy* implementation plan determined by COAG in 2010.

Heavy Vehicle Charging and Investment

In November 2011, Transport Ministers reported to COAG on the feasibility of more direct heavy vehicle road charging.

The *COAG Road Reform Plan Feasibility Study* concluded that achieving a direct link between the costs incurred from heavy vehicle road use, more direct road use charges and the funds received by road providers would reap significant economic benefits.

It recommended that more direct charging of heavy vehicles should only be implemented as part of a package of complementary charging, funding and expenditure reforms—reforms which enable funds collected from a heavy vehicle charging regime to be provided directly to road owners for road construction and maintenance purposes. The study cited preliminary net benefits as a package of between \$5 and \$7 billion over 30 years.

A Regulatory Impact Statement for a range of options for heavy vehicle charging, funding and governance reform is currently being developed for consultation. A significant element of this assessment will be consideration of the governance framework necessary to ensure that the objectives of the HVCI reform can be achieved, and in particular to ensure that there are transparent, consistent and responsive mechanisms in place to guide future investments in road infrastructure for heavy vehicles.

The HVCI reform offers the potential to achieve a significant element of the road freight productivity outcomes sought through this Strategy. In the interim, improved road charging outcomes could be supported by improvements to the current heavy vehicle charging arrangements currently being developed by the National Transport Commission (NTC) as part of the Heavy Vehicle Charges Review and Determination process.

Heavy Vehicle Access Trials

A significant constraint on governments' ability to demonstrate the potential of charging and investment reforms to improve freight outcomes is the lack of 'real world' situations where underlying principles can be tested.

Trials involving increased use of HPVs in specific locations, as highlighted at Issue 2, can provide a range of data useful for evaluating the broader costs and benefits of road reform. Such trials can provide information on freight operators' willingness to pay for increased access by larger or heavier vehicles; the demand responses at particular price levels; and the business systems necessary to support direct pricing and governments' ability to provide access at particular revenue levels. In the absence of such trial data, assessments of the costs and benefits of wholesale road reform will rely more on estimates than real world data.

Box 14 Case Study: Over Size Over Mass (OSOM) Unit

Global demand is causing unprecedented growth in the mining and energy sectors in Western Australia. Consequently, the size of project cargo and mining plant and equipment is increasing exponentially and improved state co-ordination and planning services are required by industry to address these capacity constraints. The ability to move these OSOM loads safely and efficiently has a direct impact on the economic viability of the mining industry.

The OSOM Unit project was designed to improve and increase service delivery to the OSOM sector of the transport industry. The Unit commenced operations on 1 January 2013, with the transfer of the Traffic Escort function from WA Police to Main Roads, establishing a centralised point of contact to process applications for heavy vehicle permits and traffic escort services. Also fundamental to establishing the OSOM Unit was expansion of the capacity and capability of traffic escort wardens. Phase two of the OSOM Unit implementation will involve involves collaboration with Horizon and Western Power for the provision of line lifting services.

The critical features of the OSOM Unit include:

- hosting by Main Roads' Heavy Vehicle Operations (HVO) branch, but as a discrete business unit (OSOM Unit) providing a commercial service to industry;
- having a cost neutral, cost recovery business model with transparent financial reporting and is responsive to the demand cycle through deployment of contracting staff;
- oversight by an Advisory Committee, including State, mining sector and transport industry representatives, chaired by an independent chairperson; and
- appropriate regulatory powers and financial resources to deliver these necessary actions.

By facilitating the steadily increasing volume of OSOM movements more efficiently and effectively, WA are enabling mining and resource projects to proceed on time. The effect of a guaranteed premium service provides mining and resource companies with confidence to commit to planned ventures, providing jobs and supporting the growth of the WA economy.

Cross Modal Integration

While this section focuses on road freight charging, investment and access (reflecting the dominance of road freight in the land transport task and the significant related reform work), a broader consideration of this Strategy is also on improving cross modal outcomes.

An issue for heavy vehicle charging, investment and access will be ensuring that the reform outcomes do not inhibit efficient freight modal choice. Improved freight outcomes could be supported by ensuring that inefficient restrictions on last mile access including, for example, access to railheads, are addressed through a market-based service delivery mechanism.

