

# A survey of Kent and Medway Businesses on the impact of Operation Brock



Photo taken from the Independent Newspaper of Operation Brock in 2022

## Foreword:

Kent and Medway are prone to severe traffic congestion in the event of cross-channel disruption. This is a consequence of our position as the leading freight gateway between the UK and EU for Roll-on Roll-off (Ro Ro) traffic. In colloquial terms, when the short strait ports of Dover and Eurotunnel sneeze, Kent and Medway catch a cold.

Operation Brock is the current traffic management system in Kent that seeks to keep vehicles moving when cross-channel incidents occur at the UK border. The Kent Resilience Forum oversees its deployment.

Businesses across Kent and Medway have raised their concerns with the Kent and Medway Economic Partnership (KMEP) about the impact that Operation Brock, and other accompanying traffic initiatives, are having on their ability to trade effectively. The A2 Dover Access Scheme and the Brenley Corner Scheme (being considered for potential inclusion in RIS3 by National Highways) are frequently mentioned alongside Operation Brock as barriers to sustaining and growing the economy.

There is a feeling amongst the business community that 'enough is enough', and that it is unacceptable to continue using Operation Brock as the main management solution to cross-channel disruption; a permanent set of solutions is needed, which include off-road solutions, as well as intelligent border controls.

KMEP therefore commissioned KCC to conduct a survey of the business community to assess the scale of the impact of Operation Brock on economic growth. This survey took place between 21<sup>st</sup> and 31<sup>st</sup> July 2022. Chapter Three of this report provides an overview of the survey results. Chapter One provides the context and background to Operation Brock and its deployment. Chapter Two provides a few national and local newspaper screenshots to show the reputational damage suffered by Kent and Medway as an investment location due to Operation Brock and the associated traffic congestion.

KMEP wishes to work with all partners, including Ministers, the DfT, National Highways, Kent Resilience Forum, and the Ports, on proactively and constructively coming up with a solution and implementation plan.

Thank you for your consideration of this important issue.



**Liz Gibney**

Chairman of the Kent and Medway Economic Partnership  
Chairman of the Kent and Medway Business Advisory Board

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# Chapter One:

## Context and background to Operation Brock and its deployment



Photo taken from Kent Live of Operation Stack in 2015, the precursor of Brock.

# What is Operation Brock?

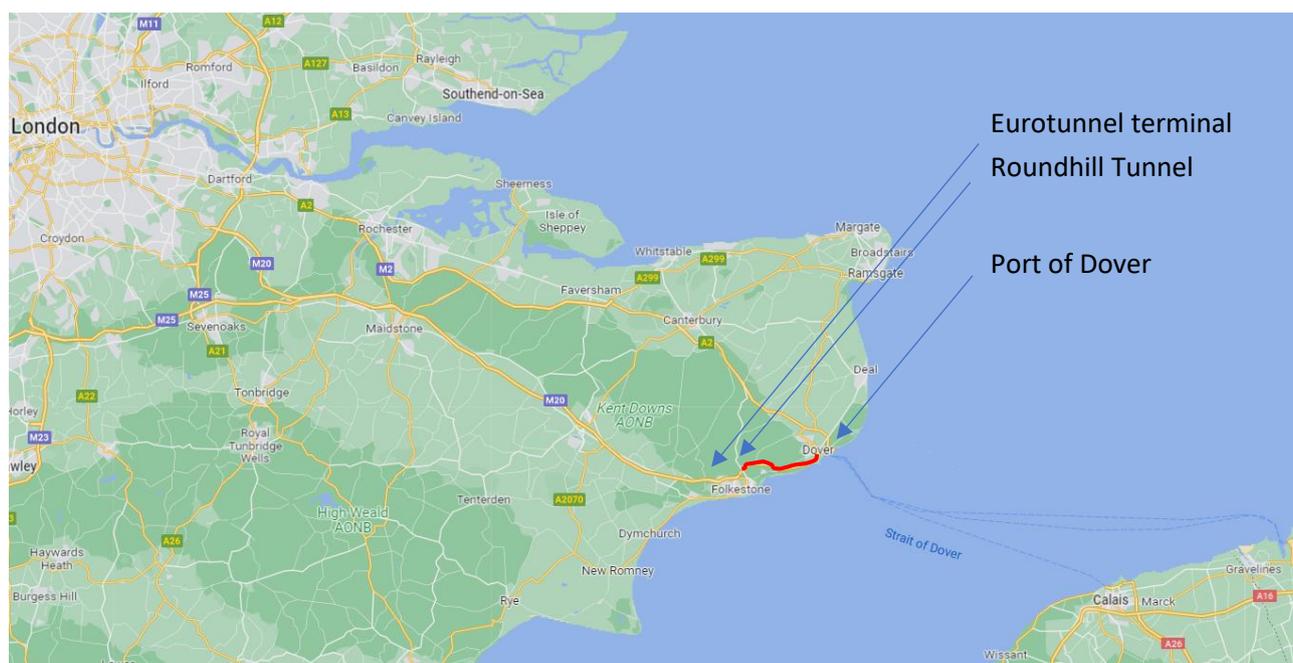
Operation Brock is the current traffic management system that seeks to keep vehicles moving in Kent and Medway when cross-channel incidents occur.

There are different phases and configurations of Operation Brock, each trying to cope with more traffic than the last.

## Phase A – Deployment of Dover TAP and TAP256

The initial phase is to activate the Dover Traffic Assessment Project ([Dover TAP](#)) once heavy goods vehicles (HGVs) start queuing for the Port of Dover.

During Dover TAP, all HGVs using the Port must use the A20 from Folkestone, queuing in the left-hand lane from the Roundhill Tunnel all the way to the Port. The road will be reduced to 40 mph and all other traffic will use the right-hand lane. HGVs are released in intervals at Western Heights Roundabout to the west of Dover, in order to avoid clogging up the only main road through the town.



The red line on this map shows the affected stretch of the A20 when Dover TAP is in force. The length of road affected is 7.3 miles.

A second TAP may also be deployed on the A256, when HGVs driving from northeast Kent will be held in the left-hand lane on the A256. The HGVs are controlled by a set of traffic lights north of Whitfield. When signalled green, a select number of lorries will then pass onto the A2, and down Jubilee Way to the Port of Dover's entrance.



The red line on this map shows the affected stretches of road when Dover TAP and TAP256 are in force.  
The length of road affected is circa 13 miles.

## Phase B – Deployment of Operation Brock

Operation Brock may be used for delays at the Channel Tunnel, and/or the Port of Dover. If delays at the Channel Tunnel mean the HGV queue backs out onto the M20, and/or when Dover TAP reaches capacity, Operation Brock may be deployed. How eastbound traffic is managed under Operation Brock depends on vehicle type and its end destination.

Traffic is separated into two categories prior to junction 8 of the M20, near Maidstone:

- HGVs heading to the EU via the Port of Dover or the Channel Tunnel.
- All local freight vehicles, seeking to deliver goods within Kent and Medway, and all car traffic (irrespective of destination).

### For HGVs travelling to the EU:

The EU-bound HGVs are told to queue between junctions 8 and 9 on the eastbound carriageway of the M20 in two lanes (the hard shoulder and third lane) with the other two lanes reserved for emergency vehicles and maintenance vehicles. This is marked out with cones and traffic is subjected to a maximum 30-mph speed limit (although the HGVs are often stationary awaiting capacity to become available at the Ports, or on Dover TAP).

When Operation Brock is active, ALL HGVs heading to the EU are legally required to use Brock and only use the M20 to head to the Channel Tunnel and the Port of Dover. To help manage compliance, DVSA have a number of locations where non-compliant HGVs can be pulled over and a fixed penalty notice may be issued. These locations are at Potters Corner on the A20 west of Ashford, at the front of the Brock queue, and on the A2 at Boughton, adjacent to Brenley Corner, west of Canterbury. If the number of non-compliant HGVs use the A2 to Dover causing congestion in and around the town, traffic control, enforced by Kent Police, is implemented at Brenley Corner, with non-compliant HGVs redirected back along the M2 to join the back of Brock. Whilst this reduces the impact on Dover town, this traffic management causes queues on the M2 and in and around Faversham.

### For all local freight vehicles and all cars:

The eastbound carriageway of the M20 is closed between junctions 8 and 9 for these vehicles.

To permit some movement, a concrete contraflow barrier is deployed on the westbound carriageway of the M20 between junctions 9 and 8. The contraflow allows two-lanes of traffic to travel eastbound and two-lanes of traffic to travel westbound. Both directions of motorway traffic are restricted to 50-mph, and there is no hard shoulder on either side of the contraflow in the event of a breakdown.

Dover TAP may remain in force as well.

In our survey, we asked businesses about their views on Operation Brock in 'default operation' and in an 'overcapacity operation'. Please note that this phase B was used to define the 'default operation'.



*The red lines on this map shows the affected stretches of the M20 and A20 when Phase B of Operation Brock and TAP are in force. The length of road affected is circa 27 miles*

## Phase C – Deployment of Operation Brock Charlie

Ordinarily, when Operation Brock is in force, the westbound carriageway of the M20 between Junctions 8 and 9 has a concrete contraflow barrier to enable two-way traffic flow. However, Operation Brock Charlie is when lane three of the westbound carriageway is used to hold an additional 1000 HGVs queuing to reach the Ports.

When Operation Brock Charlie is in place, the contraflow is not possible.

### For HGVs travelling to the EU:

EU-bound HGVs are told to queue in three lanes (the hard shoulder and third lane of the eastbound carriageway, and the third lane of the westbound carriageway) between junctions 8-9. The HGVs also queue through Dover TAP.

### For all local freight vehicles and all cars:

All local freight vehicles and all cars are diverted off the M20 at Junction 8 and encouraged to use the A20 and re-join at junction 9.

The map below indicates how much of Kent and Medway's road network may be impacted under Operation Brock Charlie.



*The red lines on this map shows the affected stretches of road which are closed under Brock Charlie. The length of roads used for queuing EU lorries (i.e. closed eastbound or used for TAP) is circa 27 miles. The blue line shows the A20 diversion to junction 9. This is single carriageway for much of its length.*

## Phase D – Deployment of Operation Brock Zero

In extreme situations, when Phase C has reached capacity, Operation Brock Zero may be activated.

Operation Brock Zero closes the M20 coastbound between junctions 10A and 11; Dover TAP, and the earlier closure of the M20 coastbound between junctions 8 and 9 for all non-EU traffic remains in place. All on-slips from Junction 8 to Junction 11 are closed in order to keep the area sterile and not allow HGVs to queue jump.

### For HGVs travelling to the EU:

EU-bound HGVs are told to queue in two lanes (the hard shoulder and third lane) between junctions 8-9 and 10A-11 of the M20.

### For all local freight vehicles and all cars:

All other traffic is diverted onto the A20 at Junction 8, to continue around the east and south of Ashford, then along the A20 to re-join the M20 at Junction 11.

While the A20 is the official diversion, local businesses and residents may choose to select their own alternative routes to their destinations in East Kent, particularly if the A20 is congested. A popular route chosen by drivers is to use the A249, M2, and A2 to reach East Kent.

In our survey, we asked businesses about their views on Operation Brock in ‘default operation’ and in an ‘overcapacity operation’. Please note that this phase D was used to define the ‘overcapacity operation’.

The map below indicates how much of Kent and Medway’s road network may be impacted under Operation Brock Zero. If one includes the closed sections, the TAP sections used for queuing, and the diversion routes often used that experience congestion, up to 108 miles of the road network is affected. This is roughly equivalent to the distance between London and Birmingham.



*The red lines on this map shows the affected stretches of road which are closed under Brock Zero. The length of roads used for queuing EU lorries (i.e. closed eastbound or used for TAP) is 34.5 miles*  
*The blue line shows the A20 and B2229 diversion This is single carriageway for much of its length.*  
*The brown line shows a diversion that cars may choose to take to access the Port of Dover when Operation Brock Charlie is in force. It is not an official diversion route.*  
*The length of roads affected by congestion due to diversions could be 108 miles*

# The frequency and cause of Operation Brock's deployment

Traffic disruption in Kent and Medway because of cross-channel incidents is not a recent development. It existed before Brexit, however, the additional processing time required for new post-Brexit border checks is likely to see the traffic congestion worsen in future years if action is not taken.

Operation Stack, the precursor to Operation Brock, was first deployed in 1988. The Government announced Operation Brock in November 2017 as an alternative to Operation Stack. It was first implemented in March 2019 and introduced ahead of a possible no-deal Brexit.

This table shows some of the reasons for and the duration of Operation Stack and Operation Brock in years when significant disruption occurred:

Year	Days	Reasons
2000	25	Industrial action and demonstrations in Calais (port, ferries and Eurotunnel) Congestion at Port of Dover and Eurotunnel Technical problems at Eurotunnel Adverse weather
2005	27	Adverse weather Industrial action and demonstrations in Calais (port, ferries and Eurotunnel) Berth damage at Port of Calais Technical problems at Eurotunnel
2008	39	Adverse weather Industrial action and demonstrations in Calais (port and ferries) Fire at Eurotunnel Congestion at Port of Dover and Eurotunnel
2015	31	Fire at Eurotunnel Industrial action and demonstrations in Calais (port, ferries and Eurotunnel) Migrant action in Calais (Eurotunnel)
2019	37	Installation of contraflow barrier in preparation for end of EU transition period

Year	Days	Reasons
2020	48	French border closed as a result of Coronavirus
2021	69	French border closed as a result of Coronavirus The withdrawal of the UK from the EU comes into effect, as the transition period ended on 31 December 2020.
2022	106 (to end of July 2022)	Removal of 4 P&O Ferries from service over Easter Holiday and Whitsun Half Term Summer getaway (severe congestion 21-23 July)

Source: <https://publications.parliament.uk/pa/cm201617/cmselect/cmtrans/65/6505.htm> & KCC's Highway Dept

This table shows that **the use of Operation Brock has trebled this year** compared to the pre-Brexit period.

The frequency of Operation Brock being deployed is **expected to increase further in 2023**, as a result of new border controls being introduced. The most significant of these is expected to be the EU Entry and Exit System.

## EU Entry and Exit (EES) System

The European Council announced in 2017 that a new EU Entry and Exit (EES) System will be adopted across the EU. It has two objectives:

- Making borders smart by automating checks and controls on legitimate visitors while strengthening methods for combating irregular migration.
- Creating a central register of cross-border movements.

EES will replace the manual stamping of passports. The data stored in the new EES register for five years will mainly consists of:

- Name of visitor
- Passport number of visitor
- Four fingerprints per visitor
- and photos of the visitor.

The implementation date for the EES system has been postponed, but it is currently scheduled to enter into operation in **May 2023** according to the European Commission.

## The impact of the EU Entry and Exit (EES) System

The Port of Dover and Eurotunnel have advised KMEP that they estimate that the EES system will significantly increase the processing time for each vehicle and passenger.

It is anticipated by both Ports that the introduction of EES will add a processing time of 2 minutes per passenger plus 2 minutes per car. Hence, an additional 10 minutes of processing will be required for a family of four travelling to France in their car. Passengers and drivers will be required to leave their vehicles and walk through the border facility to have their fingerprints scanned/checked and photos taken.

The next section of this report looks at passenger and freight statistics. However, using this metric of a 2-minute delay per person/vehicle, if the Port of Dover had introduced EES for its passenger and tourist cars alone in 2019, an extra 428,808 hours would have been required to process passengers in that year. There are only 525,600 hours in a year.

The extra processing time will mean vehicles will be stationary at the Ports for much longer periods, this will mean that the Ports' capacity will rapidly be reached, and Operation Brock will need to be implemented more frequently. KMEP is concerned that Operation Brock may need to stay in permanent operation, effectively turning the M20 into a lorry park, and blockading the people of Kent and Medway.

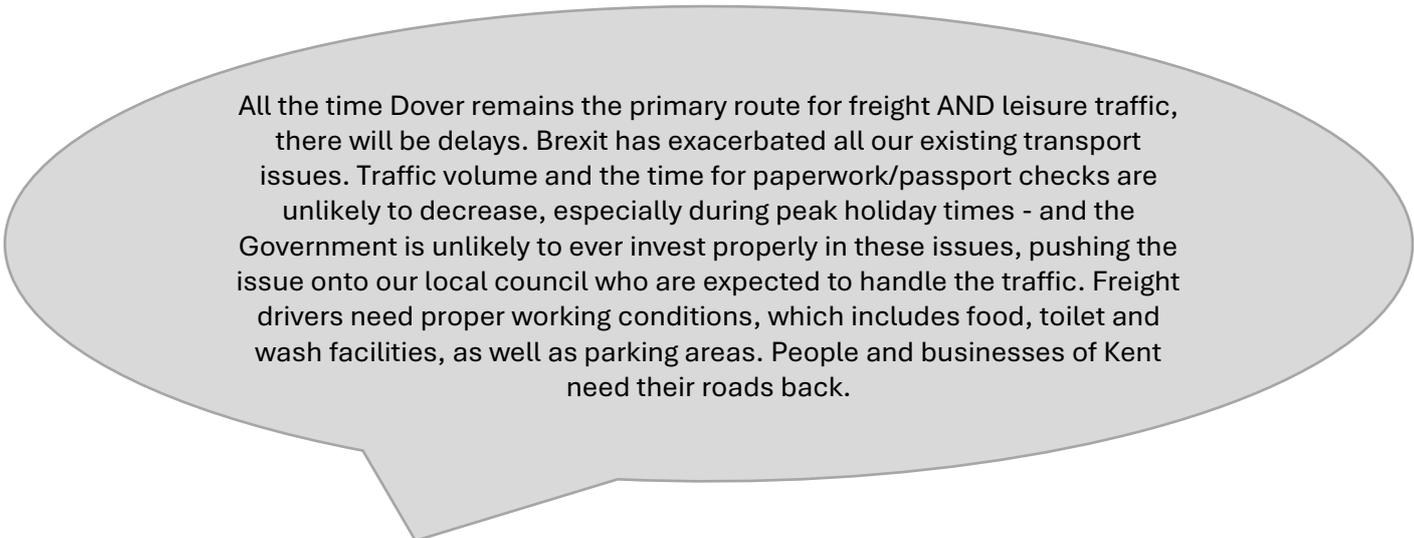
### Other border control checks

In November 2023, the European Travel Information and Authorization System (ETIAS) will be implemented. It is an electronic system that tracks visitors from countries who do not need a visa to enter the Schengen Zone. In a way, it resembles the U.S Electronic System for Travel Authorization (ESTA), which serves a similar purpose.

It is hoped that ETIAS will not cause a dramatic increase in processing time at the Ports, as all travellers should apply online before travel, and the ETIAS certificates will be valid for 3 years. However, it will be another document that will need to be checked either manually or automatically at the border.

In addition to the EES system and EITAS, there are further UK border controls required to ensure that the post-Brexit customs and excise checks have been undertaken (for example at the Sevington inland border facility). These additional checks increase processing time at the ports, and thus increase the likelihood of Operation Brock's deployment.

Some of the Kent and Medway businesses in their survey responses shared their views over how these processing checks will impact them. Here is one of the comments:



All the time Dover remains the primary route for freight AND leisure traffic, there will be delays. Brexit has exacerbated all our existing transport issues. Traffic volume and the time for paperwork/passport checks are unlikely to decrease, especially during peak holiday times - and the Government is unlikely to ever invest properly in these issues, pushing the issue onto our local council who are expected to handle the traffic. Freight drivers need proper working conditions, which includes food, toilet and wash facilities, as well as parking areas. People and businesses of Kent need their roads back.

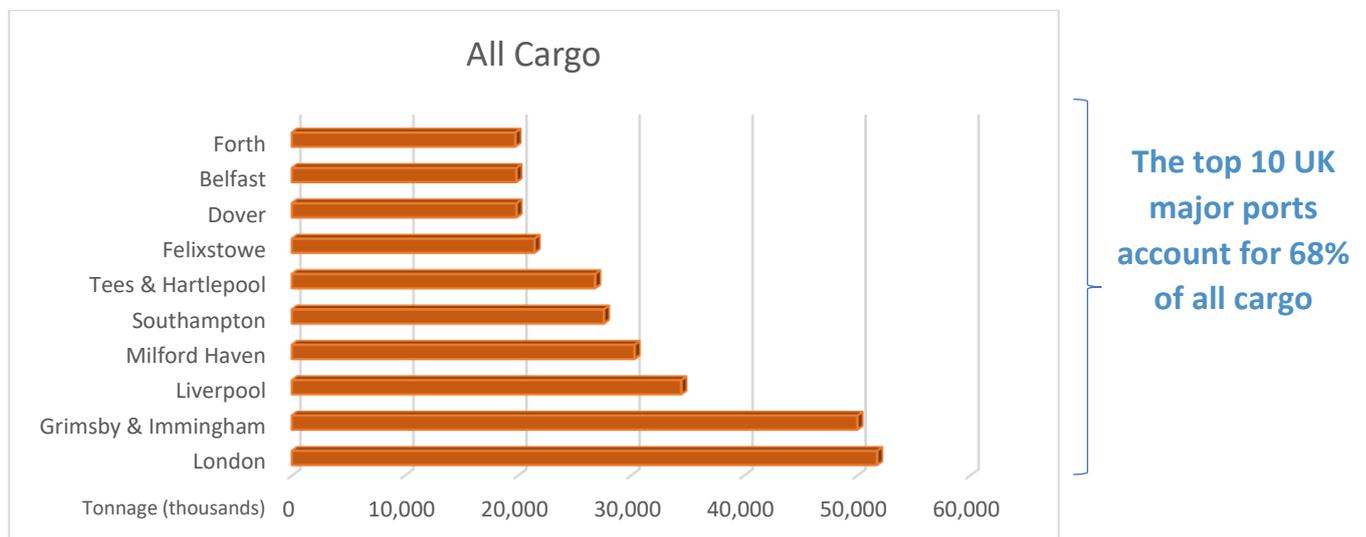
# The demand for travel through the short straits

Kent and Medway are the gateway to continental Europe. Since 1217, Dover and its Castle have been known as the **'Key to England'**. Whilst the economic dynamics may shift with time, the geographical benefit of trading via Dover has remained constant.

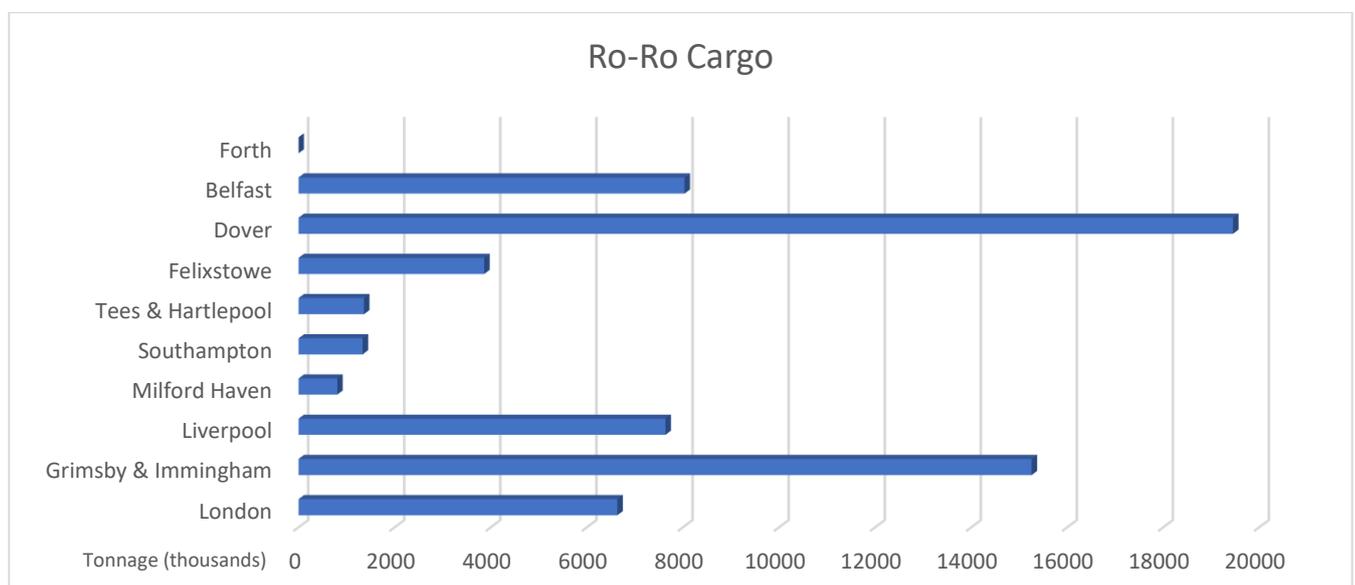
The route from Dover to Calais is the shortest sea strait between the UK and the EU. It is approximately 27 nautical miles or 31 standard miles from the Dover ferry port to the Calais ferry port.

Traders throughout the centuries have taken advantage of this short strait. The chart below shows the tonnage of goods transported by the UK's ten busiest ports in 2021. Dover is the eighth most used UK port in 2021 for all cargo by tonnage.

## UK Port Statistics



However, when you exclude container ships and only consider Roll-on Roll-off cargo, **Dover is the UK's busiest port in 2021**, as the chart below indicates:



Source for both tables: <https://www.gov.uk/government/statistical-data-sets/port-and-domestic-waterborne-freight-statistics-port#all-port-traffic-totals-major-and-minor>

Turning to the Port of Dover’s annual statistics, it is possible to see the extent of the impact of the Coronavirus pandemic and custom changes due to Brexit on trade via Dover:

## Port of Dover Statistics

Year	Passengers	Tourist Cars	Coaches	Road Haulage Vehicles
2021	3,102,599	336	4,476	2,149,595
2020	4,348,478	608,767	11,777	2,268,525
2019	10,863,262	2,000,966	73,856	2,397,270
2018	11,783,869	2,249,129	78,128	2,497,804
2017	11,723,411	2,180,611	79,638	2,601,162
2016	12,059,538	2,179,331	87,023	2,591,286
2015	13,008,400	2,335,531	96,592	2,539,918
2014	13,295,492	2,456,817	96,576	2,421,537
2013	12,753,343	2,471,193	90,478	2,206,728
2012	11,921,671	2,400,471	84,246	1,952,138
2011	12,764,699	2,653,127	84,938	2,069,945

} Drop-off in passenger and tourist cars due to travel restrictions imposed during COVID-19 pandemic

Source: <https://www.doverport.co.uk/about/performance/>

As the tables above and below show, the number of Road Haulage Vehicles and Trucks that use the Port of Dover and Eurotunnel has remained relatively consistent during the Coronavirus pandemic and post-Brexit. However, the events of 2020 and 2021 and associated travel restrictions significantly depressed the number of tourists using these Ports.

This depression in tourist numbers is expected to be temporary. In 2022, we are already seeing a very significant uplift in the number of tourists wishing to travel abroad via both Ports now travel restrictions have eased.

The increasing tourist demand and vehicular traffic in 2022 mean that the pressure put on Kent and Medway’s road network in 2020 and 2021 as a result of Operation Brock is expected to worsen. Operation Brock is expected to be more frequently deployed in this and future years.

## Le Shuttle Statistics

The table below shows Le Shuttle’s annual statistics, as provided by Eurotunnel:

Year	Passenger Vehicles	Trucks
2021	960,205	1,361,529
2020	1,413,433	1,451,556
2019	2,652,059	1,595,241
2018	2,711,714	1,693,462
2017	2,646,476	1,637,280
2016	2,663,865	1,641,638
2015	2,614,972	1,483,741

} Drop-off in passenger vehicles due to travel restrictions imposed during COVID-19 pandemic

Source: <https://press.getlinkgroup.com/traffic.html>

These statistics show Operation Brock is a programme of **national significance to the UK economy**.

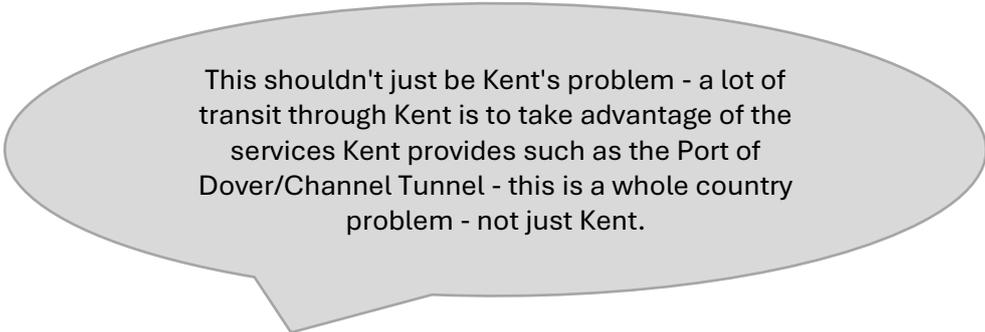
According to Nomisweb Business Count data, there were 64,700 enterprises based in Kent in 2021, and not all of these businesses export and import goods to the EU. Yet these port statistics show over 3.5 million trucks and road haulage vehicles used the Kent Ports in 2021.

It can therefore be surmised that many of the freight and logistic businesses that use the Ports are based outside of Kent and Medway. This assumption is backed up by the Lower Thames Crossing modelling data of National Highways. Many HGVs travel from the North and the Midlands, via the Dartford Crossing, and then use the M2 or M20 to reach the Kent Ports, and then the EU.

The disruption to Kent's motorways thus affects businesses across the entirety of Great Britain, which send Ro-Ro freight to the EU. It is not only Kent businesses that suffer lost productivity and lost staff hours as drivers sit in queues.

The survey in this report only asked Kent and Medway businesses for their assessment of the impact of Operation Brock, however the survey could be repeated at a larger scale across the nation if this would be helpful to the Government.

As one Kent and Medway business said in their survey response:



This shouldn't just be Kent's problem - a lot of transit through Kent is to take advantage of the services Kent provides such as the Port of Dover/Channel Tunnel - this is a whole country problem - not just Kent.

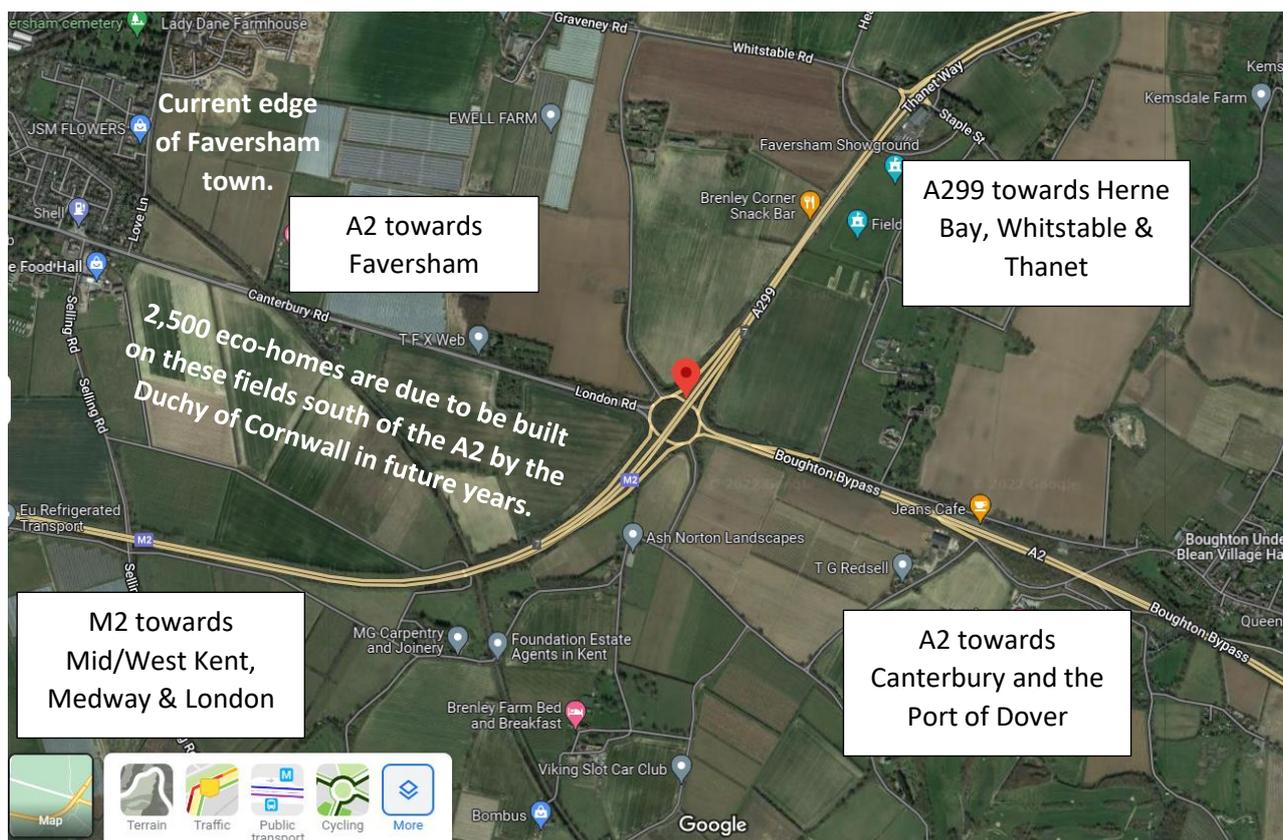
# What other traffic initiatives have businesses referred to in their survey response?

