



CÒMHDHAIL TRANSPORT
ALBA SCOTLAND

SCOTTISH FERRY SERVICES

.....
DRAFT PLAN FOR CONSULTATION

DECEMBER 2011

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Glossary of Terms

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Introduction from Alex Neil MSP, Cabinet Secretary for Infrastructure and Capital Investment and Keith Brown MSP, Minister for Housing and Transport



Alex Neil MSP

Cabinet Secretary for Infrastructure and Capital Investment



Keith Brown MSP

Minister for Housing and Transport

Scotland's island communities make a substantial contribution to the social, cultural and economic wellbeing of our nation. Ferry links to these islands and our remote communities are therefore an integral part of Scotland's transport network. That is why we have placed so much importance on carrying out the Scottish Ferries Review. We have ensured that the focus of the Review has been on the things that matter most to communities: how much they pay for their services; the level and type of services provided; who is responsible for providing these services, and what happens if the current provider fails to deliver a service; whether ferry services are accessible to all and whether services are provided in the most environmentally friendly way. Given the continued financial pressures we face, it has also been important to ensure that we have sufficient resource in place to fund our ferry services and that the money available is targeted most effectively. We want to see improved and more reliable ferry services to promote social inclusion on our island and remote rural communities. We also anticipate that the investment in ferry services going forward will maximise the opportunities for increased employment, business growth and expansion for leisure and tourism in Scotland's island and remote rural communities.

The Ferries Review is now complete but before finalising our Ferries Plan we are keen to hear your views on the conclusions we have reached. We are particularly keen to hear your views and opinions on the options we have identified for the provision of ferry services to your community.

Please take the time to respond to this consultation. Your views and opinions are vital to inform the Final Ferries Plan. Our aim is to publish a Final Ferries Plan in 2012 which will provide clear strategic guidance for the provision of ferry services in Scotland, through to 2022.

Chapter 1: Introduction

1. We all know that ferries are an essential part of Scotland's transport network. It is in recognition of this that we carried out the Ferries Review.
2. We want to maximise the economic and social potential of our remote rural and island communities. In addition to building on the current success of sectors such as oil and gas, fishing, aquaculture, tourism and whisky production, we are excited at the expanding possibilities for renewable energy. To achieve this we understand that the quality, reliability and affordability of transport links, along with other measures are essential in allowing our island communities to fulfil their potential.

What is this document for?

3. This Draft Ferries Plan has been prepared following the 2010 public consultation exercise. We have used consultation responses and information from a number of other sources to inform the drafting of the Plan. The Draft Ferries Plan sets out the Scottish Government's proposals for the provision and support of Scotland's ferry services over the next decade.
4. For most areas covered by the Ferries Review we have reached the stage where we are clear about the way forward and have set out our views. We do however still need to gather opinions and views about the level and type of services each community should receive. Chapter 4 sets out a number of options available for delivering services to each community and a number of specific questions have been asked.
5. To ensure that all respondents are in a position to submit detailed and full responses, and to take account of the fact that this consultation covers the Christmas and New Year period, the closing date for responses will be 30 March 2012, a period of 14 weeks.
6. You will find a summary of the consultation questions in Appendix 4. An online questionnaire is available at <http://www.surveymonkey.com/s/QZ25CFT>. Alternatively, responses and comments can be sent to:

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The purpose of the Scottish Ferries Review

7. As stated in the 2010 consultation document, the purpose of the Review has been to:

- develop a shared vision and outcomes for lifeline ferry services in Scotland, in the context of the Government's Purpose, Economic Strategy and National Transport Strategy;
- analyse the current lifeline ferry services and network, identifying how well it meets the proposed outcomes and how it links to the rest of Scotland's transport network;
- inform the Scottish Government's long-term plan for lifeline ferry services in Scotland and influence the next round of procurement of ferry services;
- identify policies to be taken forward to deliver the long-term plan, including the planned investment framework.

The Ferries Plan will ultimately make recommendations regarding:

- where investment should be focussed to make connections better for island and remote rural communities;
- improving reliability and journey times;
- seeking to maximise the opportunities for employment, business, leisure and tourism;
- promoting social inclusion.

8. We have considered these issues within a framework designed to maintain the strong safety record of Scotland's ferry services.

How the Review has been carried out

9. In carrying out the Ferries Review, we have been as inclusive, open and transparent as possible. The Review has been led by the Scottish Government but we have been helped in forming opinions by a Steering Group, a Council Group and an Operators Group. This involved input from organisations and individuals with a range of views, perspectives and expertise. A considerable amount of data collection and analysis, including a household survey, was carried out in relation to all aspects of ferry service delivery and usage. We appointed consultants to provide us with detailed information, and have drawn on the expertise of Caledonian Maritime Assets Ltd (CMAL) to advise us regarding vessels, ports and harbours. Highlands and Islands Enterprise advised us regarding the economies of the communities reliant on ferries. All of the consultants' reports and a report on the household survey are available on the Ferries Review website [Scottish Ferries Review](#).

10. A first round of consultation on the Ferries Review was carried out during the spring and summer of 2009. A public consultation on what should be included in the Ferries Plan began on 10 June 2010 and closed on 30 September 2010. The public consultation included over 40 events across the Highlands and Islands, including a series of public meetings and a public

consultation document. 600 responses from both organisations and individuals were received. An analysis of consultation responses was made publicly available in March 2011 Scottish Ferries Review Analysis of Written Responses.

11. A high-level Strategic Environmental Assessment (SEA) has been undertaken on the proposals set out in the Draft Ferries Plan. The SEA will be published before the end of December. The deadline for responses to the SEA consultation is also 30 March 2012.

National Objectives in Providing Support to Ferry Services

12. We are confident that the proposals set out in this document are consistent with, and contribute to, the Scottish Government's purpose and cohesion targets. Details of these targets were made available in the 2010 consultation document.

13. We are also confident that the proposals set out in this document are consistent with all of our targets, strategic outcomes and national objectives, details of which are also set out in our 2010 consultation document.

The Current and Future Position

14. Appendix 2 shows maps of the ferry services that currently exist in Scotland. Appendix 3 provides a table detailing each of the ferry services in Scotland along with details of our proposals for RET and future responsibility.

What happens next?

15. We will carefully consider all the responses and comments received in response to this consultation. We will then work to finalise the Ferries Plan, including a vessel renewal programme and investment plan, which we would expect to publish in 2012.

16. An Equalities Impact Assessment (EQIA) is being undertaken on the Draft Ferries Plan and will be published along with the Final Ferries Plan.

Future Procurement Issues

17. In the consultation document we undertook to consider how ferry services are tendered in the future. The Scottish Government is engaged in a reform programme for public sector procurement which is intended to enhance economic impact and value for money as well as diversify sources of procurement such as social enterprise. Within this context we will publish a separate policy statement on our future approach to ferries procurement.

State of Finances

18. We made clear in our 2010 consultation document that the financial context in which we are operating has changed since the Ferries Review was initiated. We are now operating in an environment where public expenditure is

under sustained pressure and where real terms reductions are expected for some years. There has therefore been a need to identify where we can get most value for our investment. This is true for both Local Authorities and the Scottish Government. The proposals contained within this Draft Ferries Plan necessarily reflect an awareness of this increasingly challenging financial reality.

19. There is, and will continue to be, significant cost escalation in the ferry sector to both central and local government primarily as the result of expected fuel price increases and more stringent regulations about the type of fuel that can be used. There is also the necessary investment for vessels, ports and harbours replacement required over the period of the Ferries Plan. In short, Scotland's ferries infrastructure is ageing and will need significant investment over the next decade if it is to remain fit for purpose.

20. Chapter 2 of this document explains that there is a need to better understand the level of investment required over the period of the Ferries Plan. To do this we need to first determine what services will be provided in the future. Chapter 4 of this document sets out further details about how this will be achieved.

21. Set against this background of continuing financial constraint and competing priorities, it is vital that the decisions and choices we make at these final stages before we publish the Final Ferries Plan are well informed. We are therefore grateful for the help and feedback we have so far received from stakeholders, and we hope that we will get a similarly strong response to the publication of this Draft Ferries Plan.

Chapter 2: How should ferries be funded and procured?

Introduction

1. Since we began the Scottish Ferries Review in 2008 we have remained committed to changing and improving ferry services so that they can continue to contribute to the economic development of our fragile island and remote rural communities.

2. This Draft Ferries Plan has been prepared within the context of a dramatic reduction in public spending imposed on Scotland by the UK Government. Over the period of the UK Government's Spending Review to 2014-15, the Scottish budget is being cut by 12.3 per cent in real terms. The Scottish Government's capital budget will bear the harshest reduction, with a real terms cut of 36.7 per cent; this has a direct impact on our ability to fund new vessels and major harbour projects.

How ferries are currently funded

3. The majority of Scotland's internal ferry services and vessels are funded through the Scottish Government and local authority subsidy. There are a few exceptions to this, e.g. the Kererra ferry which receives no public funding. There are also a number of services that are provided on a purely commercial basis, e.g. the service provided by Pentland Ferries across the Pentland Firth and the Western Ferries service between Gourock and Dunoon.

4. For ports and harbours, the current position is that they are owned and therefore funded through a variety of sources. Harbour dues are charged for the use of harbours, and for subsidised services these harbour dues are paid by the public purse as part of the subsidy requirement. For ports owned by Caledonian Maritime Assets Ltd (CMAL) these harbour dues are then reinvested in the development and maintenance of harbours. However, for the ports owned by Local Authorities, they decide what they do with the harbour dues received.

5. Independent Trust ports and CMAL ports use a combination of harbour dues and grants from us to fund maintenance and development of their ports. CMAL discuss with the Scottish Government what funding is available to them before reaching final decisions about maintenance and development of their ports. Some private operators own the ports that they use and are therefore responsible for their funding.

6. The vessels used to provide ferry services provided by CalMac are chartered from CMAL. CMAL own a fleet of vessels funded by the Scottish Government. The Scottish Government fund the capital cost of vessels through voted loans to CMAL and also through an ongoing operational cost for charter within the subsidy currently paid to CalMac. CalMac pay CMAL for the lease of the vessel and that money is used by CMAL to repay the loans to the Scottish Government.

7. The three passenger vessels used by NorthLink are chartered from Lombard (Royal Bank of Scotland) and therefore the cost of the vessels on the routes is funded through the operational subsidy paid to NorthLink. In addition, the two freight vessels are time chartered directly by NorthLink.

8. Orkney Islands Council and Shetland Islands Council who are responsible for providing all of their ferry services to their outlying islands, provide funding for vessels via their capital programme. Highland Council and Argyll & Bute Council also provide ferry services, either directly or via tender, and are responsible for providing vessels for these services.

Future investment requirements

9. In the 2010 consultation document we indicated that significant investment is required for vessels and ports and harbours over the period of the Ferries Review. This position has not changed and as noted earlier we are operating in an environment where public expenditure is under sustained pressure and real term reductions are expected for some years.

10. Despite the shortfall in future funding, the level of investment made available by the Scottish Government and CMAL's contribution in the last few years has allowed for substantial works to be taken forward. Examples include: approximately £4.2m on Largs, £6.7m on Rothesay Pier, £4.7m on the development works at Port Ellen, Islay and £5m for Kennacraig Phase 1 works. We have also invested £24.5m in the new MV Finlaggan vessel serving Islay. Further details of investment made available in the last few years is provided in Chapter 4 of this document. CMAL should over the next 3 years be in a position to start to take forward the construction of the next generation of 2 small hybrid vessels costing over £20m to serve 2 routes Sconser to Raasay and either Tayinloan to Ghiga or Tarbert to Portavadie. Funding has also been allocated for new vessel solution options for the Stornoway to Ullapool route, the details of which will be announced shortly. In addition, major investment plans are also in place for essential piers and harbour works at Brodick Pier and Oban.

11. It is worth noting that previous estimates on the level of investment required are based on all of the existing services continuing, and continuing to be operated with vessels which are procured and owned by CMAL and are leased to the operator of the Clyde & Hebrides ferry services.

12. To allow us to gain a clear understanding of the level of investment required over the period of the Ferries Plan, we need to have a clear idea of what services will be provided. Consultees' views are being sought in Chapter 4 of this document on a number of routes and services options for each community. A Scottish Transport Appraisal Guidance (STAG) type appraisal of each of the routes and services options will also be carried out before the final Ferries Plan is published. Consultees' views and the results of the STAG type appraisal will allow us to determine what routes and services each community should receive, and what vessels and ports and harbours are required to provide these services. It will only be then that we can have a full understanding of the level of investment required. The Final Ferries Plan will

provide details of the final investment required and details of how we will ensure our funding priorities can be met over the period of the Ferries Plan, to 2022.

Options for future funding of ferry services

13. As noted above we have concluded that we are not yet in a position to determine the actual level of funding required over the period of the Ferries Plan. However, in the 2010 consultation document we asked for views on a number of options for future funding of ferry services and these options have been considered further.

14. A 'Cost and Affordability' and a 'Funding' report, prepared by external consultants, was published at the same time as the 2010 consultation. These reports confirmed that the cost and affordability of Scotland's ferry services are key issues, and that the main challenge for the Scottish Government is to identify funding opportunities.

15. These reports highlight the rising costs associated with the operation of ferry services, and the vessels and ports and harbour infrastructure required to provide the services. The reports also highlight opportunities for potential cost savings to be made. Many of these savings can be achieved as part of the tendering process, e.g. we can be less prescriptive when tendering, allowing tenderers to be innovative with the potential to reduce costs. In relation to vessels and ports and harbours we can work with CMAL to investigate a range of potential strategies for funding. The opportunities for potential cost savings highlighted in the reports are consistent with the options for future funding presented in the 2010 consultation document.

16. Those responding to the 2010 consultation supported the idea that change in the way we currently fund and procure ferry services is necessary, in the interest of 'improving consistency in provision' and to 'secure funding for the future' of ferry services.

17. In the 2010 consultation document we presented a number of possible ways of securing additional funding:

- CMAL to access funds
- Make ports and harbours self-funding
- Users to provide more of the funding at point of use
- Open the market up to greater competition

CMAL to access funds

18. The 2010 consultation document explained that with its present status as a public corporation, CMAL is only allowed to borrow from the Scottish Government. As, under current rules, the Scottish Government does not itself have borrowing powers, the Scottish Government is restricted in the amount it can lend to CMAL.

19. Our intention is to continue to work with CMAL to consider alternative financing options. We will consider potential alternatives for short, medium and longer term investment opportunities. In doing this we will be mindful of the potential risks involved in not being in a position to meet investment priorities.

20. Once we fully understand the level of investment required we will reach final decisions about how CMAL might access funds. This information will be made available in the Final Ferries Plan.

Make ports and harbours self-funding

21. The 2010 consultation asked for views on whether harbours should move to a new regime of self-funding through harbour dues, or whether the current system of grant-based funding should be retained.

22. The 'Cost and Affordability' report discusses the current system for charging harbour dues at ports owned by CMAL. CMAL currently offers a discount to the operator of the CHFS services. To ensure consistency in terms of access to CMAL's harbour facilities this discount is extended to other operators using the ports. These discounts limit the ability for CMAL to be self funding and mean that they require a piers and harbours subsidy from the Scottish Government to allow them to develop and maintain their harbours.

23. Moving forward, CMAL are currently considering the future level of pier and harbour dues, and discounts, at their facilities. CMAL's intention is to make sure that the level of income generated wholly covers the cost of the ongoing maintenance and repair of their piers and harbours. This is something that will be addressed by CMAL and the Scottish Government in future operating contract(s) for the Clyde and Hebrides ferry services.

24. We are also keen to explore what would be involved if we, through CMAL, were to take responsibility for all ports used for the provision of subsidised ferry services currently owned by Local Authorities. It is envisaged that ports would transfer to CMAL who would then maintain and develop them and would receive the harbour dues associated with these ports in order to do so. This would ensure harbour dues for these facilities were being reinvested in the development and maintenance of ports and harbours. This approach was welcomed by some Local Authorities and we will in parallel take forward discussions with them and with CMAL about if and how this might happen. We will make clear in the Final Ferries Plan which ports will transfer to become the responsibility of the Scottish Government.

Users to provide more of the funding at point of use

25. Consultees were asked for their views on how funding for ferries should be split between private user and public subsidy. Most consultees understood the need to make some contribution, but stressed that it had to adhere to what is affordable and reasonable. There was also strong support for the continuation of public subsidy to support services that would not exist otherwise.