Jurisdiction-specific deliverables

The Queensland Government will be undertaking HPV initiatives such as a quad-axle semi-trailer policy, PBS, Higher Mass Limits and the Intelligent Access Program. Since 2010, approximately 468 kilometres of strategic roads have been assessed and approved for PBS Level 2B access in South-East Queensland and the broader Townsville area, with a further 2,600 kilometres of state controlled and local government being considered. Key priorities to June 2013 include routes around Lytton and Hemmant (Brisbane), Cunningham Highway from Warwick to the Ipswich Motorway, and Barwon Highway to Francis Street/Russell Street, Goondiwindi.

Practical first steps

- Commonwealth, State, Territory and local governments will improve freight access and outcomes as a key deliverable under the Heavy Vehicle Charging and Investment initiative, and consult closely with industry and other stakeholders in consideration of reforms under the initiative.
- The Australian Local Government Association, ARRB Group Ltd, the National Heavy Vehicle Regulator and other state-based local government associations will undertake a national trial of the PBS Route Assessment Tool, to assist local governments to make informed decisions on increased high productivity vehicles access to their areas.
- The Queensland Government will be assessing routes to potentially expand access for high productivity vehicles. These include routes around Lytton and Hemmant (Brisbane), Cunningham Highway from Warwick to the Ipswich Motorway, and Barwon Highway to Francis Street/Russell Street, Goondiwindi.



Issue 4: Better regulation

Freight movement in Australia is largely a commercial activity undertaken by industry on government owned or funded infrastructure. As a commercial activity, industry makes decisions on where and how freight should be moved generally on a least cost basis.

Governments have an important role in balancing economic with environmental, community amenity and social outcomes. Governments influence the movement of freight through a number of mechanisms, including prescriptive rules or regulations.

In an effort to reduce red tape and unnecessary costs to industry (and in turn the customer), the focus in recent years has shifted to deregulation, and ensuring that where regulation is necessary, it is consistent and non-duplicative.

Challenges

Inconsistent State and Territory regulation of landside freight imposes a considerable burden on business. Many freight companies operate nationally, and national consistency in frameworks, laws and regulators would remove confusion and inefficiencies relating to safety, road-use requirements and vehicle specifications. These challenges also hamper efforts to achieve national productivity and safety, as well as potentially distorting competition across jurisdictional borders (as similar vehicles are allowed different access arrangements).

The Productivity Commission has found that despite efforts over the last decade to increase regulatory consistency across jurisdictions, progress has been slow, with previous efforts at model legislation failing to deliver the desired outcomes.

COAG focus on consistent regulation

One of COAG's strategic themes is to 'ensure Australia has a national economy driven by our competitive advantages'. Improving efficiency in freight will be a key platform in achieving this goal.

In 2008, the Commonwealth, States and Territories agreed to implement regulation and competition reforms under the *National Partnership Agreement to Deliver a Seamless National Economy*. It includes competition and regulation reforms to improve the operating environment for Australian businesses and enhance productivity in the national economy, including safety, access and efficiency reforms affecting freight infrastructure and transport.

New national regulators

As a part of the *Seamless National Economy* reforms, two new national transport regulators began operating in January 2013 (the National Heavy Vehicle Regulator and the National Rail Safety Regulator), a major step in regulatory consistency across the national land freight system.

- The **National Rail Safety Regulator** will administer a single National Rail Safety Law—initially in four jurisdictions with the remaining expected to join over the next 12 months. It will oversee rail safety performance across all rail freight and passenger operations and administer a single national accreditation for rail transport operators. The Regulator will also collect and assess data to develop consistent risk based policies and approaches.

