



## **TERMS OF REFERENCE BETWEEN ROYAL MAIL AND THE CWU COVERING THE TRIAL OF ELECTRICALLY ASSISTED CARGO TRIKES**

### **Introduction**

Royal Mail and the Communication Workers Union are working together in developing key business policies, mutual interest solutions and a new culture, which is at the core of all the commitments contained within The National Guiding Principles Agreement.

Both parties recognise that creating the right IR and collaborative working environment is key to the general success of the Delivery Function/Operation, and are committed to achieving the above by resolving all local issues and concerns across the wider operation and also within this trial without recourse to disagreement wherever possible.

Concern over air-quality in urban areas means there is an emerging trend to create policy restricting the use of fossil fuel vehicles, for example by insisting on emission control to defined levels as set in line with EU standards, or charging a penalty charge/ daily fee, or outright ban of usage of fossil fuel vehicles in certain areas. Royal Mail has a universal service obligation and therefore needs to be able to make delivery in all areas. Both RM and CWU are supportive of appropriate initiatives which benefit the environment.

Several initiatives have been started to anticipate increased restriction on fossil-fuel vehicles, including the purchase of 100 fully electric Peugeot Partner vans, and the trial of smaller number of alternative van models from a range of manufacturers. Elsewhere within Royal Mail Group, in GLS, use is made of Electrically Assisted Pedal Trikes to deliver parcels in urban environments and Royal Mail would like to evaluate their use in the UK for combined letter and parcel delivery. An Electrically Assisted Pedal Trike is clearly different from existing delivery and equipment and vehicles, such as High Capacity Trolley, Car Derived Van and a trial will allow us to jointly learn about them and jointly test and monitor if they are suited for any wider agreed National deployment beyond those included within the trial and units specified.

### **Joint Involvement/Information Share**

Divisional/Area and Local managers and CWU IR, H&S representative(s) will be fully involved in all aspects of the trial from the initial stages with the appropriate and Nationally agreed processes being fully utilised throughout the operation and the reviews of what is found.

Appropriate release will be provided during the trial for the local CWU representatives in order to ensure full meaningful involvement within the trial and be fully involved with the suitable delivery route/part routes and individuals selection process along with any training requirements and to also deal with any workload issues that arise linked to the trial. (Such as travel time to and from delivery and overall changes in delivery methods)

Joint involvement will enable the development of mutual understanding of the issues of the trial and consideration of the potential impact on both individuals and the operation. It will also enable us to jointly identify any issues requiring clarification or further investigation.

## **Trial Outline**

- Royal Mail has purchased 11 Electrically Assisted Cargo Pedal trikes from a supplier who has already supplied GLS. Notwithstanding the commitments to work jointly in the spirit of mutual interest as outlined above it is jointly recognised that CWU had no prior involvement in terms of the suitability of these Trikes and were also not consulted prior to their purchase.
  - This type of vehicle (classed as an Electrically Assisted Pedal Cycle) requires the rider to pedal in order to move, but has battery-operated motors which can provide assistance as long as you continue to pedal a low number of revolutions per minute.
  - This means that most of the effort is provided by the electrical motors, which means that the e-trikes can carry a larger volumetric load with less effort than a traditional pedal cycle.
  - The batteries are charged from solar panels on the cargo box roof, regenerative braking and from mains charging when not in use. They can be fully charged from empty in 6 hours.
  - They have a single saddle seat with handlebar controls at the front, and a cargo box mounted between the two rear wheels which can hold mail items.
  - The e-trikes do not require a driving licence to be used on the road. Familiarity with riding a bicycle and or using the road with a motor vehicle is beneficial to adapting to the tricycle but not essential. However, it is recognised that some Local Authorities place restriction as to what weighted vehicles can be ridden or driven in pedestrian walkways or areas and this factor must be taken account of.
- The intention is to use the e-trikes in place of the traditional equipment such as High Capacity Trolley or Shared van. It could either be used to deliver directly from it at each stop, or to support loops of delivery. For the trial the cargo-trikes can be left unattended for up to a maximum of 10 mins in normal crime risk areas. The security team will risk assess the trial locations to give specific adjustments to this advice where necessary.
- All current Work equipment change processes to be followed as standard practice. The processes include full CWU involvement and joint agreement as standard.
- For the trial externally-developed training will be provided to the early users which involves theory and practical training and opportunity to practice.
- Feedback will be sought from users as an output of the trial process.
- The specific sites are listed in the schedule attached Annex 1. These are the initial view and maybe subject to updating, however any proposed alternative sites will be subject to further discussions and joint National agreement during the trial.

