

Annual assessment of National Highways' performance - April 2025 to March 2026

Performance

2.1 This year's annual assessment of National Highways' performance covers the year from April 2025 to March 2026, also referred to as the 'interim period'.

2.2 To span the gap between the end of the second road period (RP2) and the start of the third road period (RP3), government set statutory directions and guidance for National Highways in the form of an 'interim settlement' (IS). The IS included the performance specification, which set targets and commitments that the company was expected to deliver.

2.3 The IS included 11 key performance indicator (KPI) targets. The KPIs were supported by a suite of performance indicators (PIs), detailed in the Operational Metrics Manual. This chapter sets out National Highways' performance against all its KPIs, and selected PIs where stakeholder interest is greatest. Data for all KPIs and PIs are published in our interactive performance dashboard.

Performance overview

2.4 National Highways achieved nine of its 11 KPI targets for the interim period.

Table 2.1 Interim period performance overview

KPI	Target	Performance	Outcome
The number of people killed or seriously injured on the SRN	At least a 50% reduction by the end of 2025 compared to the 2005 to 2009 baseline	38% reduction by the end of 2024. 2025 data will be published later in July 2026	Almost certain target is missed
Average delay	No worse than of the final year of RP2 (11.8 seconds per vehicle per mile)	10.9 seconds of delay per vehicle per mile	Target met
Network availability	Lane availability of 97.5% or higher	97.5%	Target met
Incident clearance rate	At least 86% of motorway incidents cleared within an hour	89.3%	Target met
Road pavement condition	At least 96.2% of the network in good condition	96.3%	Target met
Biodiversity	Validate and assure 2,700 biodiversity units, for schemes delivered in RP2	3,061 biodiversity units assured, for schemes delivered in RP2	Target met

KPI	Target	Performance	Outcome
Corporate carbon	A 75% reduction in emissions against the 2019/20 baseline	73% reduction in emissions	Target not met
Noise	Produce a noise mitigation plan ready for implementation in RP3	A plan was produced for RP3	Target met
Road user satisfaction	Road user satisfaction at least 1 percentage point above of the final year of RP2 (69.6%)	71.1% road user satisfaction	Target met
Roadworks information, timeliness and accuracy	At least 75% of overnight road closures accurately shared 7 days in advance	76.1% of road closures accurately shared 7 days in advance	Target met
Efficiency	Demonstrate efficient delivery throughout the interim period	Reported efficiency is sufficient	Target met

Improving safety for all

KPI: number of people killed or seriously injured on the SRN

2.5 National Highways had a target to reduce the number of people killed or seriously injured on the strategic road network (SRN) by at least 50% by the end of December 2025 compared to a 2005 and 2009 average baseline. The company also had a requirement to deliver its interim period safety action plan, consisting of 12 actions.

2.6 In March 2026 we published our fourth annual assessment of safety performance on the SRN. This included the latest road casualty statistics, produced by the Department for Transport (DfT), which showed that 1,931 people were killed or seriously injured (KSI) on the SRN in 2024. This is a reduction of 38% compared to the baseline. It is almost certain that the company will have missed its 2025 target.

2.7 In 2024, casualty rates per mile travelled on the SRN were the lowest on record (excluding 2020, when traffic volumes were significantly lower due to the pandemic). However, the number of deaths and serious injuries on the SRN was 1% higher than in 2023, with traffic increasing by a similar amount over the same period. The longer term trend of decreasing casualties on the SRN has stalled in the past three years as traffic has returned to pre-pandemic levels.

2.8 In previous annual safety reports, we highlighted that the safety KPI was at risk and required National Highways to produce a plan setting out how it would close the gap to its target, which it did in March 2024. The company then delivered this plan, full details of which are set out in latest annual safety report.

2.9 In the interim period, National Highways also completed the 12 actions in its interim period delivery plan. This included eight safety schemes, suicide prevention interventions, and communication and partnership campaigns targeting driver and rider behaviour. The company also undertook work to develop safety schemes for delivery in RP3.