26. It is fair to say that there is a lack of appetite for increasing fares for any users of ferry services. There is however some support for allowing operators to manage demand on busier sailings. This issue is covered in more detail in Chapter 3 of this document.

Open the market up to greater competition

27. In the consultation document we undertook to consider how ferry services are tendered in the future. The Scottish Government is engaged in a reform programme for public sector procurement which is intended to enhance economic impact and value for money as well as diversify sources of procurement such as social enterprise. Within this context we will publish a separate policy statement on our future approach to ferries procurement.

How flexible should we be about what we tender for?

28. Greater dialogue with the market before tendering and a less prescriptive specification at the tender stage can result in ferry operators being more willing to bid to run the services. This approach will allow operators the flexibility to innovate and reduce costs where possible. Consultees agreed with this approach.

29. We have followed this approach with the Northern Isles ferry services tender and are currently in competitive dialogue with bidders. We will learn from this experience and consider whether a similar approach when tendering the Clyde and Hebrides ferry services would be appropriate.

The need for a tendering system in the future

30. The 'Funding' report discussed concerns over the European Commission's preferred maximum six-year contract period. The report highlighted the advantages to operators of a longer contract period, allowing them to make an acceptable return on their investment. Although we must adhere to the current rules which involve tendering subsidised services every 6 years, we believe longer contracts could be beneficial and we will continue to explore this possibility with the European Commission.

How we will prioritise funding?

31. Chapter 4 of this document sets out details of how we will prioritise funding. We have made clear that options for routes and services within each community are being presented as proposals only and that communities have been invited to respond to the consultation. We also make clear that the timing and funding of any changes is yet to be agreed. In the Final Ferries Plan we will provide more precise details about how we will prioritise each of the proposals to be taken forward.

Summary of way forward

32. The way forward is summarised below:

- We need to consider what services will be provided in the future to allow us to understand better the level of spending required over the period to 2022. The Final Ferries Plan will provide details of the final investment required.
- We will continue to work with CMAL to consider alternative financing options.
- We will revisit through CMAL the future level of pier and harbour dues with the intention that the level of income generated wholly covers the cost of the ongoing maintenance and repair of their piers and harbours.
- We will explore what would be involved if we, through CMAL, were to take responsibility for ports currently owned by Local Authorities.
- The service specifications for the next Northern Isles and CHFS tenders will be less specific, only specifying what is deemed to be a minimum requirement. The final contracts will fully specify details of the agreed proposal.

Chapter 3: Fares

Introduction

1. This chapter looks specifically at our proposals around fare-setting for ferry services in the future. The first section deals with the challenges around fare-setting and how the operator and the Scottish Government must sometimes balance a range of competing issues.
2. Our actual proposals are summarised in the second and third sections of this chapter. The final section of this chapter deals with some of the more practical details and how any changes might be implemented. A summary of the way forward for fares completes the chapter.

Challenges, issues and problems

Overarching Fares Policy

3. The way fares are currently set is unnecessarily complicated and no longer fit for purpose. The current system of fare-setting is not transparent or easily understood by people who use and rely on their ferry service.
4. The underlying basis of fare-setting should be the same across the network. The fares policy should be transparent and linked directly to the aims and objectives of both the ferry operator(s) and the Scottish Government. The problem with the present system is that the current level of complexity frustrates this ambition. We agree with the majority of consultation responses and accept that we should work as far as possible towards an overarching fares policy.

Competing Aims and Objectives

5. We asked consultees what should form the basis of an underlying rationale for fares. They said that a fares policy should encompass a broad range of issues and that it shouldn't be restricted to one aspect. The criteria that scored highest were 'community sustainability', 'fairness' and 'supporting the particular need of a community'.
6. We agree with these views and accept that one of our aims should be to enable communities to develop and grow in a sustainable way. If we set fares too high it reduces travel, jeopardising the long-term sustainability of many communities.
7. However lower fares, while clearly advantageous to ferry users, generally require additional subsidy and therefore shift the funding burden from the user to the taxpayer. If we set fares too low then the long-term viability of the ferry service itself is affected. A fares policy needs to balance our ambition for strong island and remote communities along with our desire to put the ferry service as a whole on a more sustainable financial basis.

Residents and Visitors

8. Our fare-setting policy also needs to address the sometimes competing priorities of residents and visitors. The Road Equivalent Tariff (RET) pilot to the Western Isles and Coll and Tiree has generated a substantial increase in visitor traffic, which we very much welcome. The local economies of many communities depend to a large extent on a tourist season and by continuing to encourage this effect, we are taking a large step to meet our aim of increasing the sustainable economic growth of these communities. But we have also become aware that sometimes this additional traffic is at the expense of local residents' ability to travel at times that best fit with their needs.

9. Should we therefore charge more for visitors than residents? Consultees thought not in the 2010 consultation exercise. We agree with this view. The potential adverse economic impact on communities is likely to be substantial and therefore we need to find another way to better manage demand for ferry services that does not discriminate against visitors and tourists.

Individuals and Communities

10. We also need to recognise that people have different incomes and we need to ensure that every resident has the opportunity to travel using their ferry service, regardless of their ability to pay. Equality of opportunity is a central point to the Government Economic Strategy of building a fairer society. This concurs with what ferry users said in the 2010 consultation that fares needed to reflect the particular needs of students and older people along with other less well off members of the community.

Integration

11. The Government Economic Strategy (GES) of the Scottish Government from 2007 states that:

"an efficient transport system is one of the key enablers for enhancing productivity and delivering faster, more sustainable growth."

This was re-affirmed in the update to the GES published on 12 September 2011. Underpinning this, the National Transport Strategy (NTS) published in 2006 sets out three Key Strategic Objectives - one of which is:

"to provide sustainable, integrated and cost effective public transport alternatives to the private car, connecting people, places and work, across Scotland."

12. In this we recognise having both simple ticketing and better integrated services and interchanges is vital. There have already been successful local schemes for integrated ticketing in Scotland, for example, Zonecard, Plusbus and One Ticket. We are now looking to ensure that our ferry operators work with other transport providers to encourage integrated ticketing and better

timetabling. This will allow for more seamless journeys, between different modes of transport, e.g. bus, ferry and rail.

Road Equivalent Tariff (RET)

13. We have had in place a RET pilot to the Western Isles, Coll and Tiree since October 2008. An extensive evaluation of the pilot has now been published, and this has given us a range of insights into formulating a future fares policy for the whole network.

14. First of all RET-based fares have succeeded in reducing fares for the vast majority of classes of passengers, with reductions in some cases of up to 50 per cent. As a consequence there has been a substantial increase in patronage, with an increase of 30 per cent in car traffic in the first year of the pilot.

15. Across the three basic classes of patronage - foot passenger, car and commercial vehicle – car patronage has considerably out-performed the other two groups. And while foot passengers have increased by over 20 per cent over the first two years of the pilot, we need to keep in mind that a substantial proportion of this is as a consequence of the growth in car patronage. Commercial vehicles has seen a comparatively small increase, not all of which is attributable to lower fares, but other business considerations, of which the cost of ferry transport is one amongst a number of factors.

16. One encouraging aspect of the increase in patronage is that cheaper fares appear to have had a positive impact for both residents and visitors. While for the summer season around seven out of ten of the additional trips were made by visitors, the remainder were made by residents. In the winter season, the majority of the additional patronage was attributable to residents travelling more, but even here visitors account for around four in every ten additional trips.

17. It is our proposal that single journey fares for foot passengers and car traffic should be based on the principle of RET. This ensures that regardless of where you are travelling from or to on the network, the basis for fare-setting will be the same.

Managing Demand on Busy Sailings

18. Cheaper ferry fares are good news, but inevitably there are some unintended consequences that we need to address. The increase in patronage, particularly car patronage, on RET routes has clearly had an adverse effect on peoples' ability to book and travel on their preferred sailing. Before the introduction of RET certain sailings at peak times, mainly during the summer months, could be over-subscribed. Cheaper fares have exacerbated this problem, with people and businesses finding it more difficult at times to book their vehicle on the sailing of their choice. For foot passengers the problem is much less significant.

19. RET is a uniform fares structure, in which everyone is treated the same, regardless of their particular need to travel. But these needs are different and some people will have a greater willingness to pay than others, based on the purpose behind their journey. Some people might occasionally travel, and they are flexible about when they travel. Others have to travel regularly, often at short notice, and there is little or no discretion about the timing of that travel. A uniform pricing structure does not allow the operator to distinguish between these different needs and this is at odds with how fares are set across most other transport systems, including public sector transport networks.

20. For those shorter crossing-time services with a distinctive operating day it should be possible to distinguish between on-peak and off-peak services. Typically on-peak will be around commuter times covering the early morning and late afternoon/early evening period, with services during the day and in the late evening reverting to off-peak. For longer journeys and crossing times, where there might only be one or two services a day, the busy sailings might be for two-three weeks during July, or a particular sailing might be extremely popular.

21. The requirement for some form of demand management was well supported by a range of organisations with a significant interest in ferry services in the 2010 consultation exercise.

22. Our proposal is that while RET will form the basis for the fares structure across all sailings, the operator will have the opportunity to bring forward proposals on how they intend to manage demand where there is excess demand. Stakeholders (the local Ferry Committee or User Groups or other stakeholders) must be consulted on demand management plans.

RET for Commercial Vehicles

23. In the short term we are replacing RET for larger commercial vehicles on the Western Isles, Coll and Tiree, with an enhanced pre-RET discount scheme because:

- The RET evaluation report shows that savings made by hauliers through RET have generally not been passed on to the consumers. The reduction in the ferry fare is a small part of the overall cost of transporting the goods and becomes very small indeed when divided by the number of goods being carried.
- In 93 per cent of cases, the reduction in ferry fares arising through the RET Pilot have been wholly or partially absorbed at some stage in the supply chain, without being fully passed on to customers. Only 7 per cent of firms in the sample of businesses indicated that the savings had been passed on in full throughout the supply chain from both their suppliers and on to their customers.
- The increase in freight traffic over the first 2 years of the Western Isles pilot was 8 per cent, much less than the increase in passenger and car traffic. It has been a second order response to changes in business activity on the islands rather than a direct response to lower fares.

- The cost of rolling out RET to larger commercial vehicles is an estimated 40 per cent of the total cost of RET.
- Before the introduction of RET, hauliers received discounts to their fares up to a maximum of 15 per cent dependent on their volume of business with CalMac. Island hauliers told us when we rolled RET out that they were concerned mainland hauliers would be able to compete more effectively with them now that the same discounts applied to all hauliers. We will reinstate the pre RET discounts that were enjoyed by hauliers and increase for the Western Isles, Coll and Tiree the maximum discount from 15 per cent to 25 per cent.
- For the Western Isles, Coll and Tiree the Government is considering how to extend the current discount eligibility criteria for hauliers.
- The Government is open to discussing with businesses which use larger commercial vehicles the most equitable formula which could be used to apply these discounts so that they benefit both larger and smaller companies.
- These improvements to the discount will be made for the Western Isles, Coll and Tiree only, where hauliers have received the RET discount since October 2008. While the discount has not been passed on to consumers we accept that in these difficult financial times some hauliers may find it difficult to now pay a fully increased fare. The increase to the maximum discount reduces the impact on these hauliers. We will revisit the discount again when we renew the Clyde and Hebrides contract in October 2013.
- Given that the main benefit of RET is to the tourism industry, we will retain RET for coaches.
- We will look in the next CHFS tender to extend the current definition of a commercial vehicle from 5 metres to 6 metres. This will be consistent with the position in the Northern Isles.

24. In the longer term it is our aim to develop an overarching freight fares policy.

Concessionary Tickets

25. We will retain the current terms and conditions of the National Concessionary Travel Scheme for older and disabled people. Those eligible are entitled to two concessionary return trips as foot passengers only each year. A similar commitment exists for the young persons' scheme for people aged between 16 and 18 years of age.

Multi-journey Concessions

26. Multi-journey tickets offer discounts on certain routes and reward frequent travellers. But they can be very expensive, with a higher up front cost, particularly for people wanting to travel with their vehicles. They also require holders to use the ticket in a certain amount of time, normally a year. Multi-journey tickets are not transferrable so people need to be absolutely certain they will travel the required number of times in the period, otherwise they are in danger of not realising the available discount.

27. For these reasons we want to introduce RET but discontinue multi-journey tickets. As is currently the case on the RET Pilot routes, we want the RET single fare to be competitive with any discounts that would or might be available through any multi-journey ticket scheme. We feel that this is a much better way to ensure that all travellers can access discounted fares.

Delivery and time-scales

28. As well as retaining the RET scheme to the Western Isles, Coll and Tiree, there will be further RET pilots on the same basis to Islay, Colonsay and Gigha from October 2012 and to Arran from October 2014. The intention is to rollout RET to all other West Coast and Clyde islands within the term of this Parliament, including to some inter-island routes such as the Sound of Harris and the Sound of Barra.

29. For the Northern Isles, implementing RET now or in the next few years, would mean an increase on a range of fares currently available on the Aberdeen/Kirkwall/Lerwick route. The intention then is to phase in the introduction of RET fares over a much longer time-frame so that no one will pay more for a RET fare than their current standard single fare. We are committed to an overarching fares policy, but we need to act with appropriate discretion in how such a formula might be implemented between various communities across the network.

30. For all other routes please see the table in Appendix 3.

Other issues

RET for Commercial Operators

31. In the event that RET fares are introduced on a route that also has a commercial operator, then funds would be provided to allow the operator to set their fares at RET rates.

Future RET Formula

32. There is further work required around the precise rates for RET. Currently how RET fares are set is based on research prior to the start of the Western Isles, Coll and Tiree Pilot in October 2008. These figures (and research) are now out of date, and we wish to update the RET formula.

Annual Fares Review

33. We also expect RET fares to be reviewed each year, in line with the cost of travel. We intend to look at various ways that this might be accomplished that makes sense to ferry users.

Summary of our proposals

34. Our proposals are summarised as follows:

- We will replace the route-specific nature of fare-setting with one single overarching framework.
- We will roll-out RET across the network as the basis for single fares for passengers and cars.
- We will work with operators to better manage demand where necessary. Stakeholders must be consulted.
- We are not satisfied that RET for commercial traffic is cost effective. Therefore, in the short term we will continue to support existing discount schemes such as the Traders Rebate Scheme. In the longer term it is our aim to develop an overarching freight fares policy.
- Once RET is introduced there will be no need for multi-journey discounts.
- RET will be rolled out further during the term of this Parliament. An announcement was made on 29 November.
- A new system of annual fares reviews will be implemented in line with the cost of travel.
- In the current Northern Isles tender and the next CHFS tender we will make it a requirement for ferry operators to work with other transport providers to encourage integrated ticketing and better timetabling.

Chapter 4: What kind of ferry services should be funded?

Introduction

1. The main section of this chapter discusses our proposals for routes and services across the whole network. We have summarised our proposals for each community grouped under the following headings:

- Firth of Clyde
- Inner Hebrides
- Northern Isles
- Skye, Raasay, the Small Isles and Knoydart
- Southern Hebrides
- Western Isles

2. The chapter first of all gives a brief overview of the needs based assessment that has been carried out to arrive at our proposals, followed by our working principles on routes and services.

Needs Based Assessment

3. We have carried out a considerable amount of work to determine the kind of ferry services that communities need. We have developed a routes and services methodology that has enabled us to determine a model ferry service for each community on the network. The methodology treats all communities the same. It is evidence-based so we are not favouring one community against another. If we find evidence that a community has a particular need then this is reflected in the model ferry service we are recommending for that particular community. We will repeat the methodology every few years, in line with tendering timetables, to ensure we are always up to date with the needs of the communities.

4. When we compare a community's model service to what they currently receive, this informs us about whether or not the existing service provision is adequate. For many communities there is a gap in provision between their current ferry service and what their model service would look like.

5. We have also carried out an exercise to determine what we could do to ensure that each community receives the type of service that they need.

6. Where we think the existing service is not far short of the model service, then we have largely considered a range of short-term proposals. Where the service gap is more significant then the proposals are more substantial and longer term. The intention of the exercise was to ensure that we ended up with a set of possible ways forward that were proportionate to the gaps in service provision that we have identified.