- Trial sites identified in Annex 1 have been proposed because:
  - May be in a planned or proposed emission control zone
  - May have been involved in current or previous trials of electric vans or cycles and therefore have electrical infrastructure to support battery-charging and familiarity with this type of equipment
  - Have areas which appear suitable for use of the cargo-trikes, for example delivery area which is relatively flat including the route out and back, and either shared or traffic-free spaces such as semi-pedestrianised areas, or quieter roads to reduce the exposure to heavy road-traffic (in number and speed of vehicles and whether there are typically heavy goods vehicles in the area)
  - They may have potential to generate interest from media and potential suppliers.
- Within the trial sites the aim is to seek suitable routes where the characteristics of the route match with those expected to suit the cargo-trikes coupled with volunteer participants who are willing to use the new equipment and provide feedback. Route and candidate selection will involve on-site review which the CWU locally will be fully involved and participate with as a joint exercise. The initial plan is to identify up to a maximum of 8 potential and suitable routes or part routes within each unit. Therefore the suitability of the route which must be jointly assessed along with the individual volunteering to use the Trike must be on a “matched” basis. It is confirmed therefore that no existing duty holders will be expected to be moved away from their current delivery unless they agree and consent to do this.
- Participation is with the agreement of the individual route-holders on suitable routes only.
- As outlined above Individuals will not be displaced off their own duty. If there is a volunteer who wants to be part of the trial and someone else in the unit with a suitable route who doesn't, it is accepted that they can both agree to swap for the purposes of the trial.
- Individuals will have the option to cease their participation by informing the manager and the reason so this can be captured as part of the trial; however sufficient notice should be given in order to allow alternative arrangements to be planned.
- During the trial the equipment can only be used on routes which have been assessed for suitability and where the user has been trained.
- Full training will be provided for individuals. The training covers the need to travel slowly when in areas of mixed use with pedestrians/ children, how to drive defensively and vigilantly with constant expectation of other space users to do unpredictable things, and be ready to come to a stop.
- There will be a full assessment in each unit of each route to rate its suitability based upon such factors as steepness of undulation, amount of road traffic and size of vehicles, along with any security issues.
- At initial deployment the expectation is that the duty-holder will use the electrically-assisted pedal trike on their work days, but during leave or days off the route will revert to the traditional method. This is to focus the training on the people who will use the equipment most regularly. During the trial we may jointly explore how day-off cover or annual leave reserves could be trained and participate as we get some experience of usage on core routes provided these are volunteers as outlined above.

- In order to generate positive media coverage, the launch of the electrically-assisted pedal cargo trikes will be centrally-managed, and initial training will be undertaken on unbranded versions of the cargo trike, and uniform will not be worn and PPE used will be unbranded. Images will be available after the media launch has taken place
- Training will take place for the first group of users in week commencing 11<sup>th</sup> February 2019 with each person attending training on one day of that week.
- To support the media-launch we will train potential users from the trial units and additional people based local to media launch locations (Manchester and London) who can demonstrate the devices to media representatives but may not be from a participating trial unit. These equipment demonstrators will be selected to be ambassadors of the Royal Mail, and to represent the diverse range of employees which the company has. They will be sourced as volunteers from some units convenient to support launches in Manchester and London.
- After the media launch has been completed branded versions of the cargo trikes will be deployed into the trial units for use.
- Involvement in this trial is also intended to generate attention from key agencies such as Transport for London and Department for Transport to generate opportunity for Royal Mail with help from CWU to strengthen our voice in the development of Urban Logistics policy.