Chapter 3 of this report contains the survey responses from the Kent and Medway Businesses. Although the survey asked how Operation Brock impacted their business; the free text responses revealed growing frustration with other pinch-points on Kent's road network. These pinch-points often have insufficient capacity to deal with the number of vehicles traversing through them in peak periods and when these roads are used as a diversion route when Operation Brock is in effect.

The most significant pinch-points are described below:

## Brenley Corner

Brenley Corner is a traffic-light controlled roundabout by the Junction 7 slip off on the M2. It is prone to significant congestion, particularly at peak times.



Google satellite image of the Brenley Corner roundabout

As the satellite image shows the two-lane M2 terminates at Junction 7. Traffic wishing to continue on the A2 towards Dover must exist on the slip road, navigate the roundabout which connects with the local traffic network serving the businesses and residents of Faversham.

During Operation Brock, the Police are deployed at the Brenley Corner roundabout to ensure EU-bound HGVs are not inappropriately using the A2 to access the Port of Dover and avoid the queues on the M20.

The photo below shows the capacity on Brenley Corner roundabout. The police close off the left-lane to pull over each HGV to check on its destination, **reducing the roundabout's capacity to one lane only**. This limited capacity means cars form lengthy queues on the M2 eastbound often a few miles long (as they queue to access the slip road and roundabout).



The Brenley Corner Roundabout

Also, when there is disruption at the Brenley Corner roundabout, it is exceedingly difficult for the businesses and residents of Faversham to access this junction.

Whilst three arms of the roundabout are traffic light controlled (from the M2, A299, and A2 westbound), there are no traffic lights for the arm of the roundabout from Faversham. In practice, this means that during congestion, the roundabout is jammed by traffic coming from the M2 and wishing to leave at the A2 Canterbury junction. Without traffic lights and yellow hatch markings, Faversham residents struggle to enter the roundabout, and often become stuck waiting on the A2 (London Road) with businesses saying the delays last often an hour or more.

Brenley Corner is currently one of thirty-two schemes nationwide being considered for inclusion in Road Investment Strategy 3 (RIS3). **KMEP and its business network would strongly urge the Government and DfT to commit to the Brenley Corner's upgrade being implemented.**

Here are a handful of free text comments made by Kent and Medway businesses in the survey specifically about Brenley Corner:

Faversham becomes impossible to leave due to the ludicrous lane restrictions on the Brenley Corner roundabout. Journeys are made significantly longer; it has taken an hour to make the ten-minute trip to Canterbury at times.

Some clients have decided not to use my services if their drive involves the A2 Canterbury turn-off near Faversham (i.e., Brenley Corner).

Delays on the A2 and M7 at J7 Brenley Corner are excessive and are causing unnecessary delays

I trade between Faversham and Canterbury and all the journeys associated with my business: suppliers, customers, deliveries, staff are all adversely affected by the tailbacks at the Brenley Corner.

Roundhill Tunnel/Brenley Corner restrictions are the most disruptive.

We're based on the A2 with a lot of our traffic going through Brenley Corner. This delayed some of our operations quite a lot.

Massive congestion in Faversham due to Brock/Brenley Corner. Took 2 hours to get from one end of the town to the other. Even local tourists cancelled bookings. Staff members could not get to work.

When J7 M2 is down to one lane on the roundabout, traffic queues back along A2 as far as Ospringe (2.5 miles away).

There is vastly increased cost in Haulage from Italy to the UK because of Operation Brock holding lorries for extended periods that have to be paid for. Access sites in and around Dover and Folkestone and Canterbury is taking my engineers a lot longer, because of BROCK and the impact on adjacent roads, and the checks on Brenley Corner causing delays.

The survey has not mentioned the impact of Brock on the M2. I am not at all clear why the Kent Resilience Group think that it is acceptable to strangle flow of traffic at Brenley Corner by reducing a major roundabout to one lane thereby causing many miles of backed-up traffic on the M2. Having been caught in the queue yet again on Friday for well over an hour, I was far from impressed to see just one high-vis jacketed individual turning lorries back on to the M2 to join the back of the M20 queue. Whoever thought that this was a good idea has an intellectual capacity shortfall.

We own a fruit farm 1 mile from Brenley Corner; all traffic is slow with most trying to avoid it, thus going down Graveney Road where our packhouse is.

Brenley Corner constrains travel to East Kent often, and it doesn't only correspond to when Operation Brock is in effect. The University of Kent run an annual 'Kent and Medway Business Summit' in Canterbury, which hundreds of businesses attend. At this year's event in January 22, some of the keynote speakers and attendees to the event were severely delayed, as congestion at Brenley Corner resulted in multi-mile long queues on the M2. The whole conference had a delayed start and was curtailed as a consequence.



In addition to dualling sections of the A2, KMEP requested that Highways England considers upgrading the A260 route from Lydden on the A2 to Hawkinge, which can therefore act as the most easterly rung in the ladder between the M20/A20 and M2/A2.

Here are a handful of free text comments made by Kent and Medway businesses in the survey specifically about the A2:

Kent's investment in infrastructure such roads etc is very poor, and will only get worse the constant house building, bring more traffic onto the already overcrowded road network in Kent. There only has to be one issue on the M20 or M2/A2 for havoc to start, because the M20 and A2/M2 are the main roads in to and out of Kent.

Delays on the A2 are causing unnecessary delays.

The traffic problems caused by Op Brock on the M2/A2 are a problem for commuters going into and from Canterbury.

Our customers do not want to travel to Dover as they believe they are unable to get there.

Operation Brock held up our delivery vans getting to and through Dover and Folkstone, and having to take adverse diversion costing more in fuel and driver time

Our facilities are beyond the eastern extremity of the M20, and most prone to disruption when impacts reach Dover and its surroundings (affecting the A20 continuation from the M20 and A2 as things "backup").  
By way of example our tearoom saw a drop in expected income of circa 60% across the weekend of Friday 22nd - Sunday 24th July 2022.

We need a resilient road network. There are two routes to Dover, one via M20/A20 and one via M2/A2. When the A20 is blocked by Brock or Dover TAP, the A2 needs to stay open so local businesses, residents, and tourists can reach the town. The single carriageway on the A2 doesn't help.

Operation Brock causes heavy traffic on A roads (e.g., A2/A20) - lane closures on M20, lots of time wasted and excessive fuel used.

## Lower Thames Crossing

KMEP emphatically supports the construction of a Lower Thames Crossing.

As the National Highways' website states, the Dartford Crossing's unique position as the only road across the Thames east of London makes it one of the most strategically vital roads in the UK, connecting people to jobs, businesses to customers, and some of the country's biggest ports and distribution hubs.

But it cannot keep up with unprecedented demand. Despite being carefully managed 24/7 the huge number of vehicles that use it make it one of the country's most unreliable roads, causing misery for millions of motorists and acting as a handbrake on the economy. Whenever there is an incident on the Dartford Crossing, it on average takes 3 to 5 hours to clear, and for traffic flow to return to the pre-incident levels. This is an acute barrier to Kent and Medway businesses, particularly those based in West and Mid-Kent.

The proposed Lower Thames Crossing (LTC) will almost double road capacity across the Thames east of London – easing congestion on the Dartford Crossing, improving journeys across the southeast, and creating a reliable new route across the river.

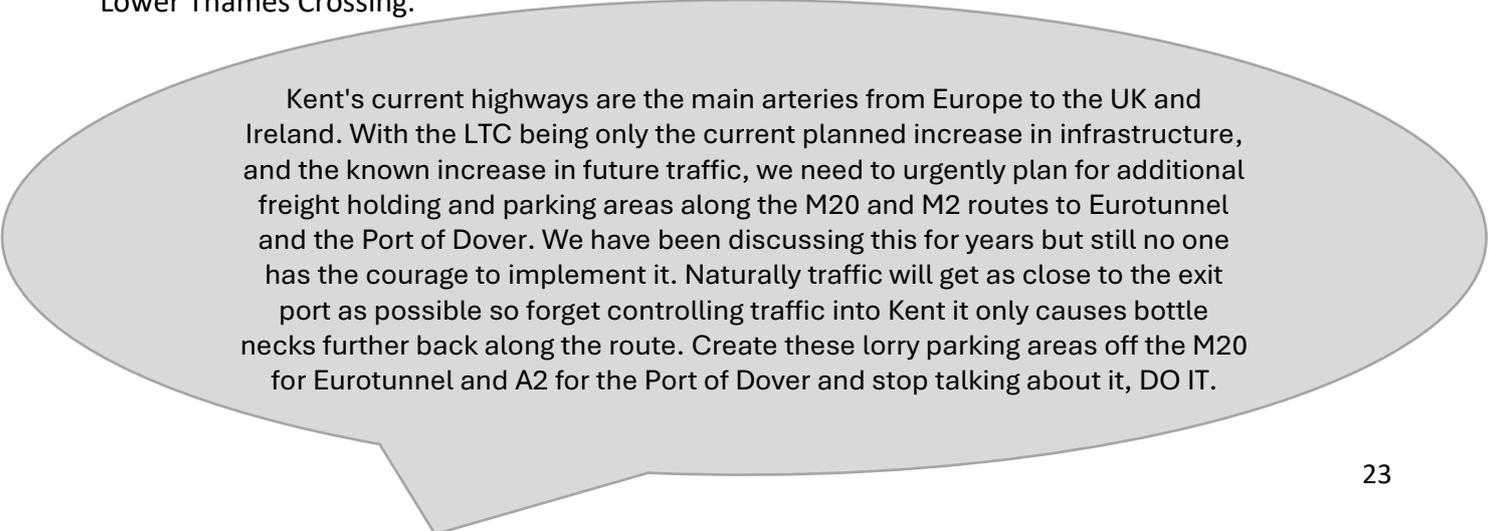
As the previous section of this report mentioned, the (much welcomed and anticipated) opening of the Lower Thames Crossing may impact the traffic flows through Kent and Medway.

The traffic modelling suggests 7 million vehicles may use the new crossing, and enter Kent in the Gravesham district. They will enter the road network on the A2/M2. Some of these vehicles may choose to connect onto the M20, via the A229, but others may choose to continue to the Ports and East Kent on the M2/A2, unless this is restricted by Police enforcement.

The investment in the existing pinch points of Brenley Corner and A2 between Lydden and Whitfield is therefore more critical than ever, and it needs to happen concurrently with the building of the new crossing. In addition, **KMEP would ask that careful consideration is given to the impact of these new vehicle movements on the A229**, which is vital for businesses, especially those that operate between Maidstone and Medway.

It is not clear currently how Operation Brock will be affected by the introduction of the new Lower Thames Crossing. KMEP would thus welcome the separate DfT and National Highway teams working on these individual schemes to work together with the Kent Resilience Group and local partners on ensuring that there is resilience across the whole network, especially when Operation Brock is in effect.

Here is one business' comment on the need for a network of lorry parking areas that refers to the Lower Thames Crossing.



Kent's current highways are the main arteries from Europe to the UK and Ireland. With the LTC being only the current planned increase in infrastructure, and the known increase in future traffic, we need to urgently plan for additional freight holding and parking areas along the M20 and M2 routes to Eurotunnel and the Port of Dover. We have been discussing this for years but still no one has the courage to implement it. Naturally traffic will get as close to the exit port as possible so forget controlling traffic into Kent it only causes bottle necks further back along the route. Create these lorry parking areas off the M20 for Eurotunnel and A2 for the Port of Dover and stop talking about it, DO IT.

## Closure of Roundhill Tunnel

Roundhill Tunnel is often closed when Dover TAP is in force. Businesses have reported that its closure has significant impacts on its business.

One such business is Stagecoach, which provides local bus services in East Kent. Stagecoach South East's Business Development Director is a board member of KMEP. He has reported that when Roundhill Tunnel is closed, Stagecoach must re-route their bus service and, on occasion, the bus service must be cancelled entirely.

The communication of the closure of Roundhill Tunnel has often been at very late notice. This has meant it is difficult to communicate the changes in bus routes/services to the customers in a timely manner, dissuading some of them from using public transport in the future.

In addition, whilst the changes in bus service will affect employees trying to access their workplace, dissuade customers from using the bus to visit businesses (such as retailers), and hinder local residents, it also has wider societal problems. Stagecoach transports a great number of pupils and students to their schools and colleges; thus, they are unable to reach their place of education when the bus service is cancelled. Furthermore, vulnerable residents that use the bus to reach hospital and medical appointments are left to find alternative modes of transport.



Location of Roundhill Tunnel on the A20.

Here are a few other comments made about Roundhill Tunnel in the business survey responses:

Operation Brock is a huge pain for us. We had to close our business, we have lost money over this. they cannot keep closing the Roundhill Tunnels at Folkestone, our town comes to a complete standstill, it is not fair!

Roundhill Tunnel/Brenley Corner restrictions are the most disruptive.

## Chapter Two:

# Media coverage of Operation Brock, leading to reputational damage to Kent and Medway as an investment location



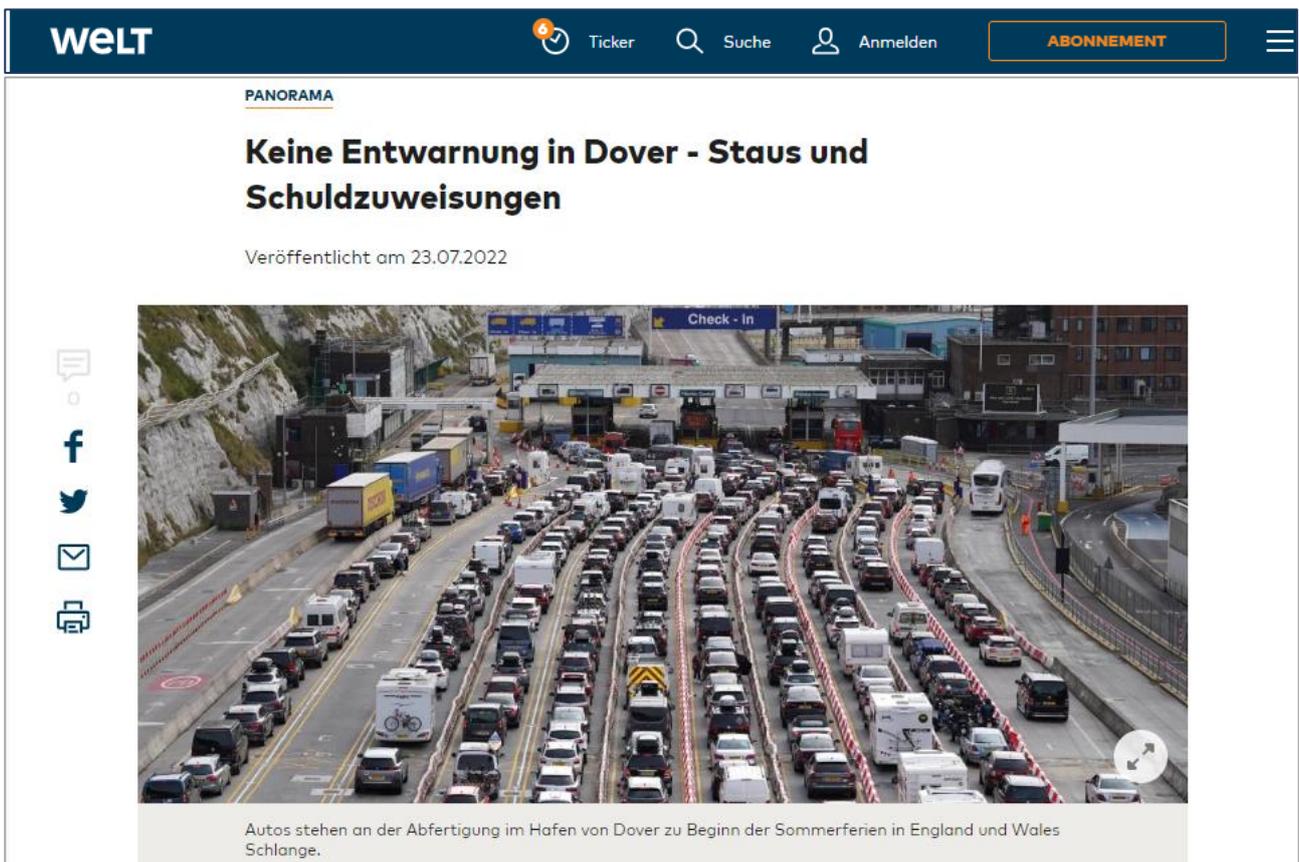
Photo taken from The Guardian of “Motorists Stuck in Dover”, July 22

# Media Coverage

A factor that influences inward investment into Kent and Medway is its reputation. International, national and local media coverage has widely covered the disruption to Kent and Medway's transport network that damages our reputation as a place to invest. Word of mouth and personal experience of being stuck in lengthy queues has also resulted in less business, or businesses choosing to move away.

This chapter shows a small sample of the newspaper headlines over recent months. Please note there are many more headlines that could have been selected showing the detrimental effect on our reputation.

## International Media Sample



**WELT** Ticker Suche Anmelden ABONNEMENT

PANORAMA

### Keine Entwarnung in Dover - Staus und Schuldzuweisungen

Veröffentlicht am 23.07.2022

Autos stehen an der Abfertigung im Hafen von Dover zu Beginn der Sommerferien in England und Wales Schlange.

Die Welt newspaper – 23 July 22 – the headline reads **“No all-clear in Dover - traffic jams and finger pointing”**.

16, 2022  
e

INTERNATIONAL - UNITED KINGDOM

Share   

## UK blames France as travelers face hours-long delays at Dover port

Port authorities said there aren't enough French border officials to handle checks, as many British travelers head out on vacation.

Le Monde newspaper – 22 July 22

**Bloomberg**  
Switch Editions ▾

**Business**

## More Queues at Dover Amid Fears for 'Vulnerable' Summer

Bloomberg newspaper – 25.7.22

**Bloomberg**  
Switch Editions ▾

**Business**

## Invest in Facilities Instead of Turning M20 Into Truck Park: RAC

Bloomberg newspaper – 24.7.22

## National Media Sample



The screenshot shows the top navigation bar of the ITV News website. The main headline reads: "Dover traffic: Chaos blamed on P&O ferries as bad weather and holiday traffic spark deepen gridlock". Below the headline, there is a sub-header: "MERIDIAN | DOVER | KENT | TRAFFIC | Saturday 2 April 2022 at 1:32pm".

ITV website – 2 April 22 – The issue was covered on their 6pm news as the headline story.

## MailOnline

### 'We'll just go home and sit in the garden with a Pimms': Britons say they'll NEVER travel through Dover again and abandon all hope of making it to France after sitting in traffic all day

- There have been delays for a second day at Dover as travellers get a frustrating start to their summer holidays
- A lack of French border control staff caused long queues at the port yesterday, sparking a cross-channel row
- Doug Bannister, CEO of Port of Dover, has blamed Brexit for 'increased transaction times' at the ferry terminal
- In the face of the delays some people have vowed never to go back through the port when they go on holiday

Daily Mail – 23 July 22



The screenshot shows the top navigation bar of The Guardian website. The main headline reads: "'Worst it's ever been': travellers bemoan gridlock at Dover port". Below the headline, there is a sub-header: "Holidaymakers and people travelling to visit family have found themselves stuck in six-hour queues to board ferries".

The Guardian – 22 July 22



# Dover port traffic chaos: Critical incident stood down with queues of one hour to clear passport control

There are predictions of further backlogs today as more queues build up around the ports, with local authorities warning that the disruption could last all summer

iNews – 25 July 22

## Drivers warned to expect long delays as millions plan Easter getaway

In Kent, roads have faced particular high levels of disruption as Operation Brock is enforced along the M20 and delays continue at the Port of Dover following the fallout of the P&O Ferries scandal.

Sky News – 8 April 22

## Shun France, tourists told as Folkestone becomes new 'hotspot of holiday hell'

John Redwood MP advised Britons to travel elsewhere if they are not 'welcome' across The Channel

The Telegraph – 25 July 22

HUGO RIFKIND

## Port chaos is price of choosing to be different

We voted to end frictionless travel yet holidaymakers and ministers are in denial about what Brexit means at our borders

Hugo Rifkind | Monday July 25 2022, 9.00pm, The Times

**L**ook, it wasn't the worst thing in the world. It was just seven hours, on Saturday, stuck in traffic largely a mile and a half from the Eurotunnel terminal. Others had it worse. One family, interviewed in another paper, were stuck for 21. Twenty-one hours! Although that's what you get, I expect, for following the signs.

The Times – 25 July 22



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## Dover-bound holidaymakers warned to take food and drink after 'perfect storm' causes Easter travel chaos

The cancellation of P&O Ferries' services from Dover after the mass sacking of 800 seafarers has caused huge tailbacks for lorry drivers and travellers heading to France

iNews – 9 April 22

[Search jobs](#) | [Sign in](#) | [Search](#)

UK edition ▾

**The Guardian**  
News website of the year

## Customs IT meltdown adds to long delays at Channel crossings

Chaos as outage of key HMRC system combines with P&O Ferries problems and surge in tourist traffic

The Guardian – 7 April 22

## Local Media Sample

**KentOnline** News you can trust 22°C | 15°C  
5 day forecast >

### Travel chaos predicted on Kent's roads this half term including M20, A20 and M2 at Brenley Corner

Kent Online – 26 May 22

**KentLive** NEWS ▾ MYDOVER IN YOUR AREA MORE ▾ f | t | q

### M20 chaos as Port of Dover and Eurotunnel drivers face second day of misery - live updates

Operation Brock persists on the M20

Kent Live - 24 July 22

**KentOnline** News you can trust 22°C | 15°C  
5 day forecast >

### Driver calls for removal of Operation Brock on M20 after Mercedes written off in crash

Kent Online – 7 August 2022 – Story refers to a crash between Junction 8 and 9 westbound when contraflow was deployed.

**KentLive** NEWS ▾ MYDOVER IN YOUR AREA MORE ▾ f | t | q

### Operation Brock: Trucker stuck in Dover for more than 32 hours says drivers are now illegal

'Who is failing? Is it Kent Police? Is it Kent County Council? Is it Kent Resilience Forum, whoever they are? Someone is failing in their duty of care'

Kent Live – 3 April 22

**KentOnline** News you can trust 22°C | 15°C  
5 day forecast >

### Dover TAP: Councillor demands more is done for residents as lorry scheme used 63 times in 10 months

Kent Online – 24 January 2022

It is not only local Kent and Medway newspapers that cover the issues at Brock. During our research, KMEP has found local regional news organisations, from Belfast to Shropshire, have covered the Operation Brock issues in their local editions.

## **Belfast Telegraph**

### **Kent authorities demand more Government money to handle Dover traffic chaos**

Leaders of a number of local councils as well as Visit Kent and Eurotunnel have penned an open letter to the Secretary of State for Transport.

The Belfast Telegraph – 29 July 22

## Chapter Three:

# Results from the Survey of Kent and Medway Businesses



Photo taken from Kent Online of Dover TAP in 2022

# About The Survey

Businesses across Kent and Medway have raised their growing concerns with the Kent and Medway Economic Partnership (KMEP) about the impact that Operation Brock, and other accompanying traffic initiatives, are having on their ability to trade effectively.

KMEP therefore commissioned KCC to conduct a survey of the business community to assess the scale of the impact of Operation Brock on economic growth. This survey took place between 21<sup>st</sup> and 31<sup>st</sup> July 2022.

## The Authors of the Survey

The Kent and Medway Economic Partnership (KMEP) is the economic partnership which aims to drive forward economic growth and prosperity throughout Kent and Medway. It is a federated board of the South East LEP. KMEP's membership is drawn from business, local government<sup>1</sup>, further and higher education.

## The Recipients of the Survey

This was not a public consultation, rather the survey was sent to a targeted audience of businesses located across the entire breadth of Kent and Medway. The groups that received the survey were:

- Members of the **Kent and Medway Business Advisory Board (BAB)**<sup>2</sup>
- Members of the **Kent Invicta Chamber of Commerce (KICC)**
- Members of the **Federation of Small Businesses (FSB)**
- Members of **Visit Kent**
- Businesses on **Locate in Kent**'s distribution list

In addition, the survey was sent to the Economic Development Officers at the twelve District Councils and Medway Council, with the request that they circulate to their own local business networks.

In total, 333 responses were received from businesses during the 10 days<sup>3</sup>. Some additional 'free text' responses were sent in via email following the conclusion of the survey.

## 'Default' and 'Overcapacity' Operation Brock Questions

KMEP recognises that the extent and severity of traffic congestion caused by Operation Brock varies significantly according to the cross-channel conditions. Sometimes the border is not open to any traffic, and long diversions along the M2 or A20 are required, and traffic grinds to a near complete halt. On other days, the border is open, and traffic is flowing, but the Operation Brock contraflow on the M20 is deployed (which reduces motorists' speed to 50mph), as there is potential for some future disruption at the port.

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<sup>1</sup> KMEP Board Members include the Leaders of Kent County Council, Medway (Unitary) Council, Ashford Borough Council, Canterbury City Council, Dartford Borough Council, Dover District Council, Folkestone and Hythe District Council, Gravesham Borough Council, Maidstone Borough Council, Sevenoaks District Council, Swale Borough Council, Thanet District Council, Tonbridge and Malling Borough Council, and Tunbridge Wells Borough Council.

<sup>2</sup> The Business Advisory Board is the business-only sub-group of KMEP. It currently contains approximately 50 business members.

<sup>3</sup> Please note it was not mandatory to answer every question. This explains why in the survey results, some questions show only 300 responses, whereas others show the full 333 responses.

KMEP felt it was important to split out the questions in the survey, so that businesses assessed the impact of Operation Brock to their trade in an 'overcapacity' scenario, and in a 'default' scenario. On issuing the survey, KMEP expected to see that the severity of Operation Brock's impact was much less in the 'default' scenario compared to the 'overcapacity' scenario, as the M20 could still be used, even if at a lower speed and with less capacity. As the results in the next chapter shows, this turned out not to be the case, with a significant proportion finding 'default' Operation Brock had a severe impact on their day-to-day activities.

In the survey, KMEP provided businesses with **an example of when the 'overcapacity' Operation Brock** was deployed:

On 17<sup>th</sup> March 2022, P&O announced the temporary cessation of the sailing of all their vessels from the Port of Dover. This meant significant traffic disruption, and phase D of Operation Brock had to be deployed (please see page 11 for the full definition). All freight bound for Kent and Medway and all cars were diverted off the M20 at junction 8 and used other routes (such as the M2 or A20) to reach their destinations. Dover TAP was implemented, and the M20 was closed between junctions 8 and 9, and 10A and 11 to enable EU-bound HGVs to queue on it.

In the survey, KMEP provided businesses with **an example of when the 'default' Operation Brock** was in force:

In early/mid-July, Operation Brock was in effect, with the contraflow deployed between junctions 8 and 9 of the M20. All freight bound for Kent and Medway and all cars could still use the M20 (as the contraflow had been deployed), but the motorway capacity was reduced from 3-lanes + hard shoulder to 2-lanes without hard shoulder in each direction, and the speed limit was reduced from 70mph to 50mph (please see page 8 for the full definition).

# The Survey Results

## Impact of Operation Brock

The first question of the survey asked, 'Has Operation Brock had a positive or negative impact on your business?'

The headline results are:

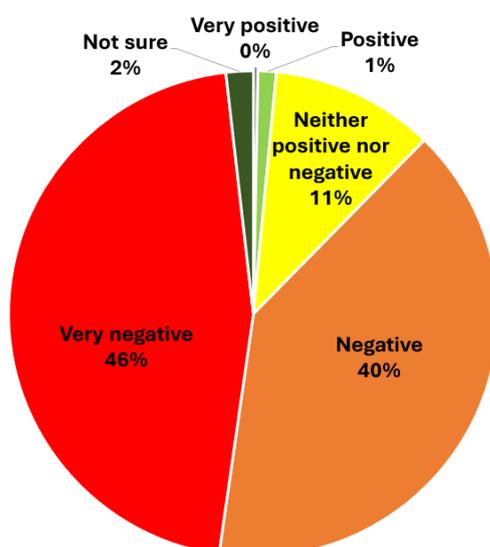
- **86%** of businesses said Operation Brock has a **negative or severely negative impact** on their business when it is '**overcapacity**' (286 of the 333 respondents).
- **76%** of businesses said Operation Brock has a **negative or severely negative impact** on their business when it is '**default**' mode (253 of the 333 respondents).

This finding is revealing in that it shows, even when there is only light to no disruption at the port, but the contraflow is deployed on M20 J8-9, most businesses still believe that their performance is negatively impacted.

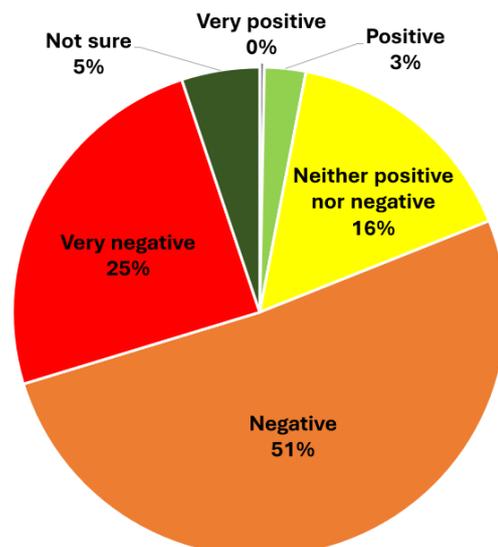
While the 'overcapacity' Operation Brock arrangements have only needed to be deployed on two main occasions so far in 2022 (in March-May 22 due to P&O, and in late July 22 due to understaffed French border controls); the 'default' deployment of Operation Brock happens on a much more frequent basis (please see page 12), suggesting businesses are negatively impacted for a large part of the year.