7. We also considered how ferry services could be delivered in a way that is better for the community or in a way that is more cost effective.

8. Appendix 1 describes in further detail the routes and services methodology and the appraisal of proposals.

Working principles

9. During the course of the needs based assessment, a number of principles emerged that have come to underpin many of our proposals.

10. We concentrate on the correct service profile to meet the needs of the community. We do not rely on the correct vessel(s) currently being in place to deliver the model service profile. To attain the model service profile, it may first be necessary to replace the vessel(s) on a route.

11. We will ensure that there is always sufficient capacity on the route to meet demand. This may be done through demand management, especially in the shorter term.

12. We will ensure that each island or remote peninsula community has at least one direct ferry route to the Scottish mainland.

13. We will consider the need for secondary routes. Where a community has more than one route then we have reviewed evidence that helps us to understand the value of that second route to the community. There may be a requirement to retain a secondary route if patronage levels on that route are quite significant, or comparable to the main route for the particular community. It is also quite possible that if the physical distance between the principal and secondary routes is large, and the secondary route serves a substantial population, that the secondary route should be retained. Finally, the secondary route might also serve some additional strategic purpose, for example it might be part of a wider network of routes, the removal of which could have far-reaching consequences.

14. When considering the need for secondary routes we will ensure that port facilities will continue to be maintained in order to provide resilience facilities in the event of an operational failure on the principal route.

15. We will work towards combining routes that overlap and compete with one another so that we emerge with a stronger single route option.

16. There are a few communities where the ferry service is a secondary service to the road network. Here we have looked at ways in which the ferry service could be changed to provide people with a real choice, particularly if the road network still means a long journey.

17. We will strengthen and augment existing routes rather than start up new routes. We need to recognise that we have in place a mature network of long-established routes. To introduce a new route we would need to be sure that the additional benefits to a community would outweigh the substantial set-up costs of a new route along with the loss of existing port facilities.

18. Public money should be targeted to support routes and services that are essential to the community. We have made a distinction between essential and discretionary ferry services. An essential service means that people have no choice but to use the service. For a discretionary service this is not the case. For these types of services we have looked for ways in which the service could continue but with less or no support from public money.

How we will prioritise funding?

19. Priority for funding will be focussed on a community's principal route and a lower level of funding priority will be given to secondary routes.

20. Priority for funding will also be focussed where the service gap, as identified by the routes and services methodology, is more significant.

21. Short-term proposals have been considered where existing services are close to what our methodology describes as the model service.

22. As a general rule, any proposed changes to vessel infrastructure and ports and harbours will be taken forward as part of the vessel replacement and port and harbours programmes. These proposals are therefore medium- to longer-term solutions. It may be possible to address some of these during the next CHFS contract (2013-2019).

23. As indicated earlier in this document, the Scottish Government is facing significant pressures on its ferries budget following the UK Government's Spending Review. Consequently the exact timing of the proposals set out in the sections below will be subject to these financial constraints.

Results by community

24. The following section explains what our proposals are for each community (and sets of communities). We are presenting these as proposals, inviting views and opinions from the local communities. The timing and funding of any changes is yet to be agreed.

Firth of Clyde

Arran

25. Arran currently has two ferry routes; the principal route is from Ardrossan to Brodick, and the secondary route is between Lochranza and Claonaig on Kintyre.

26. Currently a typical service day on Ardrossan to Brodick would run from early morning to early evening, with the first sailing to the mainland around 8.30 am and the last sailing around 7.30 pm. The Friday service offers an additional sailing later in the evening. There are around 5 to 6 sailings per day Monday to Saturday, less on a Sunday.

27. Our needs based assessment for Arran suggests increasing the service provision on the Ardrossan to Brodick route so that the new operating day runs from very early in the morning (around 7 am) through to much later in the evening (at least 10 pm). We also suggest increasing the frequency of the service so that it closely matches a shuttle service. This proposal would substantially increase the connection between Arran and the Scottish mainland.

28. There are no low cost practicable options for how we might increase the service provision on Ardrossan to Brodick. Currently the route is served by one large vessel. To double-crew this vessel so that we could extend the operating day would be extremely expensive.

29. A better long-term option would be to replace the existing vessel with two smaller vessels. These vessels would be more fuel efficient and each vessel would require a smaller number of crew than the current vessel. So while there is a substantial initial investment, the increase in running costs is significantly less. We may be able to achieve this change during the next CHFS contract (2013-2019) or it may be that this change is only possible as part of the vessel renewal programme to be published as part of the Final Ferries Plan.

30. We recognise that the current harbour infrastructure at Brodick acts as a capacity constraint and that this needs to be addressed prior to the introduction of RET on this route. Major investment is planned at Brodick to replace the ageing harbour infrastructure. That work will be taken forward by CMAL over the current Spending Review period 2012/13 to 2014/15. In addition to addressing the current capacity problems, the improvement work will improve the operational resilience of Brodick for existing and future vessels.

Claonaig to Lochranza

31. Claonaig to Lochranza largely fulfils a specialist function in the movement of dangerous goods. In terms of passenger and vehicle numbers it is very much a secondary route to the Ardrossan and Brodick service - for every passenger travelling between Claonaig and Lochranza, there are around 16 passengers travelling between Ardrossan to Brodick. The figure for cars is around 9 to 1 in favour of Ardrossan to Brodick.

32. It would be our intention to review services between Claonaig and Lochranza following the upgrade to Ardrossan to Brodick.

33. **In summary, our proposal is (a) for the Ardrossan to Brodick service to be upgraded to a two-vessel service operating a more frequent shuttle service through to the late evening and (b) services between Claonaig to Lochranza would be reviewed following these changes to the Ardrossan to Brodick service.**

34. **The community is asked for their views on these proposals.**

Bute

35. Bute has two ferry routes. The principal route from Wemyss Bay to Rothesay, linking the island to the central belt of the Scottish mainland. The secondary route between Colintrave and Rhubodach links the northern part of the island to the Argyll and Bute peninsula. Both routes are popular and while Colintrave to Rhubodach is a secondary route, it remains a well used route in its own right with around 250,000 foot passengers and 85,000 cars travelling on this route every year. By comparison, Wemyss Bay to Rothesay has an annual count of around 750,000 passengers and 150,000 cars.

36. Bute has recently benefited from major investment in vessel and port infrastructure. Two comparatively new vessels operate the route, the MV Argyll in service from 2007, and the MV Bute from 2005. In 2008, Rothesay pier was completely upgraded, the work led by Argyll and Bute Council (as the port owners) with a substantial financial contribution from the Scottish Government.

37. The assessment for Bute from our needs based assessment is that a model service would have an operating day from 6 am in the morning through to midnight. Neither of the two routes currently have a service profile that meets this; the Wemyss Bay to Rothesay service is around fourteen hours, with a typical service day from early morning to around the middle of the evening. The Colintrave to Rhubodach service operates from 5.30 am to around 8 pm in the evening.

38. We looked first at how we might meet this need by upgrading the service between Wemyss Bay and Rothesay. To extend the operating day we would need to double-crew and run at least one of the two vessels to cover the late evening service. This would be very expensive and a disproportionately costly solution to the issue we have identified.

39. We also considered the option to upgrade the Wemyss Bay to Rothesay service, at the expense of the loss of Colintrave to Rhubodach. This has also been rejected on the basis that the Colintrave to Rhubodach service is a substantial second service and its loss would be particularly harmful for the local economy.

40. **Instead we could enhance the Colintrave to Rhubodach service, running the service through to midnight, thereby extending the operating day and meeting the model service profile. We feel that this is the most cost effective solution to meet the service gap, which at the same time, because of the reasonably high patronage on the route, could bring substantial benefit to the local economy. The intention would be to include this proposal as part of the next tender for Clyde and Hebridean Ferry services in 2013.**

41. **We recognise that this is not the principal route, or the route that may most often be used for commuting purposes. The community is therefore asked for their views on this proposal and whether an extended service on this route would be well used.**

Cumbrae

42. Cumbrae currently has a frequent or shuttle service that operates between the island and Largs. It is a two-vessel service with an extended (fourteen hour) operating day, with a typical service day from early morning to around the middle of the evening.

43. The ferry service from Cumbrae has benefited from new vessel provision in 2007, with the MV Loch Shira replacing a smaller vessel, and thereby increasing the capacity. Largs Pier, that serves the ferry service to Cumbrae, was upgraded and completely re-built with the works completed and opened in 2009, the Scottish Government providing £4.2 million of grant towards the overall cost of the CMAL led scheme.

44. The assessment for Cumbrae from our needs based assessment suggests that a model service would offer some later evening services compared with the current service provision. The intention would be to include a later evening service for one or two evenings per week as part of the next tender for Clyde and Hebridean Ferry services in 2013.

45. The community is asked for their views on this proposal.

Cowal Peninsula and Dunoon

46. The town centre to town centre service between Gourock and Dunoon has very recently been re-tendered with a substantial increase in service provision. The new service operates on a shuttle-basis for seven days per week from early morning to very late evening. It is a very comprehensive service which will be retained for the period of the current contract and will be reviewed in time for the next contract period.

47. Alongside this ferry service, a commercial operator provides a vehicle and passenger service, sailing between Hunter's Quay (Dunoon) to McInroy's Point (Gourock). This service provides a twenty minute crossing with four services per hour at peak periods. The service operates from very early morning to late evening.

48. Whilst the outcome of the recent tendering process was the best that could be achieved under the circumstances (particularly the restrictions imposed by the European Commission), Scottish Ministers were disappointed not to be able to continue the vehicle and passenger service.

49. We are absolutely committed to providing a ferry service that meets the needs of users and will continue to look at more options to improve the overall service and facilities.

50. The community is asked for their views.

Inner Hebrides

Mull

51. Mull has four ferry services, including the Iona service (see separate section below). Of the remaining three, the service between Oban and Craignure is the principal route to the Scottish mainland, while the other two routes are secondary, Fishnish to Lochaline and Tobermory to Kilchoan, connect Mull to the Morvern and Ardnamurchan peninsulas respectively. This is reflected in the patronage count with over 500,000 foot passengers and 100,000 cars using the Craignure service each year. This is around five times more foot passengers and twice as many cars as Fishnish to Lochaline. Tobermory to Kilchoan is the least used of the three routes with around 35,000 foot passengers and 5,000 cars per annum using this particular route.

52. The needs based assessment has suggested that for the Craignure service there is a substantial mismatch between the current service and what a model service would look like. At present the service might be described as a regular timetabled service operating from fairly early in the morning - with the first service typically leaving around 9 am to the mainland - to early evening, with the last service leaving at 7 pm.

53. We propose to upgrade this service to operate all day from very early morning, with the first sailing around 7 am, through to late evening, with the last sailing around 10/11 pm or later. The service would also be a shuttle service operating frequently on the route for most of this extended operating day.

54. There are two principal options for how we might achieve this substantial increase in service provision. We can use the existing vessel with double-crewing so that the second crew covers the extended operating day. On one of the busiest routes in the network, this doesn't adequately resolve the capacity difficulties that people experience as there are real limitations with the current vessel. It also does not increase the frequency of the service, only the length of operating day. Therefore we would still be left with a service gap.

55. Alternatively we could upgrade the service from one to two vessels. This option is preferred on the basis that it is a genuine step-change in capacity and offers the opportunity for a high frequency/shuttle service. We may be able to achieve this change during the next CHFS contract (2013-2019) or it may be that this change is only possible as part of the vessel renewal programme to be published as part of the Final Ferries Plan. This proposal offers an adequate solution to the problems that have been identified with this particular service.

Mull to Ardnamurchan/Morvern

56. When we strengthen the Craignure to Oban service, it is our intention to review the service between Fishnish and Lochaline. This service is mainly used for timber transportation and in patronage terms is very much a secondary service to the main service from Craignure.

57. The Tobermory to Kilchoan service runs from the other end of the Sound of Mull (from the Craignure service) to Ardnamurchan. This service does not currently carry substantial numbers of passengers, certainly compared to comparable routes on the network. Although it is clearly a secondary service in patronage terms, it is also an important service for the local population, in particular people travelling from Ardnamurchan.

58. An option that would continue to meet the needs of the local community would be to replace the current vehicle and passenger service with a passenger-only service. The very low vehicle patronage on the route makes the continued use of a vehicle-carrying ferry very difficult to justify, while a passenger vessel will allow existing needs to be met. We may be able to achieve this change during the next CHFS contract (2013-2019) or it may be that this change is only possible as part of the vessel renewal programme to be published as part of the Final Ferries Plan.

59. **In summary we have a package of proposals as follows:**

- **To upgrade the Craignure to Oban service to a two-vessel service, operating as a shuttle-service through an extended operating day;**
- **Following the upgrade to Craignure to Oban, to review operations on the Fishnish to Lochaline service.**
- **To replace the current passenger and vehicle service on Tobermory to Kilchoan with a passenger-only service.**

60. **The community is asked for their views on these proposals.**

Iona

61. The service to Iona currently reflects the substantial variation in tourist passengers between the summer and winter seasons. The number of services is significantly reduced in winter compared to summer provision.

62. The needs based assessment suggests that while we think the winter service is largely fit for purpose, there is a potential gap around the length of the operating day during the summer season. The last service typically leaves at 6.30 pm and we propose that the community would benefit from later sailings in the summer period.

63. We identified a number of options. Operating with an additional crew for the late evening would remove the problem, but would not be cost effective. An alternative way forward is to provide a new berthing facility. This is currently the only route on the network without appropriate overnight berthing facilities. Taking forward this proposal would not only alleviate a long-standing safety issue - the crew has to be transferred via another boat every day – it would also allow for an increase in available operational service hours. Given that significant funding is likely to be required this is a medium-to longer-term solution.

64. Our proposal is for an additional 90 minutes of services in the evening, so the last service is around 8 pm. The community is asked for their views on this proposal.

Ardnamurchan/Morvern

65. The Ardnamurchan/Morvern area has in total four ferry routes. Two of these, Fishnish to Lochaline and Tobermory to Kilchoan, are discussed under Mull. The communities of Ardnamurchan and Morvern are invited for their views on the proposals that affect these particular routes.

66. The remaining two routes are the Corran ferry at Ardgour, run by the Highland Council, and a small passenger-only service at Camusnagaul. We have used the needs based assessment to assess the Corran service because it is used by many residents as a principal route. The service operates seven days a week from very early in the morning through to the late evening on a frequent/shuttle basis. **Our assessment has suggested that this is a model service and appropriate for the importance of the route.**

67. As noted in Chapter 2 we are willing to discuss the transfer of responsibility for services with the relevant Local Authority.

68. The community is asked for their views.

Lismore

69. There are two routes that currently serve Lismore: a vehicle service to Oban under the jurisdiction of the Scottish Government, and a passenger-only service from the north of the island, between Port Appin and Point, provided by Argyll and Bute Council. Each service is a seven-day service, summer and winter. A typical operating day for the Oban service is from early morning to late afternoon/early evening with around three to five sailings per day. The Port Appin to Point service is more of a shuttle service with a similar operating day to the vehicle service.

70. We have assessed both services using our needs based assessment and consider that - taking each route on an individual basis - neither service adequately meets the needs of the island. The model service for Lismore would offer a shuttle-type passenger and vehicle service with an extended operating day from 7 am through to 10/11 pm in the evening. The current vehicle service is not frequent enough, nor does it operate over an extended operating day. The passenger service is much more frequent with a longer operating day, but is only a passenger service.

71. We reviewed a number of options including enhancing the service provision on either route, while retaining the other, and removing either one of the two routes, while retaining the existing service on the other route. None of these options were deemed suitable. They were either rejected as too expensive or potentially damaging to the community's links with the mainland.

72. We consider the most appropriate option would be to replace the two existing services with a single passenger and vehicle service. Lismore is a fairly small island and it is not sensible to have two ferry routes that substantially overlap one another. Replacing two services, neither of which quite provides the required service profile, with a single service that does, is therefore our preferred way forward. The comparatively short crossing time between Port Appin and Point would make this route the most appropriate location for the new service.

73. In reaching this conclusion we confirm the findings from a recent appraisal exercise that was commissioned by Caledonian Maritime Assets Limited. We may be able to achieve this change during the next CHFS contract (2013-2019).