- The **National Heavy Vehicle Regulator** covers all vehicles over 4.5 tonnes gross vehicle mass. Initially, it will manage the National Heavy Vehicle Accreditation Scheme accreditations and Performance-Based Standards (PBS) Scheme design and vehicle approvals nationally. Once all jurisdictions pass application laws to apply the *Heavy Vehicle National Law Act 2012*, it will deliver a comprehensive range of services under a consistent regulatory framework. One of its responsibilities will be to manage road access applications on a national basis, working closely with asset owners and the trucking industry to deliver greater efficiency, consistency and transparency in decision-making. By dealing with issues such as maintenance management, fatigue management and PBS applications and design approvals, the NHVR is not only reducing costs and enhancing efficiency—it also improves safety.

Review of the National Transport Commission and other bodies

In 2010, COAG asked Transport Ministers to review the National Transport Commission and a number of other transport bodies in light of the impending national transport regulators. These reviews will examine the roles and statutory functions of the National Transport Commission and the Rail Industry Safety Standard Board, including how these bodies should work with the new national regulators.

Long term directions

While there is scope for further regulatory reform, the completion and full implementation of the existing regulatory reforms under the *National Partnership Agreement to Deliver a Seamless National Economy* and the Review of the National Transport Commission should be a priority for all governments.

Commencement of both the National Heavy Vehicle Regulator and the National Rail Safety Regulator represents an important foundation of regulatory reform for the land freight system. The next important phase of work will be to bed down these reforms to ensure that the freight sector derives the full benefit of this new national focus.

There is also ongoing work for governments to better understand how the wider planning, regulatory and taxation environment interacts with the private sector, and whether these areas of public policy are contributing to the long term goals for freight and economic growth more broadly, especially in growing metropolitan areas.

The outcomes of the Productivity Commission's 2016 review of the overall economic impact of the national transport regulation reforms will be critical to ensuring the objectives of the reforms are delivered.

Box 15 Case Study: The Green Triangle

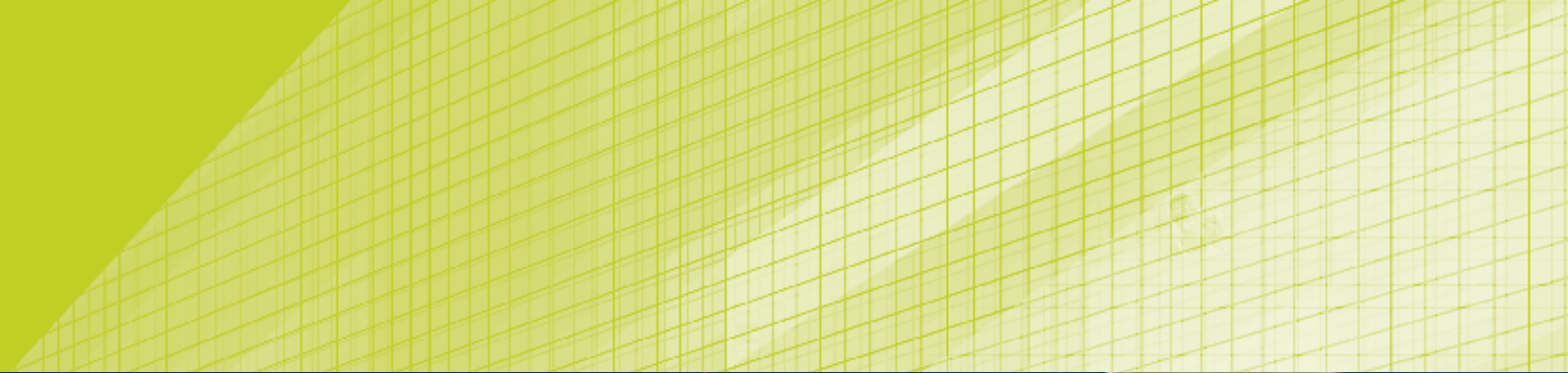
A joint Victorian and South Australian Government freight strategy released in 2009 included a package of reform initiatives to reduce regulatory burden on the heavy vehicle industry in the Green Triangle region in south west of Victoria and south east of South Australia. These reform initiatives, which sought to support the region's large timber industry, included:

- publication of common Timber Transport Load Management Guidelines for the Green Triangle Region;
- harmonisation of cross-border regulations for truck/tailler combinations;
- development of a Performance-based Standard application flowchart and collaborative assessment process;
- release of a Freight Industry Code of Conduct; and
- development of an Access Management Framework for Timber Coupes.

