Expert Ferry Group Paper – Norwegian Policy Analysis

Issue	Norway	Scotland	Comments	Proposals
Route	Shortest feasible crossing integrated into the road network	Largely historic, and based more around rail, and consequently foot passenger traffic, rather than the road network. Some progress towards shorter crossings	Shorter crossings make intuitive sense in terms of the NTS objective of reduced journey times (assuming decent roads) and operating costs. However this would require upfront capital investment in new terminal facilities, road links and public transport. STAG process would already require consideration of alternative options including port relocations and fixed links.	Ensure long-term cost benefit analyses carried out during STAG appraisals.
Operating model	Frequent services linked to short crossings and smaller vessels	Larger ships with bigger capacity although service frequency has also increased in summer and winter in line with Ferries Plan commitments	Port capacity is likely to determine a maximum vessel size after which additional frequency would be required to deliver additional capacity. In time, once there is no further scope for timetable expansion additional tonnage would be required (or shorter routes, where feasible, see above). This assumes that we continue to try and meet peak summer capacity and accept significant off-peak redundancy.	The Vessel Replacement & Deployment Plan (VRDP) 2014 noted the need for more strategic thinking on questions of vessel size and service frequency. This will need to be informed by consideration of costs (capital and operating) and benefits of alternate models. The timing of the CHFS2 procurement has meant that this consideration has not been undertaken in detail and will be picked up with the CHFS2 operator idc.

Length of operating day	“early to late” – at least 0600-2400 and through the night on busier routes	Focused around daytime hours in many cases although longer routes have very long operating days.	Longer days require additional crews; patronage figures suggest a preference to travel at particular times. Some community resistance to early and late sailings, particularly from the tourism sector on long haul routes. Length of day was one of the parameters considered by the Ferries Review needs-based analysis of routes and services.	Already included in the routes and services methodology underpinning the Ferries Plan. Keep under review on a route by route basis.
Vessel and terminal design	Standardised	Some standardisation but split into main 2 networks (major vessels using linkspans and minor vessels using slips).	The minor vessel network is already largely standardised although recent reclassification of some waters by MCA risks undermining this for the future. Increased standardisation of the major vessel network is being pursued through the VRDP but important to decide what is standardised rather than simply standardise for its own sake.	To consider as part of Network Strategy work 2016-17.
Vessel design speed	“moderate to minimise fuel burn and emissions”	Largely defined by historic crossing times and timetables on routes.	Would be interesting to see more detailed comparisons of vessel speeds, fuel consumption and overall journey times (including waiting times) on comparable Norwegian and Scottish vessels /	A potential candidate for further study ahead of future vessel specifications in the context of future timetables.

			routes.	
Terminal design	Standardised lock-in linkspans	Mixture of ramp/linkspan (major vessels) and ramp/slip (minor vessels)	Deserves further examination of how this would work, reliably, in Scottish sea and wind conditions. Transitional issues (would reduce flexibility and associated resilience in the meantime).	A potential candidate for a technical feasibility study which if successful could be followed by decision on a live trial.
Passenger capacity	Typically 2.5 per car space	Around 7.5 per car space	Would be interesting to see the actual pattern of passenger use of Norwegian and Scottish ferries and look in more detail at actual design numbers of comparable vessels / routes	A potential candidate for further study ahead of future vessel specifications.
Passenger vessels	Fast catamarans provide good alternative to road services	Foot passenger demand accommodated on ro-ro ferries (low marginal additional cost?)	Do passenger services address excess passenger demand (see above)? Scottish experience to date of passenger-only ferries is not positive. User resistance. Excess passenger demand is likely to be seasonal which should in part address reliability concerns. Could be associated additional shore-side costs?	We could look at the use of passenger-only ferries elsewhere in terms of trends in reliability and patronage/demand. Worth considering this option when planning how to meet forecast demand / capacity requirements.

Crewing	"small crews working in shifts… typically one-third of comparable CalMac ferries"	Crew numbers are fixed by MCA in accordance with the Passenger Certificate but also in collective agreements with the TUs	Noted that crew numbers are influenced by a variety of factors (regulatory, technical, operational) so comparisons would need verifying and "unpacking".	Principally a matter for the operator so pending the outcome of CHFS2 procurement.
Terminal manning	Links to above – no shore personnel required, other than for Hurtigruten which uses 2 on-board crew	Typically 6 crew on board and 3 people on shore (larger vessels) – smaller vessels use unmanned terminals	Worth verifying these figures and considering whether this is a simple cause-effect or whether there are other factors (including requirements from regulators)	Principally a matter for the operator so pending the outcome of CHFS2 procurement.
Procurement policy	Several bundles of different sizes	Two bundles and one individual route	CHFS is not larger than some Norway bundles. Clear policy decision from Ministers of successive governments	Given Ministerial policy decisions, no further work proposed.
Vessel ownership	Operators bring their own vessels	CHFS vessels owned by CMAL. N Isles and GD contracts are operator led	Seems to link to the unbundling (above). The N Isles and GD vessels were operator led but have both been criticised though for different reasons. Question whether vessel ownership rather than design is the issue.	For CHFS2, given Ministerial policy decisions, no further work proposed. Future vessel solutions are part of Northern Isles STAG now underway. Vessels provided by operators is working assumption for next Gourock-Dunoon contract.