The pie charts below show in detail the responses to question one:

'Overcapacity' Operation Brock:



'Default' Operation Brock:



# How Operation Brock has impacted businesses

The second set of questions asked how Operation Brock has impacted the business. The businesses were asked to consider **'To what extent has Operation Brock impacted on the following aspects of your business':**

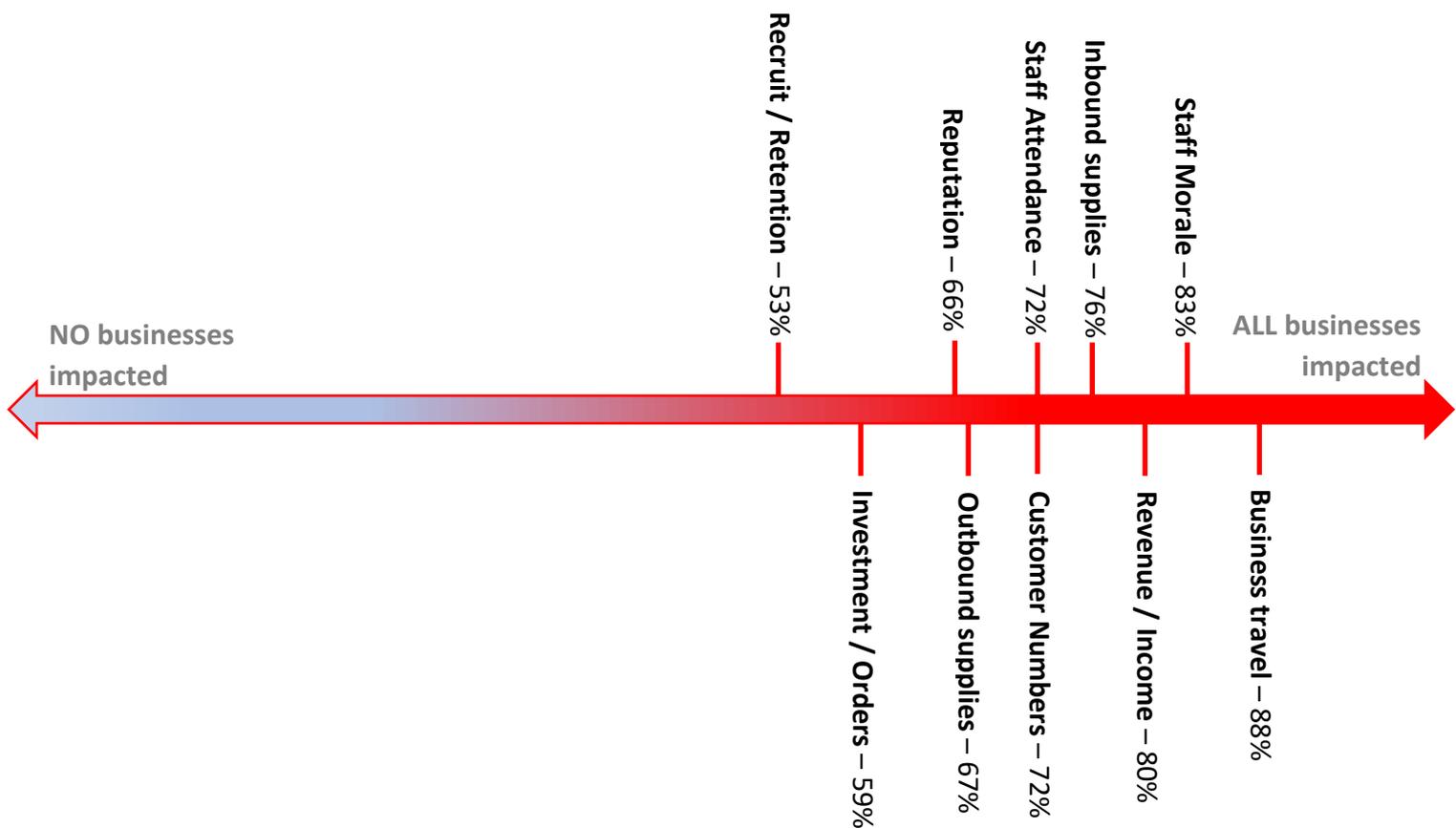
- Inbound supplies – delivery time
- Outbound supplies – delivery time
- Customer numbers / Visitors to the business
- Business Travel (e.g. between sites, for meetings, etc)
- Staff Recruitment and Retention
- Staff Attendance
- Staff Morale
- Revenue / Income to the Business
- Investment and orders (e.g. lost a control with poor travel times cited as the reason).
- Reputation (e.g. expect fewer repetitive visits by customers in future as the reputation of the business as a reliable provider has been tarnished).

The businesses were also given the opportunity to provide a free text answer.

The headline results for how many businesses had these aspects impacted (to some extent) by Brock are as follows:

- All these aspects of business operation are impacted by Operation Brock.
- Business Travel was most severely impacted aspect of business operation. **88%** of businesses reported their **Business Travel** was impacted by Operation Brock in an 'overcapacity' scenario. Under 'default' conditions, this reduced to 85% of all businesses.
- **83%** of businesses reported **Staff Morale** was impacted by Operation Brock in an 'overcapacity' scenario. Under 'default' conditions, this reduced to 76% of all businesses.
- Notably, **80%** of businesses reported that their **Revenue and Income** had been impacted by Operation Brock in an 'overcapacity' scenario. Under 'default' conditions, this reduced to 70% of all businesses.
- **76%** of businesses reported **Inbound supplies** were impacted by Operation Brock in an 'overcapacity' scenario. Under 'default' conditions, this reduced to 72% of all businesses.
- **72%** of businesses reported that their **Customer/Visitor Numbers** had fallen, and 72% also reported their **Staff Attendance** had reduced during 'overcapacity' Operation Brock. These figures reduced to 68% and 65% respectively under 'default' conditions.
- **67%** of businesses reported **Outbound supplies** were impacted by Operation Brock in an 'overcapacity' scenario. Under 'default' conditions, this reduced to 65% of all businesses.
- **66%** of businesses reported their **Reputation** was impacted by Operation Brock in an 'overcapacity' scenario. Under 'default' conditions, this reduced to 65% of all businesses.
- **59%** of businesses reported the **Investment and Orders they received** had been impacted by Operation Brock in an 'overcapacity' scenario. Under 'default' conditions, this reduced to 50% of all businesses.
- **53%** of businesses reported their **staff recruitment and retention** was impacted by Operation Brock in an 'overcapacity' scenario. Under 'default' conditions, this reduced to 45% of all businesses.

The diagram below displays these headline results pictorially for the 'overcapacity' Operation Brock:



These results show how pervasive the negative impact of Operation Brock is. Only 63% of the businesses that replied to the survey are based in East Kent, yet 88% of all Kent and Medway businesses said their business travel is affected, showing how far reaching the problem is. Businesses in West Kent and further afield are affected by Operation Brock. It is not a localised traffic problem.

Secondly, these results show once again that the 'default' Operation Brock, where traffic can still flow using the M20 J8-9 contraflow, is not an appropriate solution for traffic management. While the businesses may not have to divert from the M20 in 'default' Brock, businesses are still seeing the negative impacts on their trade.

This report will now examine each of these aspects of business operation in turn.

## Business Travel (e.g., between sites, for meetings, etc)

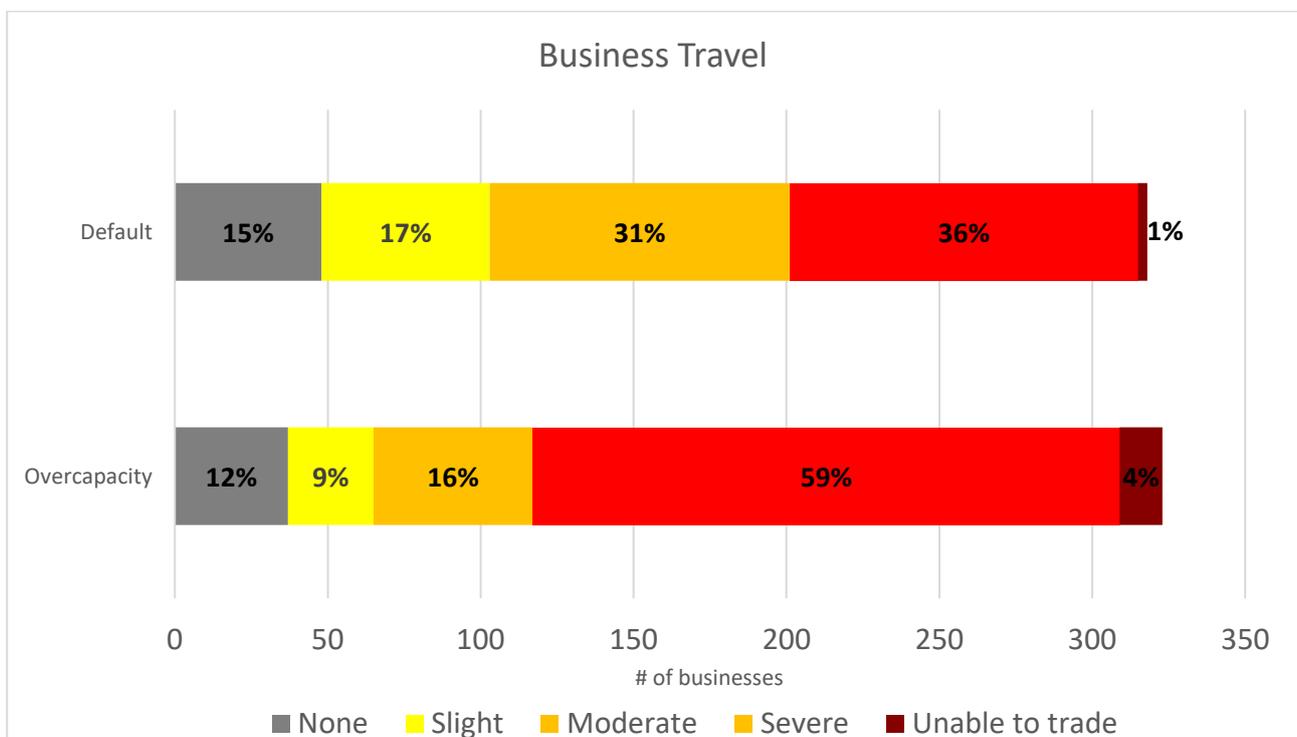
As stated previously:

- 88% of all businesses reported their Business Travel was impacted to some extent by Operation Brock in an 'overcapacity' scenario.
- Under 'default' conditions, this reduced to 85% of all businesses experienced some impact to their business travel.

The survey asked the businesses to gauge **the extent of this impact**. For each aspect of business operation, businesses were asked to rate if there was:

- No impact
- Slight impact
- Moderate Impact
- Severe Impact, or
- So severe an impact that they were unable to trade.

The chart below shows their responses for business travel.



These results show the severity of Operation Brock's impact:

- **59%** of all businesses said 'overcapacity' Brock had a **severe impact on business travel**, with 4% of businesses saying they were unable to trade as they could not travel for business purposes.
- Under 'default' Brock, 36% of all business said Brock had a severe impact on business travel, with 1% of businesses saying they were unable to trade as they could not travel for business purposes.

Overleaf are some free text comments made by Kent and Medway businesses in the survey specifically about the impact of Operation Brock on business travel:

Deliveries being delayed getting to us. We are getting to site late so jobs can take more days costing us money and reducing profit, fuel cost increases, morale of team when working in affected areas - stressed frustrated and fed up. Journeys taking so much longer - commutes so much longer. Not arriving on time to appointments makes us look unprofessional. No clear plan as to when this is going to STOP.

I have clients that have missed meetings as they cannot get to our offices and we need them to physically sign documents as they are financial commitments.

The ability to get quickly and easily to the east of the county and the channel ports is severely compromised.

We lost anticipated trade. Can't get anywhere without going miles out of the way. We have to start at 5 am to get a full complement of staff. Nobody wants to deliver or collect.

Journey times longer and unpredictable, customers cancel visits as they don't want the stress of unknown journey times.

We need to remain flexible in our engineering scheduling and allow our Sales Team to be able to travel to Client meetings. This travel is always impacted when Operation Brock is bought into place. Not just Easter.

Travel delays in getting to work and to clients. Clients unhappy with the length of time engineering response takes in an emergency situation. We maintain security systems so if a client cannot access a building or area or their alarm sounder is sounding and cannot stop. It becomes an emergency for them.

When BROCK comes into operation, I plan to avoid all travel between Maidstone & Folkestone.

Travel times are greatly increased, and the motorway becomes unreliable due to breakdowns and accidents in the contraflows. Local traffic increases as people try to avoid the motorway increasing travel times by double in some instances around junction 7 of the M20.

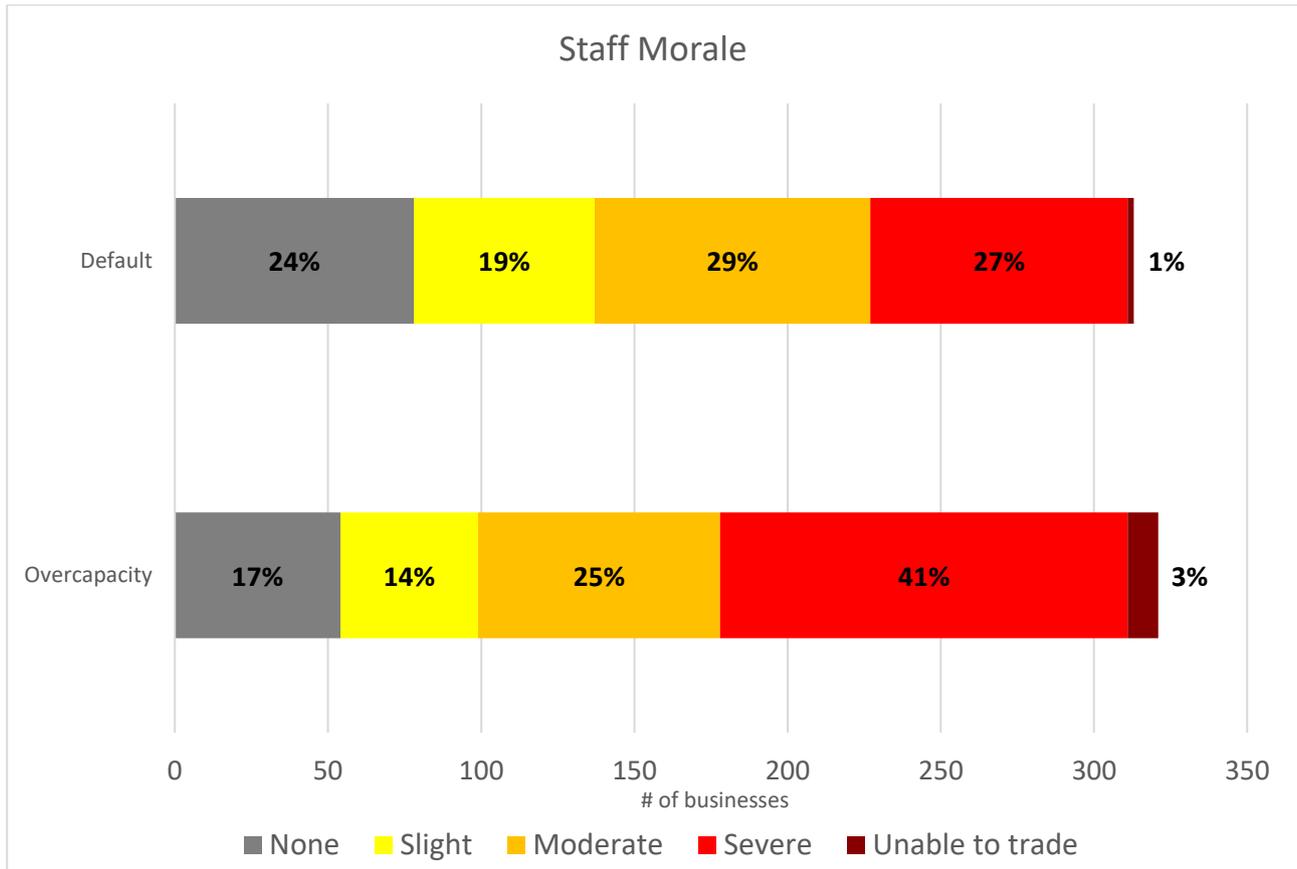
We deliver across the county, using the M20. When it is restricted and congested, it significantly increases our delivery/journey times, and sometimes causes us not to meet time slots for customers.

## Staff Morale

As stated previously:

- 83% of all businesses reported their staff's morale was impacted to some extent by Operation Brock in an 'overcapacity' scenario.
- Under 'default' conditions, this reduced to 76% of all businesses experienced some impact on their staff's morale.

The survey asked the businesses to gauge **the extent of this impact**. The chart below shows their responses for staff morale.



These results show the severity of Operation Brock's impact:

- **41%** of all businesses said 'overcapacity' Brock had a **severe impact on staff morale**, with 3% of businesses saying they were unable to trade as a result.
- Under 'default' Brock, 27% of all business said Brock had a severe impact on staff morale, with 1% of businesses saying they were unable to trade as a result.

Overleaf are some free text comments made by Kent and Medway businesses in the survey specifically about the impact of Operation Brock on staff morale and wellbeing:

My travelling time was doubled when trying to get to clients in Medway from Ashford. There were DAILY delays, and tailbacks on the M20 London-bound due to already restricted carriageways being blocked by broken down cars or lorries. Volume of traffic (normally long convoys of HGV's) slowed down already restricted speeds from 50mph to 30-40mph when overtaking each other. This extra (double) travelling time meant I lost time in business development, not to mention the nervous exhaustion experienced on these journeys, worrying I'd get to the clients on time regardless of how early I left. Diverting to the A20 as an alternative wasn't always easier with additional traffic adding to traffic build up and slow journeys.

It makes us late for our clients, jobs not getting finished meaning more time on jobs - our team morale drops if they have to work in this area as they know they will come across issues. Also had to use the A20 several times when the M20 closed. The 50MPH slows us down and makes journeys even longer - what with the pothole damage to our vehicles and the fuel increases and the Dartford crossing issues - Kent is becoming a car park.

It took some members of our staff over an hour to get to work on some days. In some cases, it was less than an hour of traffic however it still creates lateness not talking about wellbeing and morale of the staff being affected, too including productivity.

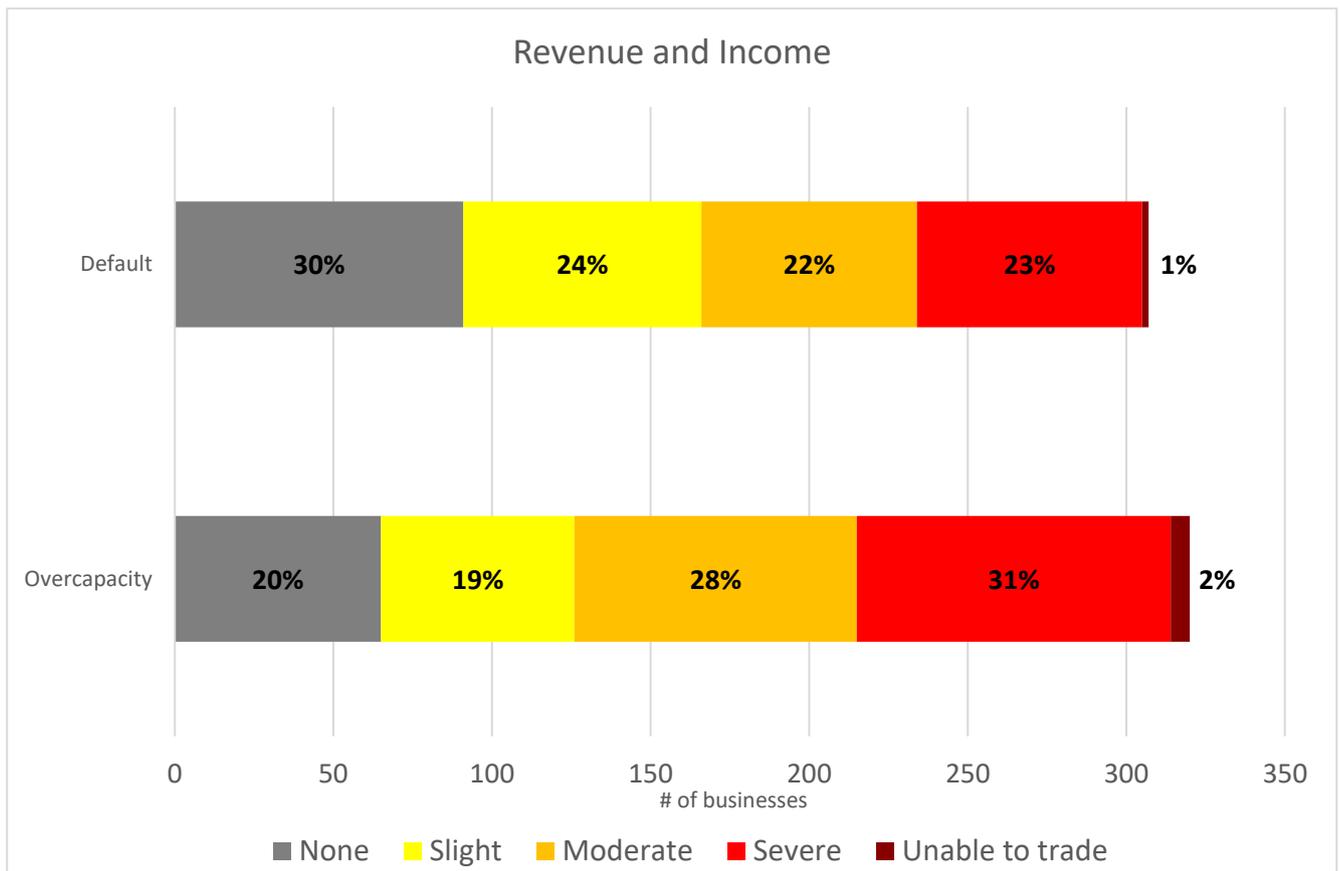
Although we are not a haulage or delivery company, our fleet of 20 + work vans (Transit style) have to travel to London regularly. Traffic in Ashford - London is generally good (all be it for the Jnct 9 - 8 contraflow), it is the return journey, London - Ashford that is putting our drivers at risk of breaching fatigue levels. Another result of the current traffic management in and around Ashford / Jnct 9. 10 & 10a, is that it is increasingly difficult to get from East of Ashford (our depot) to various close by sites on the West side of the motorway.

## Revenue / Income to Business

As stated previously:

- 80% of all businesses reported their revenue and income were impacted to some extent by Operation Brock in an 'overcapacity' scenario.
- Under 'default' conditions, this reduced to 70% of all businesses experienced some impact on their staff's morale.

The survey asked the businesses to gauge **the extent of this impact**. The chart below shows their responses for revenue and income.



These results show the severity of Operation Brock's impact:

- **31%** of all businesses said 'overcapacity' Brock had a **severe impact on their income and revenue**, with 2% of businesses saying they were unable to trade to generate income.
- Under 'default' Brock, 23% of all business said Brock had a severe impact on their income and revenue, with 1% of businesses saying they were unable to trade as a result.

KMEP did not ask businesses to provide an exact estimate of how much their income had fallen, however, there were three examples provided in the free text answers. A tearoom said their income fell by 60% on the weekend of 22-24 July; the DDC Commercial Services Director said Dover's car park income fell 50% after overcapacity Operation Brock came into force at Easter; and Dover Traders as a group reported to Dover District Council that their income fell 40% on average.

If these examples are indicative of other businesses' performance, **it suggests revenue and income falls between 40% and 60% when 'overcapacity' Operation Brock is in effect.**

Here are some free text comments made by Kent and Medway businesses in the survey specifically about the impact of Operation Brock on revenue and income:

Customers found it difficult to travel to our holiday park during this period. Long delays resulted in holidays being cancelled, customers not wishing to come and view caravans and **ultimately loss in sales.** We saw a knock-on effect for our additional income streams (coffee shop / bar sales) and lower takings across the park. We are anxious that customers will chose to buy caravans in different parts of the country as getting to the SE coast is no longer an easy drive from Greater London, Surrey, and the Medway towns. We are yet to see whether Operation Brock this weekend has impacted supplies (food / drink etc).

Car park income which was down by almost 50% in Dover Town Car Parks in the week after 17<sup>th</sup> March 22, compared to the week before; as well as details of a 40% drop in takings reported by Dover Traders to Dover District Council.

This is crippling our business.

We are a fine arts auction house selling items of value on behalf of our clients. Buyers are invited to visit our auction house on viewing days to look at the Lots up for sale. We have found that the disruption on the M20 has put off many prospective buyers from travelling to Folkestone, and so have been unable to view items properly. That then translates into a loss of valuable sales for us, and for our vendors.

We employ 500 staff at our site in Lenham and operate 100 HGVs delivering food products across the UK only. The delays to our drivers, staff and partners and contractors **costs us thousands in extra wages,** delays, failed deliveries by us and by hauliers delivering stock to our warehouses. The impact to our business in massive.

The continuous restrictions on the M20, which has also impacted the A20, has created many issues with our trading capabilities between Ashford, Folkestone & Dover.

I'm a local trader in Dover. The sales impact of Operation Brock during the weekend of 2<sup>nd</sup> April was Fri / Sat - 40% drop in takings, the following week was around a 10 - 15% drop in takings. Also, there was high wastage following drop in trade with stock flow needing time to adjust to lower takings.

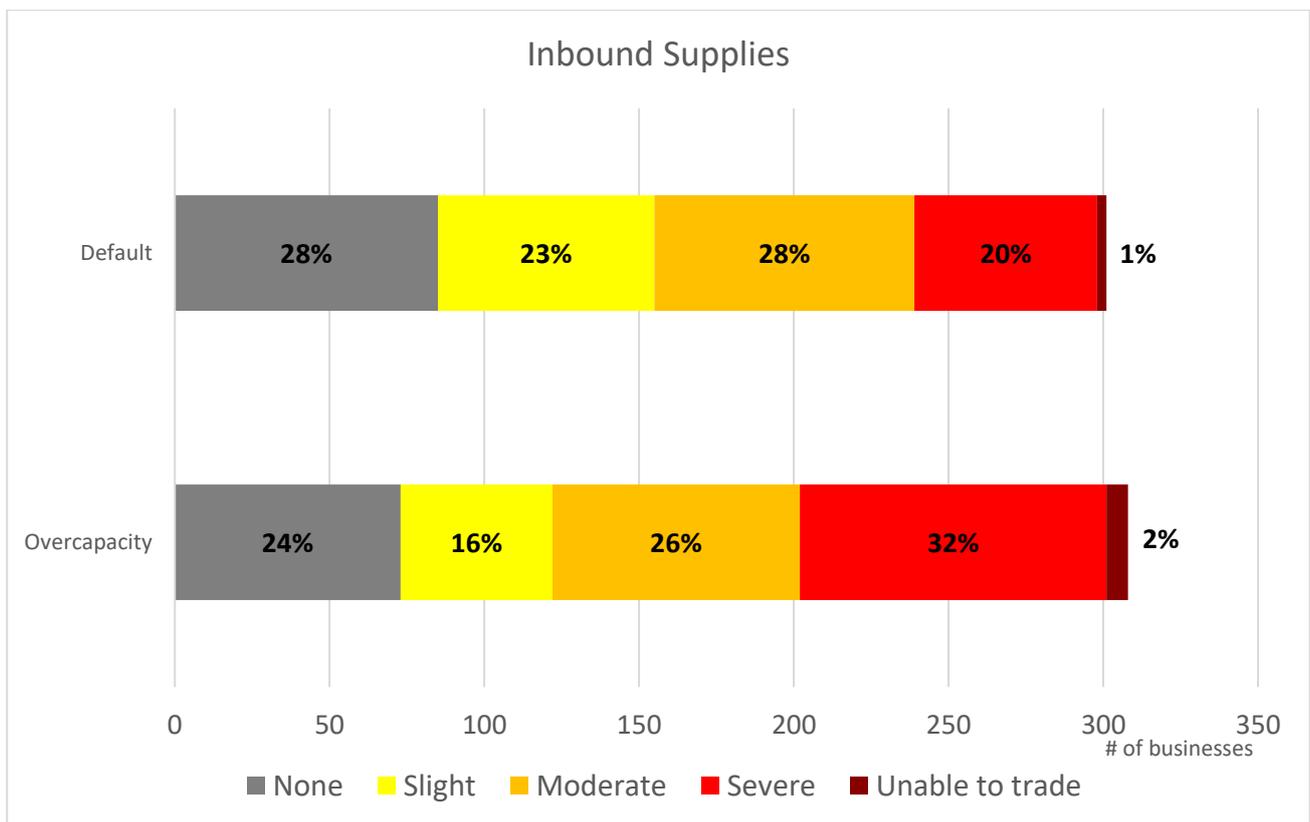
In Brock, we cannot stop trading normally but incur massive delays and subsequent on-cost.

## Inbound supplies – delivery time

As stated previously:

- 76% of all businesses reported their inbound supplies were impacted to some extent by Operation Brock in an ‘overcapacity’ scenario.
- Under ‘default’ conditions, this reduced to 72% of all businesses experienced some impact on their inbound supplies.

The survey asked the businesses to gauge **the extent of this impact**. The chart below shows their responses for inbound supplies.



These results show the severity of Operation Brock’s impact:

- **32%** of all businesses said ‘overcapacity’ Brock had a **severe impact on their inbound supplies**, with 2% of businesses saying they were unable to trade due to difficulty receiving the goods.
- Under ‘default’ Brock, 20% of all business said Brock had a severe impact on their inbound supplies, with 1% of businesses saying they were unable to trade as a result.

Overleaf are some free text comments made by Kent and Medway businesses in the survey specifically about the impact of Operation Brock on the delivery time of inbound supplies:

I'm a local trader in Dover. There were operational issues on Friday 1<sup>st</sup> and Saturday 2<sup>nd</sup> April with deliveries coming in Friday 3pm (usual time 5am) and Saturday 10:45am (Usual time 5am). This improved as we switched to emergency delivery process using smaller vehicles than normal. We had one vehicle postponed from Saturday to Monday and our click and collect orders were up to 4 - 5hrs late. No delivery of newspapers on the Friday.

We have also had impacts to staff attending work, late arrival on the Friday / Saturday mainly and 2 staff members on Saturday had to take the train to be able to get in at all from where they live.

Suppliers reduce deliveries from daily to once or twice a week, resulting in longer lead times. Goods going out are sometimes delayed.

Increased travel time for maintenance engineers resulting in cost increase. Local pickups are also affected as there are numerous accidents in Brock causing mayhem.

We have trouble with couriers, deliveries, and staff - this issue needs a proper resolution. Being based in Folkestone we are trapped trying to move goods in and out of Kent.

Staff are late for work causing delays to manufacturing and service provision for customers. Deliveries of goods, materials and services to us are also late and can in a worst-case situation stop production or causes disruption to day-to-day operation.

Delays in deliveries, delays in despatches, and people choosing to close their businesses causes reduced demand for our products.

We're in Ashford and every time Brock is on, it makes it a lot harder for our staff to get to work and deliveries and collections made on time.