These reforms are supporting the region to more efficiently manage the growing cross-border freight task, particularly as the Green Triangle's timber plantations progressively mature.

Practical first steps

- By December 2016, the Productivity Commission will review the overall economic impact of the national transport regulation reforms (a COAG agreed commitment in the National Partnership Agreement for a *Seamless National Economy*).



Issue 5: Understanding the freight task

Good data availability plays a critical role in helping governments, industry and researchers better understand how and where land freight is moving around the country. It is also used to assess when and where substantial investments are needed and how growth of the freight task can best be managed and improved.

High quality, timely, accessible, useable and comparable data on freight and related issues have many uses.

Forecasting	It supports more accurate analysis and responsive forecasting of freight at the national level.
Decision-making	It provides a better evidence base for infrastructure investment and regulatory reform, and enhances governments' abilities to settle investment directions in a fiscally constrained environment, as well as for evaluating and adapting long term plans over time.
Innovation	It facilitates better research and private sector innovation to improve understanding and efficiencies across the supply chain, including interoperability.
Financing and investing	It improves understanding of the costs of providing and maintaining infrastructure and operations, and pursuing cost-efficiencies, including through better knowledge of the impact of heavy vehicles on particular roads. It is also essential in justifying taxes, levies and industry assistance policy and making the strategic business cases for investment in productivity-enhancing proposals by both the public and private sectors.
Communicating	Finally, it assists governments and industry to better communicate freight issues, provide a transparent picture to the community about the effects of freight, and garner community support for major city shaping investments.

Challenges

The Australian freight task is projected to continue to grow strongly, nearly doubling over the next two decades. While data and trends in total international import and export freight volumes are relatively well known, there is much less consistent data consistency for the value of freight supply chains and for domestic freight generally to inform infrastructure planning and investment.



Consequently, there is limited scope to produce accurate forecasts and scenarios of freight volumes across different parts of the network and value of freight supply chains to the national, regional and local economies. This affects decision-making, certainty and long term planning for governments, businesses and investors. It also hinders intergovernmental cooperation on the best approaches and prevents nationally coherent planning.

For instance, nationally consistent origin-destination road freight data have not been collected in over ten years. During that time, there have been significant developments in Australian road transport that have changed the distribution and nature of road freight operations. For example, B-doubles carried around 25 per cent of total freight tonne kilometres in 2000–01. Current estimates suggest that they have grown to account for nearly 50 per cent of all road freight.

The impediments to better understanding include poor coordination between and within governments, lack of access to private sector data and limited capacity to utilise emerging data sets that might assist in understanding elements of the freight task. Lack of certainty around funding for data collection, as well as the long lead times associated with traditional survey methods, has also exacerbated this gap in Australian freight transport statistics. The consequential poor understanding of the total freight challenge has undermined efforts to elevate its national importance or to more accurately assess and discuss freight externalities with the community.

Long term directions

Recent technology, such as freight tracking, provides an opportunity to substantially reduce collection costs and enable more frequent and ongoing collection of freight data. As the current road freight dataset is over ten years out of date, there is the opportunity to collect new data at a significantly reduced cost.

Given the importance of considering freight holistically, datasets that integrate all modes of transport will be of most use. A number of governments already collect transport and freight data and there would be national benefit in wider sharing of this information.

Box 16 Case Study: New South Wales Virtual Library for Freight Information

The Bureau of Freight Statistics (BFS) at Transport for New South Wales is developing a virtual library of freight information as a resource for decision makers to leverage available information.