74. The community is asked for their views on this proposal.

Coll and Tiree

75. The service to Coll and Tiree (from Oban) is once per day on average. In the summer the service operates seven days per week. One day per week the service is shared with the Barra/Castlebay to Oban service. In the winter the service runs for four days per week.

76. On the basis of our needs based assessment we suggest that the present number of sailing days in the winter is insufficient.

77. A number of options were considered that would significantly change the nature of the service. Procuring a dedicated vessel for the route would not be cost effective. Air services could also play a role in improving accessibility – currently the service operates between Coll, Tiree and Oban between two and three days per week. But air services are not a close substitute for ferry services, and ideally we would like to recommend a ferry-related solution to meet the service gap.

78. Our commitment is to work towards an improved winter service for Coll and Tiree. Proposals to procure new vessels for other communities (see Arran and Mull) will at a network level provide opportunities for existing vessels to be made available to increase the service provision to Coll and Tiree. In the longer-term, subject to other proposals going forward, **we would want to move to a service that operates for at least six days per week during the winter period.** We may be able to achieve this change during the next CHFS contract (2013-2019).

79. **The community is asked for their views on this proposal.**

Kerrera, Luing and Easdale Island

80. The service to Kerrera is currently provided by the private sector and the services to Luing and Easdale by the Local Authority.

81. The Scottish Government is committed to ensuring ferry services continue to be provided to our island and remote rural communities. In Chapter 5 our proposal for commercially run ferry services is that in the event of market failure we would intervene if a route is deemed to have a lifeline nature. In addition, our proposal (in Chapter 5) on the future responsibility of ferry services is that we will discuss with Local Authorities whether they wish to transfer responsibility for routes currently under their jurisdiction to the Scottish Government.

82. **In the meantime, our initial findings suggest that these services are fit for purpose and meet most of the communities' needs.**

83. **These communities are asked for their views.**

Northern Isles

84. Shetland only has one route from Aberdeen to Lerwick. Orkney's principal route is across the Pentland Firth and the secondary route is between Aberdeen and Kirkwall.

Services to/from Aberdeen

85. The passenger and vehicle service between Lerwick and Aberdeen runs every day (summer and winter) with each service departing from Lerwick in the late afternoon/early evening for an overnight journey, arriving in Aberdeen the following morning three days per week. The service also stops in at Kirkwall on three days. This is a two-vessel service with the second vessel making a concurrent (overnight) return sailing stopping at Kirkwall four days per week. In addition, a complementary freight service operates on the same routes.

86. This is a long-standing mature service and our appraisal suggests that it is generally fit for purpose. The important consideration is to arrive at the correct balance between a daily regular service for Shetland to the mainland, an access point for Orkney at least part of the time (given the presence of the Pentland Firth services) and a link between Shetland and Orkney mainland.

87. We looked at a series of options including a separate shuttle service between Shetland and Orkney, a separate passenger and vehicle service for Orkney and the Scottish mainland, a call in everyday at Kirkwall, and an enhanced service/timetable that would allow two daily sailings from Kirkwall, one to Aberdeen and the other to Lerwick. Some of these options are only achievable with substantial new investment and an expansion of the existing fleet. Others would seriously inconvenience one community against another, upsetting the balance that has been achieved with the existing service configuration.

88. Our proposal is therefore to retain a broadly similar level of service and this is reflected in the tender process for the Northern Isles contract from 2012 to 2018. There are greater options around how freight can best be provided for and this too has been reflected in the tender process. The Ferries Review extends beyond that period and the community is therefore invited to provide their views on this.

Pentland Firth

89. The Pentland Firth is served by three providers, a publicly-funded service operating from Scrabster to Stromness, and two commercial services, one operating between Gill's Bay to St Margaret's Hope, and another summer-only service operating out of John O'Groats. The two principal services operate seven days per week to a regular timetable around a normal working day.

Our proposal is to retain a broadly similar level of service and this is reflected in the tender process for the Northern Isles contract from 2012-2018.

The Northern Isles Ferry Services Tender for services from 2012

90. The tender gives bidders the opportunity to come forward with alternative proposals for configuring the Aberdeen – Kirkwall – Lerwick service while achieving a broadly similar service and:

- at least one sailing, each way, per day, every day throughout the year between Aberdeen and Lerwick.
- No lesser level of service between Aberdeen and Kirkwall than is currently provided
- A regular, broadly similar level of service between Kirkwall and Lerwick

91. If no obvious preferable proposals come forward then we will ask bidders to submit final proposals replicating the current service configuration.

92. For the Scrabster to Stromness route, the tender requires a minimum passenger and vehicle service of 2 sailings a day in winter while allowing for an alternative pattern of e.g. 3 sailings and 2 sailings a day in summer to suit demand.

93. Bidders have been asked to come forward with any additional proposals to meet current and anticipated future demand for freight on both routes.

Orkney and Shetland Isles

94. The services within the Orkney and Shetland Isles are currently the responsibility of the respective Local Authorities. The proposal is that we will discuss with the responsible authority and through these discussions determine the future responsibility for these services.

95. In the meantime we expect that the overarching framework should be the same across all ferry services and have therefore had a number of discussions with both authorities including an application of the methodology for each set of islands. The intention is to continue to work closely with both Local Authorities on taking this work forward.

Skye, Raasay, the Small Isles and Knoydart

Skye

96. The Skye service from Mallaig to Armadale operates a seven-day service during the summer season, with a typical operating day from early morning through to early evening. There are normally around eight return services per day. The service is largely used by tourists and this is reflected in the service provision during the winter months, which reduces to a six-day service with around 2-3 services per day.

97. A key issue for this Draft Ferries Plan is to make a distinction between routes that are absolutely essential to the community they serve (i.e. if these routes were removed the community would either cease to exist altogether or be seriously harmed as a consequence) and a discretionary service often linked with local tourism. The reliance that residents of Skye have for the ferry service has changed substantially with the construction of the Skye Bridge. The ferry service is now mainly about providing tourists with the opportunity to travel via Skye and the mainland in a different way from the road connection.

98. We considered a range of options for Mallaig to Armadale. We could remove the service on the basis that it is not an essential service. This would result in a saving that could be reinvested in the network. However, we want to find a solution that retains the service. Because of the tourist trade, removing the service altogether might have implications for the local economy. So we have therefore rejected this option.

99. Our preferred way forward is to continue to have a summer and winter service. For the summer service, recognising the revenue potential, we will offer minimum subsidy only. The winter service will continue to receive a subsidy. We may be able to achieve this change during the next CHFS contract (2013-2019).

100. The community is asked for their views on this proposal.

Raasay

101. Raasay currently has a service every day (to Sconser), with a typical service day from early morning to early evening.

102. On the basis of the needs based assessment we identified a requirement for an extended operating day with later evening services for Raasay during the summer period.

103. We reviewed a range of options that would allow us to extend the operating day into the later evening. The operating day at present is at the limit of what is possible with one crew. Providing an additional crew was rejected on cost effectiveness grounds, as would the procurement of an additional vessel for a two-vessel service. **Although we have no specific proposals for**

Raasay at this stage, we will explore this further as part of the CHFS re-tender in 2013.

104. In arriving at this position, we have taken due consideration of the new harbour facility at Raasay. We can also confirm that one of the two new hybrid ferries currently being built for CMAL is to be earmarked for the Sconser to Raasay service. The new ferry is expected to enter service by the middle of 2013.

105. **The community is asked for their views.**

Small Isles

106. The Small Isles (Muck, Eigg, Rum and Canna) are currently served by one vessel. Depending on the actual island there are between four and five sailing days in summer and three to four in winter. The number of sailings per day ranges from one to two sailings. The current timetable allows visitors to make a meaningful return trip in the course of a day, but does not allow residents to travel to the mainland and back on the same day.

107. Using our methodology, we identified that the current service is substantially below a model service to meet the community's needs. The significant weakness is the number of sailing days. We therefore have a number of shorter-term proposals, and a longer-term proposal that would require a significant amount of new investment.

108. **For shorter-term options we have identified the following:**

- **A new Sunday service to each of the Small Isles (for school children returning to school);**
- **A Friday/Saturday level of service on more days (i.e. two sailings as opposed to one sailing per day);**
- **At least one day per week where it will be possible for residents of each island to make a meaningful return trip to the mainland in the course of a normal working day.**

109. We understand in discussion with the ferry operator that the timetable has come about through consultation with residents over a long duration. But it is important that we test the merits of these shorter-term options with the respective communities. We may be able to achieve these changes in the lead up to the next CHFS contract period.

110. **We have also considered upgrading the service to the Small Isles from a single to a two-vessel service.** A passenger and loose freight service would operate on a daily basis to each of the islands. And this would be supplemented with a once-per-week roll-on/roll-off service, again for each island. We may be able to achieve this change during the next CHFS contract (2013-2019) or it may be that this change is only possible as part of the vessel renewal programme to be published as part of the Final Ferries Plan.

111. We believe that this would substantially increase the service provision compared with the current level of service and meet the requirements for a model service to the Small Isles.

112. The communities are asked for their views on each of these proposals.

Knoydart

113. Knoydart currently receives a service five days per week during the summer season and three days per week during the winter season. The service is currently provided by a private operator with some public funding from the Highland Council.

114. The assessment based on the needs based assessment suggests that Knoydart would benefit from additional sailing days in both the summer and winter seasons. As a first step the community is asked whether or not additional sailing days would be beneficial and well used.

115. The community is asked for their views.

Southern Hebrides

Islay & Jura

116. The Islay service to the Scottish mainland uses two Islay ports, Port Askaig and Port Ellen. It is a seven-day service with between three and four services per day covering specific times during the operating day. A small shuttle service operates between Islay and Jura, providing frequent access for residents of Jura to mainland services that call at Port Askaig.

117. The needs based assessment for the service from Islay suggested that the current service profile exceeds that for a model service. The mainland services have recently benefited from significant investment with the new vessel, the MV Finlaggan, entering service on the summer of 2011. The facilities at Port Askaig, Port Ellen and Kennacraig have also benefited from an ongoing investment programme.

118. Our household survey showed that unlike e.g. the outlying islands of Orkney and Shetland where residents access their services on Orkney and Shetland mainlands, the residents of Jura access their services on the Scottish mainland.

119. Islay and Jura are part of the same island group. We therefore want to ensure that residents of Jura have equal access to the Scottish mainland set of services. We have looked at a number of options that would improve accessibility for Jura to the mainland.

120. One of the underlying principles of this Draft Ferries Plan is to strengthen the existing network rather than procure new routes. Funding a direct summer-only service such as the current service between Craighouse and Tayvallich would not be cost effective, particularly against a backdrop of the new investment as described beforehand. Similarly, a mainland service to Jura as a triangular route would also require a significant upgrade of facilities at Feolin. It would not be cost effective to have two expensive facilities only a short distance apart.

121. Our specific proposal for residents of Jura is to offer no cost fares on the current service between Islay and Jura, when this journey is part of an onward journey to the mainland.

122. Fare levels would continue to apply for trips from Jura to Islay that do not involve onward travel to the mainland. What this does is to ensure that the financial cost of travel, whether a person is resident of Islay or Jura, to the Scottish mainland is the same. In fare terms, regardless of whether a person is resident of Islay or Jura, they would pay the same fare for services to the Scottish mainland.

123. Residents of Jura are asked for their views on this proposal.

124. Our second proposal affects both residents of Islay and Jura. At present all services are routed through Port Askaig while Port Ellen is undergoing essential maintenance work. After this work is complete **we intend to run more services from Port Askaig and fewer services from Port Ellen than was the case before the suspension of services from Port Ellen.**

125. Port Ellen is an important facility for grain delivery and storage. We will run enough services to ensure that it continues to operate effectively and contributes to the local economy. But in shifting the balance of services to Port Askaig we are recognising Port Askaig's ideal geographical location for both the communities of Islay and Jura.

Both communities are asked for their views on this proposal.

126. These proposals for Jura would be implemented at the time of the next tender for the Clyde and Hebridean Ferry service in 2013. In the meantime we will provide financial support for the summer-only service between Craighouse and Tayvallich. Our financial support for this service will cease once these proposals have been implemented.

Colonsay

127. The service to Colonsay (from Oban) is a six-day service for the summer season, and three days during the winter season. The needs based assessment has suggested that a model service of seven days during the summer and additional sailing days for the winter is required.

128. The current timetable does not allow for residents to make a day return trip to the mainland that allows for a reasonable duration of time on the mainland. We consider that it is essential for residents of Colonsay to be entitled to at least one sailing day which offers the opportunity to make a day return trip.

129. We have identified the requirement for additional sailing days during the winter. A number of options were identified including an improved air service and procuring a dedicated vessel. Neither of these options is satisfactory; air services are not an adequate substitute for ferry services and the purchase of a new vessel would not be cost effective.

130. Our commitment is therefore to work towards an improved winter service for Colonsay. Proposals to procure new vessels for other communities (see Arran and Mull) will at a network level provide opportunities for existing vessels to be made available to increase the service provision to Colonsay. In the longer-term, subject to other proposals going forward, **we would want to move to a service that operates for at least six days per week during the winter period.** We may be able to achieve this change during the next CHFS contract (2013-2019).

131. **The community is asked for their views on the following proposals:**

- **An additional sailing day in the summer;**
- **At least one day per week where there is a return sailing between Colonsay and the mainland;**
- **A commitment in the longer-term to work towards more sailing days during the winter if (and when) other vessels are released across a reconfigured network or during the next CHFS contract (2013-2019).**

Gigha

132. The service for Gigha (to Tayinloan) runs seven days per week from early morning to early evening on a frequent basis. The needs based assessment has suggested that during the summer season, Gigha would benefit from an extension of the operating day into the later evening.

133. At present the operating day is the maximum extent that can be achieved with the existing crew. We would therefore need an additional crew to extend the operating day which would not be cost effective. An alternative option is to establish whether or not it might be possible to make better use of the vessel and crew, by constructing a facility that allows the boat to be berthed at Ardminish. At present the vessel is berthed on the south point of the island and has to journey for a period to Ardminish. Valuable operating day time is taken up with the vessel getting into position rather than being already on station.

134. **By constructing a berthing facility at Ardminish we would be able to extend the operating day. The community is asked for their views on this proposal.**

Kintyre

135. Kintyre currently has a service from Tarbert that links the peninsula with Portavadie. This is an important connection which is not only used as an alternative to the extended road journey for people travelling from Kintyre to the central belt, but is used by people living around Portavadie who want to travel to Kintyre and from there to Oban. It is also popular in the summer with visitors and forms part of a strategic set of routes that facilitate tourism in the summer months. To remove the route could have implications for not just the immediate area but further afield.

136. Given the inaccessibility of the Kintyre peninsula via road, we have looked at the potential for a new ferry route between Campbeltown and the Scottish mainland. This would be subject to two smaller vessels being introduced on the Arran route. **Specifically, a service operating between Kintyre, via Arran to Ardrossan (or Troon). The service would operate one or two days per week and allow for a meaningful day return trip to the Scottish mainland.**

137. We very much welcome the introduction of West Coast Motors passenger only service between Campbeltown and Ballycastle. We would hope that any new service introduced would complement what is already provided.

138. The proposal is at an early stage and would be dependent on proposals going forward from other parts of the network. In particular the potential to introduce a two-vessel service on Arran's principal route. It is therefore a longer-term proposal.

139. This Draft Ferries Plan does not consider a Campbeltown to Ballycastle ferry service. Given continued financial pressures, ferries budget priorities must remain on the existing contracts and committed vessel and harbour projects.

140. **The community is asked for their views on the following proposals:**

- **To retain the Kintyre to Portavadie service as is;**
- **Whether a vehicle service as described between Campbeltown and the Scottish mainland (for example Troon) would be well used.**

Western Isles

141. The Western Isles is a complex archipelago made up of three distinct land masses. The northernmost land mass takes in Lewis and Harris. Across the Sound of Harris is the next landmass made up of North Uist, South Uist and Benbecula. The southernmost landmass is Barra across the Sound of Barra.

142. Lewis and Harris have access to a direct service to the Scottish mainland by travelling from either Stornoway (to Ullapool) or Tarbert (to Uig). Similarly, for the Uists and Benbecula they have direct services from Lochmaddy (to Uig) and Lochboisdale (to Oban). The vessel on the Lochmaddy route is shared with Tarbert. And finally Barra has a direct service from Castlebay to Oban. This is a triangular service shared (in part) with Lochboisdale on South Uist.