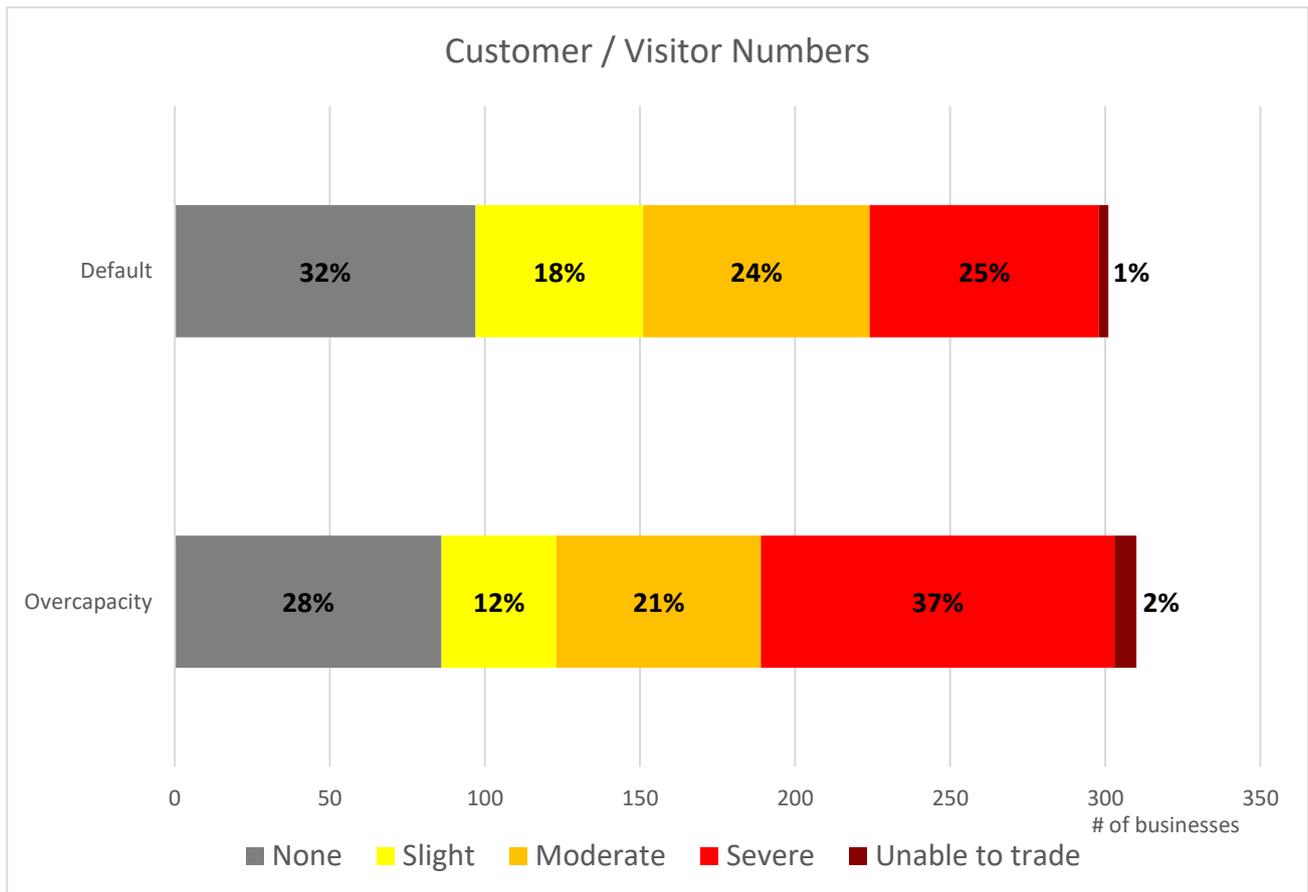
During Brock, Staff cannot get to work. Deliveries cannot be made. Customers cannot get to premises.

## Customer and Visitor Numbers

As stated previously:

- 72% of all businesses reported their customer or visitor numbers were impacted to some extent by Operation Brock in an 'overcapacity' scenario.
- Under 'default' conditions, this reduced to 68% of all businesses experienced some impact on their customer/visitor numbers.

The survey asked the businesses to gauge **the extent of this impact**. The chart below shows their responses for customer/visitor numbers.



These results show the severity of Operation Brock's impact:

- **37%** of all businesses said 'overcapacity' Brock had a **severe impact on their customer / visitor numbers**, with 2% of businesses saying they were unable to trade.
- Under 'default' Brock, 25% of all business said Brock had a severe impact on their customer / visitor numbers, with 1% of businesses saying they were unable to trade as a result.

It should be stressed that all sectors are affected by Brock. However, its impact on visitor numbers is keenly felt by the tourism and hospitality sectors.

Kent and Medway pride themselves on their position as the 'Garden of England'. The Lonely Planet has ranked Kent's Heritage Coast as one of the world's best regions to visit in 2022. Kent and Medway are blessed with stunning sandy and pebble beaches, iconic chalk faces, a thriving cultural and creative scene, second-to-none castles and heritage assets, stately homes, vibrant

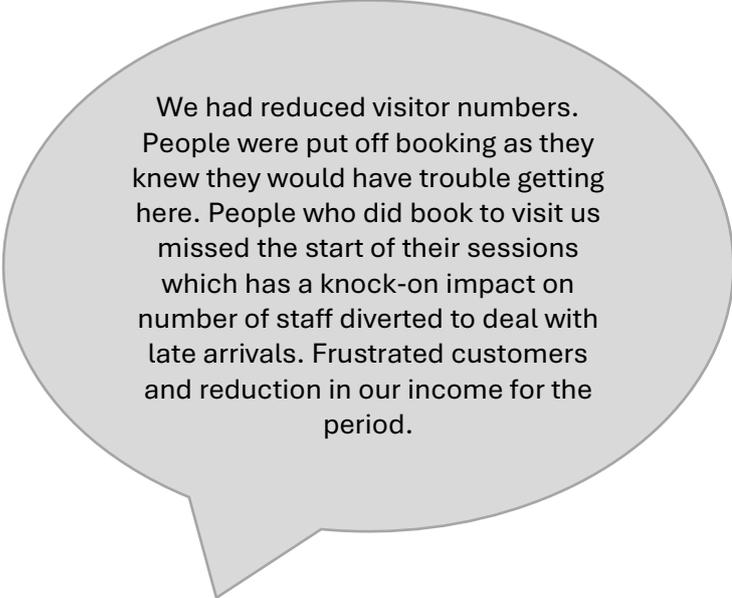
town centres, historic cathedrals, and outstanding food and drink experiences, including some of the best English vineyards in the country. KMEP is very proud of the local tourist offer.

Visit Kent's research shows that the Kent's visitor economy was worth £4.1 billion in 2019.

Now that the COVID pandemic is easing, the ambition of all local partners is to see the visitor and hospitality sectors thrive in 2022, and to capitalise on Lonely Planet's ranking. However, Operation Brock is thwarting these ambitions, and damaging our reputation.

The CEO of Visit Kent reported to Kent and Medway Business Advisory Board (BAB) at their meeting on 12<sup>th</sup> May 22 that: "Easter was badly affected by the deployment of Operation Brock. Some of Kent's visitor attractions were down 50% and, given that Easter is worth about 25% of annual revenue, that was a real blow. There is much nervousness about how traffic management might affect summer trade, with the planned works on the M2 combined with the M20 closures. Visitor businesses in Canterbury are saying they feel physically cut off."

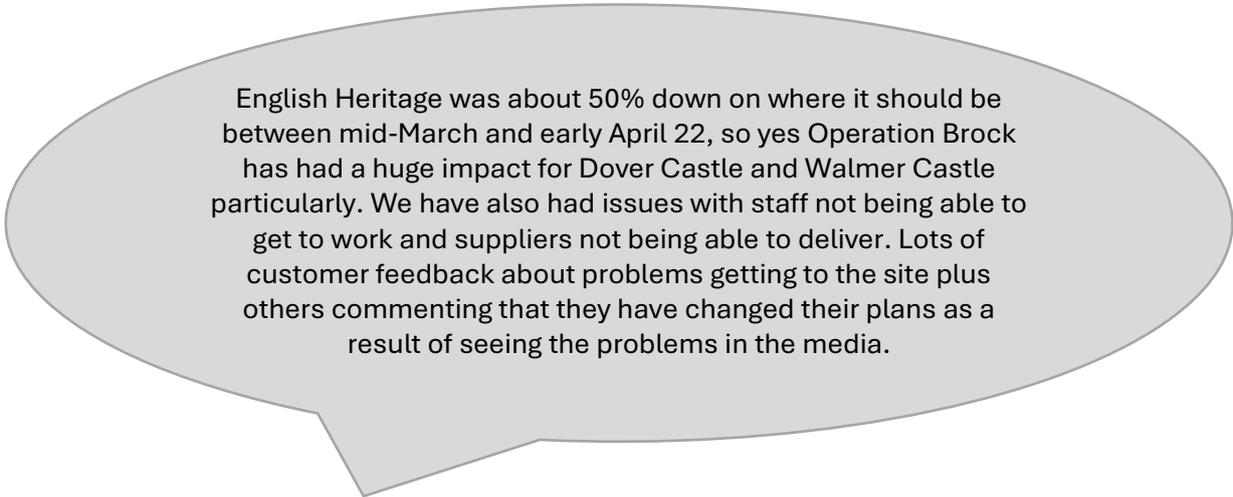
These sentiments were echoed by the Kent and Medway businesses that responded to the survey, and a sample of comments is shown below. Please note these comments come from businesses from across the different sectors (not only tourism).



We had reduced visitor numbers. People were put off booking as they knew they would have trouble getting here. People who did book to visit us missed the start of their sessions which has a knock-on impact on number of staff diverted to deal with late arrivals. Frustrated customers and reduction in our income for the period.



I have holiday lets and my guests over the weekend of 23 July had a commute which took them twice as long to arrive, which impacted their first day's plans, not to mention their mental health. We are located between Folkestone and Dover in a rural area. On Thursday 21 July, they travelled from Chester, Banbury, Oxford and Leamington Spa.



English Heritage was about 50% down on where it should be between mid-March and early April 22, so yes Operation Brock has had a huge impact for Dover Castle and Walmer Castle particularly. We have also had issues with staff not being able to get to work and suppliers not being able to deliver. Lots of customer feedback about problems getting to the site plus others commenting that they have changed their plans as a result of seeing the problems in the media.

Delays to coastbound traffic = less visitors = less income.

The Battle of Britain Memorial Trust has certainly seen a fall in our visitor numbers by at least 50% if not higher. As we approached Easter 22 and our local schools were already on their holidays, we would have seen more visitors usually than we got.

Our customers do not want to travel to Dover as they believe they are unable to get there.

Tourists were diverted to A2, M2 creating long queues towards Canterbury. Bookings were cancelled because of the long journey times as well as many of our guests decided to travel via other Channel departure ports.

We have to work from the office, we have no choice (head office rules). Luckily all staff members are based in Folkestone where the business is so that is not an issue but we have no customers when Operation Brock is on so we're paying staff to work where there's no work to be done.

It has caused a lot of congestion in the roads surrounding my business and the main roads leading to my business. Customers have arrived stressed when they already feel vulnerable or have been late or even missed appointments. We have chosen not to charge patients that miss appointments due to Operation Brock traffic as it is out of their control, so we have directly lost income.

We are a small independent business based in Ashford, not far from Junction 10. When the motorway is closed, this prevents customers and patients coming to Ashford to buy our product and use our services. Our staff also suffer problems getting to and from work. Our market is not restricted to Ashford. We also have a big presence in Folkestone, Hythe, Dover and Deal and surrounding areas. Which are all affected when Op Brock is in place.

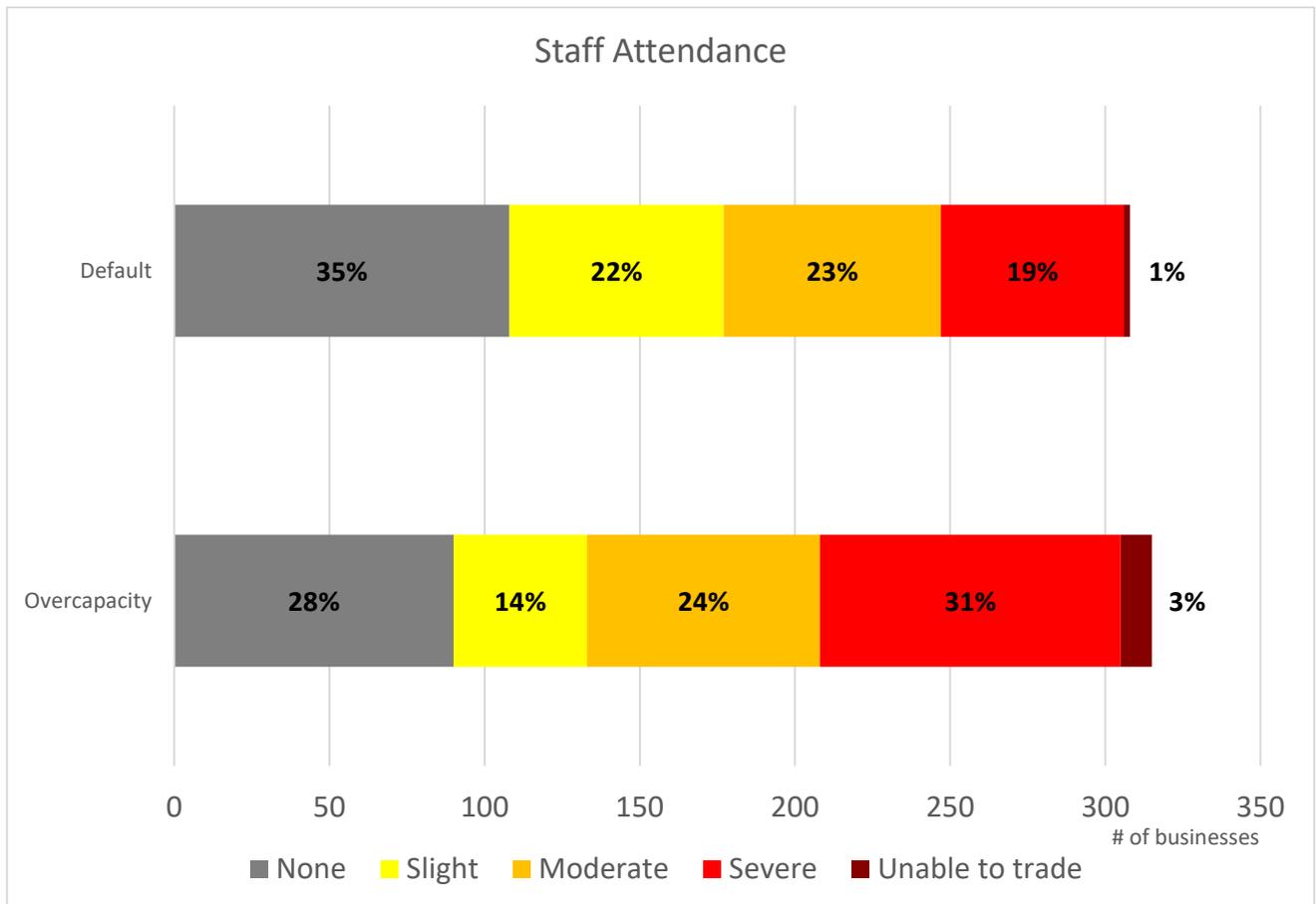
Traffic is jammed today - Friday 22 July. I have had 3 customers in 4 hours on what would normally be a busy Friday.

## Staff Attendance

As stated previously:

- 72% of all businesses reported their staff attendance were impacted to some extent by Operation Brock in an 'overcapacity' scenario.
- Under 'default' conditions, this reduced to 66% of all businesses experienced some impact on their staff attendance.

The survey asked the businesses to gauge **the extent of this impact**. The chart below shows their responses for staff attendance.



These results show the severity of Operation Brock's impact:

- **31%** of all businesses said 'overcapacity' Brock had a **severe impact on their staff attendance**, with 3% of businesses saying they were unable to trade due to difficulty in staff attending the workplace.
- Under 'default' Brock, 19% of all business said it had a severe impact on their staff attendance, with 1% of businesses saying they were unable to trade as a result.

Overleaf are some free text comments made by Kent and Medway businesses in the survey specifically about the impact of Operation Brock on staff attendance:

The implementation of Operation Brock has impacted the ability of our staff to get to and from work. Some journey times have been in excess of 2 hours, and on average I would say the journey from the coast to our headquarters takes over an hour. I have lost count on the numbers of days that staff members have reported late for work due to an accident or breakdown in the contraflow. It continues to have a negative effect on staff morale.

People have taken annual leave when Dover TAP and Brock is on to avoid having to try and travel to Dover for work.

Brock's caused a big inconvenience with the traffic and I had to change my hours of operation from 9am - 5pm to 7am-3pm just to avoid the extra traffic it caused.

Our Director lives in Surrey and has to use this section of motorway to get to the office/workshop in Hythe. I am also a retired director living in Ringwood. Getting to work for us is a nightmare and sometimes almost impossible when the motorway is closed. We import goods from Germany and these deliveries are frequently delayed due to the outward transport being snarled up.

We have to employ more staff to cope with late arrivals. This directly impacts our trading costs. Staff arriving late means increased pressure on those who have managed to get here on time.

Travel disruption has meant staff are unable to attend the office.

Staff lateness to the office, but we advise them to work from home.

Later start times for staff coming into the office and earlier finish times to enable them to make their journey.

I live in Stanford (between Ashford and Dover) and a staff member lives in Dover. Both of us were unable to get to work in Sandwich.

Staff may have to work from home if travel is difficult - often at last minute due to quick build of a situation.

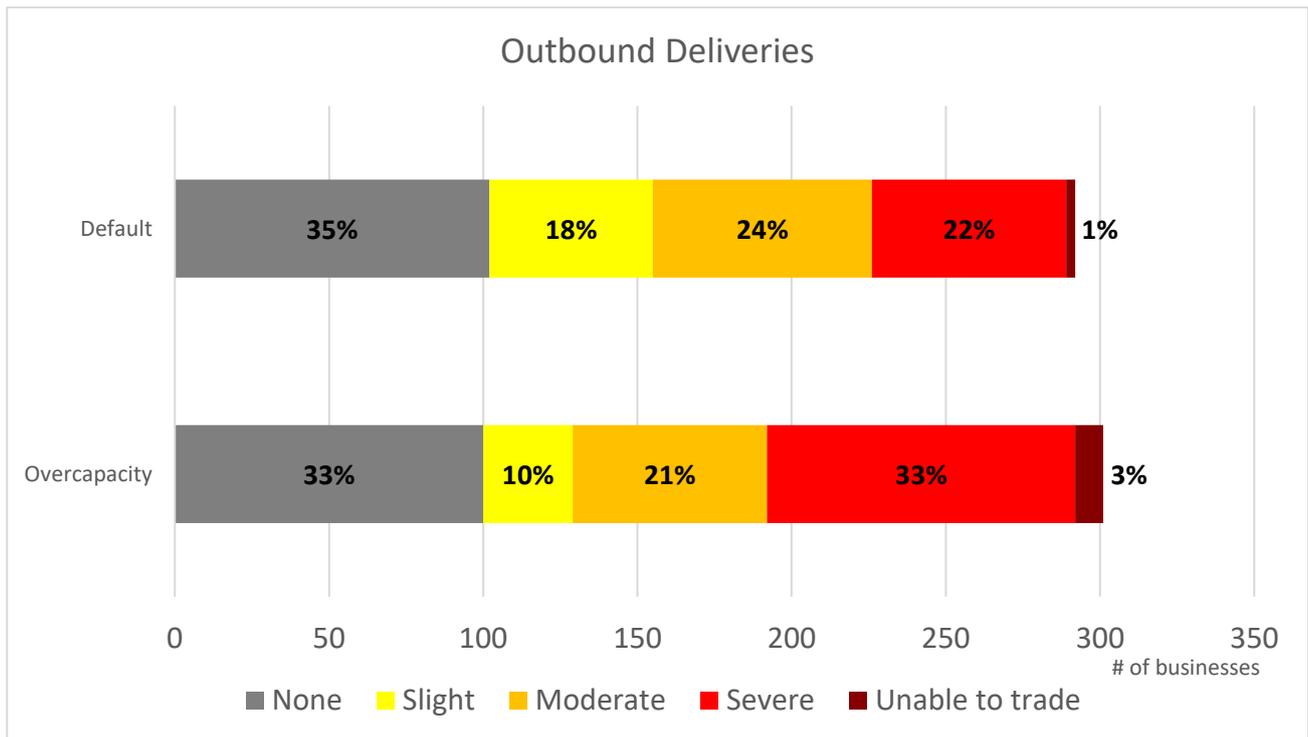
Staff are doing less hours to allow for the extra travel times and if there is an accident and restrictions / diversions are put in place, all they think about is how they can get to meetings / home and will tend to leave early because of this which never seemed to happen when the M20 is running with all 6 lanes.

## Outbound supplies – delivery time

As stated previously:

- 67% of all businesses reported their outbound deliveries were impacted to some extent by Operation Brock in an ‘overcapacity’ scenario.
- Under ‘default’ conditions, this reduced to 65% of all businesses experienced some impact on their outbound deliveries.

The survey asked the businesses to gauge **the extent of this impact**. The chart below shows their responses for outbound deliveries.



These results show the severity of Operation Brock’s impact:

- **33%** of all businesses said ‘overcapacity’ Brock had a **severe impact on their outbound deliveries**, with 3% of businesses saying they were unable to send deliveries and trade.
- Under ‘default’ Brock, 22% of all business said it had a severe impact on their staff attendance, with 1% of businesses saying they were unable to trade as a result.

Overleaf are some free text comments made by Kent and Medway businesses in the survey specifically about the impact of Operation Brock on outbound deliveries:

I am an event florist, working mainly on weddings. It is a very time-critical industry. Flowers must be delivered on the wedding day by a certain time.

Operation Brock has had a huge impact on my business. Flower deliveries from my wholesalers have been late, meaning our timescales have had to shift, with little notice. And delivering flowers on the morning of a wedding is extremely nerve-wracking. The main problem is the increase in traffic on other roads, including unexpected traffic jams. This weekend I encountered long queues of cars on tiny country lanes, attempting to get onto the A20 at Lenham. When Operation Brock is in place, I have to make sure I leave at least 3 hours of extra time on the morning of an event - sometimes leaving home at 6am on the morning of a 2pm event, simply to ensure I make it in time. It is honestly nail-biting sometimes.

We cancel long-distance customers while Brock's on.

We were being affected by the queues of lorries stacked up all around, Dover and the surrounding area at Easter. Our deliveries took 3 hours longer than usual which comes at a cost financially and upset our customers. Hotels and Restaurants were having to wait longer to receive their orders, and this impacted on their business logistics too. Our driver also struggled to fill the van with fuel on occasion due to deliveries to petrol stations being affected.

When there is an issue on the M20, such as Op Brock, it makes navigating around the county for deliveries next to impossible. There are closures everywhere, all of the A and B roads become blocked, and there are plenty of non-GB registered HGVs using smaller roads to try and get around the Op Brock queue.

When Brock is in place, we leave hours earlier than usual to make deliveries and will not deliver to certain locations.

During Operation Brock, we have to plan for additional time & queues which can result in postponement or cancellation of some deliveries.

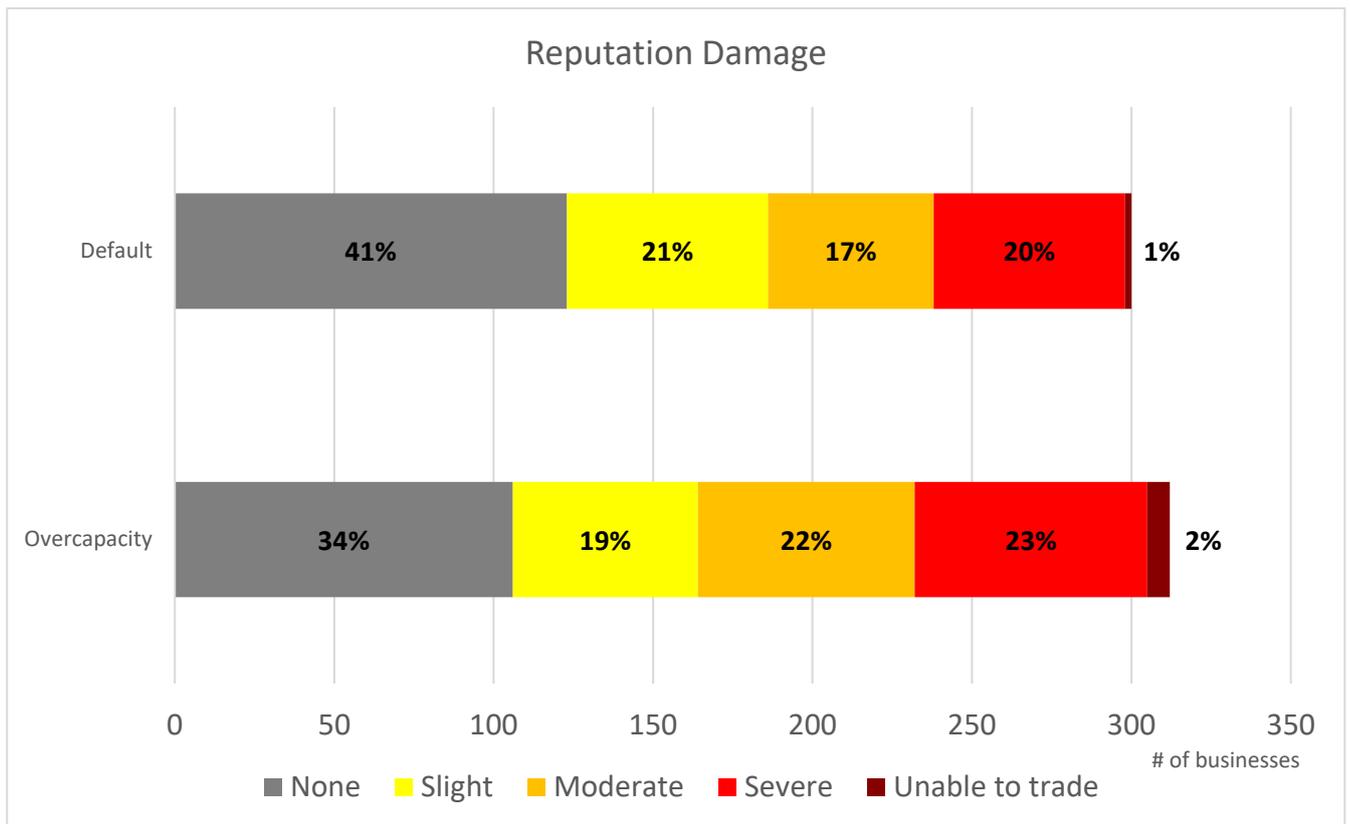
Brock held up our delivery vans getting to and through Dover and Folkestone, and having to take adverse diversion costing more in fuel and driver time.

**Reputation** (e.g., expect fewer repetitive visits by customers in future as reputation of firm as reliable provider has been tarnished)

As stated previously:

- 66% of all businesses reported their reputation was impacted to some extent by Operation Brock in an ‘overcapacity’ scenario.
- Under ‘default’ conditions, this reduced to 65% of all businesses experienced some impact on their reputation.

The survey asked the businesses to gauge **the extent of this impact**. The chart below shows their responses for reputation damage.



These results show the severity of Operation Brock’s impact:

- **23%** of all businesses said ‘overcapacity’ Brock had a **severe impact on their reputation**, with 3% of businesses saying they were unable to trade.
- Under ‘default’ Brock, 20% of all business said it had a severe impact on their reputation, with 1% of businesses saying they were unable to trade as a result.

Overleaf are some free text comments made by Kent and Medway businesses in the survey specifically about the impact of Operation Brock on their reputation:

We have a family-run Skip and Grab hire business in Folkestone, but cover all areas within a 20-mile radius, when Brock is on, it blocks all of our exit and entrée roads and those around us. Due to traffic and traffic jams, we cannot deliver or collect skips. On Friday 22nd June, we had to completely close our business before lunch time, as the traffic in Folkestone and Hythe was at a complete standstill. Also to Dover and Deal. I had to ring all our customers, who have paid and are awaiting their skips. This is not the service we want to provide, we then have a back log of skips to deliver and collect and still have to pay our workers for being at home.

Some clients have decided not to use my services if their drive involves the A2 Canterbury turn-off near Faversham.

The road closures and additional traffic on local roads as a result means that all our local deliveries are delayed and we lose jobs over the course of a day or week, thus impacting both from a reliability point of view for our customers and also reducing our daily and weekly income. Long term it simply isn't sustainable.

Guests were delayed and arrived grumpy, tired, frustrated. Some had missed dinner appointments and concerts etc. Many cancelled bookings because of the horror stories they read in the press.

Reputational, Kent is becoming a joke!

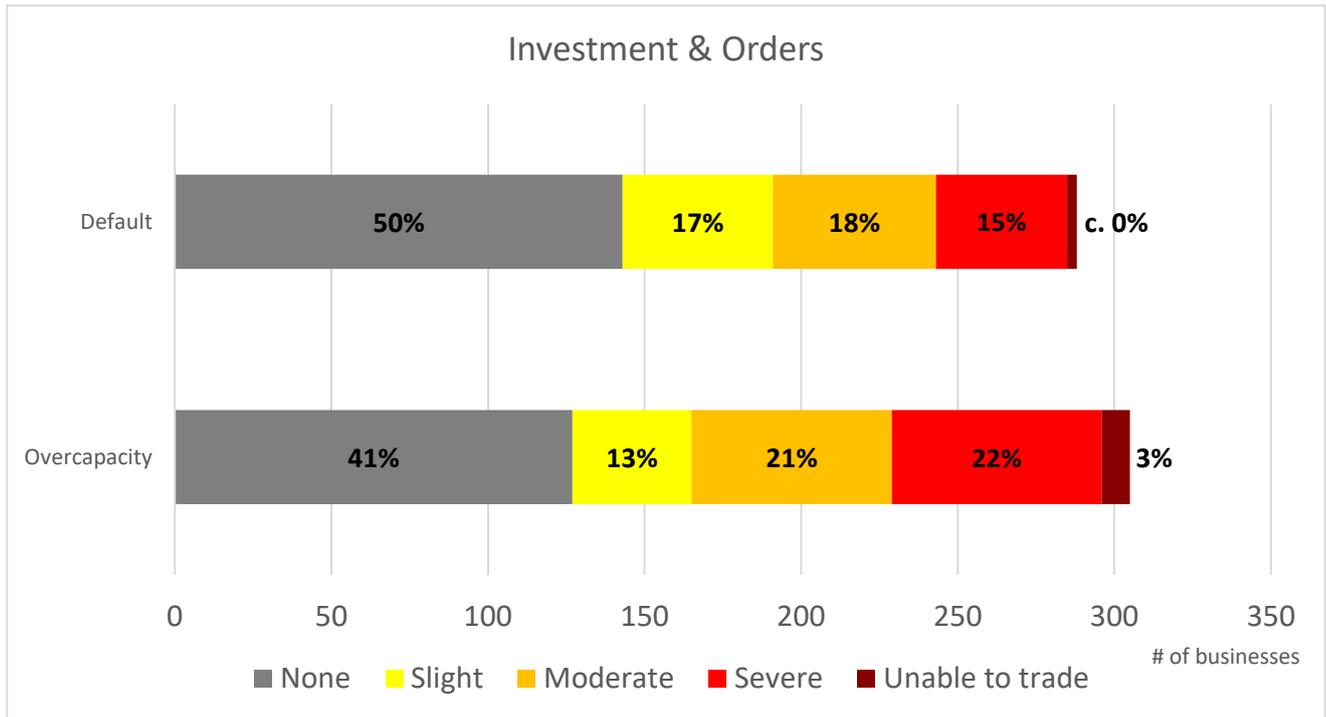
Brexit has made this part of Kent very unattractive for people to visit. The reputation of the county is at an all-time low. Parking lorries on a Motorway and negatively impacting all motorway users is madness. If we have to suffer Brexit, and suffer we do, we need Lorry Parks not stationary freight and poor lorry drivers held on the motorway.

## Investment / Orders (e.g., lost a business contract with poor travel times cited as a cause)

As stated previously:

- 59% of all businesses reported their investment / orders were impacted to some extent by Operation Brock in an 'overcapacity' scenario.
- Under 'default' conditions, this reduced to 50% of all businesses experienced some impact on their reputation.

The survey asked the businesses to gauge **the extent of this impact**. The chart below shows their responses for investment/orders.



These results show the severity of Operation Brock's impact:

- **23%** of all businesses said 'overcapacity' Brock had a **severe impact on inward investment and orders**, with 3% of businesses saying they were unable to trade.
- Under 'default' Brock, 15% of all business said it had a severe impact on their reputation.