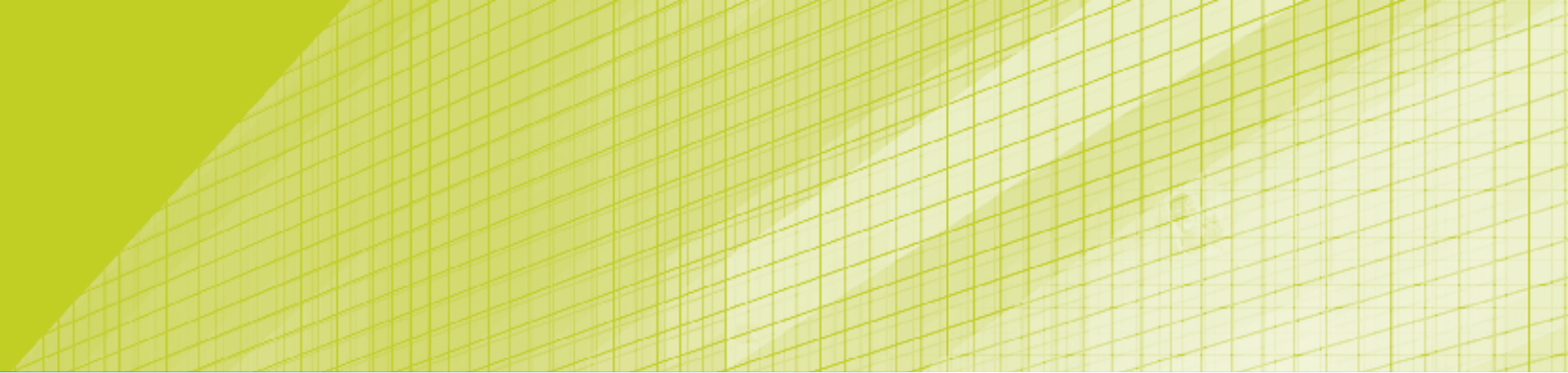
Disparate organisations or centres developing and commissioning freight data collection and analysis mean that it can be difficult to find relevant local and national experience when building an evidence base for freight policies and projects.

The BFS Virtual Library aims for efficient use of existing data with:

- virtual collection: Identifying and cataloguing data holdings within government agencies (NSW, Commonwealth, states, local) and the private sector;
- data acquisition: of secondary data and parameters needed for models and supporting analysis;
- information storage: as a single source for relevant reports and documents (or their location); and
- map repository: network and thematic maps for use in investigation and reporting.

Practical first steps

- The Commonwealth Department of Infrastructure and Transport, through the Bureau of Infrastructure, Transport and Regional Economics will:
 - By December 2014, produce nationally consistent freight data, including container based freight, to inform freight planning (including origin-destination data for road freight).
 - By December 2013, commence publishing freight data in the form of a series of short publications, bringing together information on the freight flows of each commodity, including a freight flow map.



Issue 6: Building community support

A place for freight in the future cannot be assured without due consideration of the community views on how freight movement affects them. Building an efficient national land freight system requires more than a partnership between governments and industry. There is a need for wider community understanding and acceptance of how freight is critical to a functioning economy and of reforms and investments that allow freight to grow and operate productively.

A challenge for both governments and industry is to make the importance of freight movement more visible to the community, while also mitigating and managing the negative effects associated with such movement.

Typically, the community engages with freight and its planning in two ways:

- when governments consult with the community on specific planning issues, and development proposals; or
- when an individual feels the direct impact of freight movement or freight infrastructure.

Challenges

The community has understandable and justifiable concerns about the negative impacts of freight. They include noise pollution, greenhouse gas emissions, health and amenity issues, safety issues including accidents, and disruption through road maintenance and expansion. Understandably these effects give rise to community concern. While statistics demonstrate a significant reduction in heavy vehicle fatalities in recent years, the safety of heavy vehicles remains a concern for communities. Similarly, noise and coal dust have been raised as concerns around rail corridors and will increase as the freight task grows.

The complex relationship between freight and the community is exacerbated by urban encroachment on freight activities, that is instances where increased freight activity in long-standing corridors and facilities interacts and competes with the location of businesses, housing developments and the increased use of passenger vehicles. This can lead to incompatible land uses, as well as a perception that congestion is caused by an increase in heavy vehicle traffic. Without proper management and mitigation, including through open national dialogue, freight needs and quality of life goals can become disconnected in the minds of the community.