143. There are also services across the Sounds of Harris and Barra, which fulfil an important function. They not only allow inter-island travel within the Western Isles, but also enable people to access different services, so that they may indirectly travel to the Scottish mainland via an inter-island service. In total there are seven principal ferry routes that service the Western Isles, five to the Scottish mainland, and two inter-island services.

Lewis and Harris

144. The principal route for Lewis and Harris is from Stornoway to Ullapool. Our needs based assessment has shown that the current service profile - as defined by number of sailing days, sailings per day and operating day – is fit for purpose.

145. The route between Tarbert and Uig is a secondary route; it carries substantially less patronage than the principal route. Due to the journey time between Stornoway and Tarbert and the population around Tarbert we consider that this secondary route should be retained.

146. Although the Review has no specific proposals for Harris and Lewis, this is because the service is very mature and well developed. We are at an advanced stage of considering new vessel options for the Stornoway to Ullapool service, which will further enhance the principal service. In addition, a number of improvements and upgrades are planned to the shore infrastructure at Ullapool and Stornoway.

Uists and Benbecula

147. The principal route for the Uists and Benbecula is from Lochmaddy to Uig. Our needs based assessment has shown that the current service profile - as defined by number of sailing days, sailings per day and operating day – is fit for purpose.

148. The route between Lochboisdale and Oban is the secondary route. Patronage levels on this route are significantly less than on the principal route,

Lochmaddy to Uig. The crossing on the principal route is also much shorter. Due to the journey time between Lochboisdale and Lochmaddy and the population around Lochboisdale we consider that this secondary route should be retained.

149. Although we have no specific proposals for the Uists and Benbecula, we would refer the community to our proposals for the long-term development of the Barra service. Because Barra and South Uist share a vessel, these proposals could have a potential knock-on beneficial effect on the future of the Lochboisdale service.

150. We have considered whether a Mallaig to Lochboisdale service could become the principal route for the Uists and Benbecula. We believe that given the shorter crossing between Lochmaddy and Uig, and the easier access to this service by a greater proportion of the Western Isles population, that it is correct that Lochmaddy to Uig remains the principal route for the Uists and Benbecula. Our household survey showed that while 42 per cent of residents in South Uist were not satisfied with Oban as their mainland port, 52 per cent were satisfied and 6 per cent said destination port was not important. However, we accept the strength of feeling held by some of the South Uist Community. We will further consider the economic viability of this proposed service in the context of other planned improvements to services to, and within, the Western Isles.

Barra

151. The Castlebay to Oban service is the only direct access to the mainland that Barra has. On the basis of our needs based assessment we have concluded that the service profile for this service - as defined by number of sailing days, sailings per day and operating day – is not satisfactory. We have therefore concluded that Barra should be seen as a funding priority for the Western Isles. In particular there are only three sailing days at present during the winter season. We suggest that the community should expect at least five sailing days during the winter from their principal (and only) service.

152. We have looked closely at how we might address this gap in provision and have determined that there is no immediate short-term solution, certainly with the current vessel fleet and funding constraints. Increasing the number of sailings on the Barra service will impact adversely on the Lochboisdale service. As we have concluded, the Lochboisdale service remains a valuable secondary route for the Uists and Benbecula and we cannot improve the service provision to Barra without affecting that service.

153. In the longer-term our commitment is therefore to work towards an improved winter service for Barra. Proposals to provide new vessels for other communities (see Arran and Mull) will at a network level provide opportunities for existing vessels to be made available to increase the service provision to Barra. In the longer-term, subject to other proposals going forward, **we would want to move to a service that operates for at least five days per week during the winter period.** We may be able to achieve this change during the next CHFS contract (2013-2019).

Summary of Western Isles proposals

154. Our proposals are summarised below:

- The principal route for Harris and Lewis is the Ullapool to Stornoway route. Tarbert to Uig is the secondary route. The principal route for the Uists and Benbecula is Lochmaddy to Uig. Lochboisdale to Oban is the secondary route. Barra has only one direct route to the mainland, Castlebay to Oban;
- There is a need for all principal and secondary routes to be retained because of the distance between the ports; the population around the secondary routes and the need to ensure adequate exit ports for resilience purposes;
- Barra is the only landmass in the Western Isles which does not currently receive a service that meets the community's needs in terms of service profile. (Their current winter service is 3 days per week and ideally we want to provide at least 5 days);
- We think the secondary route (Lochboisdale to Oban) for the Uists and Benbecula should also be retained for the reasons given above;
- We think the secondary route (Tarbert to -Uig) for Lewis and Harris should also be retained for the reasons given above;
- We have considered options for improving the service to Barra. However, there are no viable cost effective options available without affecting the other Western Isles services. Within the Western Isles the Barra service will be given priority for funding in the future.

155. **Communities are asked for views on these proposals.**

Conclusion

156. We are committed to an evidence-based needs based assessment for each community. At the core of this Draft Ferries Plan is a routes and services methodology which treats all communities on an equal basis. The proposals that have emerged are the outcomes of a consistent and robust process. We therefore invite you to consider the proposals for your respective community and provide your views on our conclusions.

Chapter 5: Who should be responsible for providing ferry services?

Introduction

1. There are different ways in which Scottish ferry services are provided. Some are funded, tendered and managed by the Scottish Government and some are funded, tendered and managed by Local Authorities. One ferry service is funded, tendered and managed by a Regional Transport Partnership (RTP). There is also one service (the Kererra ferry) that is funded by a community in the form of a 'tied house' for the ferryman and the provision of and use of the slipways at either end of the route. There are also a number of purely private/commercially-run services.

2. There is currently no consistent split of responsibility between the Scottish Government, Local Authorities and RTPs. A number of alternative ways to split responsibility, involving the role of the Scottish Government, Local Authorities and Regional Transport Partnerships (RTPs), were presented in the 2010 consultation document. Consultees agreed that there needs to be clarity about where responsibility lies, and felt that neither local government or RTPs should be given overall responsibility for ferry service provision. There was however a general degree of support for the Scottish Government maintaining a major role in ferry service provision. There was also support for a more consistent and comprehensive approach towards planning ferry services, and the procurement of ferry services. It was felt that the Scottish Government would be best placed to take on this role.

Entry and Exit strategy

3. Having considered Consultees' views we are willing to be responsible for all 'lifeline' ferry services in Scotland. It is important to be clear about what 'responsibility' means. Our view is that the 'responsible' authority is there to ensure that regardless of who currently operates a ferry service, no community should feel vulnerable about the longer-term future of their service. As the 'responsible' authority the Scottish Government would first assess the 'need' for a service to continue on the route and would then consider the most appropriate course of action to ensure a service is provided. If the Scottish Government did intervene and a decision was taken to provide funding this would usually be preceded by a full public tendering exercise.

4. As noted above, before considering taking on responsibility for any route we will first assess its 'lifeline' characteristics. We will do this by considering a variety of factors: the needs of the community being served, alternative routes available, including where appropriate distance by road compared to the distance by ferry, and historic carryings on the route.

5. The remainder of this chapter focuses on our willingness to take responsibility for all 'lifeline' ferry services.

6. Our proposal would involve working with Local Authorities with current responsibility for ferry services to determine whether they would wish to transfer responsibility for particular routes to the Scottish Government.

7. In discussion with Local Authorities we will be clear that the Scottish Government will only become involved if the Local Authority wishes us to do so. If we do get involved we will need to explore levels of funding currently made available to Local Authorities via the Scottish Government's local government block grant. If the Scottish Government were to take on responsibility for particular routes it would be on the understanding that the appropriate amount of funding came back to the Scottish Government. This may also involve the transfer of capital funding.

8. We will also be willing to work with any Local Authority who wishes to assume responsibility for any ferry service, currently the responsibility of the Scottish Government. In a similar way to that noted above we would need to consider if an adjustment to the local government block grant or to capital funding would be required.

9. As noted above, before considering taking on responsibility for any route we will first assess its 'lifeline' characteristics. We will continue to assess all routes in this way to ensure that services funded by the public purse are justified.

10. In addition to services run by Local Authorities, the private sector is responsible for a number of services, e.g. the service from Ulva to Mull and the Kerrera ferry service. The Scottish Government will only assume overall responsibility where the route is 'lifeline' and as noted above we will determine this by assessing its 'lifeline' characteristics. In addition, our involvement or 'responsibility' will be limited to getting involved only where the private sector fails to deliver an adequate service.

11. Turning now to how we address consultees' views that there needs to be a more consistent and comprehensive approach toward planning all of Scotland's ferry services. Our view is that we should be responsible for setting a national policy framework. The Final Ferries Plan would represent this national policy framework, setting out high level objectives for all of Scotland's ferry services. We would make clear however that it will be left to those responsible for delivering services to consider whether they wish to adopt this framework.

Routes for consideration

12. The Scottish Government is willing to discuss with the relevant Local Authority future responsibility of the following routes:

| Current Provider | Route |
|--------------------------|---------------------------------|
| Argyll & Bute Council | Jura-Islay |
| | Isle of Seil to Isle of Easdale |
| | Isle of Seil to Isle of Luing |
| | Lismore Service |
| Highland Council | Cumusnagual-Fort William |
| | The Corran Ferry |
| Orkney Islands Council | All inter-island routes |
| Shetland Islands Council | All inter-island routes |

13. The Scottish Government is willing to discuss any other route with either the Local Authority, RTP, or private sector operators to agree the 'lifeline' nature and future responsibility of the route.

Procurement skills

14. The 2010 consultation document asked for views on whether there should be a central provision of procurement expertise. There was general support for the Scottish Government to take the lead on procurement although there was also recognition that the Scottish Government should not be wholly responsible for ferry provision and procurement.

15. We will therefore make available in our Final Ferries Plan details of the good practice procurement guidance followed by Transport Scotland. It will be up to those responsible for procuring ferry services to consider whether this guidance applies to their particular procurement exercise. We will also make ourselves available to any provider of ferry service who wishes to discuss how ferry services are procured by Transport Scotland.

Ferries Regulator

16. The case for a Ferries Regulator was not consulted on as part of the public consultation document. However, the need for a Ferries Regulator has been considered during the Ferries Review period.

17. There is currently no Ferry Regulator in Scotland, nor broader regulation in place, besides the contractual controls that exist in the various ferry service contracts and the statutory controls (e.g. safety and environment) overseen by the Maritime Coastguard Agency (MCA) and Scottish Environment Protection Agency (SEPA).

18. The maritime sector is, by its very nature and history, an international industry with international law and convention controlling ships and shipping. In relation to the ferries sector, it is controlled by a broad range of International, European and domestic laws. An open seas policy exists limiting the restrictions on the movement of travel by sea. In essence, within the UK, anyone with a suitable vessel, appropriate permissions from the MCA and access to the ports can start a ferry service. There is no need to get permission from government to operate a ferry service nor could government interfere unless there was a safety, environmental or employment law concern. Users of these services are intended to be protected by the UK Competition Act 1998 which deals with the abuse of a dominant market position. Any government interference on a particular ferry service, as a business enterprise, could therefore be seen as discriminatory.

19. We recognise that a Ferries Regulator could regulate the pricing and provision of services of ferries not provided for under contract to the Scottish Government or other public body and that a Ferries Regulator would therefore allow us more comfort should we wish to move in this direction. However, we believe that within the lifetime of the Ferries Plan, while we wish to encourage greater competition to run our ferry services under contract, it is unlikely that we would wish to leave any of the routes to be run without a contract.

20. The Scottish Government intends to explore what legislative provision would be involved in setting up a Ferries Regulator.

Summary of way forward

21. Our proposals are summarised below:

- The Scottish Government is willing to be responsible for all 'lifeline' ferry services in Scotland;
- The Scottish Government will work with the relevant Local Authorities to discuss the possibility of the Scottish Government taking over responsibility for services currently provided by them;
- The Scottish Government is also willing to work with any Local Authority who wishes to assume responsibility for any ferry service currently the responsibility of the Scottish Government;
- The Scottish Government will also become responsible for ensuring the continuation of any lifeline ferry service currently provided by the private sector;
- For any transfer of responsibility we will need to consider if an adjustment to the local government block grant or a transfer of capital funding is required;
- The Final Ferries Plan will represent the national framework for the provision of all subsidised ferry services in Scotland. It will however be up to those responsible for delivering these services to consider whether they wish to adopt this strategy;
- Our Final Ferries Plan will provide details of the good practice procurement guidance followed by Transport Scotland. We will also make ourselves available to any provider of ferry service who wishes to discuss how ferry services are procured by Transport Scotland;
- We are keeping the need for a Scottish Ferries Regulator under review and further details will be made available in the Final Ferries Plan.

Chapter 6: Accessibility

Introduction

1. The Scottish Government is firmly committed to equality for disabled people and is striving to create a Scotland that is fair and inclusive to all. This chapter focuses on what steps we will take to ensure ferry services become more accessible to all passengers.
2. We recognise that accessibility is an issue for a wide range of passengers with disabilities. A person has a 'disability' under the Equality Act 2010 if:
 - they have a physical or mental impairment
 - the impairment has a substantial and long-term adverse effect on their ability to perform normal day-to-day activities.
3. Accessibility is also an issue for others, for example, people travelling with small children and people travelling with luggage.

Legislation and guidance

4. An Accessibility report prepared by CMAL was published at the same time as the 2010 consultation document. The 'Accessibility' report set out the legislation and guidance in place at the time for vessels, ports and harbours. All of the various Acts covering discrimination were replaced in 2010 by the Equalities Act 2010 (the Act). A link to the legislation can be found at <http://www.equalityhumanrights.com/legal-and-policy/equality-act/equality-act-codes-of-practice/>
5. In addition to the above, EU Regulation 1177/2010 Concerning the Rights of Passengers When Travelling by Sea and Inland Waterway will be applicable in the UK (and all EU Member States) from 18 December 2012.
6. The Regulation will provide legislation in two very distinct areas. Chapter 2 provides for rights of disabled persons and persons with reduced mobility (PRMs). It will give disabled persons and PRMs the same opportunities to travel by water as they have in the rail and aviation sectors across the EU. The Regulation will thus standardise the basic rights, service and redress which they can expect. Chapter 3 of the Regulation sets out the obligations of carriers and terminal operators in the event of interrupted travel. The Regulation establishes the right of all passengers to assistance in cases of cancelled or delayed departures and lays down the right, in certain circumstances, to compensation in case of delay in arrival.
7. We are working closely with Department for Transport (DfT) on the implementation of the EU Regulation on Maritime Passenger Rights and we have been in contact about implementation of this new Regulation and the UK Equality Act provisions (Part 3 of the Equality Act to Ships and Hovercraft). Implementation is being led by DfT as the legislation will apply cross-UK and

we have had reassurances that the two pieces of legislation will be implemented in parallel and that we will be involved in that process.

Way forward

8. Although all operators must comply with all of the relevant legislation we recognise that more can be achieved. We want to do this by specifying or encouraging particular actions via the tendering process.

9. The 2010 consultation document focussed on the recommendations set out in the Accessibility Assessment report, including the establishment of an Accessibility Fund and the usefulness of an Information system to indicate the degree of accessibility that exist at a harbour, on a ferry or on a route.

Accessibility Assessment

Implementing accessibility recommendations

10. Most of those who responded to the summer 2010 consultation indicated that they were in favour of recommendations set out in the 'Accessibility' report. Recommendations included full consideration of Disabled Persons Transport Advisory Committee (DPTAC) guidance at the design stage of new ferries and harbours; the need for regular, recognised disability training; the need for operators to plan their communication and information dissemination to take full recognition of those with restricted mobility; development of assistance policies to help people with a disability or other restricted mobility issues; and a left-luggage facility.

11. Despite being in favour of these recommendations consultees recognised that forcing compliance could lead to increasing costs and that this could be counter productive. A phased approach to the implementation of the recommendations was therefore favoured by a number of consultees.

12. CMAL, as owners of a number of the ports and vessels used by the operators of the Clyde and Hebrides ferry services, is best placed to take forward recommendations involving improvements to existing vessels and ports and harbours and the design of new vessels, ports and harbours. CMAL is indeed already taking the DPTAC guidance into account in the building of new infrastructure. One example of this is the new MV Finlaggan on the Islay route which caters very well for passengers with limited mobility or wheelchairs. Examples include the provision of lifts from the car deck to take persons with restricted mobility to all upper decks including the topmost outside deck, wide-access corridors throughout the vessel and some tables in the cafeteria adapted for wheelchair use. There is also a disabled toilet on the vessel.