Overleaf are some free text comments made by Kent and Medway businesses in the survey specifically about the impact of Operation Brock on inward investment and their orders:

Goods delay in and out of the EU - cost implications, resource implications, loss of customer and future orders because of delays.

The negative impacts of Brock are:  
Staff struggling to get to work.  
Suppliers struggling to access our site. Potential investors & potential customers unable to visit without significant delays.

This has had a very high impact on recurring and potential new import/export trade, due to these problems and delays imported product suppliers are reluctant to send via Dover.

We've had cancellations at Easter due to the congestion caused by the closure of the M20. Can we send an invoice to P&O Ferries for compensation please?

The impact directly affects our business, being an emergency glazing and locksmith service, our coverage area is diminished as we are unable to service parts of Dover & Folkestone & Maidstone, as our travelling times cause the jobs to be unprofitable, with the current cost of living issues, customers are unable to cover any additional costs. Operation Brock increases our fuel costs when we are sitting in traffic and the lack of an emergency services lane northbound causes severe issues during breakdowns and collisions.

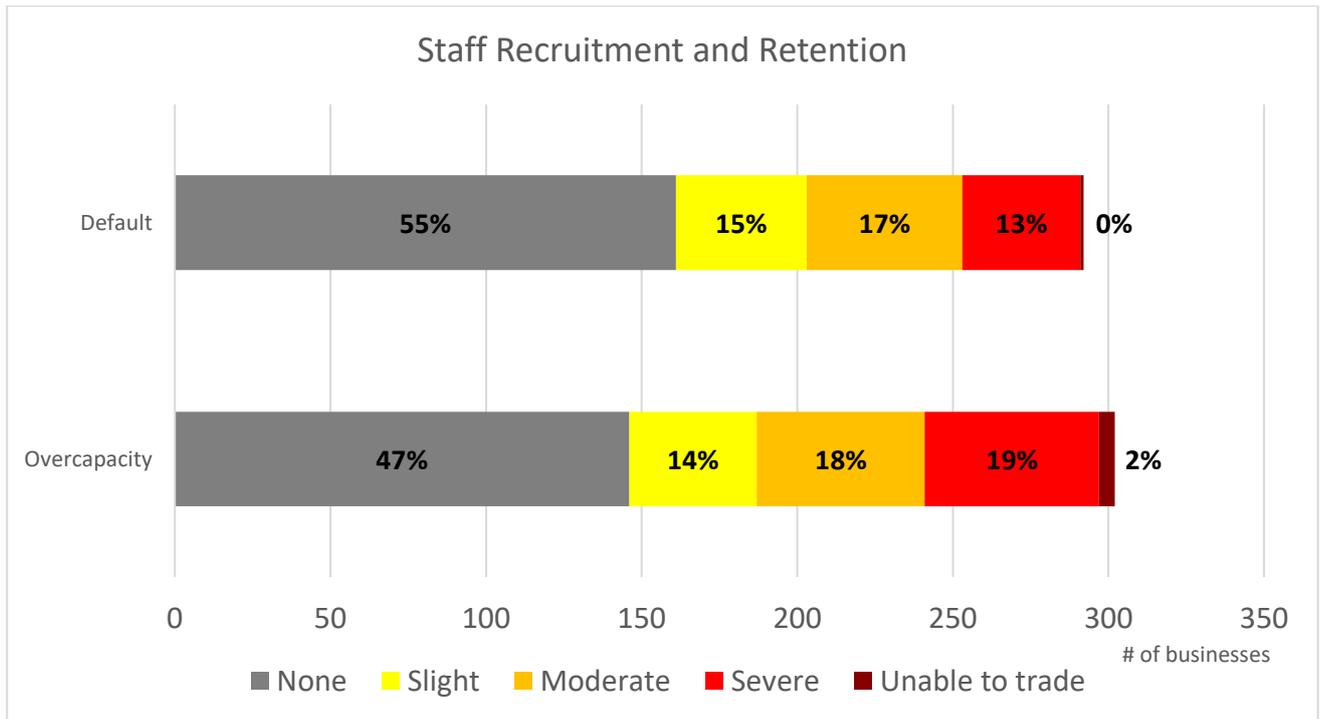
Our staff have trouble getting to work as all the local roads are blocked with cars and lorries. We have to rework rotas on the day to make sure the venue is staffed. Brides and Grooms struggle to get to their own wedding days along with their guests. This extends to Suppliers and the Kent Registration Services who conduct ceremonies. We also have viewings for new business on most days which are affected when they cannot attend the venue. On top of everything else we've had to deal with in the past 2 years, we've got the chaos of Operation Brock to contend with.

## Staff Recruitment and Retention

As stated previously:

- 53% of all businesses reported their staff recruitment and retention were impacted to some extent by Operation Brock in an 'overcapacity' scenario.
- Under 'default' conditions, this reduced to 45% of all businesses experienced some impact on their recruitment / retention.

The survey asked the businesses to gauge **the extent of this impact**. The chart below shows their responses for recruitment / retention.



These results show the severity of Operation Brock's impact:

- **19%** of all businesses said 'overcapacity' Brock had a **severe impact on their staff recruitment and retention**, with 2% of businesses saying they were unable to trade.
- Under 'default' Brock, 13% of all business said it had a severe impact on their staff recruitment and retention.

Here are some free text comments made by Kent and Medway businesses in the survey specifically about the impact of Operation Brock on staff recruitment and retention:

One of our valued team members, who has been with us for over four years, lives in Folkestone so you can only imagine the difficulty she experiences in coming to Deal when Dover TAP is on. Luckily, she works part-time but I believe that if she was a full-time employee, we would have lost her to an employer on the other side of Dover.

Staff affected by Brock manage their attendance on an individual basis. Some choose to take holiday, but it isn't convenient. Stress levels go up (a lot) which hit morale and productivity and does ultimately impact on staff retention.

# Business relocation due to Brock

The third question of the survey asked, 'How likely is your business to relocate away from Kent due to Operation Brock?'

The headline results are:

- **5.2%** of businesses said they were **extremely likely to relocate** from Kent due to Operation Brock (17 respondents).
- **12.2%** of businesses said they were **likely to relocate** from Kent due to Operation Brock (40 respondents).
- **16.8%** of businesses said it was **difficult to say / don't know if they will relocate** from Kent due to Operation Brock (55 respondents).
- **32.3%** of businesses said they were **not likely to relocate** from Kent due to Operation Brock (106 respondents).
- **33.5%** of businesses said they were **not at all likely to relocate** from Kent due to Operation Brock (110 respondents).

Hence, for every 6 businesses that replied to the survey:

- **1 is expecting to move away from Kent due to Operation Brock,**
- **1 is not sure yet if they will stay or relocate, and**
- **The remaining 4 businesses plan to stay.**

These results show that Operation Brock does not only affect future economic growth in Kent and Medway, but economic sustainability and the **retention of the existing economic activity** and trade.

Here are a handful of comments from business about their intention to relocate from Kent and Medway as a result of Operation Brock, or their decision to no longer operate in markets away from their immediate vicinity:

The disruption is not an occasional happening but a regular occurrence and often for weeks/months on end. Personally, if there is no forthcoming resolution in the near future, I will not stay in this area as my personal travel is badly affected stopping me pursuing my activities, this will mean moving the business as well. Quality of life for my employees is a priority and my key staff would move.

I don't do markets in London anymore, partly because travel can be disrupted unexpectedly.

Operation Brock is a complete disaster for the M20, M2 and A20 after Maidstone; life has to almost stop! We are seriously thinking of moving.

I am considering moving my business and moving home. Living and working in Harrietsham (between Maidstone and Ashford) is becoming hard to commute. If you are retired, it's fine to live there, but working... nightmare.

Operation Brock has such a big impact on businesses located close to Eurotunnel and Dover and needs a proper thought-out solution. This part of Kent is becoming a no-go zone and businesses will move out and certainly not locate themselves here. Knowing what I know now, I would have chosen a location away from this area to build the business and employ staff.

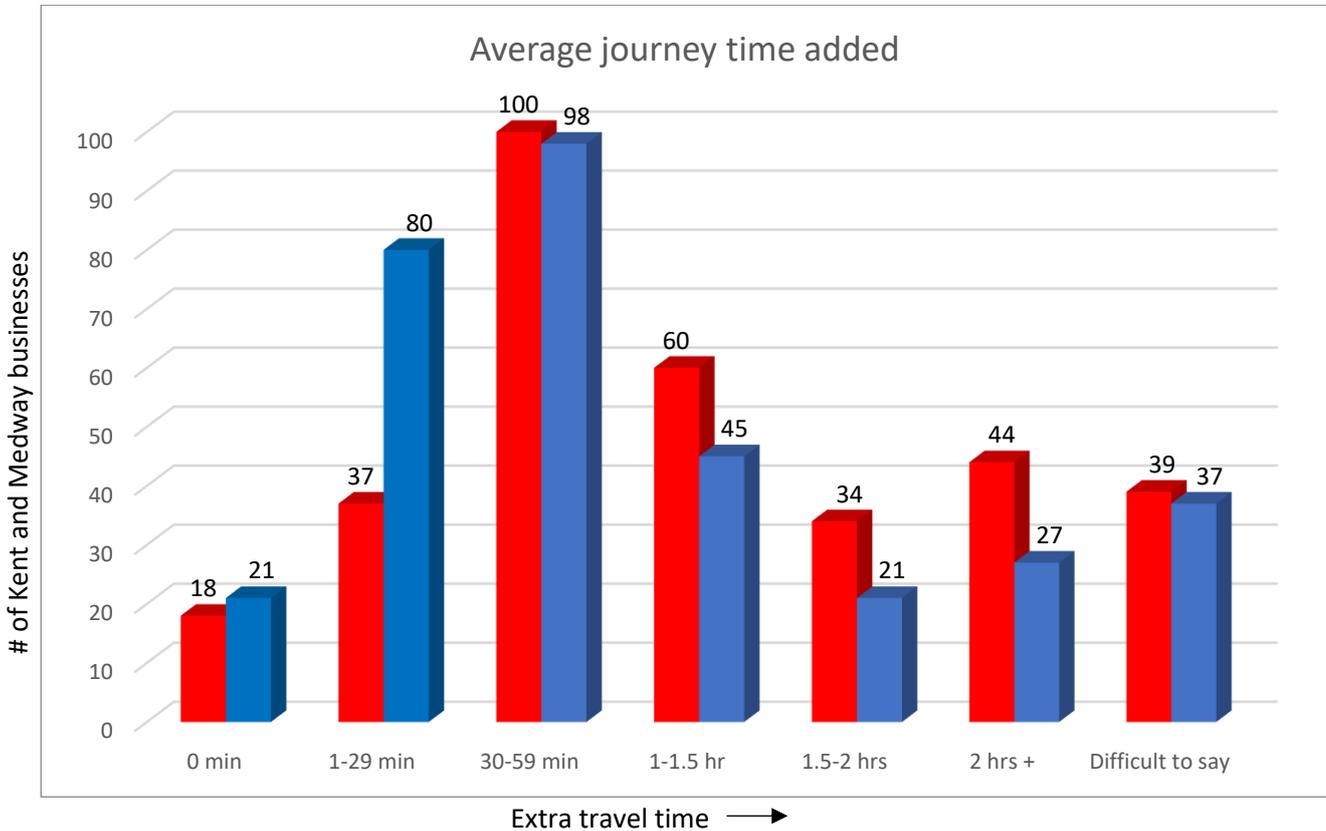
Operation Brock has crippled our business and we have experienced many cancellations because of this. This cannot continue and we are now seriously considering moving out of Kent.

Visitors and suppliers are reluctant to visit. Due to the negative press this area of Kent has become known for all the wrong reasons.

# Extra Journey Time

The fourth question of the survey asked, ‘**Approximately how much time is added onto your average business journey when Operation Brock is in place (be it staff travelling or freight in transit)?**’

The graph below displays the results:



- = The red bars show the average journey time added by ‘overcapacity’ Operation Brock.
- = The blue bars show the average journey time added by ‘default’ Operation Brock.

The headline results are:

- The **most common delay** is that businesses must spend **an extra 30 to 59 minutes** in transit, on top of their usual journey time. This is irrespective of whether it is during ‘default’ or ‘overcapacity’ Operation Brock.
- **42%** of businesses said they had to travel for **at least an additional hour**, on top of their usual journey time, to reach their destination in ‘overcapacity’ Brock.
- **13%** of businesses said they had to travel for **at least an additional two hours**, on top of their usual journey time, to reach their destination in ‘overcapacity’ Brock
- **28%** of businesses said they had to travel for **at least an additional hour**, on top of their usual journey time, to reach their destination in ‘default’ Brock.
- **8%** of businesses said they had to travel for **at least an additional two hours**, on top of their usual journey time, to reach their destination in ‘default’ Brock.

Here are a handful of comments from business about the additional travel time that was added to their journeys during Operation Brock.

I do not need to cross the channel. During the overcapacity period, I had difficulty in getting to and from my customers (e.g., a normal pre-Brock trip of 30 minutes was taking up to 2 hours).

Lost time in the business due to travelling time. Driving from junction 8 on the M20 to junction 11 say use to take 40 minutes it can now take up the 5.5 hours due to Dover port and accident. Increased cost of fuel when sitting in traffic, lost production time of engineering staff.

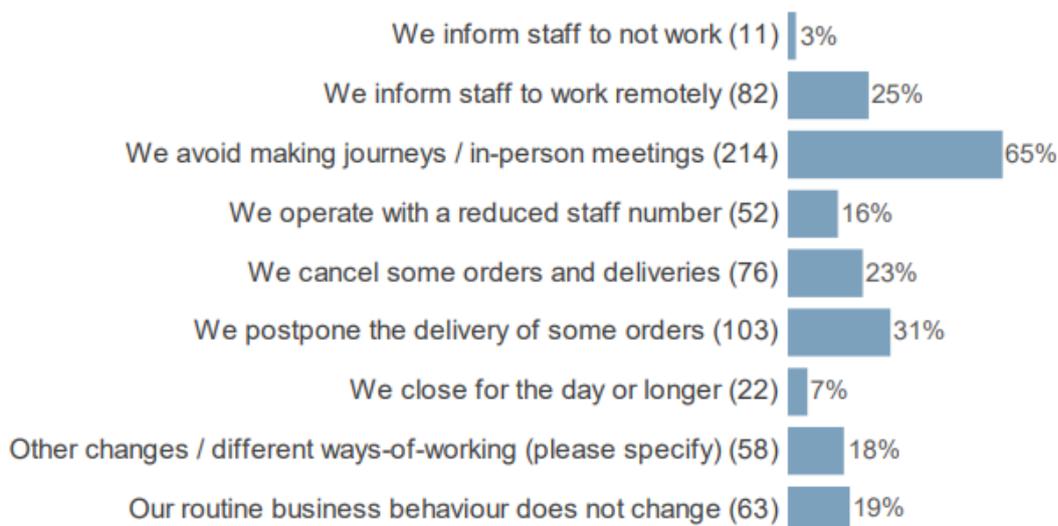
Traffic on surrounding roads, particularly A249 is heavier than usual causing longer journey times between Maidstone and Sittingbourne.

Just before Easter, I had to make a business trip from Maidstone to Folkestone. On a normal day, this would take 50mins. In the end, my trip during Brock lasted 2.5 hours, despite using local knowledge to use different back roads to avoid congestion shown on the sat nav.

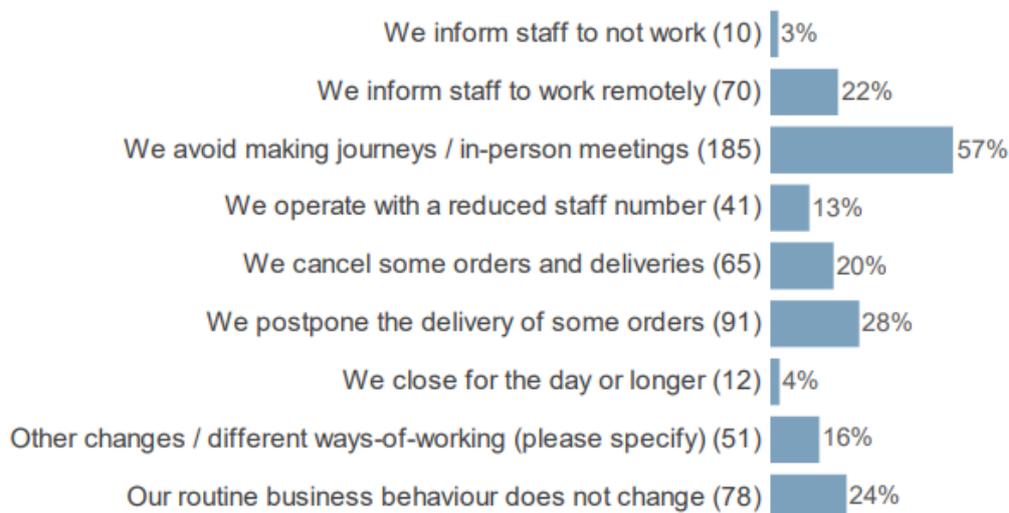
# Behavioural change necessitated due to Operation Brock

The fifth question of the survey asked, ‘When Operation Brock is in place, how does your routine business behaviour change?’

Businesses were given a drop-down list and asked to select all options that applied. The chart below displays the results for ‘overcapacity’ Brock:



The chart below displays the results for ‘default’ Brock:



Businesses could provide ‘free text answers’ to the other changes/different ways-of working. These free text answers from both ‘overcapacity’ and ‘default’ Brock could be summarised as:

Free text answer re: other changes	% of ‘other change’ responses referring to this change
We reroute our services (with greater mileage costs as a result)	23%
We change our hours of operation (earlier start and earlier end time to avoid worst congestion)	21%
We allow longer times for journeys, so reduce our productivity	16%

We reschedule work and operations	15%
We change our hours of operation (staff work longer days with earlier start and later end)	6%
We cancel appointments with clients/customers	6%
We stay away from home and pay for hotel accommodation close to the worksite	4%
We post more items	3%
We stop working in the affected areas	3%
We change meeting locations	1%
We have alternative pick-up points	1%
We have to be on-hand to guide our visitors to the holiday-let business	1%

Here are a handful of comments from business about their behavioural changes when Brock is in effect:

Operation Brock affects our Engineers travelling to service calls. Rerouting logistics around the additional traffic. Staffing relocations and working from home as unable to travel to office due to backlog of traffic and the negative impact this has on the local roads.

Care calls run late therefore staff can't always stay on due to other commitments meaning calls are cut short or cancelled.

Staff who arrive on time have to work twice as hard to make up for people arriving late. Visitors do not receive the same level of attention. Shorter cafe opening hours so unable to provide food and beverage to customers until later than planned, resulting in loss of income.

Our staff have trouble getting to work as all the local roads are blocked with cars and lorries. We have to rework Rotas on the day to make sure the venue is staffed. Brides and Grooms struggle to get to their own wedding days along with their guests. This extends to Suppliers and the Kent Registration Services who conduct ceremonies. We also have viewings for new business on most days which are affected when they cannot attend the venue. On top of everything else we've had to deal with in the past 2 years, we've got the chaos of Operation Brock to contend with.

We have to change rotas at the last minute, change menus at times, and spend hours guiding guests to find alternative routes to the venue.

Our business comes to a standstill and we are losing work because of it.

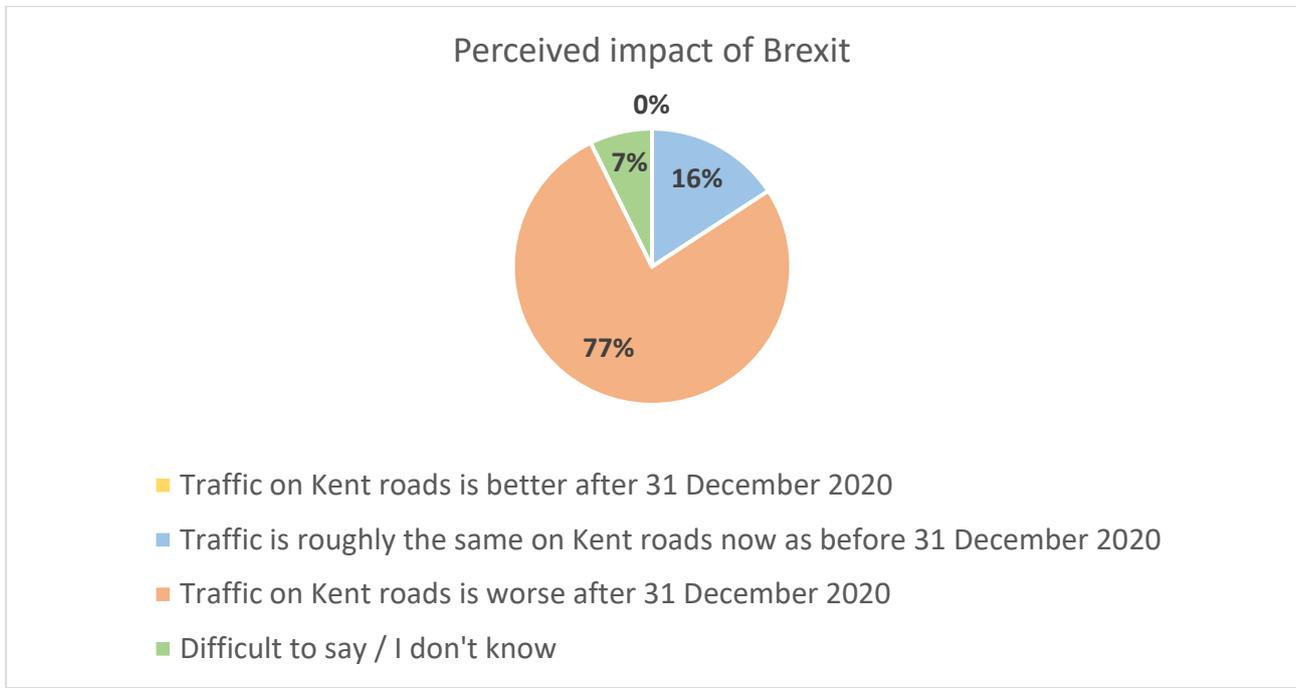
We cannot close as we provide statutory services - we route and reschedule trips.

We have to be on hand to guide our visitors to our holiday let business. We cannot 'switch off', it is a real worry. Locally, it is noisy - you can hear the traffic engines, emergency vehicles in the distance. Our country lane is used as a cut through into Dover.

# Perceived Frequency of Brock

The sixth question of the survey asked, 'Do you believe that your business has experienced better or worse traffic on the roads since the EU transition period ended on 31 December 2020?'

The graph below displays the results:

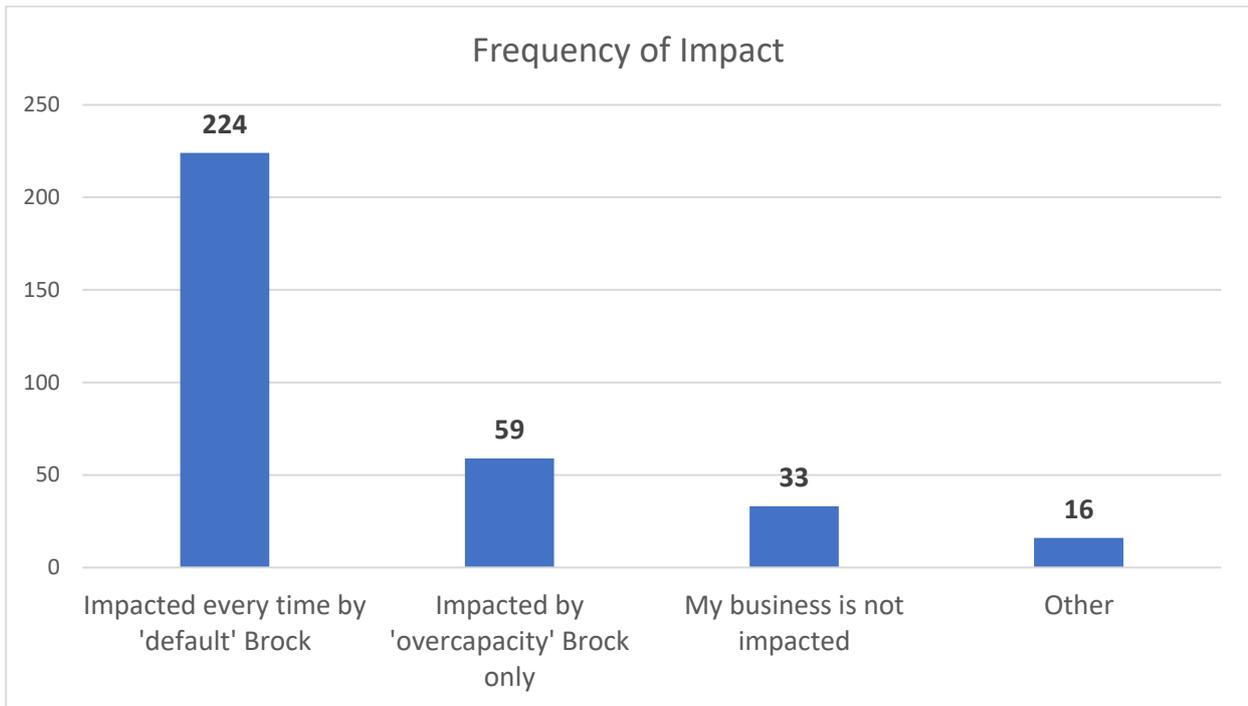


The seventh question of the survey asked 'How often is / has your business been directly affected by Operation Brock? For example, late deliveries, late staff, lower customer numbers, etc...?'

The drop-down options provided were:

- My business is impacted every time Operation Brock in normal default operation is in place
- My business is impacted only when the over-capacity Operation Brock is in place (with M20 j8-j11 closed to all coastbound traffic, except EU-bound HGVs) such as during Easter 2022 when P&O stopped sailing.
- My business is not impacted
- Other

The chart overleaf displays the results:



As chapter one shows, severe traffic congestion and the stacking of HGV queues on the M20 has been a feature well before Brexit. 2015 was a notable year when Kent and Medway businesses suffered financial disadvantage due to Operation Stack (the precursor to Brock).

However, the actual deployment figures (see page 12) and the business perception is that the situation has worsened significantly since the introduction of Operation Brock as a way to manage traffic post-Brexit.

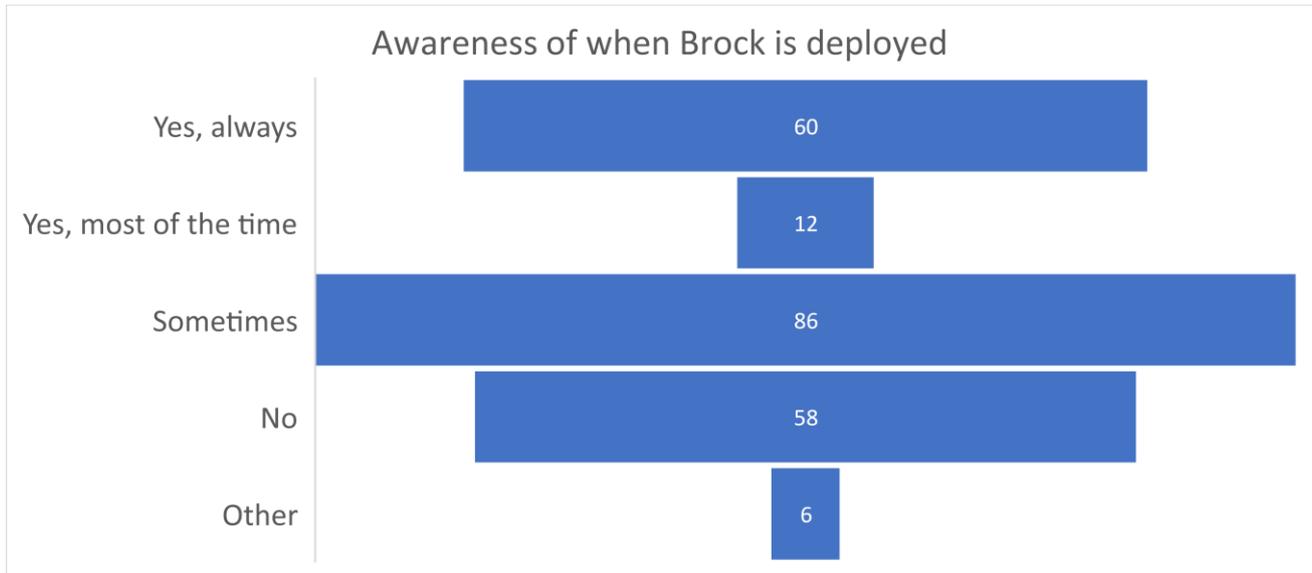
Businesses also seem to suggest that when 'default' Brock is in place, their businesses are impacted.

# Communication

## Awareness of Operation Brock's deployment

The eighth question of the survey asked, 'Thinking about communications, are you aware when Operation Brock is on?'

The chart below displays the results:



A large segment of the business community (58 people) is not aware when Operation Brock is in effect. Many of the free text answers refer to finding out Brock is deployed when the business leaders join the back of the traffic queues. Other answers show that businesses may know when Brock is deployed but do not know when Brock is lifted, and the traffic flows have returned to normal. Here is an example free text answer:

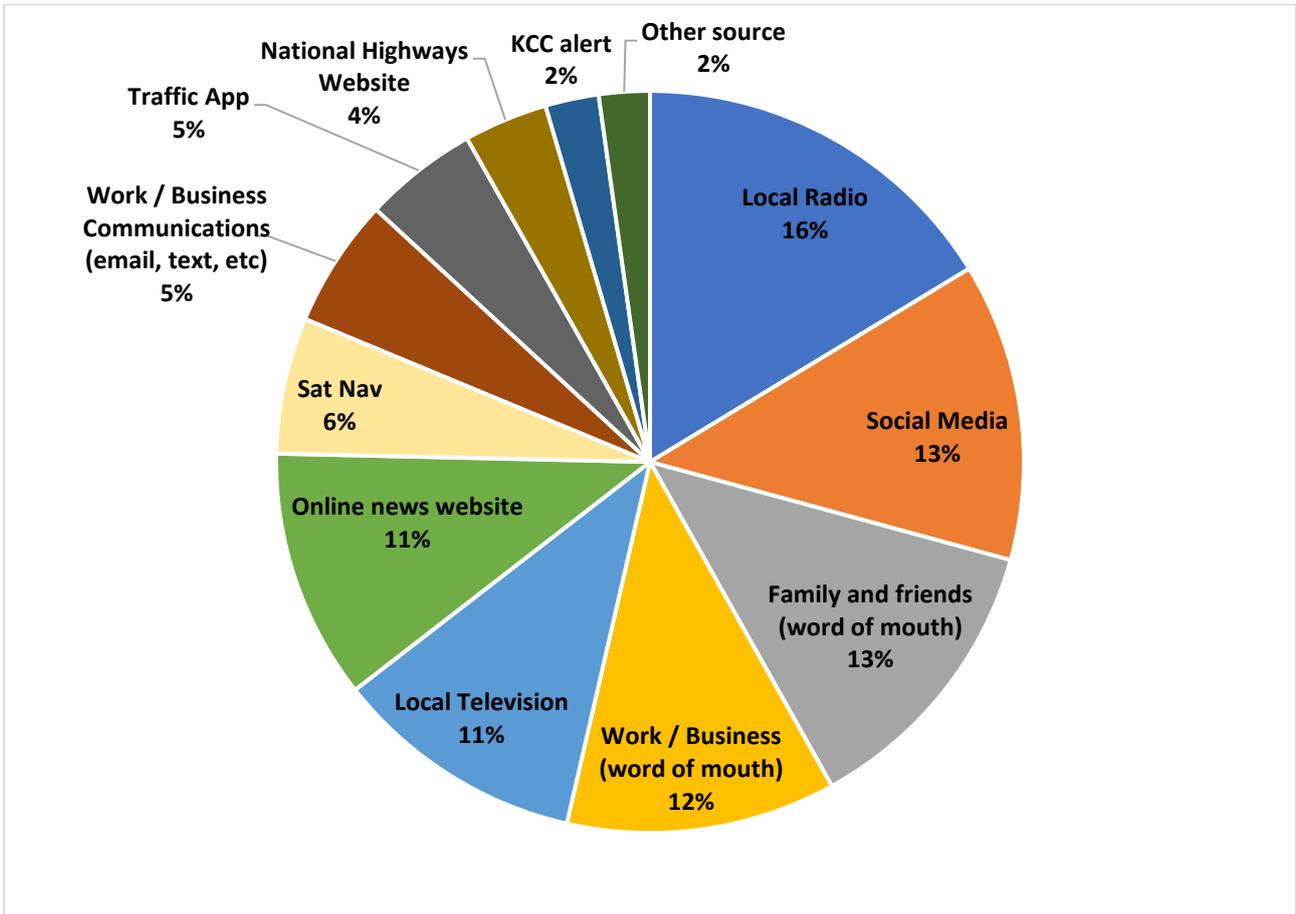
The local radio or national media alert me when there is congestion due to issues at the Port. However, I'm never sure when Brock has been cleared. Sometimes the delays last for days on end, and other times, it might be over in a weekend. However, I don't want to get stuck in traffic, so I arrange my diary, so I don't travel to Mid- and East- Kent for the next few weeks after disruption, just in case it isn't fully cleared yet. I think the communication could be improved. Could the live M20 CCTV images be shared online, so we know when the coast is clear to travel?