Box 17 Case Study: The Road Ahead

The Road Ahead is the only national road safety campaign dealing specifically with the interaction of cars and trucks, and is the centrepiece of the Australian Trucking Association's community activities to improve road safety and educate road users about heavy vehicles and sharing the roads.

The exhibition won the Chartered Institute of Logistics and Transport Australia's 2010 Transport and Logistics Industry Excellence in Community Service Award.

The Road Ahead is a \$1.3 million travelling exhibition of interactive displays to promote road safety. More than 82,000 people have visited the exhibition in its first four years, and regional tours have been conducted across Australia. The ATA's trained presenters have delivered more than 1,400 presentations at 230 schools, road safety days and community events.

The Road Ahead exhibition provides a hands-on, credible and socially engaging method to educate the wider Australian community about road safety. Audiences to date have included school leavers, primary school students, their families and the heavy vehicle industry. These segments of the population represent all road users, but particularly new and future drivers. The Road Ahead exhibition also receives strong media support with profiles in industry magazines, mainstream media, regional news outlets, blogs, discussion forums and websites.

Long term directions

Implementing early, well-resourced engagement processes

Consultation and engagement is one of the key challenges facing all governments in implementing long term strategic urban and infrastructure plans, including for freight. A factual, honest discussion about the freight task is therefore essential. Freight also requires a longer-term focus and conversation, beyond political cycles and site-specific projects.

Managing the community effects of freight, including safety

The effects of freight movement on the community need to be better managed. Communities need assurance that access by more and larger vehicles will not compromise road safety. The community dialogue needs to acknowledge, respect and address community concerns, and manage expectations in an open way by presenting real choices and policy options.

Box 18 Case Study: Northern Territory Ichthys LNG Project

The Ichthys LNG Project is the second-biggest investment in a single project in the history of Australia and will be one of the world's largest LNG facilities with gas and condensate reserves in the Browse Basin expected to last around 40 years. The Project, located in Darwin, is now in the construction phase following a Final Investment Decision by INPEX and its French partner Total in January 2012.

The 5 year (approx.) construction phase represents a significant peak for the transport of freight and other materials across the Territory transport networks and includes the requirement for some 4.4 million tonnes of material to be delivered by road to the LNG facility construction site in Darwin. In addition to this is the expected workforce of up to 4,500 people, of which 3,500 will reside in an accommodation village and need to be transported to and from the site daily.

This transport activity represents a noticeable impact across the road network in the greater Darwin area and the management of community expectations, education and awareness measures and effective community engagement has been a critical element of the Project planning and management to this point in time.

A collaborative working relationship between INPEX, Northern Territory Government and local governments has seen an investment in roads infrastructure by INPEX of approximately \$20 million to date and the development of a comprehensive Transport Management Plan based on the Principles to:

- Preserve public road safety
- Minimise public inconvenience
- Manage flow of transport and use alternatives where practicable
- Maintain the function of the public road network and improve where necessary

Balance these measures against the need to maintain the Ichthys Project on schedule and budget through safe and timely delivery of people and materials.

Box 19 Case Study: Addressing Rail Noise

By 2031, freight volumes are expected to double from 2011 levels. Rail will play an integral role and targets have been set to double the proportion of container movements through ports by rail by 2020 (NSW 2021, 'Enhance rail Freight Movement'). The Draft NSW Freight and Ports Strategy has identified that more rail infrastructure, and more effective use of existing infrastructure will be required to support the projected growth in the rail task, and to meet the targets and objectives of the NSW Government. Government must also balance freight needs with those of the broader community and the environment.

Transport for NSW is leading the development of a rail noise management strategy in conjunction with other government stakeholders including the NSW Environmental Protection Agency, Department of Health, Department of Planning and Infrastructure and RailCorp as well as private sector freight operators. Key to this strategy was the endorsement of the Strategic Noise Action Plan in February 2013.

The Strategic Noise Action Plan has three areas of focus:

1. reducing noise at source;
2. minimising the impact of increasing rail noise through the implementation of development controls for land adjacent to new and existing rail corridors and facilities; and
3. mitigating the impact of rail noise on affected residents and other sensitive land uses.