2.10 We recognise that not all factors affecting road safety are within National Highways' direct control. Therefore, it is important that the company's safety plans for the next road period clearly demonstrate how it is doing all it reasonably can to achieve the key performance indicator target to reduce KSIs by 7.5% by the end of 2031. This will require the company to clearly identify those areas where it does have the greatest influence and, where possible, quantify how all its work,

beyond those areas identified in its safety action plan, contributes to improved safety for road users.

2.11 DfT's road safety strategy, which was published in January 2026, provides an opportunity for National Highways to support further improvements in road safety by continuing to use its position in the sector to promote innovation and influence those areas where it has less control. This will support the company's safe system approach and longer term ambition of zero harm on the SRN.

2.12 We will report on the final position against the safety KPI after the department publishes 2025 road casualty data later in 2026.

Providing fast and reliable journeys

KPI: average delay

2.13 Fewer delays, and predictable journey times, are important to all road users, including business such as bus and coach operators, and logistics firms. Research by Transport Focus has shown that satisfaction with journey time has the greatest effect on road users' overall satisfaction with their journey.

2.14 National Highways had an ambition for average delay during the interim period to be no worse than the final year of RP2. To support this ambition, the company was also required to deliver its Customer and Delay Action Plan.

2.15 National Highways met its ambition, with average delay on the SRN of 10.9 seconds per vehicle per mile (SPVPM). This is lower than the end of RP2, when average delay was 11.8 SPVPM.

2.16 The improved performance partly reflects the effect of higher levels of delay that were recorded in the final year of RP2 due to extensive roadworks on all lane running smart motorways as part of the National emergency area retrofit (NEAR) programme. These roadworks finished in early 2025, resulting in decreased delays in the interim period, compared to the preceding year. National Highways' analysis of network performance shows a direct correlation between roads where NEAR programme roadworks were removed and decreases in delay in the latest year. On roads that were unaffected by this work, average delay remained broadly stable over the interim period.

2.17 In its 'customer and delay action plan', National Highways set out and delivered 14 activities that aimed to reduce delay and improve road user satisfaction in the interim period. This included a programme of improvements for freight drivers that saw the company upgrade 12 lorry parking facilities. The interim period delivery plan included an action to provide upgrades at Maidstone motorway service area. However, this was delayed, with work delivered at alternative sites instead. Upgrades at Maidstone are now due to complete in RP3.

2.18 Our assessment of National Highways' initial 'customer and delay action plan' was that it did not include sufficient detail of what actions the company was going to take, by when, and how they would benefit road users. Therefore, we worked closely with the company during the interim period to help it identify and explain how its actions would deliver meaningful outcomes for users, and how it would evidence these improvements. The company should continue to build its ability to measure the success of the actions it takes to mitigate delays on the network. This will enable it to use better evidence to ensure that its interventions are as effective as possible in providing benefits for road users in RP3 and beyond.

2.19 Action plans will form part of National Highways' work to demonstrate how it is contributing to reducing delays on the network in RP3. It is important that the company learns from the interim period and publishes a plan with clear, timebound activities against which it can be held to account on behalf of road users, taxpayers and the wider public. This includes where the company considers performance is affected by factors beyond its direct control.

KPI: network availability

2.20 This KPI measures the amount of the SRN that is available to traffic and unaffected by closures caused by roadworks. National Highways had a target to achieve 97.5% lane availability on average in the interim period. The company met this target, achieving availability of 97.5% throughout the interim period.

2.21 This was a new metric for the interim period that replaced the previous roadworks network impact KPI from RIS2. At the start of the year, National Highways encountered issues in processing its data, so was unable to report progress against the KPI until halfway through the interim period. The company identified a fix and was able to report performance from October 2025, including back dated data for the whole of the interim period. It is important that National Highways ensures that, where it has committed to report performance data against new metrics, it is able to do so.

2.22 As this is a new metric, there is limited understanding of how National Highways' levers can

affect performance. Therefore, the company needs to build analytical capability to better forecast how its planned interventions will enable delivery of this KPI.