KMEP asks the Kent Resilience Forum and partners to please consider if there are improvements that could be made to the communications strategy, so that business can take the appropriate mitigating action.

## Method of Communication

The ninth question of the survey asked, 'How do you hear if Operation Brock is in place?' Business were asked to select all answers that applied from a drop-down list.

The chart below displays the results:

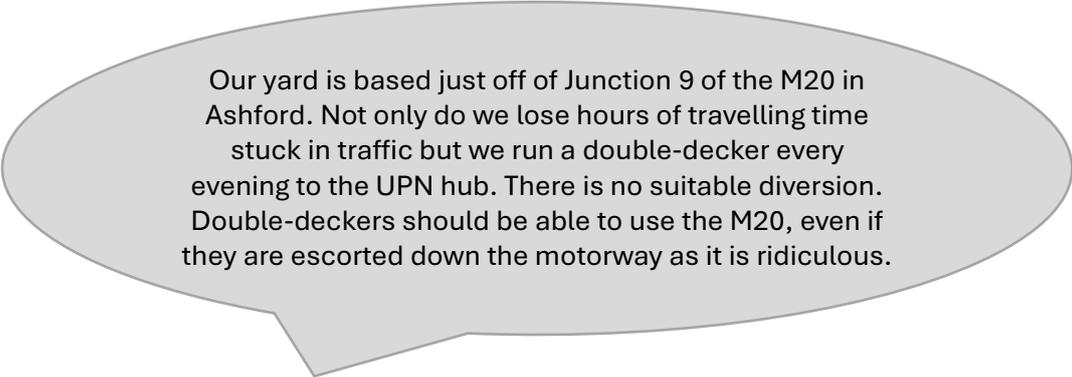


## Other issues raised in free text

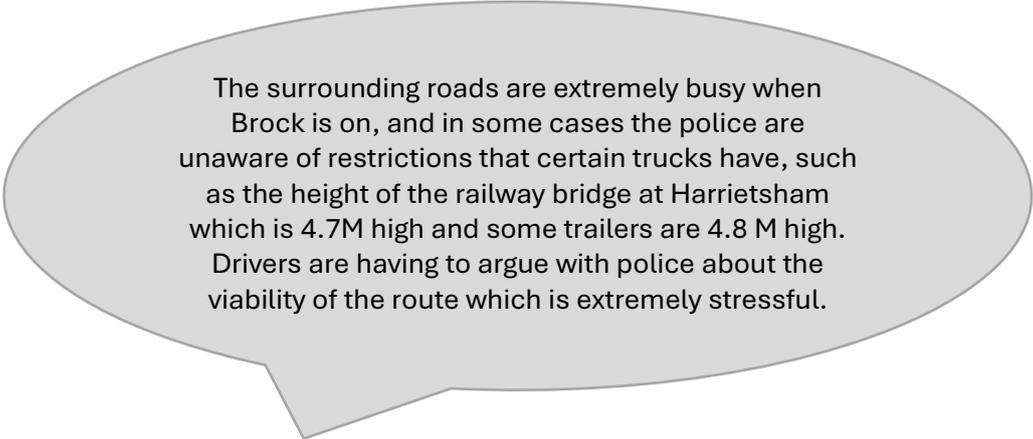
The free text answers revealed businesses are concerned about some issues that were not specifically asked about in the original survey questions.

### Height restrictions on diversions

Two businesses raised their concerns that Operation Brock diversions are not appropriate for HGVs and vehicles above a certain height (such as buses).



Our yard is based just off of Junction 9 of the M20 in Ashford. Not only do we lose hours of travelling time stuck in traffic but we run a double-decker every evening to the UPN hub. There is no suitable diversion. Double-deckers should be able to use the M20, even if they are escorted down the motorway as it is ridiculous.



The surrounding roads are extremely busy when Brock is on, and in some cases the police are unaware of restrictions that certain trucks have, such as the height of the railway bridge at Harrietsham which is 4.7M high and some trailers are 4.8 M high. Drivers are having to argue with police about the viability of the route which is extremely stressful.

### Increase in theft and anti-social behaviour

A few businesses raised their concerns that the rate of theft had increased in their area during Brock – as the police are engaged in traffic enforcement, and some individuals decide to steal goods from worksites as they cannot access time-critical goods by usual means as deliveries to their area are blocked. KMEP would be interested in seeing the crime statistics from Kent Police.

Many businesses also mentioned the antisocial behaviour that is unavoidable when HGVs and vehicles are stranded and not able to travel forwards (or backwards). There is a lack of toilet facilities, especially on the A-roads used as diversion routes. Many free text answers referred to drivers needing to use the road verge as a toilet, and the human excrement and litter left behind afterwards. Also, without lorry park facilities, they struggle to find appropriate places to park their HGVs.

Furthermore, whilst this is a survey that focuses solely on the businesses' views, a few replies did mention the impact Operation Brock has on local residents. Some local residents, particularly those linking in Dover, were blocked into their homes by the stationary queue of traffic heading to

the Ports. If a medical emergency had occurred, it would be extraordinarily difficult for the resident to reach the hospital, given the traffic flow (or lack thereof).

Here is a small sample of business comments that relate to theft and anti-social behaviour during Brock:

I'm a local trader in Dover. There were more occurrences of theft with Police tied up with traffic disruption and issues caused by blocked roads.

Taking lorries from the motorway and diverting them onto A roads degrades the roads, leads to excessive littering and urinating at the side of roads. Lorries park in village laybys leading to a loss of quality lifestyle for village residents.

I support a lorry park. Drivers being stuck on the motorways while everybody else can't use those same motorways is ridiculous. Having proper parks will allow continued flow of domestic traffic but also should have facilities for the drivers that are stuck rather than the immense amounts of rubbish that is thrown across the roads every time there is traffic issues.

Ashford is plagued by lorries parking illegally. We have noticed they are now parking under bridges and on slip roads near park farm. No enforcement action is being taken and the rubbish on our verges around the ring road has become disgusting and is not being regularly cleared. Our industrial estate (Henwood) has over 30 illegally parked trucks most weekends, all of which use the grass areas as toilets. Again, minimal enforcement is taken. KCC and Ashford Borough need to up their game with the enforcement of lorry parking and also the maintenance of our verges and green areas.

### Impact on statutory services

Several businesses that replied to the survey said they provide statutory services (such as carer services). When Brock is in effect, these businesses have no choice but to continue service provision. However, the delays in accessing their clients does have perverse consequences and may put their clients at risk. An example comment in the free text answers is shown here:

During Brock, we have to find other extended routes to deliver the hot community meals to vulnerable older clients, with some of the meals not able to be delivered at the correct temperature. With this in mind, clients are delivered alternative options, such as salads and yogurt, not always appropriate for older people when it is their main meal.

## Driver Welfare

Driver Welfare is a significant concern for KMEP. The HGV driver shortage, witnessed in 2021, when goods could not be delivered on time and Army drivers had to be drafted in to drive fuel tankers to petrol stations, was a prime example of why it is important to ensure that the haulage industry remains an attractive sector for employment.

Logistics UK is a member of the Business Advisory Board (KMEP's business subgroup), and they have been clear that substantial improvements are needed to how HGV drivers are treated. A key message is that new driver facilities alongside motorways must be introduced, particularly in Kent. Drivers are missing basic facilities, such as toilets and a place to eat and drink. They also need facilities so they don't break the tachograph drivers' rules.

Newspaper journalists have interviewed drivers during Brock and, as one of the media headlines shows in chapter two, it is not unheard of for an HGV driver to be in an Operation Brock queue for 32 hours.

Back in December 2020, the BBC covered how charities from across the UK supported the HGV drivers stranded on the M20, by delivering hundreds of meals. For example, members of KhalsaAid Charity travelled 80 miles from Maidenhead in Berkshire to take food to drivers in Kent; and on another occasion, the Sikh charity's LangarAid members travelled almost double the distance, from Coventry, to take water and food to the drivers<sup>4</sup>.

Here are a few comments businesses made about driver safety and wellbeing:

There needs to be a better solution to parking thousands of lorries on the M20. The current situation is not fair on the residents of Kent or on the lorry drivers themselves. By having facilities strategically placed on the M20, M2, M25 and at other key motorways the impact of delays at the ports will be reduced to local Kent residents. Additionally, having decent facilities that contain showers, toilets, food outlets etc would allow for the lorry drivers to wait until the delays have been cleared.

All the time Dover remains the primary route for freight AND leisure traffic, there will be delays. Freight drivers need proper working conditions, which includes food, toilet and wash facilities, as well as parking areas. People and businesses of Kent need their roads back.

We are hauliers. It is only in the UK we experience this type of short-sighted traffic "management"; Stacking traffic is not safe for our drivers, and no facilities are provided by KCC. It is not good for residents that complain about the trucks being stacked and knock on to the Re-routes of all other traffic (sometimes HGV traffic on village roads).

<sup>4</sup> <https://www.bbc.co.uk/news/uk-england-kent-55421924>

Lorry parks mean less disruption, less mess and the lorry drivers would have toilets and washrooms.

We need to find an alternative method to keep the roads free and flowing. We cannot keep closing the motorway. The lorry drivers also need accessible facilities to use.

A lorry park would provide places for the drivers to eat, wash and use the toilets rather than a van providing food and the verge the toilet!!

A network of lorry parking sites would enable drivers to park-up to avoid tacho infringements, and have access refreshments & amenities - similar to the frequent pull-ins on the French motorways.

A lorry park is required in our modern world, both for the convenience of local people and for the health and safety of HGV drivers.

A properly managed temporary parking system which can provide basic facilities for drivers is essential. Truck drivers are restricted in the hours they are allowed to work and if they cannot stop at specific times they can face prosecution. All this through no fault of their own. Additional lanes should be added to the M20 between the Roundhill tunnel and Ashford just for Channel Freight traffic. These must have dedicated rest areas with facilities every 3 miles to enable trucks to pull out of the queues to take a statutory break or comfort break when required.

We need to keep the infrastructure clear for local people to travel and to ensure lorry drivers have somewhere to stay without using our highway verges as public toilets.

If it is done properly, a lorry park could make significant improvements. HGV drivers could rest safely, rather than at the side of the road or under a bridge, it could create jobs. I'd prefer there to be a cargo/trailer transfer station, as drivers and tractor units could switch over rather than being stationary.

They seem more humane than leaving the drivers stranded in the road without toilets or water access.

I feel sorry for the lorry drivers being stuck in their lorries with no facilities.

UK & International HGV drivers are often left unsupported for hours at a time without suitable facilities such as washing, catering etc in adverse.

## Speed of the Contraflow's deployment

A few businesses used the free text answers as an opportunity to express some frustration over the length of time it took to deploy and remove the contraflow on the M20 between junctions 8 and 9. They also commented on the impact of the 50mph limit on their businesses:

Travel times excessive. Anger when you drive down and see only 73 lorries in the Jct 8-9 section and lorries on 10-11. Who is meant to be in control? The contraflow could have been reinstated a lot earlier Sunday morning 8.30 am 24.7.22

Although when the contraflow is operating the effects are limited, it is the effect on Brock implementation and its removal that adversely affect our vehicle movements and staff travel.

It is implemented far too soon and takes forever to close once the situation has been alleviated.

The contraflow needs to be removed quicker, very quick at implementing it, not so good at returning our commute to work or home quickly.

It seems that Operation Brock is rolled out and then unused for the great majority of its deployment. I would estimate that it is only being used during 10% of its overall deployment term. I would welcome consideration of a more rapid deployment and removal system.

Lorry parks would take the lorries off the motorway so traffic can still flow though. We have had 50 miles an hour on our motorway for ages and it's a pain. When Brock is on, it causes so much chaos in Dover and Folkestone. It is not fair on all of the people from this area to have to put up with it. Not to mention the poor lorry drivers, who just want to get on and are driving around our villages not knowing where they are supposed to be going!

## Safety of the Contraflow

Several businesses expressed unease over the safety of the Contraflow's use on the M20, given that the lanes on the motorway are narrowed and the hard shoulder is removed. Local press articles (as shown in chapter 2) have also commented on this aspect of Brock and the concern that vehicles may ease collide with each other or the concrete barrier.

Here is a sample of the comments made about the contraflow and the accidents that occur between junctions 8 and 9 on the M20:

The delays caused by the contraflow are significant with the 50 MPH limit, especially worse if there is an incident like a break down or accident which brings it to a standstill - no escape routes. It also doesn't feel safe London bound as the international lorries have no respect for the narrow lanes or the slower speed limit.

Because of Operation Brock, no-one on the road has any patience and accidents occur. Forcing huge delays every morning when attempting to get to work. This has to stop!

We use the M20 every day (we work remotely repairing generators) if just one car breaks down then its chaos, if a lorry breaks down the Highways Agency goes into overdrive with their plastic cones. The overhead signs COULD be utilised far sooner once a breakdown occurs then, we would have the option of leaving the M20 and finding another route. In addition, the breakdown waggon would be able to access the situation earlier. We travel extensively on the roads of Europe and this type of amateur approach is not taken by them, they find ways of keeping roads open they do not find reasons to close them, it's all about positive thinking and a more professional approach to traffic management, don't outsource it, set up a body that has a constant to its nature.

We can't get to the channel ports to escape and the M20 is always impacted. The narrow lanes of the contraflow are potentially dangerous - How many accidents have there been in that stretch of road since the

The motorway becomes even more dangerous to use when Brock is in place due to traffic on the same carriageway, despite the 50-mph speed limit, as this is then in effect much worse than a 'smart motorway' with absolutely no chance of pulling over to a safe area in the case of a breakdown or accident. And it's getting worse and worse.

Having two lanes on each carriageway is dangerous!!! I have had huge lorries frequently overtake me on the outside. The lanes are too narrow! It only takes one lorry to steer out of their lane when another vehicle is overtaking - and catastrophe strikes!! Each time a vehicle breaks down - this blocks one lane, leading to horrendous tail backs. The 50-mph limit encourages tailgating - again...dangerous!!! Public safety is, it seems of no concern - Brock is seen as a money-making exercise for the powers that be, in the way of fines. And most of the speeding is done by foreign lorry drivers - who are NEVER going to pay the fine anyhow!

### Timing of Roadworks

A few businesses mentioned that Operation Brock, or a related element, may come into effect at the same time as roadworks are planned by National Highways on the motorways, and by Kent County Council or utility providers on the A-roads. This amplifies the traffic congestion, as businesses cannot use the motorways nor the A-roads that would usually serve as the diversion route. Below is one example comment:

Something needs to be done. Kent business cannot be expected to fail because of traffic chaos as all the countries freight goes through Kent. Freight should be travelling by rail. Other ports should take some of the freight - not just Dover. Local roadworks must wait and not be allowed to make the problems here even worse. Housing development must be stopped in this area - we're already ground to a halt in Faversham.

Lack of joined up thinking. I have experienced a time when the M2 was closed for roadworks at the same time as operation brock was on. Also, ALL roadworks/temp traffic lights on A20 should be removed without exception if operation brock is on. Also, traffic lights on some junctions along A20 should be reprogrammed when operation brock is on. I have experienced times when the main road is on red & the access/egress lanes to/from M20 are on green when clearly there will be no traffic. In short - I understand why operation brock is on sometimes but there must be joined-up planning to ensure the impact to local businesses is minimised.

There is a complete lack of thinking when putting Brock into place. For example, someone decides in KCC that Brock should happen the weekend the M2 is shut or other roads are closed therefore it makes the whole of Kent grid locked. Surely someone can think if Brock is in place, let's cancel all M2 work until it is re-opened. I fail to see how things like this can be missed or not considered. Kent is getting busier and busier all the time and revenue is being lost from families and business as it's just not worth the hassle of going out for either a business lunch or a family visit because you never know if you're going to get stuck in traffic. I appreciate this is a business survey, but a lot of my business activities take place at the weekend.

## Housing Growth

A few businesses commented on high level of housing growth planned for Kent and Medway, and that this will be accompanied by additional road users, exacerbating the congestion during Operation Brock. Here are a few of the businesses' comments:

Kent's investment in infrastructure such roads etc is very poor, and will only get worse the constant house building, bring more traffic onto the already overcrowded road network in Kent. There only has to be one issue on the M20 or M2/A2 for havoc to start, because the M20 and A2/M2 are the main roads in to and out of Kent.

The M20 and the surrounding roads have been rubbish for years and Brexit has nothing to do with it. However, building more houses and not improving the infrastructure is a massive concern.

## Traffic Enforcement

The Police conduct traffic enforcement checks at Brenley Corner, and the businesses' concerns about this activity are covered on page 18 of this report.

Other businesses commented on the lack of traffic enforcement elsewhere in the county, meaning HGVs were using inappropriate back roads. Here is one example comment:

I fail to understand why Junction 8 is closed off and coastbound traffic has to either go to Junction 7 to join Operation Brock or as many lorries do, they simply go up the A20 and who is there to stop them, so they simply bypass the M20.

## Chapter Four: Lorry Park(s): A Potential Solution?



Photo taken from [parkings-securises-pl.fr](http://parkings-securises-pl.fr) of the Calais Truckstop, France

# The Menu of Solutions

KMEP invited the Kent County Council Corporate Director for Growth, Environment, and Transport, and the National Highways' representative on the Kent Resilience Forum to their board meeting on 14<sup>th</sup> June 22 to discuss Operation Brock.

At that meeting, there was a discussion about potential solutions and plans to manage the traffic congestion within Kent.

The potential solutions that were offered at that meeting are as follows:

## Short-term Plan

- Warning, informing and preparing
- Operational adjustment
- Relieving pinch points
- Technology and legislation
- Open for business
- Enhance intelligence and forecasting
- Resources
- Funding

## Medium-term Plan

- Off road facilities
- Lorry Parks
- Legislation – Traffic Officer, Moving Traffic, Routes
- Enforcement
- Funding – State Aid
- Turn up and go?
- Tourist traffic management?

## Long-term Plan

- Strategic National Infrastructure
  - Brenley Corner improvements
  - Access to Dover improvements
  - Port of Dover and Eurotunnel capacity works
  - Strategic Road Network
- Frictionless autonomous borders

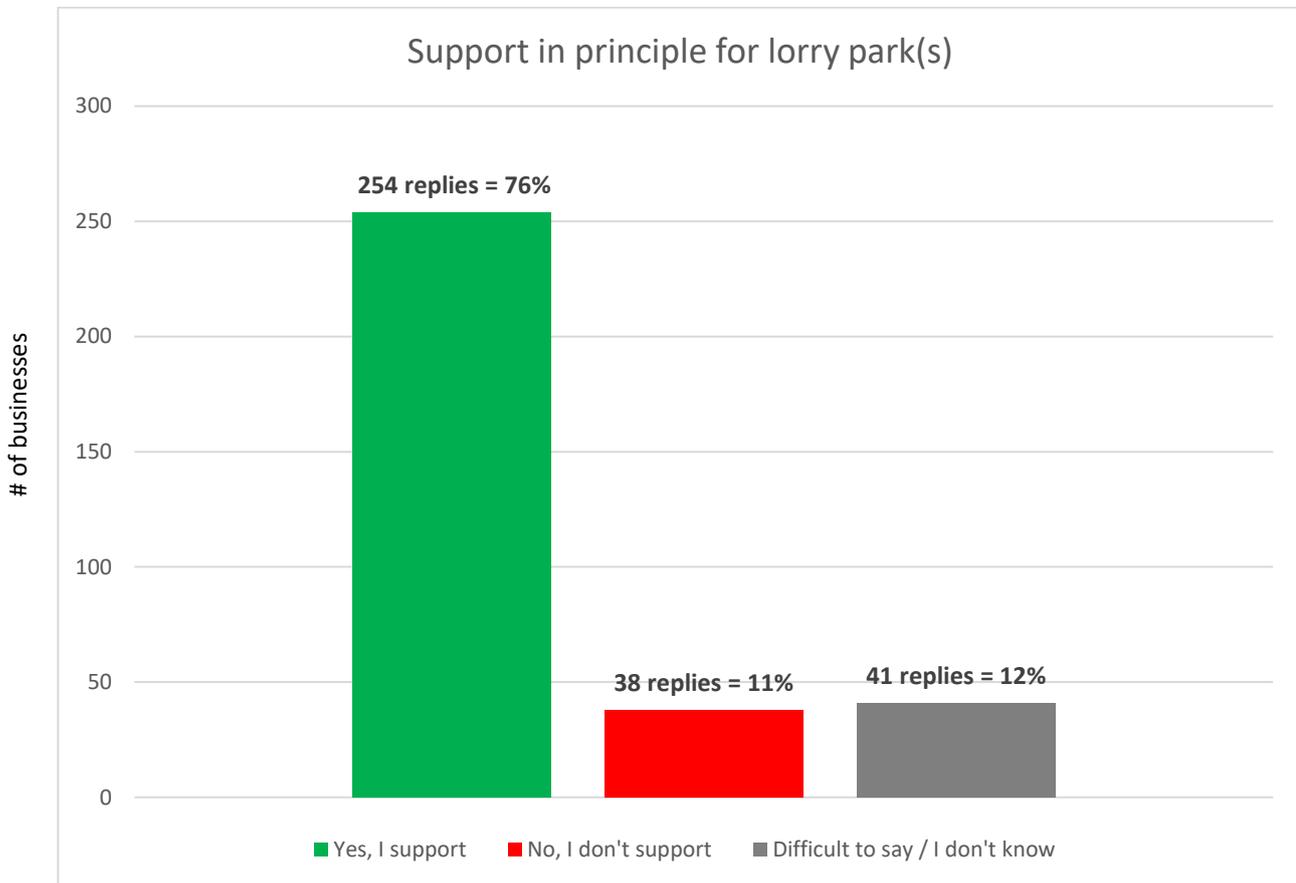
KMEP appreciates that cross-channel disruption leading to traffic congestion requires a mix of solutions, such as those listed above. However, as the business responses have shown so far in this report, there is a feeling that 'enough is enough' and that on-road solutions in and off themselves will not provide sufficient capacity to ease congestion and allow businesses to trade effectively.

KMEP therefore asked businesses about their support (or lack thereof) for a lorry park, or a network of lorry parks, as this is the off-road solution that has been muted over the last 5-10 years by various parties.

# Business Support for a Lorry Park

The penultimate question of the survey asked businesses 'Would you support in principle a lorry park or a network of lorry parks being built beside Kent and Medway's motorways, as an alternative solution to Operation Brock?'

The chart below displays the results:



**This survey shows there is overwhelming support for a lorry park or network of lorry parks by Kent and Medway businesses.**

A repetitive comment made in the free text answers showed that, while there is very strong support for a lorry park, there is a belief by the businesses that the lorry park network should not only cover Kent and Medway, but the entire country. The request by some businesses is for a network of UK lorry parks to be linked by intelligent communication, so that some HGVs can be held elsewhere in the UK, while other HGVs with a nearer departure time are held at a lorry park closer to the Ports.

Some businesses also felt a network of smaller lorry parks, rather than one large lorry park, would be beneficial.

# Reasons for and against a Lorry Park

KMEP recognises a lorry park, or a network of lorry parks, is not a panacea. A lorry park will undoubtedly bring with it many benefits, such as relieving the motorway network so it can operate for its original purpose and improving driver welfare, however, it does have disadvantages, such as its environmental impact.

The last question of the survey thus asked businesses **‘Why do you say you would or would not support in principle a lorry park or a network ...?’**. The ‘free text answers’ are shown in the appendices, and we would urge you to read the comments in full.

## Reasons for lorry park(s)

In summary, the main advantages of a lorry park, mentioned by businesses, are those aspects that have been already covered in chapter 3 of this report.

The survey has shown that the large majority of businesses (approx. 4 in every 5 business leaders) assess that Operation Brock, both in its ‘overcapacity’ and ‘default’ modes, has a negative or severely negative impact on their business. It negatively affects their:

- Business Travel
- Staff Morale
- Revenue and Income
- Inbound Supplies – Delivery Times
- Customer and Visitor Numbers
- Staff Attendance
- Outbound Supplies – Delivery Times
- Reputation
- Investment and Orders
- Staff Recruitment and Retention

A lorry park, or network of lorry parks, would alleviate these negative impacts according to businesses.

Other business comments in favour of the lorry park, or network of lorry parks, raise the following points:

- The principle that a motorway should not be used as a car park. Motorways and A-roads need to be free-flowing.
- The Kent Ports are vital to the UK economy. This is a national problem.
- Kent and Medway businesses have endured traffic congestion for decades, and now is the time for action. If not several businesses, say they will relocate, as it is perceived the frequency of Brock is increasing, particularly due to border checks increasing. The current approach is unsustainable. Some business request compensation for loss of earnings.
- Driver Welfare. Freight drivers need appropriate facilities, including toilets, washrooms and a place to park, rest, eat (removing anti-social behaviour (such as littering) and inappropriate parking from Kent and Medway’s A-roads).
- Kent effectively does not have a 3-lane motorway, as the contraflow is often in effect.
- Operation Brock cripples all businesses in the local area, even if they are not hauliers. It particularly affects the tourism and hospitality sector, which provides much employment locally. The towns of Dover and Folkestone become impassable. Businesses and residents

located in villages and towns along the border of the M20 and M2 struggle greatly to leave their premises due to congestion.

- Taxpayers pay to have a good motorway system.
- If vehicles are to be held, there should be a holding area. This decision should not have a financial/negative impact on local businesses.
- The Lower Thames Crossing, whilst strongly welcomed, may bring more freight onto Kent and Medway's already stressed motorway network. One business said 'Kent cannot sustain the forecast growth of freight traffic (40% if Damien Green's forecast is to be believed)'.
- The British Government cannot control when Operation Brock comes into effect. Outside forces, be it adverse weather or the availability of French border agents (etc), will dictate when and for how Operation Brock needs to be deployed. However, the British Government can set legislation and conditions to control the movement of traffic within the UK. In other words, the Government cannot cure the ill, but it can alleviate the symptoms.
- Lorry Park(s) will lessen the impact on local traffic.
- Lorry Park(s) will allow traffic movement on motorways, allowing businesses to start offering services and goods in other areas of Kent / Medway / the UK, which are currently cut off due to Brock.
- Brock has a significant detrimental environmental impact, because the HGVs and cars must take significant detours when Operation Brock is on, travelling many more miles than would have been necessary if Brock was not deployed.
- It will increase quality of life for Kent and Medway residents and reduce stress.
- The Lorry Parks could be built with charging facilities, helping to future-proof Kent and Medway.
- Lorry Park(s) would improve safety on our road network, and reduce the accident rates. It would also enable emergency services to be able to move around Kent and Medway with greater ease.
- It would enable more businesses to relocate from London and other expensive areas to areas in Kent and Medway, which are more affordable. It would encourage inward investment.
- Extra paperwork checks could be made at the lorry parks and ease the congestion at the Ports.

## Reasons against lorry park(s)

In contrast, the disadvantages mentioned by some businesses are as follows:

- The environment impact of building a lorry park and the loss of green habitat.
- The cost of building a lorry park, and the difficulty of incentivising Truckstop operators to build it, in tandem with the Government.
- Light pollution from the lorry park.
- One respondent said it seems such a permanent fix for an occasional problem.
- New lorry terminals may be unsightly and building them may attract public protests.
- Some businesses say this is an issue for the ports to sort out themselves, by increasing their handling capacity.
- Infrastructure should be built away from Kent, in other UK port locations, to relieve the bottleneck that Dover is causing.

## Reasons why some businesses are neutral

Forty-one businesses said it was difficult to say if they would or would not support a lorry park. The free text answers indicate these businesses would need to see proposals before commenting.

## Alternative solutions suggested by business

Businesses proposed a number of solutions, which could act as an alternative to a lorry park, or could be deployed in addition to a lorry park. All the alternative solutions put forward by businesses are shown below:

- Replicate the **entry permit system** used in parts of Europe; it only allows the number of lorries through that the network can cope with, i.e. provide an allotted time to access the M20/M2, and a ban from the local roads much as used to happen in the French corridor before the coming of the new motorway over there.
- Bring back **cabotage**.
- Encourage **alternative means of transporting freight**, e.g. via rail infrastructure, or alternative ports (such as Ramsgate).
- **Revive old port routes to other EU countries**, such as Belgium. This may enable lorries to be able to still travel to the EU if the French authorities close their border. A suggested route in the free text comments was create a route from Ramsgate to Oostende.
- **Work more with the French/EU authorities** on creating better seamless border checks.
- **Re-join the EU**
- Build a **second channel tunnel**
- **Build a second motorway** adjacent or above the M20 to act as the lorry park.
- **Use all three-lanes of the M20 eastbound carriageway** to stack lorries during Brock, as the Police could still use the hard shoulder to direct the traffic.
- Improve the current situation by having **information screens** around Kent, rather than the current signage that may simply say 'M2 closed'.
- Develop an **Operation Brock/Dover TAP App** that anyone can use which gives the same up-to-date information that the Operation Brock managers have.
- **Limit the incoming lorries** from the EU, when the reciprocal arrangements of the EU accepting UK lorries is not working well.
- **Promote local and UK products** and goods to society and try to reduce foreign imports where possible.

One business made an alternative solution to the police enforcement at Brenley Corner:

- “When closing Brenley Corner roundabout, could an alternative consideration be that of filtering lorries off via the weighbridge site adjacent to the A2? Then their papers could be examined and they could proceed around the Brenley Corner roundabout again and either back down the M2 again or along the A2 East if they have, say, a colour coded sheet of A4 in their windscreen.”

# The Government Commitments

Kent and Medway businesses have welcomed past commitments of the Government to find a more permanent solution to Operation Brock/Operation Stack.

## Government Commitments to Date

In 2015, local government partners agreed to bid for some of the Government's Local Growth Funding (LGF) to create a small lorry park at Westenhanger. Some LGF funding was awarded and plans were being taken forward.

However, in the Spending Review and Autumn Statement in November 2015, the then Chancellor of the Exchequer announced that Government would be **"...providing up to £250 million for a major new permanent lorry park to increase resilience in Kent, by taking pressure off the roads in the event of Operation Stack."** This followed unprecedented disruption to the roads of Kent when parts of the M20 had to be closed on 32 days during 2015 due to a reduction in cross-Channel capacity. The Government mentioned in the Spending Review that 'Over the years, there have been a number of studies of possible locations for a permanent lorry area in Kent'.