13. For other ferry services, including services to the Northern Isles, currently provided by NorthLink, it is the responsibility of the owner of vessels, piers and harbours to ensure that they comply with the current legislation. We note however that the Scottish Government has been involved in the specification of the vessels used for the Northern Isles services. It is also for

them to reach decisions about what other measures if any, over and above what is required within the legislation, they wish to take. We note the vessels, piers and harbours used for all subsidised services comply with the current legislation. Facilities such as tables with moveable seats to allow wheelchair access in all restaurants and bars are available. On overnight routes there are 4 cabins per ship designed for use by disabled persons. Walkways make it possible to use a motorised wheelchair from terminal to ship and vice versa. All of these things are evidence that accessibility issues have been considered seriously when designing the vessels. In addition, staff on board these vessels will assist passengers either through the terminal or from the car deck with a wheelchair if required.

14. The Scottish Government will ensure that the services they subsidise provide a clear example of how accessibility should be given high priority.

15. We will ensure that the owners of all infrastructure being used for subsidised services continue to be made aware of the need to make progress in improving accessibility on all publicly owned vessels and in all publicly owned ports and harbours. We will also write to all Local Authorities, Independent Trust Ports and private owners of vessels and ports and harbour facilities to ensure they are aware of the need to comply with the legislation and make progress, in terms of improving accessibility.

16. In the next Northern Isles and CHFS tenders we will:

- Specify the need for the correct level of staff training, including the requirement for operators to plan their communications strategy and information dissemination to ensure the needs of people with restricted mobility, cognitive impairment and those with hearing and visual impairments are adequately taken into account;
- Encourage operators to consider developing and implementing 'Disabled Persons Assistance Policies'. We would want to see this extended to all travellers with restricted mobility for whatever reason. This simply constitutes good customer service. It is worth noting that CalMac and NorthLink already provide a level of assistance to disabled passengers and also those with other assistance needs;
- Encourage operators, where possible, to provide some form of left luggage facility, recognising the benefit this would have on travellers waiting on onward travel connections, particularly those with restricted mobility;
- Encourage operators to take account of the other issues consultees raised, e.g. integration with other public transport and the need for parking facilities.

17. We have explained above what we will do in relation to publicly-funded ferry services. However, we are keen to see all ferries services, not just publicly funded-services, made more accessible and will therefore seek to

encourage all ferry operators and harbour authorities, whether private or publicly funded, to consider accessibility issues. We will do this by writing to them encouraging them to comply with the relevant legislation and asking them to consider the recommendations set out in this draft Ferries Plan.

An Accessibility Improvement Fund

18. The Accessibility report also recommended consideration of an 'Accessibility Improvement Fund'.

19. An 'Accessibility Improvement Fund' could be used to help operators implement the necessary changes required to help reduce the barriers faced by people with restricted mobility, cognitive impairment and those with hearing and visual impairments. Examples of what the fund could be used for include the provision of ramps, handrails and assistance telephones at unmanned slipways. As noted above in the next Northern Isles and CHFS tenders we intend to specify the need for the correct level of staff training.

20. It is our intention to set up an 'Accessibility Improvement Fund'. However, before finalising arrangements and to address stakeholders concerns about affordability we will explore further how such a fund will be resourced and managed. Further details will be provided in the Final Ferries Plan.

An Accessibility Information system

21. The Accessibility report also recommended the introduction of an 'Information System' to indicate the degree of accessibility for each harbour, ferry or route. This recommendation received a high level of support from consultees, from both individuals and organisations. Consultees indicated that if such a system was to be adopted standardised or recognisable symbols should be used to describe the degree of accessibility.

22. It is thought that the cost of implementing such a system would be relatively small. The NorthLink website already provides information that is relevant to the disabled passenger and CalMac has indicated that they will seek to provide similar information.

23. We will specify in the next round of tendering for publicly-funded services that operators must put in place a system that improves the level of accessibility information that is made available to passengers. Despite calls for the use of standardised symbols our view is that it should be left to the operator to design their own system. In doing this however we will encourage operators to liaise with organisations with an interest in transport accessibility.

24. As noted above we are keen to see all ferries services made more accessible. We are also keen that all ferry service operators make available information that will inform travellers of any accessibility issues on any ferry or at any port or harbour. When we write to all ferry operators and harbour authorities we will encourage them to put in place a similar system to that used by publicly-funded ferry services.

Summary of way forward

25. Our proposals are summarised below:

- In the next Northern Isles and CHFS tenders we will specify a number of requirements and also seek to encourage operators to adopt as many of the 'Accessibility' reports recommendations as possible. (This will include putting an 'Accessibility Information System' in place);
- We intend to set up an 'Accessibility Improvement Fund' and will develop this further for the Final Ferries Plan;
- We will also write to all Local Authorities, Independent Trust Ports and private owners of vessels and ports and harbour facilities to ensure they are aware of their obligations under the current legislation. We will also encourage them to make progress, in terms of improving accessibility;
- We will ensure the owners of all infrastructure (vessels, ports and harbours) used for subsidised ferry services continue to be aware of the need to make progress in improving accessibility.

Chapter 7: Environmental issues

1. The Scottish Ferries Review Consultation sought to elicit views on environmental issues, with a focus on the mitigation of climate change through reduction of greenhouse gas emissions. Two key approaches to achieving reductions in greenhouse gas emissions from ferries have been identified by the Scottish Government: technological measures; and demand and fleet management.¹ The consultation sought views on how emissions from ferries could be reduced, and in particular sought views from operators and passengers as to whether they would support reductions in vessel speeds as a means of reducing emissions.

2. A range of suggestions was offered on how to reduce emissions from ferries. Overall the emphasis was on technical solutions, particularly for inclusion in new vessels, but service changes were also mentioned. In general the consultees did not support reductions in vessel speeds.

Draft Ferries Plan

3. A high-level Strategic Environmental Assessment (SEA) was undertaken of this draft Ferries Plan. The SEA focused on climate change issues and, in particular, the options for reducing greenhouse gas emissions from ferries.² The results of the Scottish Ferries Review have been used to inform the preparation of this draft Ferries Plan and, as part of draft plan preparation, the scope of the SEA has extended to consider the environmental implications of the proposals contained within the draft plan. The SEA has identified both environmental benefits and disbenefits of the plan, and these are reported in the Environmental Report which accompanies this draft plan.

4. The draft Ferries Plan sets out the Scottish Government's decisions regarding:

- funding and procurement
- fares
- responsibility for the provision of ferry services
- accessibility

5. The draft plan also sets out proposals for the provision of routes and services.

6. The funding and procurement of services, and responsibility for their provision, are considered to be the kinds of strategic action that would result in no or minimal environmental effects. The same applies to issues of accessibility. The SEA has therefore focused on the potential environmental effects of changes to fares and proposals for routes and services.

¹ Scottish Government (June 2009) Climate Change Delivery Plan: Meeting Scotland's Statutory Climate Change Targets

² The Environmental Report is available at <http://www.scotland.gov.uk/Topics/Transport/ferries-ports-canal/14342/Review>.

7. No route-specific environmental problems have been identified from the operation of the ferry services covered by this draft plan.

8. The proposal to commit to a roll-out of RET across the network as the basis for single fares for passengers and cars has been assessed at a very high level. The results of the RET pilot show a substantial increase in patronage, with an increase of 30 per cent in car traffic in the first year of the pilot. The proposal is therefore likely to result in increased atmospheric emissions, including emissions of greenhouse gases.

9. The proposals for routes and services have been analysed and the strategic actions involved have been grouped into the following categories:

- increased vessel traffic (due to increases in number of vessels and vessel movements on existing routes). The majority of proposals fall into this category.
- provide new vessels
- provide physical infrastructure (construction of berthing facilities)
- change existing service to a passenger-only service
- review the continued existence of a route.

10. Overall, the potential environmental effects of these proposals include:

- potential for increased collisions with cetaceans
- potential increase in the introduction of native and non-native invasive species
- potential for increase in erosion due to vessel wake (increased vessel numbers and, possibly, speed)
- potential for decreased air quality at port(s)
- potential for increased risk of collision between vessels, and the consequent detrimental effects on water quality
- potential for increased litter
- potential for increased greenhouse gas emissions in the short-term.

11. The provision of new vessels is considered likely to result in environmental benefits. New vessels will be more fuel-efficient as a result of improvements in engine technology and vessel design. Where new vessels replace older, less efficient, ones there will be a reduction in greenhouse gas emissions.

12. These potential effects are discussed in detail in the Environmental Report which accompanies this draft Ferries Plan.

13. The mitigation of negative environmental effects is likely to be progressed over both the short-term and long-term. The former is likely to comprise the inclusion of requirements for vessel operation and information collection and reporting in the Scottish Government tender documents. The latter will continue the Scottish Government's current work in progressing fuel-efficiency measures, both in the design and procurement of new vessels and in supporting technology retrofit, for example, more efficient propulsion systems.

The Scottish Government does not propose to impose emission reductions through the operation of vessels, e.g. reducing vessel speed.

Glossary of Terms

CalMac

(Caledonian MacBrayne)

CalMac is the major operator of passenger and vehicle ferries and ferry services serving the west coast of Scotland and the Clyde estuary.

CHFS

(Clyde and Hebrides Ferry Services)

CMAL

(Caledonian Maritime Assets Limited)

CMAL owns ferries, ports and infrastructure for ferry services serving the west coast of Scotland and the Clyde estuary. CMAL are wholly owned by the Scottish Government with Scottish Ministers the sole shareholders.

Contract

A legally binding agreement between parties which sets out the requirement and the terms under which the agreement will be delivered.

DfT

(Department for Transport)

DPTAC

(Disabled Persons Transport Advisory Committee)

DPTAC is an independent body established by the Transport Act 1985 to advise government on the transport needs of disabled people.

EQIA

(Equalities Impact Assessment)

To look at effects of ferry services on Age, Disability, Gender, Lesbian, Gay, Bisexual & Transgender (LGB&T), Race, Race, Religion & Belief.

EU

(European Union)

GES

(Government Economic Strategy)

The purpose of the Scottish Government is to make Scotland a more successful country, with opportunities for all to flourish, through increasing sustainable economic growth.

Harbour dues

Charges in respect of any ship for entering, using or leaving the harbour including charges for any passengers or cars embarking or disembarking at the harbour. This also includes charges in respect of goods brought into, taken out of, or carried through the harbour by the ship.

Lifeline

A lifeline ferry service is to support and supply island communities.

MCA**(Maritime and Coastguard Agency)**

MCA is an executive agency of the Department for Transport, working to prevent the loss of lives at sea and is responsible for implementing UK and International maritime conventions and codes.

Maritime

(Transport/Nautical Terms) of or relating to navigation, shipping, seafaring etc.

NTS

National Transport Strategy, published in 2006 which set out a long-term vision for transport in Scotland.

PRMs**(Persons with restricted mobility)****Procurement**

Procurement is the whole process of acquisition from third parties and covers goods, services and construction projects. It applies to all public sector procurements - goods, services, (including consultancies and research), construction and works regardless of the source of funding.

RET**(Road Equivalent Tariff)**

RET scheme involved setting ferry fares on the basis of the cost of travelling an equivalent distance by road.

RTP**(Regional Transport Partnerships)**

RTPs were established on 1 December 2005 to strengthen the planning and delivery of regional transport so that it better serves the needs of people and businesses.

SEA**(Strategic Environmental Assessment)**

The Environmental Assessment (Scotland) Act 2005 applies to all the Scottish Government plans, programmes, strategies and policies. Government's statutory duties under the 2005 Act. Those strategies, plans and programmes that are likely to result in significant effects, in relation to the environment, must be assessed under SEA before the engagement strategy or consultation exercise commences.

SEPA**(Scottish Environment Protection Agency)**

SEPA is Scotland's environment regulator, to protect and improve the environment by regulating activities that can cause pollution and monitor the quality of Scotland's air, land and water.

SPT**(Strathclyde Partnership for Transport)**

STAG**(Scottish Transport Appraisal Guidance)**

The Guidance supports the Scottish Government's purpose by providing a clear framework to assess evidence-based transport problems and opportunities.

Tender

The process by which goods and services are secured.

Trust ports

Trust ports are independent statutory bodies, each governed by its own unique, local legislation and controlled by an independent board. Their common feature is their unique status as trusts. There are no shareholders or owners. Any surplus is ploughed back into the port for the benefit of the stakeholders of the trust. The stakeholders are all those using the port, employees of both port and its users and all those individuals, organisations and groups having an interest in the operation of the port.

Appendix 1: Routes and Services – Analytical approach

Routes and Services Methodology

A1. One of the key elements for this Review has been the development of a robust overarching framework or methodology for the determination of routes and services for those communities served by a ferry service. We favour this approach because we think it is absolutely essential that any changes to routes and services are based on objective evidence. Second, it is important that each community is treated on an equal footing by the Review. By choosing to develop and adopt an evidence-based methodology, we believe we have ensured against the prospect of favouring one community over another. Finally, we want a methodology that can be replicated to inform future changes to routes and services.

A2. There are three steps that describe what the routes and service methodology attempts to do. For each community:

- Step 1 defines their dependencies,
- Step 2 defines a model ferry service to meet those needs,
- Step 3 compares and contrasts the model with current services.

Scope & Coverage

A3. The routes and services methodology has been applied to all the main island communities listed at Table 1 for which we have sufficiently robust data. There are some communities for which comparable data either do not exist altogether or are not sufficiently robust to allow us to apply the methodology in full. With these communities we have relied on other sources of information, including discussions with communities, to determine their particular dependencies.

Step 1 - Defining the dependencies of a community

A4. Step 1 is perhaps the most challenging of the four steps, in that different communities unsurprisingly tend to depend on their particular ferry service in many different ways. For the purpose of this exercise we have identified four key dependencies that define a community's relationship to its ferry service. These are:

- Commuting (and frequent business use)
- Personal
- Freight
- Tourism

A5. By commuting (and frequent business use) we mean daily or near-daily commuting and business use, a particular feature of those communities which are comparatively close to the Scottish mainland. As for the personal dependency, this applies to those communities where people use their ferry service to access key services such as food shopping, health care and education on the Scottish mainland. The freight dependency is almost the opposite of the personal dependency; goods and services are transported via the ferry service so they are available in the community itself. And with tourism the methodology is reflecting the strong history of tourism-related activity across many of the communities currently served by the ferry network.

A6. We used a range of indicators (eleven in total) to assess the level of need for each community across the four key dependencies. These indicators need to be robust and stand up to scrutiny, so they are based on census, ferry operator data and findings from the recent household survey of ferry communities that was undertaken at the beginning of this review process.

A7. We chose not to rank communities against one another. That is not the object of this exercise. Instead we reviewed the evidence from each set of indicators and assessed if there was sufficient evidence to establish whether or not a community required a particular type of ferry service to meet a certain dependency. There is no question that all communities have some level of need related to each of the four dependencies - the ferry service will continue to be used for all dependencies, and we will ensure there is sufficient capacity to allow for this - but we need to make a judgement as to whether that is sufficient need to design a ferry service around a particular dependency. In summary, this exercise attempts to reflect the priority needs of each community.

A8. The following table summarises the findings for those island communities where we have sufficient data:

Table 1 – Key Dependencies for Each Community

| Communities | Key Dependencies |
|---------------------------------|---------------------------------------|
| <i>Firth of Clyde</i> | |
| Arran | Freight, Tourism |
| Cumbrae | Commuting, Personal, Freight, Tourism |
| Bute | Commuting, Personal, Freight, Tourism |
| <i>Inner Hebrides</i> | |
| Coll | Personal, Freight, Tourism |
| Tiree | Personal, Freight, Tourism |
| Mull | Freight, Tourism |
| Iona | Commuting, Personal, Tourism |
| Lismore | Commuting, Personal, Freight |
| <i>Northern Isles</i> | |
| Shetland Mainland | Freight |
| Orkney Mainland | Freight, Tourism |
| <i>Raasay & Small Isles</i> | |
| Raasay | Commuting, Personal, Freight, Tourism |
| Small Isles | Personal, Tourism |
| <i>Southern Hebrides</i> | |
| Islay | Freight, Tourism |
| Colonsay | Personal, Tourism |
| Gigha | Personal, Freight, Tourism |
| <i>Western Isles</i> | |
| Lewis/Harris | Freight, Tourism |
| Uists/Benbecula | Freight, Tourism |
| Barra | Tourism |

A9. The larger communities in the Northern and Western Isles do not show a personal dependency as a key dependency. For these communities everyday requirements are typically met on location in the community itself. Most goods are brought in through a ferry (freight) service which is why we have instead prioritised that dependency. For some of the smaller islands with few on-island facilities, the personal dependency scores much higher. Good examples are the islands of the Small Isles.