KPI: incident clearance

2.23 This KPI measures the percentage of motorways incidents affecting traffic flow that are cleared by National Highways in under an hour. For the interim period, the company's target was to clear at least 86% of motorway incidents within an hour. It overdelivered the target, with 89.3% of incidents cleared within an hour over the year.

2.24 National Highways continued to perform well against this KPI despite an increase in the number of recorded incidents. The company attributes its strong performance in this area to its use of technology on the SRN to enable better detection of incidents, and improved traffic officer patrol strategies.

2.25 National Highways continues to predict an increase in incident numbers over the next road period. It is important that the company builds on the capabilities it has developed in RP2 to ensure it can respond to the increased incident clearance target of 88% for RP3.

A well maintained and resilient network

KPI: pavement condition

2.26 Transport Focus' research consistently shows that road surface condition is amongst the top priorities for users of the SRN. For the interim period, National Highways had a target to maintain the percentage of the network with good surface condition at 96.2%. The company met its target, with pavement condition at 96.3% at the end of March 2026.

2.27 National Highways should continue improving its forecasting of pavement condition in RP3 so that it is better able to predict, and respond to, any changes in future needs. Further information can be found in the Operations, maintenance and renewals chapter.

PI: technology availability

2.28 This PI measures the percentage of time that all roadside technology services on the SRN are available and functioning. No target is set, but National Highways has an internal target to achieve 95% availability for the interim period.

2.29 Technology availability on the SRN increased to 90.5% at the end of the interim period, compared to 90.0% at the end of RP2. Progress was limited in the interim period due to incomplete information about assets and compounded by historic underinvestment, resulting in ageing assets that are more prone to failure and harder to repair.

2.30 National Highways' progress in delivering its technology renewals programme in the interim period is discussed in more detail in the Operations, maintenance and renewals chapter.

2.31 Technology availability on smart motorways is reported in our annual assessment of safety performance on the SRN. Reflecting the importance of technology to National Highways' role in managing the SRN, a measure of technology availability on all lane running motorways will be reported as a targeted KPI in RP3.

PI: drainage resilience

2.32 The drainage resilience PI is a measure of the percentage of the SRN that does not have an observed significant susceptibility to flooding. During the interim period, drainage resilience improved from 72% to 74%. The PI excludes rainfall events greater than current design standards. When all rainfall events are included, showing the true road user experience, drainage resilience improved from 70% to 73% over the interim period.