Plans were then taken forward with the DfT and National Highway's predecessor (Highways England) to develop the £250m lorry park at Stanford, near Hythe. It would be able to accommodate 3,600 parked HGVs.

As this provided a fully-funded solution, the LGF funding secured by local partners was therefore relinquished and reallocated to other projects across the South East Local Enterprise Partnership's area.

In November 2017, the Government told the High Court it will no longer be defending a judicial review against the plans for the lorry park proposal near Stanford and it had scrapped the plans entirely<sup>5</sup>.

In May 2018, the Government published a national survey of lorry parking<sup>6</sup>.

Operation Brock was devised/implemented in 2019 as an alternative traffic management solution for Kent. As the survey results show, local businesses feel this has been ineffective in easing congestion.

In July 2022<sup>1</sup>, in an open letter to the road haulage sector, Ministers pledged the DfT will work with industry leaders to support more official parking spaces for lorry drivers and look at ways to improve the standard of lorry parks<sup>7</sup>.

On 31<sup>st</sup> January 22, the Times newspaper<sup>8</sup> reported that "National Highways, the government agency that runs England's motorways and A roads, has been instructed by the Government to identify a site. A new lorry park could help prevent gridlock on the A20 in Kent."

**KMEP and the business sector would welcome understanding from the Government and DfT the nature of their current lorry park plans.**

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<sup>5</sup> <https://www.kentonline.co.uk/hythe/news/lorry-park-plan-axed-135315/>

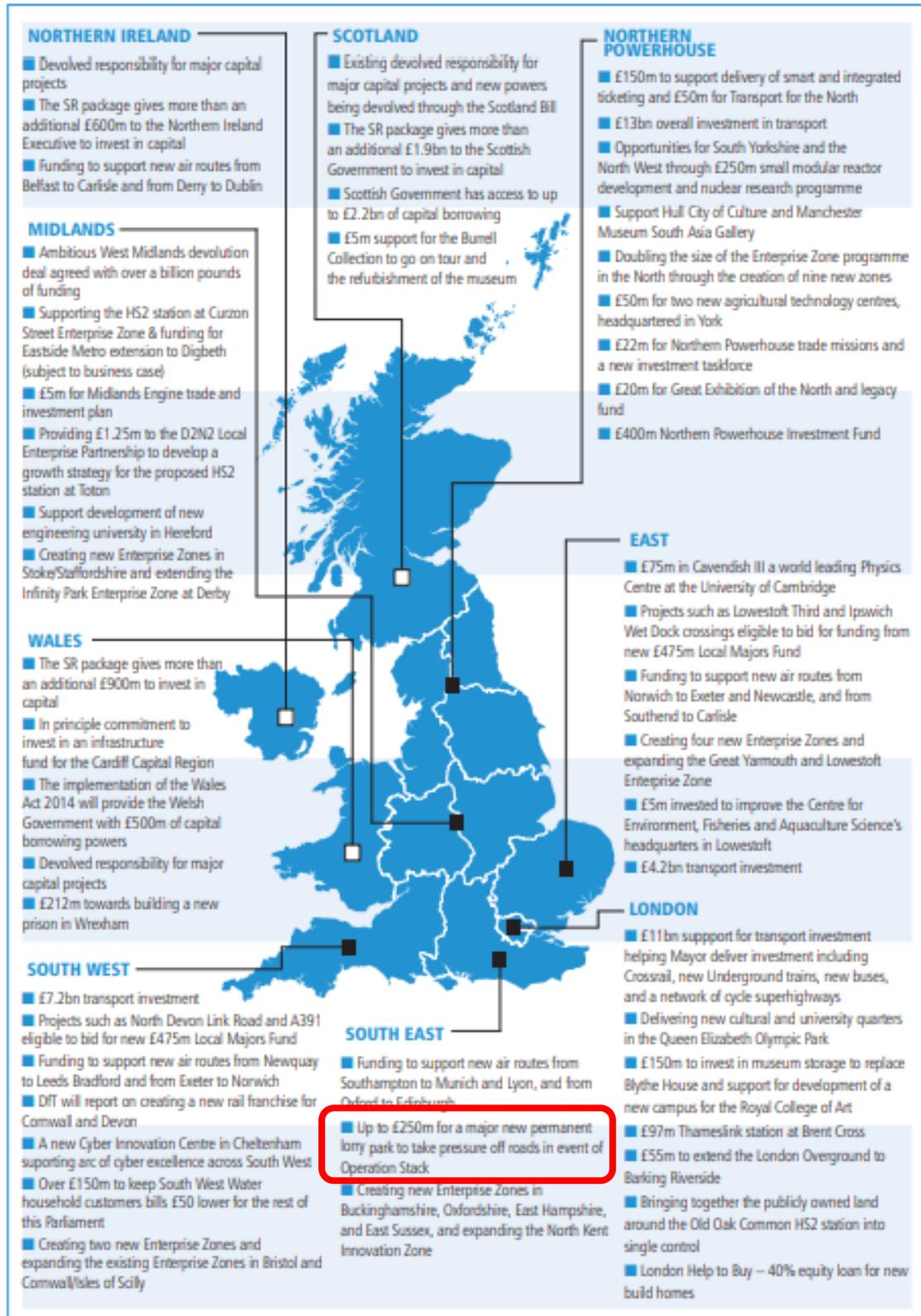
<sup>6</sup> <https://www.gov.uk/government/publications/national-survey-of-lorry-parking>

<sup>7</sup> <https://www.transportxtra.com/publications/parking-review/news/69381/ministers-promise-more-truck-parking-and-simpler-hgv-driver-training>

<sup>8</sup> <https://www.thetimes.co.uk/article/giant-lorry-park-plan-to-ease-border-traffic-chaos-on-a20-in-kent-68d0w6d5n>

# Summary and Next Steps

Figure 1: Investment across the United Kingdom

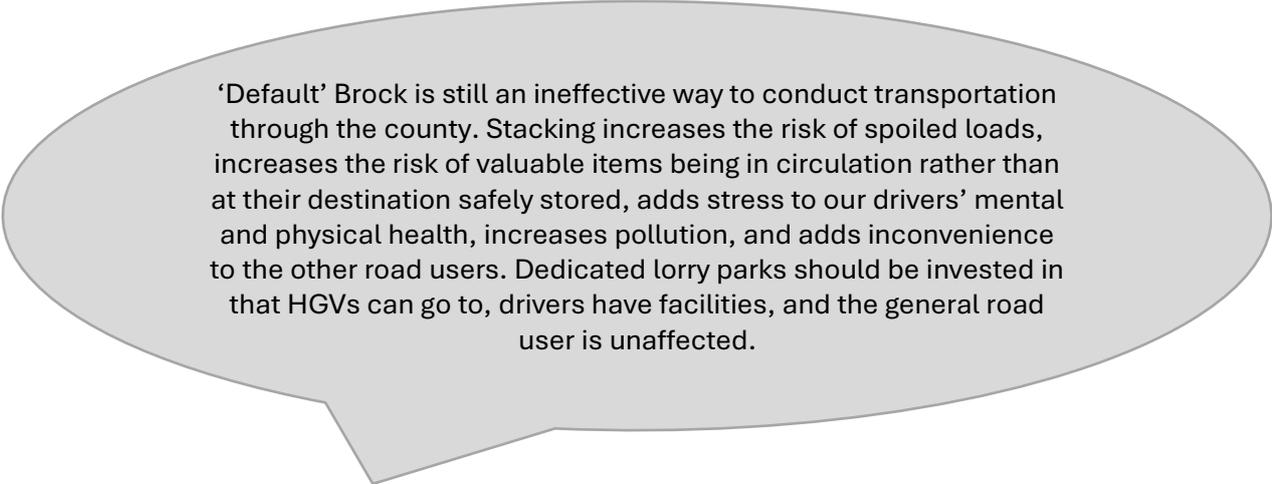


From the Spending Review and Autumn Statement 2015

# Summary

The key findings of the business survey are:

- Kent and Medway Businesses overwhelmingly assess that Operation Brock negatively impacts their business.
- All aspects of a business' operation are impacted by Operation Brock. It is particularly concerning that four out of every five businesses say that their revenue and income falls when Operation Brock is in effect. The businesses which estimated the exact reduction showed a 40-60% drop in income.
- As a consequence of the detrimental impact of Operation Brock, one in every six businesses is planning to relocate away from Kent and Medway, with a further one business not sure if they will stay or relocate. Sustaining existing economic activity within Kent and Medway is thus under threat.
- Attracting new inward investment and tourists into Kent and Medway is exceedingly difficult against the backdrop of local, national, and international media reports highlighting the travel difficulties. Consequently, economic growth is under threat.
- A permanent off-road solution is an urgent requirement according to businesses. This may accompany other improvements, such as improved traffic communications. The deep frustrations of businesses are evident from the strength of their comments.
- Businesses would welcome a network of smaller lorry parks and want some of the parks to be located outside of Kent.
- Finally, the negative impact of Brock is not negated by the contraflow solution. While there was a slight improvement in all aspects of business operation when travel is still allowed eastbound between junction 8 and 9 using the contraflow, the improvement is minimal. As one business said:



'Default' Brock is still an ineffective way to conduct transportation through the county. Stacking increases the risk of spoiled loads, increases the risk of valuable items being in circulation rather than at their destination safely stored, adds stress to our drivers' mental and physical health, increases pollution, and adds inconvenience to the other road users. Dedicated lorry parks should be invested in that HGVs can go to, drivers have facilities, and the general road user is unaffected.

# Next Steps

KMEP commissioned this survey of the business community to assess the scale of the impact of Operation Brock on economic growth.

We hope that these survey findings can prove useful to the Government, Department for Transport, and members of the Kent Resilience Forum to evidence why a permanent solution (specifically a network of lorry parks) should be committed to and implemented without delay.

KMEP will continue to focus on the issue of Operation Brock at its future meetings and wishes to invite senior officials from the Department of Transport to attend our next meeting in September 22, so they can share details of the latest activity underway in relation to the issues raised in this report.

KMEP would also welcome a conversation with the Secretary of State for Transport, once the new Government has formed in early September.

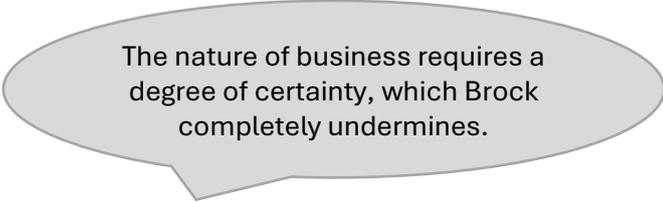
This survey report also serves to evidence why investment should be made through the Road Investment Strategy 3 in notable Kent and Medway pinch points (specially, but not limited to Brenley Corner and the A2 Dover Access Scheme).

In addition, KMEP knows a Levelling Up Bid has been submitted to the Government in recent months by the Port of Dover and Kent County Council with a view to improving efficient traffic movement through the Port in light of new customs checks. KMEP would urge the Government to select the bid for investment.

KMEP wishes to offer its services to Government and all relevant partners in helping to proactively and constructively design a solution and implementation plan. If KMEP can be of use in undertaking further surveys, we would be most willing to do that.

We understand that since KMEP undertook its survey, Maidstone Borough Council has launched a survey of the residential and business community in its area. This provides further evidence from the wider community about the impact of Brock, and the responses to date are available to view at: <https://letstalkmaidstone.uk.engagementhq.com/the-m20-operation-brock>

And finally... KMEP would like to finish with this quote from a business leader:



The nature of business requires a degree of certainty, which Brock completely undermines.

We look forward to working with you. Thank you for taking the time to read this report.

# Appendices

## All Free Text Answers (not seen elsewhere in report)

### In your own words, why do you say Operation Brock has had a positive or negative Impact on your business?

- We had to cancel various Training days, due to trainers and delegates not being able to get to their venues around Maidstone and Ashford.
- I was unable to travel from Maidstone to Ashford for meetings.
- This implementation of Operation Brock, and in particular the closing of the M20 between Junctions 8-9, impacted our business greatly. Several of our staff live around the east coast of Kent and were having great difficulties getting to and from work. Traffic management by Dads army or highways agency as they are sometimes called is absolutely dire, for instance, why close the junction at M20 J8 to all traffic when within just a few yards you could segregate the traffic quite easily. Why allow the major roadworks at Charing whilst the roadworks in the absence of Brock are still being carried out. and WHY are there only six people working on a 20 mile stretch of motorway to make hard standing for the movable barrier. by carrying out a few simple steps the whole situation COULD be made far less painful.
- Kent's main arterial roads are gridlocked at busy times which results in potential event attendees cancelling at the last minute or not wanting to commit in advance. Any negative situation can have an impact when organising an event.

### In your own words, why do you say 'Overcapacity' Operation Brock has had a positive or negative impact on your business?

- Business that depends on face-to-face meetings and which cannot be done on-line has been totally disrupted. In addition, the association of disruption with Kent is a bad place to do business is costing jobs and investment.
- Great difficulty in people judging times for arrival.
- Exceptionally difficult for members of the team commuting back to Canterbury/ Whitstable and increasingly difficult for those wishing to travel on the road from the South East to London. Alongside the rail strikes people cannot get to our office.
- Staff were unable to get into the Dover office, in addition, Dover employees who worked in Sandwich/Deal were unable to get out of the town. Clients were unable to attend appointments.
- We run a team of technicians that need to use the M20 on a daily basis, as we have clients in and around the M20, and Operation Brock has affected us hugely. Our technicians are getting caught up in traffic jams in and around Folkestone and Dover; as well there are numerous accidents that cause blockages for hours on end. The Petrol costs have increased as the team sat for lengthy times. Our guys send us images of the traffic they are caught up in.
- Increasing travel times in general and particularly badly when this is a minor blockage or breakdown.
- Unable to travel around Kent, meaning business development activities were reduced. Being an Ashford resident, long delays getting in and out of Ashford and on two days, it was almost complete gridlock.
- Delays on deliveries to us and delays on goods sent out by us.
- Difficult to move 'normally' between Ashford, Folkestone and Dover.
- I trade between Faversham and Canterbury and all the journeys associated with my business: suppliers, customers, deliveries, staff are all adversely affected by the tailbacks at the Brenley Corner.
- On the whole the traffic flowed, I was only once caught in a 3hr tailback.

- Operation Brock causes total inability to freely move around Kent.
- Increased time and cost in getting to clients. More time spent travelling and less time for work.
- The disruption caused for my business was significant as I could not travel freely, encountered major delays in my journeys and could not do much business as a result.
- Closing M20 to all traffic except Europe-bound lorries causes gridlock on alternative roads between Folkestone and Ashford. This impedes our staff and customers reaching our premises in Ashford.
- Delays in getting domestic trucks back into Ashford.
- Delivering goods when the motorway is shut causes problems and long delays.
- The 20 employees who work for my Maidstone-based business do not come from Ashford or require use of the M20 or A20 to reach work.
- Pushes local traffic onto A20 causing more delays and congestion.
- Being based in Folkestone it has impacted our travel time and has caused problems for employees getting to work, cost of fuel sitting in traffic and our hourly rate whilst being stuck in traffic.
- Operation Brock does not affect my business.
- Transporting goods in and out of the EU which before the dreaded Brexit was much more seamless and timely.
- Staff had problems getting to work when any Operation Brock is on - deliveries inwards sometimes get affected too.
- Traffic on the Ashford-side of Maidstone, especially on the A20, is paralysed.
- Our goods do not come in and out of Dover area, we mainly use ports north of the SE.
- We have been unable to move product via dover port and incurred costs involved due to the delays.
- We are within the M25 and as a business there was no impact, the general delay and lack of supply and subsequent inflated prices we suffered can't be attributed to Operation Brock.
- Unable to travel freely around Kent, can't even drop the kids off at nursery and school and be on time for work.
- Delays of both imported goods but much worse for export of finished products.
- Traffic was hugely impacted around Folkestone which stopped some clients from being able to get to me.
- It makes the roads impassable, the A20 becomes congested the 2 small lanes are nerve-wracking to drive through as they are very narrow. P and O only stopped sailing as a result of BREXIT and the erosion of worker's rights.
- Clients were unable to attend either of our offices, which impacted some of our transactional matters which need us to 'know our client' and to have sight of original documentation and signatures. Clients were also unable to attend initial meetings which, in some cases, meant they had a delayed start and in other cases, meant they went elsewhere.
- Customers unable to travel easily plus an appalling train service!
- Staff including myself are often in late due to the Dover town traffic.
- Inconvenience - delays
- I actually live in Harrietsham on the A20 (between Ashford and Maidstone) and for me to get to and from the office which is in Aylesford is an absolute nightmare, my company works on various industrial sites along the A20 to Ashford for example DHM Plastics and Ardo Uk and

the time wasted sitting in traffic is ridiculous and cannot be charged to the customer. For me to leave home to make my way to Discovery Park is a nightmare and I have to travel the 5 miles from my house to the bottom of Charing Hill with what seems to be the rest of the UK.

- Blocks M2 back to Faversham.
- The time wasted will be reduced.
- It adds to journey & response times which impacts on costs.
- Staff couldn't get to site on time.
- Disruption to staff travel on their daily commute, unable to get into work at start/end of day.
- Transport of goods into Kent has been delayed or prices gone up as companies do not want to go near the M20.
- Travelling to/from Harrietsham has been hugely challenging. Several times the A20 has had hours of long queues.
- Huge congestion is caused to the A roads and surrounding areas.
- Late to jobs due to traffic on M2 and M20 traffic. Then late home on M2 causing morning jobs to be late or cancelled.

**In your own words, why do you say 'Default' Operation Brock has had a positive or negative impact on your business?**

- Operation Brock has caused me to lose employees as the travelling time is too long.
- The reduction to 2 lanes and a 50 mph speed limit make for longer journey times.
- Because I don't want to work in Kent, that's where I get a lot of business. Why should I be sat in unnecessary traffic for hours?
- Wasted time, unable to visit suppliers. Suppliers unable to visit us or attend meetings.
- Delayed journey times.
- It's the lack of hard shoulders which causes 80% of the torture and the slow traffic speeds the other 20%.
- I can still get to my meetings & customers.
- Causes delays in travelling and increases travel distance if we try to plan and avoid this route.
- We cannot operate when severe delays are in place as it is sometimes impossible to get to where we need to get to on time.
- Clogging up Kent's roads has a negative impact on many aspects of public everyday life from work time to social time. With every other distraction we have we do not need journey times to come into the conversation or decision-making process as to how to commute to work or spend leisure time/social time. More effective planning is required to alleviate the terrible problems witnessed over the weekend of 22nd and 23rd July especially around Dover Docks and Eurotunnel.
- No real issues.
- No-one wants to sit in traffic queues, so clients don't bother to visit us.
- Most of my customers need to be reached along the M20. With the reduced speed, it takes longer to get anywhere.
- Affects client meetings and staff commuting.
- Lost time.
- It's taken longer for us to get deliveries of our materials.

- Roads are not needed for us to do business.
- Travelling times, jobs being unprofitable, cost due to engineers unable to complete as many jobs, fuel costs.
- There is increased traffic and so it takes longer to complete journeys.
- Operation Brock has no impact on my business.
- Over 50% of our customers arrive by car and travel within 10 miles of our clinic. All car journeys where significantly longer during that time.
- Kent business have had to endure the building of infrastructure (Motorways HS1 etc) for the benefit of the whole of the UK, but we have to put up with all the problems.
- Providing the "held" freight traffic is kept on motorway, and small vehicles are not re-directed through Ashford, the only consequence is a slightly slower time Ashford - Maidstone.
- Members/players have difficulty in reaching us. Either having to leave home earlier or arriving late. In some cases, not at all.
- Traffic congestion increases on alternative routes. The congestion on minor roads many years ago was the reason the motorway was originally conceived. Now it is needed more than ever.
- Awful delays.
- As for the over-capacity situation, but less severe.
- It takes some staff longer to get to the office and home again, customer are sometimes put off visiting our premises and goods take longer to arrive.
- The traffic is unpredictable, my journey time is unpredictable and it is very hard to make appointment in time with clients unless decreased significantly the business hours and therefore incomes.
- Because we have to be at a wedding venue at a certain time (and CANNOT be late), it can be worrying getting on to the motorway, not knowing if we'll get stuck there. We prefer to use the smaller roads so there's no chance of getting stuck, but the smaller roads are more congested, so journeys take twice as long.
- I avoid business meetings outside my local area.
- Operation Brock is still so slow, there is always accidents in it.
- The M20 should NOT be used as a carpark!!! That is not why we pay our business rates.
- The 20 employees at my Maidstone-based business do not use the M20 or A20 between Ashford and Maidstone.
- Travel time, increasing carbon footprint and decreasing clients' footfall.
- Deliveries take longer; Customers take longer to get here; Staff take longer to get here.
- No-one can get to us without being stuck in traffic and works that is now ongoing at the MacDonaldis roundabout on the approach road to M20 junction 10 is making it 100 worse.
- Time spent in vehicles getting to site, which has impacted our hourly rates of pay, cost of fuel sitting in traffic, lack of staff due to delays and unable to get into work.
- Gridlocks local Folkestone area.
- Everyone cannot travel or completely avoids traveling.
- If any build-up of traffic trying to get onto the motorway backs up through Folkestone or Dover we are unable to deliver or collect skips.
- Although we are not based in Kent - these negatives are impacting the image of the UK. Bigger issue is the debacle at Heathrow.
- Because we work nationally Brock only effects a small are of the business.

- Delays cause unnecessary disruption.
- We are too far from it. A few staff sometimes have longer journeys into work, but that's about it.
- DELAY, Lost time.
- Brock disrupts Ashford and the approaches to it badly.
- Clients cancelled sessions due to traffic.
- Travel times - employee, clients, deliveries.
- It ignores local traffic - it's not all about London to Dover.
- Revenue is significantly down because customers and patients cannot visit us in Ashford
- Inconvenience – delays.
- Although the traffic on the A20 is heavier it manages to still move because the majority of the traffic stays on the motorway and so this does not present such an issue.
- Minimal Impact.
- It avoids long queues behind lorries for a long time.
- I did not witness this though I think I know what you mean as it was introduced pre/post BREXIT,(a map would be helpful) Re Brock.. Although it is slower - 50 MPH, it works and keeps traffic flowing locally and routes into Kent stay fluid. That said Dover/Folkestone continue to have challenges and became gridlocked WE23July, which is hideous...it works sometimes but not all the time. It is unclear when Brock kicks in - I remember lorries parked at Capel le Ferne junction all July 2022...which is not Op Brock is it?
- Clients reluctant to drive in.
- I have had clients not wanting to travel to us because of the traffic.
- Logistics and travelling severely impacted. Client meetings cancelled or rescheduled.
- Operation Brock has a very big impact on our business. Prospective buyers will not travel down to view our auctions, and we therefore lose out on achieving high prices for our vendors.
- Journeys between us and Ashford have taken much longer for our Land Agent which means extra mileage costs.
- This was a better system as we could still use the motorway and avoid the much slower A20.
- Works well until overwhelmed or there is an accident.

**When Operation Brock is in place, how does your routine business behaviour change?** Please note a drop-down list of answers was provided (see page 63), but respondents were also able to select other, and then state what they meant by other. Here are the answers:

*In the overcapacity scenario:*

- We have to reroute/cancel/suspend local bus services depending on the circumstances at the time
- Care calls run late therefore staff can't always stay on due to other commitments meaning calls are cut short or cancelled.
- Everyone has to leave much earlier to come to work
- Earlier start times, longer times allowed for journeys, different routes involving greater mileage covered
- Re-route deliveries to avoid the immediate areas affected by Brock
- Allow staff more time to travel which means less productivity from them
- Stay away from home in hotels

- Increase hybrid working which is less efficient.
- Increased travel time allowed for.
- Change working hours, allow more flexible start/finish times.
- Added time pressure and inconvenience.
- We have to divert to other routes which increases cost, time and CO<sub>2</sub>.
- Have to cancel appointments. Cannot visit clients.
- Having to adjust opening times for staff travel
- Leave early
- Staff days are lengthened at work then their travel home.
- We reschedule work and operations
- allowing more travel time - very expensive
- We try and reroute around it
- Change of journey route
- Early or later starts to avoid rush times or to allow for extended journey
- Staff are late to work.
- Have to find alternative routes, post more items, delay visits.
- Starting extremely early to avoid traffic so we only get caught in it on the return journey.
- Changing meeting locations.
- We don't work in affected areas.
- Alternative pick-up points & longer routes to sites.
- Customers cancel or do not book.
- Drivers have to work longer hours; we cannot do any deliveries south of our yard.
- Deliveries are delayed.
- Rescheduling of engineering works unless urgent.
- Our business comes to a standstill and we are losing work because of it.
- Using different routes.
- It makes life miserable.
- Staff are offered to work remotely or battle in!
- Shorter operational hours.
- Start early to enable staff to get here.
- We wouldn't cancel deliveries, send staff home etc but people can be late, business is interrupted so we have to adapt to circumstances as best we can.
- We have to be on hand to guide our visitors to our holiday let business. We cannot 'switch off', it is a real worry. Locally, it is noisy - you can hear the traffic engines, emergency vehicles in the distance. Our country lane is used as a cut through into Dover.
- Late finish, working from home when possible.
- Alternative routes to work or work from home for affected staff.
- We spend hours on the day changing rotas and trying to find ways for our wedding guests to get here depending on the situation. We have to modify menus if deliveries do not arrive as well.
- Prepare for cancellations and amendments to bookings.
- Change hours.

*In the default scenario:*

- Re-routing to avoid delays at peak time.
- Site staff in particular those working far from home are not able to work a full day due to increased travel times.
- Stay in hotels if long delays are expected.
- We will use tieback roads to go to customers, which results in longer journeys.
- Increased hybrid working which is less efficient.
- Increased travel time allowed for.
- Flexible working times.
- We have to allow more time for routine work.

- Adds more time for us and our customers. Takes people longer to get home from work so they then don't want to come out after work. Our post work crowd is down on numbers.
- Leave early.
- Cannot go the most cost-effective route.
- We cannot close as we provide statutory services- we route and reschedule trips.
- Allow longer journey times, less productive as more time spent travelling.
- Work longer hours to complete routine tasks.
- Travel time.
- Take different routes.
- More communication and flexibility are required, but also we just lose business.
- Allow for extend journey times.
- Finding alternative routes and posting unnecessary items costing money.
- Again, still start extremely early to avoid traffic on the trips across the county so we only get the hold ups on the return trip.
- Avoid working in affected areas.
- We may ask staff to work remotely if traffic situation is bad and if their current work load permits them to do so.
- We may stay in hotels overnight in order that we can ensure arriving on site, most of our work is time critical i.e., we need to isolate electricity to site at a pre-determined time.
- Look for other ways to get to the customers.
- Extra time given to travel to work - shorter days on site - this negatively impacts our profit for a job - having to cancel jobs as cannot get to site.
- Allow for longer journey times to / from site in and around M25.
- Staff who arrive on time have to work twice as hard to make up for people arriving late. Visitors do not receive the same level of attention. Shorter cafe opening hours so unable to provide food and beverage to customers until later than planned, resulting in loss of income.
- Customers either cancelled or did not book We have to allow much more time for deliveries
- Deliveries take longer.
- Rescheduling of works.
- Taking different routes.
- Resort to virtual meetings (does restrict what's achievable and quality of service delivery).
- Start at 5 am to get staff in.
- We need to stay alert to see if it is affecting our guests route to us. We then have to 'guide them in though the back roads'.
- Finish work later than normal & work from home where possible.

**How often is / has your business been directly affected by Operation Brock? For example, late deliveries, late staff, lower customer numbers, etc...** Please note a drop-down list of answers was provided (see page 65), but respondents were also able to select other, and then state what they meant by other. Here are the answers:

- Our business is impacted all the time Operation Brock is in place, implemented or not. The reduced speed limit on the major trunk road adds unnecessary time delays to a jit business.
- These are carers the business is needed in Kent for sick and elderly people - you don't seem to have considered this with your questions.
- Whenever Operation Brock is in place it takes me longer to get to work and home and I have barely any customers come into the shop.
- Business is impacted when BOTH Operation Brock is in over capacity and operating normally.
- Hard to say how it's impacted but there is general nuisance factor that can be avoided by locating elsewhere.
- My business is impacted every time the over-capacity and default operation is in place.
- I'm not sure which Operation Brock activities impact and which don't (because we don't see them if they're not impacting us).
- It's impacted when either over capacity or default system is in place.

- My business is impacted between Dover and Ashford so when it takes days to implement and resolve the backlog of traffic, staff cannot attend work, or make it home. For example, the last few days of backlogs and gridlock across Dover and the queues for the channel tunnel. Where was Operation Brock then? It takes too long to implement and does not prevent the issue in the first place.
- Whilst the business is not based in Kent staff and links with the EU use the M20 and the delays, costs and service for our customers is what we are experiencing.
- My business is impact in both situations.
- Default operation and the over-capacity scenario both impact our business.
- Mainly when the over-capacity Operation Block is in place, however on some occasions our staff can be affected during default operation, too.

**Thinking about communications, are you aware when Operation Brock is on?**

- I only know when I see it is there.
- If I haven't seen it on the news before I leave home, I soon find out on my way to work as I live on one side of the motorway and travel into Folkestone on the other side. My normal route would take me along the motorway, which I have to avoid when Operation Brock is in place like this morning. Traffic is jammed today - Friday 22 July.
- I only know when traffic is backing up, very poor notice and plans for local traffic.
- Of course, we always notice, but not always in time before it sets in.
- It appears to be on all the time.
- Its easier to just assume that Brock is in place constantly than try to plan ahead.
- You can see it!!! The traffic cones randomly being set out.
- We look out of our window and can see the motorway from Folkestone to Dover, when is rammed with lorries, Brock is on

**How do you hear if Operation Brock is in place? Free Text Answers where 'Other (please specify) was chosen:**

- National BBC Radio Traffic News
- Neighbourhood watch
- Road signs at Junction 8
- Roadside signs
- We are informed by trade partners and we seem them do it.
- Kent Resilience Forum.
- BID Canterbury.
- Direct observation.
- We look out of our window and can see the motorway from Folkestone to Dover, when is rammed with lorries, Brock is on.
- Obvious from traffic
- Sheer volume of traffic tells you that Operation Brock is on.
- Again it is safer to assume it is on than not.
- We see it? Sit in traffic etc.

**Why do you say Would you support in principle a lorry park or a network ...?**

- Motorways are not lorry parks! The Kent ports are vital to the flow of freight and people to and from the EU and they add hugely to the UK economy. It is totally scandalous that we are in this situation. The people and businesses of Kent have had enough of political ineptitude and lack of action. The issue needs to be resolved and resolved quickly.
- The roads need to be kept clear and free flowing. Creating lorry parks will enable parking for lorries during these times and keep the road network open.
- Keeps roads flowing. KCC just abandoned the one at Whitgift on the basis it was not needed. Future predictions was the reason given. 3000 lorries on a motorway with no facilities is not humane.