The Action Plan will be a significant benefit to customers who live near freight rail corridors across NSW, with over 60 individual projects to help reduce existing freight rail noise and ensure that noise from future rail developments is minimised. The Action Plan has a focus on reducing rail noise at its source including using innovative technology to tackle 'wheel squeal' as well as working with the rail industry on research and development into making trains quieter. The plan draws together and builds on research that has been underway for a number of years under the Rail Co-operative Research Centre program.

Other projects that will benefit the community include, aligning and consolidating numerous noise complaint processes to ensure complaints are addressed in a timely manner, and the formation of a freight Rail Noise Abatement Program, that will assess and deliver noise abatement treatments to eligible properties.

The program has a preliminary timeframe to 2014–2015 financial year, however some projects and programs have a long term range of 10–20 years (for the Rail Noise Abatement Program). Key projects for 2013–14 include:

- rolling out lubrication systems to combat curve squeal;
- development of test procedures for locomotive noise;
- development of co-operative projects with freight operators focusing on low noise rolling stock design;
- rolling out a noise abatement program for residents acutely impacted by rail noise; and
- development of complaint management systems.

Box 20 Case Study: South Australian Freight Council's Green Freight Initiative

Green Freight is intended to inform the transport modal debate as it relates to the environment; to help inform Government regulation of the environmental performance of freight transport; to highlight initiatives and actions that industry has taken and could consider in their future planning; and also to demonstrate to industry that there can be business benefits to reducing the ecological footprint of the industry, provide a competitive edge to attract customers, and reduce costs. One of the objectives of the project is to inform the community regarding the environmental performance of various freight transport modes, which can assist the industry to increase efficiency, productivity and safety outcomes.

Green Freight will provide an evidence base that all governments, industry, and the community can use. Most importantly, the document will highlight ways that the transport and logistics industry can improve its emissions performance while remaining competitive in their markets.

Box 21 Fact sheet: Heavy Vehicle Safety

Over the last 60 years, Australia has significantly reduced road crash fatalities with the nation's annual road fatality rate declining from 22.2 to 6.1 deaths per 100,000 people. There are several factors that influence freight safety, including driver ability and alertness, vehicle engineering standards and vehicle condition, road and weather conditions.

The larger the vehicle, the fewer vehicles are required to move a given amount of freight. For example, a B-triple consists of a prime mover and three trailers linked by turntables. To deliver a thousand tonnes of freight, you would need 770 of the light trucks you can drive with a car licence, 42 semitrailers, or 20 B-triples.

The introduction of B-doubles from the early 1990s has coincided with a significant increase in heavy vehicle safety. The 2013 Major Accident Investigation Report by the National Truck Accident Research Centre again found that B-Doubles continue to be the safest alternative, moving 45 per cent of the workload in loaded tonne kilometres and representing less than 24 per cent of the large truck crash incidents.

Governments would expect a further significant safety increase if there was to be the widespread introduction of B-triples and similar high productivity vehicles between the Eastern-seaboard capitals. However widely-held community concern about the safety of larger combination vehicles remains an ongoing issue and will need to be addressed by governments and industry.

Practical first steps

- By December 2014, industry will work with all tiers of government in a process to enhance community engagement on the value and importance of the freight task—including an awareness-raising campaign about the role of freight in the national economy and individuals' quality of life aspirations.



4 Implementation and reporting

This Strategy outlines practical first steps for governments and industry to deliver the desired objectives. It is important that it is supported by immediate action, to deliver tangible results for Australian freight.

The Workplan at **Appendix A** contains a number of short to medium term deliverables under the six issues for action.

The Strategy also recognises the importance of tracking and reporting progress. Governments will report annually to SCOTI, with reports to be made public on the SCOTI website, with a major review and update within three years.

In consultations on the development of the Strategy, a number of stakeholders suggested new institutional arrangements, including a single body with planning, funding and regulatory responsibilities for progressing the Freight Strategy and the National Ports Strategy. Governments consider it would be premature to establish such a body at this point, but will consider further initiatives in light of progress towards the objectives outlined in this Strategy.