A10. Those communities that score highly for commuting (and frequent business use) are typically much closer geographically to the Scottish mainland. Bute and Cumbrae are examples of types of community where people regularly travel off their island to work and do related business on the Scottish mainland. For communities that are much further away, then the opportunity or inclination to travel on a regular basis is much less. Again as expected the Northern and

Western Isles do not figure for commuting (and frequent business use) to the Scottish mainland.

A11. Finally almost all the communities listed in table 1 have a tourism dependency. Again this is not unexpected, in that most of the islands and remote parts of Scotland figure strongly in the tourist economy.

A12. The intention is that the underlying data will be updated every few years to future-proof the methodology and reflect changes in the nature of how communities depend and rely on their ferry service.

Step 2 – Defining a model ferry service to fit a community’s needs

A13. The purpose of Step 2 is to define a separate model service profile for each of the four dependencies – commuting, personal, freight and tourism. For example, if one of the key dependencies is tourism, what ideally would a ferry service look like for that particular community? We attempted to resolve this issue by thinking about what the key characteristics are that describe a ferry service. For the purpose of this exercise we used:

- Journey (or crossing) time
- Sailing days per week
- Sailings per day
- Length of operating day

A14. Journey (or crossing) time influences the other aspects of a ferry service; for example, a longer journey typically means a less frequent service and in some cases a very long journey time can influence the actual number of sailing days.

A15. We have tried then to define an ideal service for each dependency and for a range of crossing times. This is summarised in Table 2. For example, a community with a commuting (and frequent business use) dependency and a crossing time of between 31 and 60 minutes should have a seven-day service, a frequent (shuttle-type) service during the core commuting periods and a regular service in the remainder of the day. Alternatively for a community with a tourism dependency and crossing time of between 181 and 360 minutes, that community should have a seven-day service and 1-2 sailings per day.

A16. We have determined model service profiles for both summer and winter timetables. We see this very much as a starting point for a model service profile for each key dependency. The summer service profile is shown at Table 2.

Table 2 – Service profiles for each dependency (summer timetable)

| | Crossing Time (mins) | | | | | |
|---|---|---|----------------|-----------------|------------------|---------------|
| | (0-30) | (31-60) | (61-90) | (91-180) | (181-360) | (360+) |
| Commuting/Frequent Business Use: | | | | | | |
| Sailing Days | 7 days | 7 days | - | - | - | - |
| Sailings Per Day | Freq. Peak | Freq. Peak | - | - | - | - |
| Operating Day | Specific | Specific | - | - | - | - |
| Personal: | | | | | | |
| Sailing Days | 7 days | 7 days | 7 days | 7 days | 7 days | 7 days |
| Sailings Per Day | Standard | Standard | Std-Ltd | Limited | Limited | Limited* |
| Operating Day | Extended + | Extended + | Extended | Partial | Partial | Partial |
| Freight: | | | | | | |
| Sailing Days | 7 days | 7 days | 7 days | 7 days | 7 days | 7 days |
| Sailings Per Day | Frequent | Frequent | Limited | Limited | Limited | Limited* |
| Operating Day | Standard | Standard | Specific | Specific | Specific | Specific |
| Tourism: | | | | | | |
| Sailing Days | 7 days | 7 days | 7 days | 7 days | 7 days | 7 days |
| Sailings Per Day | Standard | Standard | Std-Ltd | Limited | Limited | Limited* |
| Operating Day | Extended + | Extended + | Extended | Partial | Partial | Partial |
| Sailings Per Day | Frequent Freq. Peak Standard Standard/Limited Limited | Constant service throughout the day (20+) Frequent core hours and then regular (>8) Regular service throughout the day (6-8) Limited service throughout the day (3-5) 1-2 sailings per day (*denotes 1) | | | | |
| Operating Day | Extended + Extended Standard Specific Partial | More than 14 hours Up to 14 hours, 6 am to 8 pm 11 hours, 7 am to 6 pm At peak times, not prescribed No normal operating day | | | | |

Step 3 – Compare and Contrast the Model and Actual Service

A17. The final step is to compare and contrast a model ferry service with what a particular community currently receives.

A18. From the analysis we have undertaken the majority of communities have either some degree of under-provision (i.e. 'gaps') - in that their current service doesn't quite match up to the ideal service - or their current service is just about right. There are a few communities where their current service profile exceeds what the methodology suggests might be appropriate for them.

A19. The remaining section of this chapter summarises the approach we have taken to decide what options should be taken forward to ensure that we address these gaps in the future.

Development and Appraisal of Options for Achieving the Model Service Profiles for Each Community

Development of Options

A20. After comparing and contrasting the model and actual service profiles, we considered ways (or options) to meet the gaps identified by the methodology. We identified options that could then be tested to establish the preferred way forward.

A21. For the actual process of option development a series of meetings were held between officials and representatives from ferry operators, Caledonian Maritime Assets Limited, regional transport partnerships, Highlands and Islands Enterprise and Local Authorities. This process generated a range of options that might be categorised as follows (a) short-term lower cost changes, for example, a re-configuration of timetables; (b) longer-term changes such as additional vessels and new port facilities; (c) very long-term changes such as road and bridge links instead of ferry services; and (d) wider network changes such as the development of strategic service hubs and shifts between transport modes (i.e. ferry versus air services).

A22. When it came to determining the appropriate option or set of options for each community we were guided by a number of factors. The most important was to ensure that the results from our routes and services methodology frame the set of options for each community; that we come up with potential options for solutions that are proportionate to the gap between the model service and the service the community currently receives.

A23. As a general rule, where the current service was very near to meeting the needs of the community, then shorter-term, lower cost options involving smaller changes are more appropriate. Where the gap between the actual and proposed service is more substantial, and the current service is further from what we think the community requires, then we are required to consider options that are more appropriate to meet this challenge. Typically, they will be longer term in nature and require additional investment.

A24. The Ferries Review was also an opportunity to determine whether there might be alternative ways of providing an equivalent or improved service. It is appropriate for such a wide-reaching Review to look at long standing issues around service delivery and make recommendations. Therefore, we have also tested options that would mean changes in how we provide services to communities.

Appraisal of Options

A25. We designed a two-part appraisal methodology. Part 1 of the appraisal exercise required each option to be assessed and sifted against the following criteria:

Feasibility

- Engineering/Technical Failure
- Operational complexity
- Legal challenge
- Political implications

Scale & Complexity

- Scale and range of activity
- Conflict with other areas/measures
- Requirement for partnership/co-operation with others

Project Management

- Time-scale of the project/intervention
- Can the project be part completed?
- Requirement for complementary measures

A26. These criteria act as a check-list for determining the practicability associated with each option. The more complex and difficult a project or intervention, the higher the associated risk and the greater potential for failure. We have classified these risks using a 5-point scale with categories defined as 'nil/minimal', 'small', 'modest', 'significant' and 'substantial'.

A27. For example, if we wanted to replace an existing ferry service with a bridge, we would place this project in a higher risk category for most of these criteria. It would be a challenge to undertake from an engineering perspective. The scale of the project would be comparatively large and would most likely impact on other areas, and could be subject to legal challenge. It would also take a relatively long time to complete and would require a substantial amount of planning and cooperation from other groups and organisations other than the Scottish Government.

A28. Alternatively, a timetable change to an existing ferry service would typically carry a much lower risk. This could be completed with no engineering or technical risk, possibly with little impact on current operations. It is something that most likely is within our control and could be completed relatively quickly, certainly in comparison with a major infrastructure project.

A29. The second part of the appraisal exercise was a financial assessment of the potential costs (and savings) associated with each option. The relevant criteria are:

Affordability

- Initial (set-up) costs
- Running costs

Financial Sustainability

- Cost recovery

A30. For the assessment of affordability, we were concerned with both the initial (set-up) costs and running costs. Some projects (or interventions) such as timetable changes will have no set-up costs but may impact on running costs. Other interventions such as the acquisition of new vessels will mean substantial set-up costs, so it is correct that the appraisal makes the distinction between initial and ongoing costs.

A31. We also considered whether or not an intervention could generate savings. Again take the prospect of building a bridge or a road link in place of an existing ferry service. It is possible that the substantial set-up costs associated with such an undertaking could be offset in a reasonable time-frame by the savings made on not continuing to run the ferry service. So we also tested each option on the potential savings that the particular option might release.

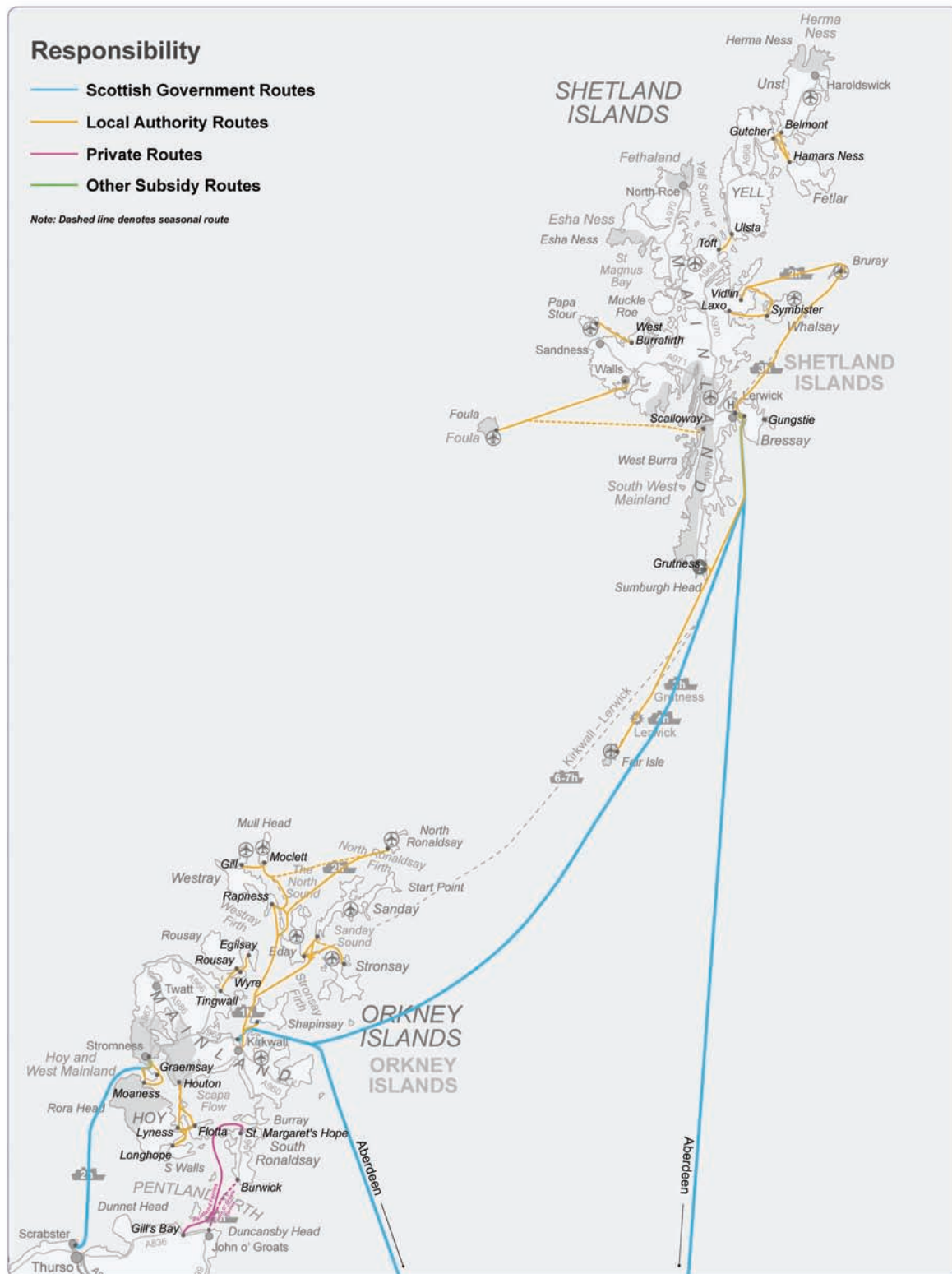
A32. We classified these various costs and savings again using a 5-point scale with categories defined as 'nil/minimal', 'small', 'modest', 'significant' and 'substantial'. These are the same categories used for part 1 of the appraisal exercise, so there is a symmetry between both parts of the appraisal exercise.

A33. For those communities with a gap between the proposed and their actual service profiles, a number of options have emerged, either shorter-term lower cost options, or in the case of those communities with a substantial gap in provision, options that would significantly change the nature of the ferry service to these communities.

A34. For each community we also tested a range of options that sit outside the routes and services methodology. Some of these have emerged from the process and typically involve a reconfiguration of service provision. There are also a few options that combine service improvements as required by the methodology with service reconfiguration elsewhere. These feature quite strongly for communities served by more than one route.

A35. Finally, for some communities we are recommending the status quo. For these communities there is either no service gap or if there is a service gap, the process has not been able to identify a cost effective solution to fill that gap.

Appendix 2: Maps showing current position

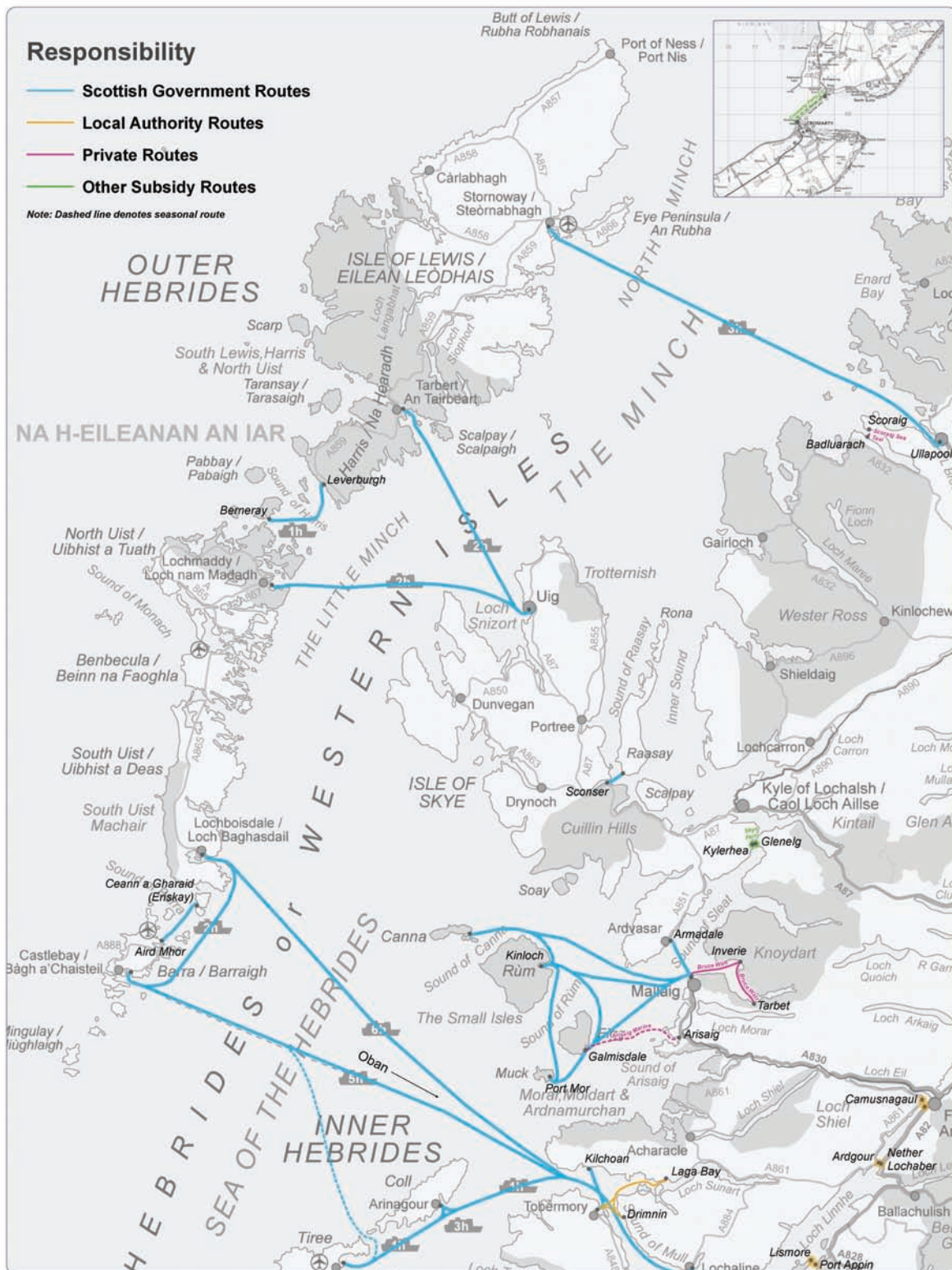


Scottish Ferry Routes Orkney & Shetland Isles

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October 2011, Job 5100 - KT





Scottish Ferry Routes

Western Isles

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Appendix 3: Table detailing RET status and future responsibility