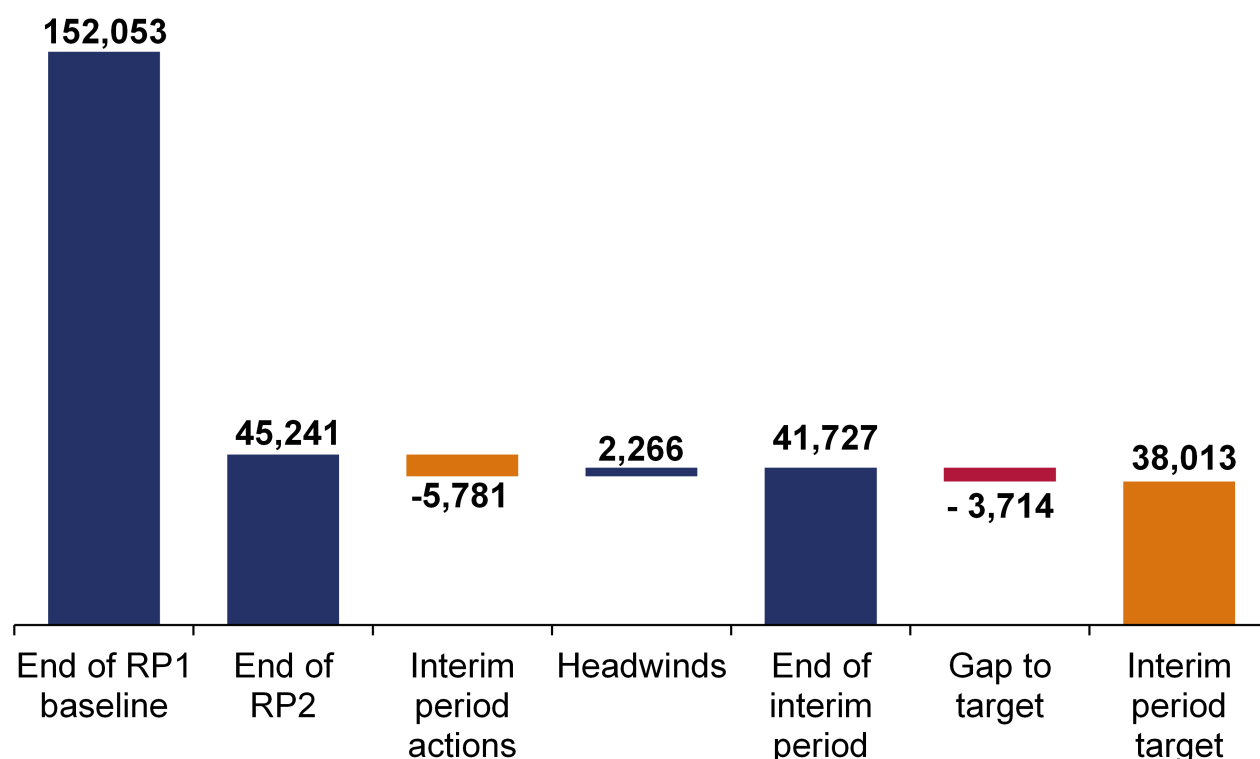
2.33 This indicator forms an important part of our assessment of drainage resilience, which is considered in more detail in the Operations, maintenance and renewals chapter.

Being environmentally responsible

KPI: corporate carbon emissions

2.34 National Highways had a target to reduce its corporate carbon emissions by 75% in the interim period compared to 2019 to 2020, the last year of the first road period. The new methodology was aligned to the Science Based Targets initiative (SBTi), and included additional emission sources, such as third party suppliers and motorway service areas. This is different to the Greening Government commitments methodology used in RP2.

Figure 2.1 Corporate carbon emissions KPI, as at March 2026 (tonnes of CO2 equivalent)



2.35 During the interim period, our analysis highlighted that National Highways was off track to achieve this target. At this point, the company forecast a reduction of 69 to 72% in its corporate carbon emissions compared to the baseline.

2.36 As a result, we challenged National Highways to produce a plan to improve performance. The company subsequently produced, and delivered, a plan that led to several thousand tonnes of additional carbon emission reductions. Some of the most effective actions it took were to improve the quality of its emissions data, which included working with motorway service area operators to provide renewable energy certification, obtaining certificates for hydrotreated vegetable oil (HVO) fuel used in heavy vehicles and updating emission factors for salt delivery. It is positive that National Highways has improved the quality of the emissions data that it collects, which will help the company to forecast performance and identify the most effective actions it can take to achieve its target in RP3.

2.37 Although the actions taken by National Highways reduced the gap to target, they were not enough to close it completely. At the end of the interim period the company reported a 73% reduction in corporate carbon emissions, short of the 75% target. The gap is equivalent to 3,714t of carbon emissions. The company can attribute headwinds due to higher vehicle mileage than forecast, purchasing of vehicles as part of Design, build, finance and operate (DBFO) hand back and

updates to external emission factors.

KPI: biodiversity

2.38 National Highways' biodiversity target for the interim period was to complete validation and assurance of at least 2,700 biodiversity units that have been delivered on the SRN. These units were delivered in the final year of RP2 but had not undergone assurance when performance was reported at the end of RP2. The company met its target, with 3,061 units assured and validated.

2.39 National Highways' original interim period target was to validate and assure 1,169 biodiversity units, based on its estimate when the interim settlement was agreed. In August 2025, the company estimated a higher total of units to be assured in the interim period. Following ORR challenge, a higher target was agreed by government to better reflect expected performance. National Highways needs to ensure that it has effective processes in place to better forecast its forward programme of work so that the right targets are set from the outset of a funding period.