Appendix A: Workplan

Key Activities	Lead responsibility	Timing
Planning for the future		
1.1 The Commonwealth, States and Territories will map the key freight routes in Australia that connect the nationally significant places for freight.	Jurisdictions	May 2014
1.2 States and Territories will identify any funding, regulatory or corridor protection measures required for these key freight routes, including consideration of private sector funding options.	States and Territories	December 2014
1.3 States and Territories will put in place long term freight plans consistent with the objectives of the Freight Strategy, including mechanisms for protecting freight corridors and precincts for the growing freight task.	States and Territories	December 2014
Investing in the right infrastructure		
2.1 The Commonwealth will ensure that its Nation Building 2 Program brings appropriate attention to freight through the inclusion of 'Moving Freight' as one of the four core themes of the Nation Building 2 Program to be implemented by the Commonwealth from July 2014.	Commonwealth DIT	July 2014
2.2 Government investments in freight infrastructure will be made in line with the priorities identified in the long term freight plans developed, outlined in 1.3.	Jurisdictions	Ongoing
2.3 A review of the National Guidelines for Transport System Management will be undertaken to ensure that a fully integrated approach is taken to project identification and evaluation, with freight being fully taken into account through the use of appropriate tools and approaches.	Austrroads and jurisdictions	June 2014

(continued)

Appendix A: Workplan (continued)

Key Activities	Lead responsibility	Timing
<p>2.4 On an ongoing basis, governments will progress demonstration projects and initiatives to address specific infrastructure impediments, including:</p> <ul style="list-style-type: none"> • trialling the use of high productivity vehicles on the Hume Highway; • increasing high productivity vehicle access to the Chullora rail terminal; and • replacing the Kapooka Rail Bridge along the Olympic Highway in New South Wales. 	Jurisdictions	ongoing
<p>2.5 The Commonwealth Government's existing funding programs allow for the funding of first and last mile projects with State or Territory government and industry contributions to improve access by high productivity vehicles, and this priority will continue with the implementation of the Nation Building 2 Program from 1 July 2014.</p>	Commonwealth	ongoing
Better access, investment and charging for heavy vehicles		
<p>3.1 Commonwealth, state, territory and local governments will improve freight access and outcomes as a key deliverable under the Heavy Vehicle Charging and Investment initiative, and consult closely with industry and other stakeholders in consideration of reforms under the initiative</p>	All governments	ongoing
<p>3.2 A national trial of the Performance Based Standards (PBS) Route Assessment Tool will be undertaken, to assist local governments to make informed decisions on increased high productivity vehicles access to their areas.</p>	<p>Australian Local Government Association, ARRB Group Ltd, the National Heavy Vehicle Regulator and other state-based local government associations</p>	current

(continued)

Appendix A: Workplan (continued)

Key Activities	Lead responsibility	Timing
3.3 The Queensland Government will be assessing routes to potentially expand access for high productivity vehicles. These include routes around Lytton and Hemmant (Brisbane), Cunningham Highway from Warwick to the Ipswich Motorway, and Barwon Highway to Francis Street/Russell Street, Goondiwindi.	Queensland Government	June 2013
Better regulation		
4.1 By December 2016, the Productivity Commission will review the overall economic impact of the national transport regulation reforms (a COAG agreed commitment in the National Partnership Agreement for a <i>Seamless National Economy</i>).	Productivity Commission	December 2016
Understanding the freight task		
5.1 The Commonwealth Department of Infrastructure and Transport, through the Bureau of Infrastructure, Transport and Regional Economics will: <ul style="list-style-type: none"> a) By December 2014, produce nationally consistent freight data, including container based freight, to inform freight planning (including origin-destination data for road freight). b) By December 2013, commence publishing freight data in the form of a series of short publications, bringing together information on the freight flows of each commodity, including a freight flow map. 	BITRE	December 2014
Building community support		
6.1 By December 2014, industry will work with all tiers of government in a process to enhance community engagement on the value and importance of the freight task—including an awareness-raising campaign about the role of freight in the national economy and individuals' quality of life aspirations.	Industry and governments	December 2014