- Our Motorway (M20) cannot constantly be used as a car park. The impact on local residents and businesses to go about their daily lives are constantly being impacted, without any compensation for loss of earnings.
- A solution has to be found but, building lorry parks is probably not the best solution, parts of Europe have an entry permit system, it only allows the amount of lorries through that the network can cope with. barring emergencies like ferry strikes etc we must be able to find a solution i.e. an allotted time to access the M20 M2, and a ban from the local roads much as used to happen in the French corridor before the coming of the new motorway over there. Bring back cabotage.
- A solution has to be found, Kent should not have to find all of the solutions this is a National problem. The traffic problems we experience in Kent are not experienced on the other side of the channel. The bigger picture has to be considered as so many non-UK lorries enter the UK. Can freight not be encouraged on other routes train/sea etc.
- All the time Dover remains the primary route for freight AND leisure traffic, there will be delays. Brexit has exacerbated all our existing transport issues. Traffic volume and the time for paperwork/passport checks are unlikely to decrease, especially during peak holiday times - and the Government is unlikely to ever invest properly in these issues, pushing the issue onto our local council who are expected to handle the traffic. Freight drivers need proper working conditions, which includes food, toilet and wash facilities, as well as parking areas. People and businesses of Kent need their roads back.
- It is ridiculous that a road is used as a lorry park; and when a lorry park is planned, it gets refused planning permission.
- Using the motorway for parking is ridiculous.
- Yes, because it is important to keep normal traffic moving allowing clients etc easy access. Folkestone is always affected by issues on the M20.
- On the whole operation Brock seems to work - the investment already made. How much more will it cost to build? Yet more green spaces lost to concrete! Deal with the issues that cause the problem.
- It would give them better facilities and keep the roads clear for local traffic.
- Solutions not problems, it is surely going to help.
- We need to find an alternative method to keep the roads free and flowing. We cannot keep closing the motorway. The lorry drivers also need accessible facilities to use.
- Will it create further disruption in more towns, we won't know until its tried?
- We need 3 lanes each way on the motorway - this is the main route for holiday makers and haulage and it needs to be kept open and flowing. Other solutions need to be found in waste land areas to assist with this and STOP affecting all the businesses in and around the area = we are all dealing with so much already in regard to less profit due to increases of fuel and materials as well as taxes and legislation give us a break!
- Because this shouldn't just be Kent's problem - a lot of transit through Kent is to take advantage of services Kent provides such as the Port of Dover/Channel Tunnel - this is a whole country problem - not just Kent. Turning Kent into a car park is probably inevitable but this needs to happen further up the line outside of Kent too to keep Kent running.
- We need the motorways to run as motorways, they are not car parks. The principal of lorry parks is great, but should not be restricted just to Kent when other areas could also hold lorries.
- Less disruption, less mess and the lorry drivers would have toilets and wash rooms.
- As my business isn't impacted by the current situation, I have no opinion on any alternative.

- Although it seems logical that lorries need to go somewhere when there's a problem at the docks, the environmental impact of nearby communities could be horrible.
- I am not sure how that will improve Operation Brock. I understand that is in place to turn round lorries who do not follow signs to park on the M20. How will they be more incentivised to go to the purpose built lorry park?
- It seems such a permanent fix for an occasional problem.
- We should not be allowing all these lorries into Kent if they can't get on a ferry / Eurotunnel. Some lorry parks should be built in Kent, but the burden should also be shared with all the other counties.
- It would (should) keep the roads flowing without pushing a lot of regular traffic from the motorway into the already over-stretched local roads network.
- Would allow traffic to flow in all parts of Kent.
- Kent residents, Kent businesses and visitors to and from the UK require quick and easy passage on a motorway style road. At present the motorway is either restricted or closed completely at the times when it is most needed.
- Something needs to be done. Kent business cannot be expected to fail because of traffic chaos as all the countries freight goes through Kent. Freight should be travelling by rail. Other ports should take some of the freight - not just Dover. Local roadworks must wait and not be allowed to make the problems here even worse. Housing development must be stopped in this area - we're already ground to a halt in Faversham.
- To stop the awful delays.
- Because motorways are for moving traffic, they are not lorry parks.
- Need to keep M20, M2 and Dover/Folkestone open.
- Kent has a perfectly good motorway system which is paid for by the tax payer. It was built for general public traffic and not for use as a lorry park.
- The road network in Kent is mostly based around the M20 and A2. Both motorways are packed on a normal morning and traffic jams are frequent at full capacity. So when you decrease the capacity of a motorway that was designed and funded to allow traffic to go by and not becoming a car park, you are making a big mistake. Parking is parking and if the government requires parking to cope with the consequences foreseen following Brexit, then government should make all efforts to create the additional parking space required.
- Because we cannot continue closing one of the main arterial roads through Kent! Local businesses need the M20 to be fully open at all times. We are finding Operation Brock desperately hard to work through. Something has to be done. The villages and towns bordering the M20 cannot cope with the volume of vehicles using them while the motorway is closed.
- We should not be using motorways as lorry parks. Motorways were built to ease traffic congestion and not as parking spaces.
- Kent's current highways are the main arteries from Europe to the UK and Ireland. With the LTC being only the current planned increase in infrastructure and the known increase in future traffic, we need to urgently plan for additional freight holding and parking areas along the M20 and M2 routes to Eurotunnel and the Port of Dover. We have been discussing this for years but still no one has the courage to implement it. Naturally traffic will get as close to the exit port as possible so forget controlling traffic into Kent it only causes bottle necks further back along the route. Create these parking areas off the M20 for Eurotunnel and A2 for the Port of Dover and stop talking about it, DO IT.
- If vehicles are to be held, there should be a holding area. This decision should not have a financial/negative impact on local businesses. It is not our fault in anyway so why should we be affected. It's a disgrace.

- Because the M20 IS NOT a carpark.
- Previous attempts to build lorry parks around Sellindge and Stanford have attracted popular protests. Any lorry park is likely to have a negative impact on the nearby villages. Taking lorries from the motorway and diverting them onto A roads degrades the roads, leads to excessive littering and urinating at the side of roads. Lorries park in village laybys leading to a loss of quality lifestyle for village residents. New lorry terminals appear to have been built nr Junction 10 and these are unsightly. The Ashford development plan over the last 20 years has in my view been terrible, spoiling a once quaint market town. Further industrial expansion will likely be carried out in the same unsightly manner as are the majority of the new developments carried out.
- Need to be logistically and environmentally correct and I do not trust the current powers that be to be able to make that decision.
- To ease traffic congestion.
- This is not just a Kent issue. We have rolled out additional parks at Ashford and Manston, and consideration needs to be taken about the impact that this is having on the Kent Community. This needs to be looked at as to how this issue can be resolved fairly or failing another park, how about addressing the issues that cause Operation Brock to be put in place in the first place.
- The M20 is the main route to Kent, so a solutions needs to be found that moves the lorries to holding area as every time the French decide to delay things it has a major impact on Kent businesses and people that live here.
- It should not be necessary to pave over the countryside when the solution is to sort out the issues at the channel ports.
- To free up the infrastructure.
- Current approach is unsustainable and massively impacts Kent.
- Anything to open up capacity on the actual roads.
- It would take the lorries off the motorway so traffic can still flow though. We have had 50 miles an hour on our motorway for ages and it a pain. When Brock is on, it causes so much chaos in Dover and Folkestone. It is not fair on all of the people from this area to have to put up with it. Not to mention the poor lorry drivers, who just want to get on and are driving around our villages not knowing where they are supposed to be going!
- I thought we had done that anyway with the customs areas being built.
- There are other alternatives available, for example spreading the load from Dover to Ramsgate and Manston with the amount of time and money being wasted and potential plans to destroy local greenland areas. A new BCP and fright crossing via Ramsgate from Oostende would greatly reduce the load into Dover while using already wasted infrastructure available. This would also reduce the time for lorry drivers and reduce the miles of travel required from northern and eastern Europe. this would also stop the UK being beholden to the French authorities and unions when unplanned strikes happen due peak times of the year, blocking the Eurotunnel and Calais ports.
- This will lessen the impact on local traffic.
- There are many aspects of a large-scale lorry park to consider - local residents, environment etc.
- Because I want to drive to and from work without being excessively delayed - I live in Ashford and most of my work is in the Swanley area.
- Planned stops with proper welfare for all involved would be better, a set of drivers either side of the channel moving goods would be even better.

- Because investment should be aimed at the cause of the problem, which is capacity handling at Dover Port and Folkestone EuroTunnel. Building lorry parks only gets rid of the symptom, not the cause.
- It's a good idea and will help both the lorry drivers and other road users.
- A designated area with rest, wash, food facilities is better for everyone. Leaving lorries and vehicles parked up a motorway with nothing is madness.
- I believe we should be building infrastructure AWAY from Kent, in other UK port locations to relieve the bottleneck that Dover is causing. Kent cannot sustain the forecast growth of freight traffic (40% if Damien Green's forecast is to be believed). There are so many other ports that should be developed for travel into Europe! Harwich, Felixstowe, Tilbury, Newhaven, Southampton - why is Dover the be all & end all of cross channel travel. I do not want more lorry parks. Sevington is already a blot on the landscape, has destroyed the lives of those who had a lovely countryside existence prior to its construction (and the light pollution at night is literally blinding)! Also, better use could be made of the rail infrastructure to transport freight directly into London or beyond, instead of 'trains' of HGVs on the M20 & M2 (which this survey doesn't mention). The traffic problems caused by Op Brock on the M2/A2 are still a problem for commuters going into Canterbury.
- Because this should have been done well in advance of these known and foreseeable problems. I don't live in Kent so numbers of lorry parks doesn't bother me and would alleviate the problem (but not solve it). Kent needs to sort its post-Brexit problems quickly. The county voted leave by a massive margin so residents cannot complain about lorry parks and other infrastructure required to sort the problem they created.
- A lorry park will only increase congestion. The border needs sorting out, not stacking lorries somewhere. Proper rest places for drivers should be built though all across the UK.
- I can't see how a lorry park is going to solve any of the issues. You still have the traffic build up and the delays you are just staggering it. There is no solution that I can see - other than re-join the EU.
- This situation cannot continue. Environmentally it is a disaster with all those trucks belching out fumes as they are parked up for extra time. Also, drivers are having to take ridiculous detours to get home or to work, this adds to the environmental impact as well as negatively impacting on the quality of life. Kent is portrayed by the media as a Brexit nightmare for freight, holiday traffic and county residents. Living and working in East Kent means at times we are effectively imprisoned by Brock and other Brexit bonuses. We can't get to the channel ports to escape and the M20 is always impacted. The narrow lanes of the contraflow are potentially dangerous - How many accidents have there been in that stretch of road since the nonsense of Brock was instigated?
- I think that this would help to alleviate the absolute gridlock experienced around anywhere close to the motorways. A holding system for lorries, in a specified park, with a some sort of registration system and specified travel times to cross the channel (therefore volume of lorries on motorways can be managed).
- Although a true ideal would be to increase rail capacity, and perhaps build a second channel crossing, as well as improving infrastructure so that there was less reliance on Dover as a crossing point, building lorry parks - with decent servicing facilities for drivers (and, in future, charging points for the vehicles themselves) - at various points across the UK (i.e. not just Kent), based on capacity factors of major ports - would keep roads clearer and enable more humane conditions for resting drivers to be provided.
- Kent is not a lorry park! The stupid idea of Brexit is the main cause of delays and until adults take charge it will only get worse.
- Something needs to be done, it's chaos for locals and not pleasant for people incl lorries who are traveling.
- It would be helpful.

- It makes sense to me to park lorries up out of the way so the rest of the county can go about its business, when Manston was used this took the traffic away from the motorways and the county functioned almost normally.
- Would need to see proposals.
- Lorries are required to move goods around country & county. If they cannot flow freely, they should not sit on our road network but in designated lorry parks where they can park, be safe, have access to toilets and essential amenities even if some of those resources are chargeable like food.
- BECAUSE LIVING IN KENT THIS HAS BEEN A PROBLEM FOR FAR TOO LONG.
- Rather for them park, saving time and the environment than in long queues on the highway.
- It is the only answer.
- We should be using our railways more.
- The scenario of using a major motorway as a parking area has to cease.
- If it frees up the roads and it is better for the lorry drivers.
- Because of traffic this is horrid and unnecessary. Not talking about how dangerous it can be - there are A LOT of accidents on the roads during those times.
- I believe a number of smaller parks and the full use of the Sevington Inland Border Facility, which is enormous and totally underused would help.
- Living and working alongside M20 I see the huge amount of freight we import and with ferry delays and challenges at the border I have witnessed thousands of lorries stranded or stuck in UK. We are an island after all, we need a lorry park to support the huge amounts of road going lorries from and to the UK by building a lorry park near there. This was supposed to happen years ago (I believe Balfour Beatty won the contract) but was scrapped by the council / government. It's the only way forward as we need to understand delays are a normal reality and the thousands of lorries need parking and safe facilities including toilets, food and water. Also to include a safe resting place.
- I cannot give a definite answer when I don't know precisely what you're proposing.
- Living and working alongside M20 I see the huge amount of freight we import and with ferry delays and challenges at the border I have witnessed thousands of lorries stranded or stuck in UK. We are an island after all, we need a lorry park to support the huge amounts of road going lorries from and to the UK by building a lorry park near there. This was supposed to happen years ago (I believe Balfour Beatty won the contract) but was scrapped by the council / government. It's the only way forward as we need to understand delays are a normal reality and the thousands of lorries need parking and safe facilities including toilets, food and water. Also to include a safe resting place.
- The M20 was built for quick and trouble free access to the Channel Tunnel and Dover ferry port, as well as opening up a new area of less expensive business parks etc. It has enabled a wide range of businesses to relocate from London and other expensive areas to places like Folkestone, which is in dire need of investment by large companies. Not having trouble free road access causes too many problems for a business in Folkestone - ie business meetings, clients visiting, deliveries, collections, viewings etc etc. Sitting in a traffic jam, or being routed off the motorway onto narrow country lanes adding upwards of 30 minutes to a journey, is not conducive to pleasant results at the end of that journey. It's about time the Council or the Government realised how much hassle businesses off the M20 are suffering.
- To ease congestion - was Manston not a site that was earmarked for this? As inconvenient as it is for us on a personal and business level, the lorry drivers are stranded in miles and miles of queues with no facilities which is totally unacceptable. The lorries need to be stacked closer to the port/tunnel where facilities can be provided and pre travel checks carried out. The motorway becomes even more dangerous to use when Brock is in place due to traffic on

the same carriageway, despite the 50-mph speed limit, as this is then in effect much worse than a 'smart motorway' with absolutely no chance of pulling over to a safe area in the case of a breakdown or accident. And it's getting worse and worse.

- I don't know all the alternatives. I don't believe Kent should bear the brunt of the inefficiency from bad Gov't decisions. Brexit was always going to be a nightmare, yet they went ahead with it anyway.
- As long as it is built away from Ashford as we already have one there and the roads cannot support it well enough and so it is havoc. But having one somewhere else along the M20 would stop the motorway getting clogged up with lorries. Better facilities could also be provided for the lorry drivers as the side of the motorway cannot support this sufficiently. With a proper facility they could have toilets, showers, a place to rest and eat without having to do all this in their cabs and then leaving rubbish on the side of the roads.
- Gets lorries off main roads and extra checks could be made at the park instead of port as well as having facilities for drivers.

### **Are there any other comments you would like to make with regard to Operation Brock?**

- Is there a compensation being discussed for affected businesses?
- We have to find a solution - losing one of our main motorways is unacceptable and the impact on Kent citizens when the current solution is deployed is significant and needs to be addressed.
- It must be dire for the climate crisis, an intolerable for the lorry drivers.
- Border customs checks need to be reviewed to enable entry and departure from the UK via Dover and Folkestone to be more efficient and speedy.
- The use of Manston as a lorry park seemed a good idea. Alternative ferry routes to Holland, perhaps from Ramsgate, should be explored.
- Try to find an alternative soon.
- Operation Brock is an unfair punishment on the people & businesses of Kent. Rail distribution of freight must be moved up country to avoid these disgraceful scenes played out on Kent roads.
- Start making radical changes in an effort to see the M20 running as it should...as a motorway!
- It's dangerous!
- The businesses and people of Kent are severely impacted by Operation Brock. The government need to get tougher with France, as it seems that they are being bloody minded, punishing the UK for leaving the EU. Why can't we, boycott the import of certain French products until they relax some of their rules. For example, new Renault cars. I'm sure that Renault would then put pressure on the French government, and hence the EU to come to some amicable agreement instead of losing millions of euros per week from the British market.
- A nonsensical approach to a problem made by people who simply cannot think strategically and in all likelihood for the convenience of local and central government rather than for the people of Kent. You seem incapable of understanding the ramifications of what you do. I include Kent Police in this observation.
- It should never have been put in place. A quick solution to a very long problem. The people of Kent and the lorry drivers deserve better.
- It's about time a proper solution is put in place. I cannot believe this inefficient and inconvenient operation has been in use for so long.
- Need to consider how M2 is running especially if roadworks are in place.
- Prevention is better than cure.

- Operation Brock if it has to be in place is often in place for far too long, especially when there are no lorries queuing.
- Whoever thought up this idea clearly never commutes between Ashford and Maidstone in rush hour.
- Only one suggestion to fix the problem, very poor show. What about building a motorway on top of the current M20 as well as additional lorry parks where necessary. No Eurotunnel and HGV vehicles could park up on lower level whilst other vehicles could use higher and go about their business. You should also build service stations at each affected motorway exit to provide those stuck with good quality facilities toilets food water.
- I wish the government wants to stop blaming everything else and acknowledge the impact of Brexit on our roads and businesses. It is an embarrassment for this country. We blame everyone, but the people who voted for this and wasn't it overwhelming in Kent?
- A very poor solution chosen to resolve an issue that has been know of ever since Brexit was thought of. Needs proper action now before the roads around Kent just become a car park.
- Use a third lane of Jct 8-9, lorries are capable of sitting in three lanes with services using one lane in one direction and the off service roads to get between them.
- Kent should not be consistently impacted by delays within the Port of Dover and Euro Tunnel. Once again this weekend 22nd, 23rd, 24th July we have been trapped within our homes, as every road around Folkestone was gridlocked. All our weekend plans had to be cancelled. We couldn't travel anywhere due to the gridlocks and chaos caused by the Port of Dover and Euro Tunnel delays. This is unacceptable.
- It is implements far too soon and takes forever to close once the situation has been alleviated. Arrange your plastic cones in order that traffic can access J8 of the M20, and stop the highways agency personnel sitting in their cars all day with the air con on and the engine running, they to have a duty of care to the planet. That includes your outsourced traffic management muppets.
- Please find a solution and expedite ASAP.
- It is unbelievable that no one saw this coming when they started talking about Brexit!
- Automate passport control and harmonise it with the new EU / Schengen system. Add capacity to roads accessing Dover. Put new information screens on all roads accessing Kent: and provide helpful information (unlike simply saying the M2 is "closed").
- Although Operation Brock sounds like a good idea, impacting the free-flowing traffic on the M20 is always bound to have a serious knock on effect for businesses.
- I am concerned about the number of foreign lorries travelling at 70mph pushing me out of the way when travelling at the prescribed 50mph. Is the average speed check enforced at all?
- The management at junction 8 needs to be looked at and made safer.
- It is dangerous. Those big concrete slabs it is mind numbing driving in a lane at 50mph it's not a long-term solution - this needs to be addressed and resolved for the long terms of Kent and its residents.
- By all accounts it is extraordinarily expensive to set up and creates large tailbacks every time a single car breaks down.
- The quicker it can be scrapped the better the whole principal is as flawed as Operation Stack and brings chaos to Ashford, Folkestone and Dover areas.
- Just clogs up Kent with high impact and inconvenience on local residents.
- Get a move on.
- While our business is not effected by Operation Brock it does affect normal travel from and to Dover as it frequently results in gridlock in the town and on the other approach roads.

- It's just a disaster.
- I don't believe the full impact on local hauliers and other local businesses as well as local residents was fully considered or accurately considered before Operation Brock commenced.
- Living in a small village (Sellindge) alongside the M20 which has greatly increased its new housing stock, and has introduced "traffic calming" through the village, which in turn has the effect of grid locking the whole village.
- Has anyone done a survey of the additional traffic on the A251. Faversham to Ashford? During Operation Brock. Tailbacks on A2 from J7 M2 towards Ospringe?
- Has anyone thought to increase the handling capacity of the cross-channel links?
- Please sort this out before Kent becomes a total car park and all the businesses have folded.
- The way it works is awful. It's called a success if the lorry traffic is managed, but it's not a success as the knock-on effect is to hobble other routes.
- It's a disaster and makes this country look like a joke.
- Why is the speed limit 50mph between junctions 9 and 8 when most single carriageway roads, apart from those through built up areas, are 60mph for cars and 50mph for goods vehicles? As a general comment why are lorries not kept to the inside lane on 2 lane sections of motorway?
- It is unbelievable that an option as temporary as this has been maintained for so long. This is incompetence at its utmost. So much for all the promises following Brexit.
- Quite frankly the overcapacity arrangements are a disaster!
- It's a well-controlled operation, but it should not be a permanent solution.
- The theory of Brock is correct, but the facility is not fit for purpose and causes delays to non-channel traffic. No channel traffic should be allowed to use the M2/A2 route to Dover at all times, unless carrying out delivery/ collections in the area, needs to be at all times to save confusion when Brock is activated.
- Limit the amount of foreign vehicles in the country, is this a possibility? Do not let trucks in if it's going to impact the road network.
- Waste of time and money.
- It seems that Operation Brock is rolled out and then unused for the great majority of its deployment. I would estimate that it is only being used during 10% of its overall deployment term. I would welcome consideration of a more rapid deployment and removal system. I realise this is difficult as the French are probably waiting for us to remove it before instigating further customs or border friction. We probably will have to work toward diplomatic solutions with regional French areas to prevent French central government from imposing punishments on the UK. I am a regular user of the M20 during Operation Brock and I would observe that increasing the speed limits from 50mph to 70 mph should be considered during periods when the barriers are deployed but standing vehicles are not present. This would be in line with dual carriageway speed limits generally. Increasing the speed limits through the deployments would be a positive mitigation.
- The situation has impacted as when Operation Brock has not been on, one carriageway in both directions has been closed due to the works on the central reservation to move the barrier. This has meant that the speed restrictions are in place for the total stretch of junction 8-9 when on some occasions only 4 workmen are present on 20 feet stretch of road. The works need to be undertaken quickly so we can get back to normal when Brock is not in place.
- What cost is this to Kent as a whole?
- Remove it. and also gives local businesses that pay a fortune in business rates a refund.

- Brexit deal needs to be amended, or preferably reversed, so that normal traffic can flow through the channel ports.
- When there are challenges in France, KCC should receive a daily compensation, that is split across affected businesses.
- Our business has been affected a little, but it must have a huge impact on leisure industries. Visitors will not travel to certain places if traffic is bad. It also starts to impact on social lives of residents, as we have to find alternative routes for even short local journeys and some trips just get put off as it's not possible without undue traffic jams.
- There has been plenty of time for this situation to not have happened and the government was warned in 2016 but no progress was made, due to the short sightedness and no one knowing how to plan. There is never anyone in charge with any actual knowledge or idea how to sort these problems out, and it will never make any difference if its labour, conservative or liberal parties as no one has ever come from a background to learn any details as to how a country should be run or in place long enough to learn.
- The whole junction needs an overhaul as it's quite bad during normal times never mind when is reduced to 1 lane.
- Take it (Operation Brock) away.
- Brexit as now applied is more bureaucratic, surely we can achieve a better flow through. Why can't more containers be shipped over on the trains?
- There has to be a better way to manage vehicle delays, ferries, trains etc. High volumes caused by whatever events.
- Sheer frustration and anger as a resident. Op Brock is just an added manifestation of what was already a problem from Operation Stack. Kent has become the car park for any delays at the docks. It's not going to improve with customs processes. The freight needs to be spread across more ports in other counties.
- It should be replaced with a permanent off carriageway solution.
- It doesn't solve the problem.
- It does work when it is in use, but it is always instigated after the initial blocks have started. Folkestone is always terribly disrupted due to lorries both for the channel tunnel and the ports.
- Please do something to end this. There must be a better solution. Obviously reversing Brexit would be a start. Unfortunately for the people of Kent Operation Fear has become Operation Sad Reality.
- It is farcical that it is even required. We can see the EU from our facilities. Unnecessary barriers are detrimental to economic performance and human understanding.
- I know it has to be done but it is put on to early and taken off to late and like most people on the M20 corridor enough is enough.
- Get somebody who knows what they are doing in charge. Transport in Kent is at an all-time low. There was less disruption in WWII.
- I fail to understand why Junction 8 is closed off and coastbound traffic has to either go to Junction 7 to join Operation Brock or as many lorries do, they simply go up the A20 and who is there to stop them, so they simply bypass the M20. Quite simply you have to live on the A20 between junction 8 and 9 to understand what the impact on both your work and private life is, a 15/20 minute journey home from Aylesford can take as much as an hour sometimes longer.
- Unfortunately, there are no alternative routes to the EU traffic.
- An App would be helpful for local businesses, so we have the same up-to-date clear intelligence as the Operation Brock staff.

- We should never have left the EU.
- Please do sort it out. It been ages since it all begun and there was no reasonable solution offered yet.
- We could take a lead from European Countries who provide managed serviced facilities for drivers.
- We are so tired of dealing with this issue. We have enough problems to deal with following the last 2 years of trading, that we don't need another, avoidable problem to solve. Our fear is this will be forgotten after the summer and nothing will be done.
- I dislike it intensely.
- Turn back the clock on Operation Brock.

## Further details about the businesses surveyed

The survey asked some ‘About You’ questions.

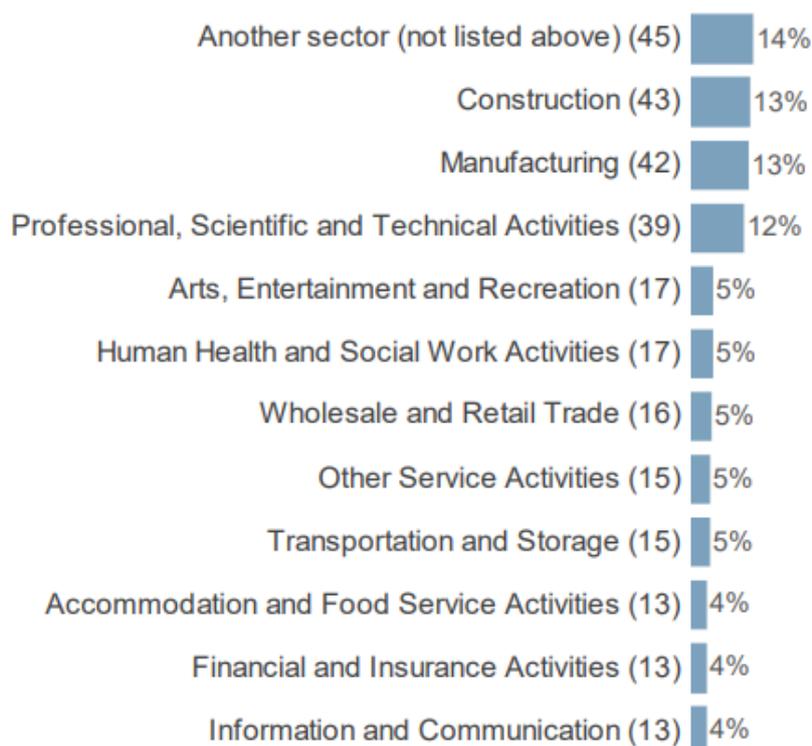
In answer to the question ‘**do you own, run, or manage a business in Kent or Medway**’, the results were:

- Yes – 296 responses (i.e. 89%)
- No – 16 responses (i.e. 5%). These businesses indicated they were located in south east England, but outside of Kent and Medway (e.g. in Sussex, Milton Keynes, Greater London)
- Prefer not to say – 20 responses (i.e. 6%).

In answer to the question ‘**Which of the following best describes the size is your business?**’, the results were:

Size	# of responses	% of responses
Sole proprietorship - a business run by one self-employed person	27	8%
Ordinary partnership - a business run by two or more self-employed people	11	3%
Small business - a business with 0 to 49 employees	212	64%
Medium-sized business - a business with 50 to 249 employees	52	16%
Large business - a business with 250 or more employees	20	6%
I prefer not to say	9	3%

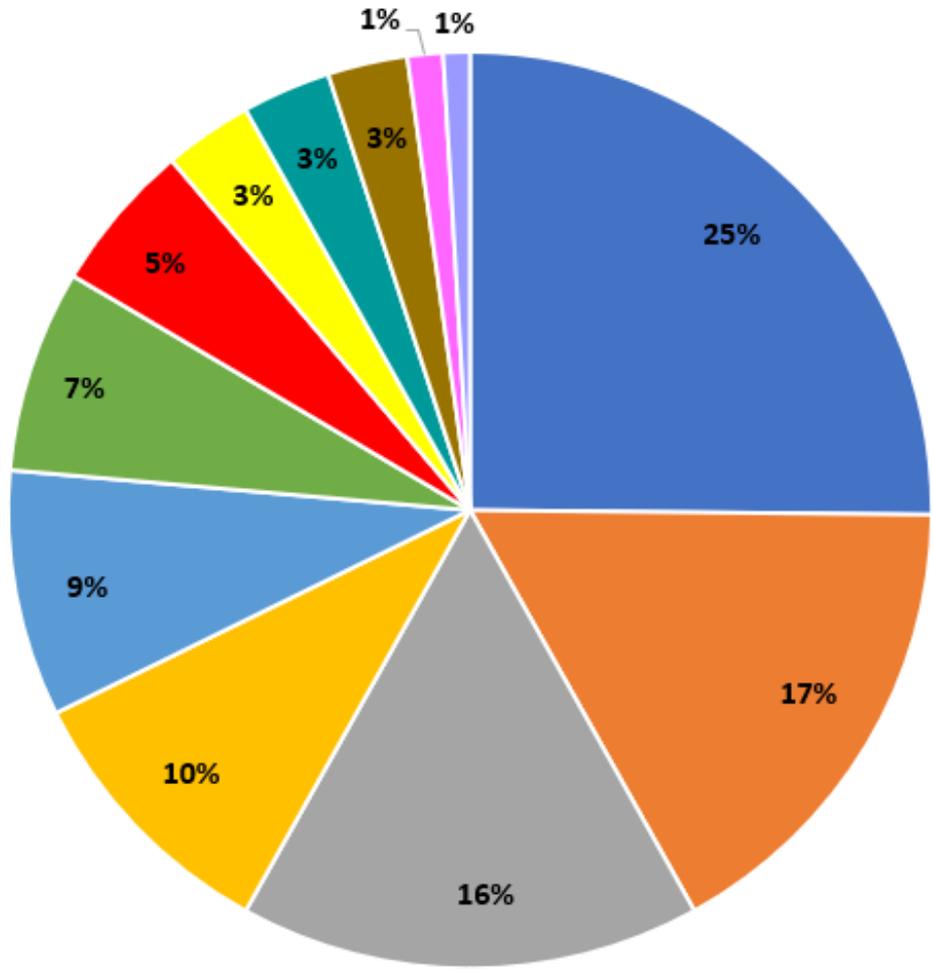
In answer to the question ‘**In which sector does your business operate?**’, the results were:



The businesses who selected 'another sector came from:

- Medical & Healthcare
- Vehicle Rental Heritage
- Access Platforms (Hire)
- Service engineers
- Solicitors/Legal
- Recycling
- Audio Visual design and installation
- Wedding Industry
- Marketing
- Veterinary
- Charity
- Tourism and Hospitality
- Environmental Services
- Travel
- Media Production
- Electronics distribution
- Marine Industry
- Motorhome hire
- Software
- Business and Personal Development Training Company
- Sport
- Auction House
- Emergency Glazing & Locksmiths
- Music Publishing
- Rail maintenance & construction
- Mail order
- Motor parts
- Drink Manufacturing, Retailing and Distribution
- Promotional products
- Skip and Grab hire to business and the public
- External Cleaning
- Electronic security systems
- Industrial electrical contracting
- Engineering

In answer to the question 'In which district/area is your business located?', the results are shown by this pie chart below:



- Ashford
- Folkestone and Hythe
- Maidstone
- Dover
- Canterbury
- Swale
- Medway
- Thanet
- Tonbridge and Malling
- Prefer not to say
- Tunbridge Wells
- Dartford

### KMEP contact details

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