KPI: noise

2.40 In the interim settlement, National Highways was set a commitment to produce a noise mitigation plan that would be ready for implementation in RP3. Subsequently, RIS3 set the company a target to reduce noise exposure for at least 5,000 households by the end of RP3. In response, it produced a plan to deliver this target by mitigating noise for households through a combination of barriers, resurfacing and insulation.

2.41 National Highways' focus in 2026 to 2027 will mainly be on procurement, feasibility and design work to enable noise reduction schemes to be delivered in the remaining four years of RP3. It is important that the company works at pace to conclude this preliminary work, aspects of which were originally proposed to be in place by the end of the interim period, so it is set up for success and can set out a detailed timeline of when it expects to complete each scheme that we will then hold it to account for delivering.

PI: litter

2.42 National Highways reports the level of letter on the SRN through the untargeted litter PI. The company also has a responsibility for collecting litter under the Environment Protection Act 1990.

2.43 The proportion of the network that was graded at A or B for litter, as defined in Defra's code of practice on litter and refuse was 62% in the interim period. This is an improvement on 59.8% at the end of RP2, and the best score reported since the metric was introduced in 2020.

2.44 National Highways should understand the effect of its interventions that led to this improvement and ensure good practice is shared between regions.

Meeting the needs of all road users

KPI: road user satisfaction

2.45 National Highways had a target to increase overall road user satisfaction to 69.6% by the end of the interim period. This target was based on a one percentage point improvement on the score at the end of RP2. To support delivery of this target, the company was also required to deliver its customer and delay action plan.

2.46 National Highways met its target, with road user satisfaction averaging 71.1% over the year. Approximately two thirds of the total increase in user satisfaction was attributable to the rise in satisfaction scores of road users using motorways. The remaining one third of the increase was attributable to the rise in satisfaction scores of road users using the all-purpose trunk road sections of the SRN.

2.47 Satisfaction is closely related to the level of delay that road users experience on the SRN. As with the average delay KPI, the increase in road user satisfaction in the interim period partly reflects the reduction in delays that followed removal of the extensive roadworks that were in place on all lane running smart motorways in the final year of RP2.

2.48 As set out in our assessment of National Highways' performance against the average delay KPI, we found that the company's initial customer and delay plan did not include sufficient detail of how its actions would benefit road users. We therefore worked closely with the company during the year to help it provide stronger evidence of how its actions would deliver meaningful improvements for road users.

2.49 Action plans will form a significant part of National Highways' work to improve road user satisfaction in RP3. Therefore, it is important that the company takes its learnings from the interim period and puts in place plans with clear, timebound activities against which we can hold it to account on behalf of road users, taxpayers and the wider public. This includes where the company

considers its performance is affected by factors beyond its direct control, enabling it to clearly demonstrate that it is taking reasonable steps to achieve the targets it has been set.

KPI: roadworks information timeliness and accuracy

2.50 Road users, especially freight and logistics firms, rely on timely and accurate notice of road closures, especially overnight closures that require diversion routes.

2.51 National Highways had a target to achieve at least 75% accuracy of roadworks closure information seven days in advance of works. The company exceeded its target, with 76.1% of closures meeting the requirements.

2.52 National Highways should build on the actions and lessons learnt from the interim period that enabled it to exceed its target, using these insights to identify further improvements, which will enable it to achieve 80% accuracy by the end of RP3.

PI: logistics and coach manager satisfaction

2.53 The satisfaction score for logistics and coach managers in the interim period was 41.4%, which is an improvement from the score of 36.0% at the end of RP2. Using data collected in Transport Focus' logistics and coach survey, this performance indicator was formally reported in the final year of RP2, and will continue in RP3, reflecting the importance of this sector in supporting economic growth. The survey data provides National Highways with information it can use to identify how it can achieve improvements to the SRN for these vital services.

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