Ferry routes in Scotland

| Ferry route | Road Equivalent Tariff (RET) Status | Current Responsibility |
|--|---|------------------------|
| Ullapool – Stornoway | Permanent | Scottish Government |
| Uig – Tarbert/Lochmaddy | Permanent | Scottish Government |
| Berneray – Leverburgh (Sound of Harris Service) | Roll-out RET within the term of this Parliament | Scottish Government |
| Aird Mhor – Eriskay (Sound of Barra Service) | Roll-out RET within the term of this Parliament | Scottish Government |
| Oban - Castlebay/Lochboisdale | Permanent | Scottish Government |
| Oban - Castlebay/Lochboisdale via Coll/Tiree (Summer only) | Permanent | Scottish Government |
| Oban – Coll/Tiree | Permanent | Scottish Government |
| Oban – Craignure | Roll-out RET within the term of this Parliament | Scottish Government |
| Oban – Colonsay | Roll-out RET October 2012 | Scottish Government |
| Oban – Lismore | Roll-out RET within the term of this Parliament | Scottish Government |
| Oban – Colonsay – Port Askaig – Kennacraig (Summer only) | Roll-out RET October 2012 | Scottish Government |
| Kennacraig – Port Ellen/Port Askaig | Roll-out RET October 2012 | Scottish Government |
| Tayinloan – Gigha | Roll-out RET October 2012 | Scottish Government |
| Ardrossan – Brodick | Roll-out RET Oct 2014. | Scottish Government |
| Claonaig – Lochranza (summer only) (<i>Secondary route</i>) | Roll-out RET Oct 2014. | Scottish Government |
| Largs – Cumbrae Slip | Roll-out RET within the term of this Parliament | Scottish Government |

| Ferry route | Road Equivalent Tariff (RET) Status | Current Responsibility |
|---|---|-------------------------------|
| Wemyss Bay – Rothesay | Roll-out RET within the term of this Parliament | Scottish Government |
| Tarbert (LF) – Portavadie | * | Scottish Government |
| Colintraive – Rhubodach (<i>Secondary route</i>) | Roll-out RET within the term of this Parliament | Scottish Government |
| Fionnphort – Iona | Roll-out RET within the term of this Parliament | Scottish Government |
| Tobermory – Kilchoan (<i>Secondary route</i>) | Roll-out RET within the term of this Parliament | Scottish Government |
| Fishnish – Lochaline (<i>Secondary route</i>) | Roll-out RET within the term of this Parliament | Scottish Government |
| Mallaig – Armadale | Roll-out RET within the term of this Parliament | Scottish Government |
| Mallaig – Small Isles (Eigg- Muck – Rum – Canna) | Roll-out RET within the term of this Parliament | Scottish Government |
| Sconser (Skye) – Raasay | Roll-out RET within the term of this Parliament | Scottish Government |
| Aberdeen – Kirkwall – Lerwick | Post Parliamentary term | Scottish Government |
| Scrabster – Stromness | Post Parliamentary term | Scottish Government |
| Gourock – Dunoon | * | Scottish Government |
| Isle of Seil – Isle of Luing | Subject to responsibility | Argyll & Bute Council |
| Ellanabeich (Isle of Seil) – Isle of Easdale | Subject to responsibility | Argyll & Bute Council |
| Port Appin – Lismore | Subject to responsibility | Argyll & Bute Council |
| Islay – Jura (Port Askaig – Feolin) | Subject to responsibility | Argyll & Bute Council |
| Camusnagaul – Fort William | * | Highland Council |

| Ferry route | Road Equivalent Tariff (RET) Status | Current Responsibility |
|--|--|--|
| (Secondary route) | | |
| Nether Lochaber – Ardgour (The Corran Ferry) | * | Highland Council |
| Mallaig – Loch Nevis (Inverie – Tarbet) | * | Bruce Watt Cruises / Highland Council |
| Shetland mainland to Shetland's outlying islands | * | Shetland Isles Council |
| Orkney mainland to Orkney's outlying islands | * | Orkney Isles Council |
| Gourock – Kilcreggan – Helensburgh | * | SPT |
| Glenelg – Kylerhea Open Easter - October | * | Community Interest Company |
| Gallanach – Isle of Kerrera (Kerrera Ferry) | * | Privately operated |
| Isle of Ulva Ferry (Mull – Ulva) | * | Privately operated |
| Hunters Quay – McInroy's Point | * | Privately operated |
| Gills Bay – St Margaret's Hope (Pentland Firth) | * | Privately operated |
| John O' Groats – Burwick (Pentland Firth) - Summer only | * | Privately operated |
| Tayvallich – Craighouse (Jura) – Summer only | * | Community Interest Company |
| Scoraig – Badluarach | * | Privately operated |
| Cromarty – Nigg Summer only | * | Privately operated |

* We intend to roll-out RET to all lifeline ferry services. Where we are not responsible for the delivery of these services we will discuss the appropriate form and timing of any roll-out with those who are, e.g. Local Authorities or commercial operators.

Appendix 4: Summary of Consultation Questions

Section A: About You

Q1. Are you responding on behalf of yourself or an organisation?

- a. Yourself (Go to Question 2)
- b. Organisation (Go to Question 1b)

Q1b. What is the name of the organisation?

Now Go To Section C

Q2. Are you resident of a community currently served by the ferry network?

- a. Yes (Go to Question 2b)
- b. No (Go to Section C)

Q2b. What is the name of the community where you live? (e.g. Arran)

Now Go To Section B

Section B: About Your Travel

Q3. Have you travelled off your island/peninsula within the last 18 months?

- a. Yes (Go to Question 4)
- b. No (Go to Section C)

Q4. What is your most common mode of transport when you travel off your island/peninsula?

- a. Ferry (Go to Question 5)
- b. Air (Go to Section C)
- c. Road (Go to Section C)

Q5. How frequently do you travel by ferry?

- a. 5 or more days per week
- b. 2-4 days per week
- c. Once a week
- d. 1-3 times a month
- e. At least four times per year
- f. Less frequently than four times per year
- g. Don't know/varies

Q6. When travelling by ferry, which of the following are your most common reasons for travelling? (tick up to two boxes only)

- a. Commuting to your usual place of work
- b. Employer's business
- c. Short-break/holiday
- d. Visiting friends/relatives/other leisure
- e. Shopping
- f. Health related
- g. Education
- h. Other (please specify)
- i. Don't know

Section C: Routes and Services – Proposals by Community

Firth of Clyde

Arran

Our proposal is for (a) the Ardrossan to Brodick service to be upgraded to a two-vessel service operating a more frequent shuttle service through to the late evening and (b) services between Claonaig to Lochranza would be reviewed following these changes to the Ardrossan to Brodick service. We may be able to achieve this change during the next CHFS contract (2013-2019) or it may be that this change is only possible as part of the vessel renewal programme to be published as part of the Final Ferries Plan.

Q7. The community is asked for their views on these proposals.

Bute

Our proposal is to enhance the Colintrave to Rhubodach service, running the service through to midnight, thereby extending the operating day. The intention would be to include this proposal as part of the next tender for Clyde and Hebridean Ferry services in 2013.

Q8. We recognise that this is not the principal route, or the route that may most often be used for commuting purposes. The community is therefore asked for their views on this proposal and whether an extended service on this route would be well used.

Cumbrae

Our proposal is to include a later evening service for one or two evenings per week. The intention would be to include this as part of the next tender for Clyde and Hebridean Ferry services in 2013.

Q9. The community is asked for their views on this proposal.

Cowal Peninsula and Dunoon

Scottish Ministers were disappointed not to be able to continue the vehicle and passenger service. However, the current contract was the best that could be achieved under the circumstances (particularly the restrictions imposed by the European Commission).

We are absolutely committed to providing a ferry service that meets the need of users and will continue to look at more options to improve the overall service and facilities.

Q10. The community is asked for their views.

Mull (and Ardnamurchan/Morvern)

Our package of proposals are as follows:

- To upgrade the Craignure to Oban service to a two-vessel service, operating as a shuttle-service through an extended operating day;
- Following the upgrade to Craignure to Oban, to review operations on the Fishnish to Lochaline service;
- To replace the current passenger and vehicle service on Tobermory to Kilchoan with a passenger-only service.

We may be able to achieve these changes during the next CHFS contract (2013-2019) or it may be that these changes are only possible as part of the vessel renewal programme to be published as part of the Final Ferries Plan.

Q11. The community is asked for their views on these proposals.

Iona

Our proposal is for an additional 90 minutes of services in the evening, so the last service is around 8 pm.

This proposal would involve the provision of overnight berthing facilities. Given that significant funding is likely to be required this is a medium to longer term solution.

Q12. The community is asked for their views on this proposal.

Ardnamurchan/Morvern (Corran Ferry)

We are not proposing any changes to the Corran Ferry service.

Q13. The community is asked for their views.

Lismore

Our proposal is to replace the two existing services with a single passenger and vehicle service between Port Appin and Point.

We may be able to achieve this change during the next CHFS contract (2013-2019).

Q14. The community is asked for their views on this proposal.

Coll and Tiree

Our proposal is, subject to other proposals going forward, to improve the current service so that it operates for at least six days per week during the winter period.

We may be able to achieve this change during the next CHFS contract (2013-2019).

Q15. The community is asked for their views on this proposal.

Kerrera, Luing and Easdale Island

Our initial findings suggest that these services are fit for purpose and meet most of the communities' needs.

The Kerrera ferry service is currently commercially run, whilst the Luing and Easdale services are currently provided by the Local Authority. Our proposal (in Chapter 5) on the future responsibility of ferry services is that we will discuss with Local Authorities whether they wish to transfer responsibility for routes currently under their jurisdiction to Scottish Government. Also, for commercially run services we will consider intervening where there is market failure and the service is considered to be lifeline.

Q16. The community is asked for their views.

Northern Isles

Our proposal is:

- That we retain a broadly similar level of service.

Q17. The community is asked for their views.

Skye

Our proposal is to continue to have a summer and winter service. For the summer service, recognising the revenue potential, we will offer minimum subsidy only. The winter service will continue to receive a subsidy.

We may be able to achieve this change during the next CHFS contract (2013-2019).

Q18. The community is asked for their views on this proposal.

Raasay

We have no specific proposals for Raasay at this stage but we intend to explore how we might extend the length of the operating day as part of the CHFS re-tender in 2013.

Q19. The community is asked for their views.

Small Isles

Our proposals are:

- A new Sunday service to each of the Small Isles (for school children returning to school);
- A Friday/Saturday level of service on more days (i.e. two sailings as opposed to one sailing per day);
- At least one day per week where it will be possible for residents of each island to make a meaningful return trip to the mainland in the course of a normal working day.

We may be able to achieve these changes in the lead up to the next CHFS contract period.

In the longer-term:

- To replace the current single vessel with a two vessel service - a passenger and loose freight service on a daily basis to each of the islands, and a once-per-week roll-on/roll-off service.

We may be able to achieve this change during the next CHFS contract (2013-2019) or it may be that this change is only possible as part of the vessel renewal programme to be published as part of the Final Ferries Plan.

Q20. The community is asked for their views on these proposals.

Knoydart

Our assessment suggests that Knoydart would benefit from additional sailing days in both the summer and winter seasons.

The service is currently provided by a private operator with some public funding from Highland Council. Our proposal (in Chapter 5) on the future responsibility of ferry services is that we will discuss with Local Authorities whether they wish to transfer responsibility for routes currently under their jurisdiction to the Scottish Government. Also, for commercially run services we will consider intervening where there is market failure and the service is considered to be lifeline.

Q21. As a first step the community is asked whether or not additional sailing days would be beneficial and well used.

Southern Hebrides

Islay & Jura

Our proposals are:

- To offer no cost fares on the current service between Islay and Jura, when this journey is part of an onward journey to the mainland.
- To run more services from Port Askaig and fewer services from Port Ellen than was the case before the suspension of services from Port Ellen.

The service between Islay and Jura is currently provided by Argyll and Bute Council. Our proposal (in Chapter 5) on the future responsibility of ferry services is that we will discuss with Local Authorities whether they wish to transfer responsibility for routes currently under their jurisdiction to the Scottish Government.

Running more services out of Port Askaig will become effective when the works are complete at Port Ellen.

Q22. The community is asked for their views on these proposals.

Colonsay

Our proposals are:

- An additional sailing day in the summer;
- At least one day per week where there is a return sailing between Colonsay and the mainland;

We may be able to achieve this change during the next CHFS contract (2013-2019).

- A commitment in the longer-term to work towards more sailing days during the winter if (and when) other vessels are released across a reconfigured network or when CHFS is re-tendered in 2013.

Q23. The community is asked for their views on these proposals.

Gigha

Our proposal is to extend the operating day in the evening by construction of an appropriate overnight berthing facility.

Given that significant funding is likely to be required this is a medium-to longer-term solution.

Q24. The community is asked for their views on this proposal.

Kintyre

Our proposals are:

- To retain the Kintyre to Portavadie service as is.
- To offer a vehicle service between Campbeltown and the Scottish mainland (for example Troon) one or two days per week.

This would be subject to two smaller vessels being introduced on the Arran route.

Q25. The community is asked for their views on these proposals.

Western Isles

Our proposals are:

- The principal route for Harris and Lewis is the Ullapool-Stornoway route. Tarbert-Uig is the secondary route. The principal route for the Uists and Benbecula is Lochmaddy-Uig. Lochboisdale-Oban is the secondary route. Barra has only one direct route to the mainland, Castlebay-Oban;
- There is a need for all principal and secondary routes to be retained because of the distance between the ports; the population around the secondary routes and the need to ensure adequate exit ports for resilience purposes;
- Barra is the only landmass in the Western Isles which does not currently receive a service that meets the community's needs in terms of service profile. (Their current winter service is 3 days per week and ideally we want to provide at least five days);
- We think the secondary route (Lochboisdale-Oban) for the Uists and Benbecula should also be retained for the reasons given above ;
- We think the secondary route (Tarbert-Uig) for Lewis and Harris should also be retained for the reasons given above;
- We have considered options for improving the service to Barra. However, there are no viable cost effective options available without affecting the other Western Isles services. Within the Western Isles the Barra service will be given priority for funding in the future.

Our hope would be that improvements to Barra's winter service to the mainland could be achieved during the next CHFS contract (2013-2019).

Q26. The community is asked for their views on these proposals.

Section D: Other Comments

Q27. Please use the section provided for any other comments you have on the content of the Draft Plan.

Further copies of this document are available, on request, in audio and large print formats and in community languages (Urdu; Bengali; Gaelic; Hindi; Punjabi; Cantonese; Arabic; Polish).

اس دستاویز کی مزید کاپیاں آڈیو کیسٹ پر اور بڑے حروف کی چھپائی میں اور کمیونٹی کی زبانوں میں طلب کیے جانے پر دستیاب ہیں، برائے مہربانی اس پتہ پر رابطہ کریں:

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Gheibhear lethbhreacan a bharrachd ann an cruth ris an èistear, ann an clò mòr agus ann an cànan coimhearsnachd. Cuir fios gu:

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