## **Aims and objectives**

The electrically assisted pedal cargo-trike trial has the following objectives:

- Demonstrate externally that Royal Mail is exploring a range of options to address changing policy around air quality and emissions.
- Experiment with a different category of vehicle to understand the use-cases where it may or may not be appropriate.
- Learn about the issues and complexities of owning and operating this different vehicle category, including safety, security, ease of use, parking, charging, and reliability.
- Inform a future decision on whether or how to use a device like this, including refining the vehicle requirements specification, training, and route selection.
- Whether the vehicles are suitable for future usage within the delivery function, whilst fully taking into account the ergonomic and physical effects of those individual volunteers using them during the trial, this will also include detailed individual assessment with appropriate expertise.
- The product range including weight, timed delivery specific, inc RM Special Delivery etc and volumetric size etc that this vehicle is capable or appropriate to use for delivery.

## **Safe Systems of Work and Standard Operating Procedures**

Health & Safety is of paramount importance to both Royal Mail and the CWU. All relevant safety compliance documentation will be fully developed and agreed jointly between RM and the CWU National Health & Safety Department. These systems and ways of working will be reviewed and updated as necessary during the trial and jointly evaluated by the appropriate Royal Mail and CWU experts. The CWU National Health and Safety department will also be fully involved with the review as outlined below.

## **Joint review and next steps**

Selecting routes is an important part of the application of this piece of equipment, which although used by GLS is new to Royal Mail and new to use for delivery of letters with parcels. The selection process will involve prior assessment of the route to consider level access to and from and around the route, type of traffic on the route to and from the delivery route and around it. Any width restrictions or other challenges and any areas where we may need to obtain landlord's permission to use the electrically-assisted Pedal Cycle. Area Safety Reps will be invited to the route assessment to undertake it jointly.

Participants in the trial will operate on the selected and assessed routes. These should include current high capacity routes and shared van routes. Participation will be with consent. No participant will be required to move off their core duty. However, if there is a suitable route in an office and a volunteer to participate is on a different route, then the two people can by mutual consent swap for the purposes and duration of the trial.

The role of the trial participant is to become familiar with the equipment and provide evidence and feedback on its use. This will enable the evaluation of this piece of equipment and provide input to requirements for any future equipment, how to use it, and where this may be best deployed.

The trial will be formally reviewed by the signatories of this TOR. Those identified above including Local Managers, and CWU representatives involved within the trial will feed into this review process and a joint report with conclusions will be finalised as part of this review.

The expectation is that the vehicles will be deployed for around 6 months in the trial commencing March 2019 after the national media launch is complete. However this time span will be kept under regular "touch point" National monthly review during the trial with feedback provided at the regular Strategic Involvement meetings involving the national Delivery Director and the CWU Outdoor Secretary in order to ensure any issues related to the trial are resolved.

The trial units are expected to receive a maximum of 4 trikes per identified unit subject to there being suitable routes and consenting participants. This enables closer support from the business, national representatives, supplier and maintenance agent.

Should the vehicles used within the trial be considered suitable, safe, complying with appropriate security and worthy of wider deployment or rollout this will be subject to discussion and agreement at National level.

Any operational changes proposed during the trial will be progressed fully in line with the IR Framework and will be consistent with existing National Agreements.

Any questions of interpretation, implementation, or application of these terms of reference shall be referred to the respective Headquarters for resolution.



Matthew Lawlor  
Head of Delivery Design  
Royal Mail



Mark Baulch  
National Outdoor Secretary  
CWU

Date: February 2019

**Annex 1:** Schedule of planned units for pilot of Electrically Assisted Pedal Cargo-trikes

3 units to be selected from:

Stratford or another London unit with suitable shared space eg Olympic Park

Clifton (Nottingham) or Cambridge – For use in University campus areas (shared space for pedestrians and cyclists)

Oxford or Sutton Coldfield – For use in low speed road situations and semi-pedestrianised areas.

Amendments to the schedule will be made through joint national agreement.