

FERRY SERVICES IN SCOTLAND

ALAN REHFISCH

Ferries provide a physical link between remote mainland and island communities and major population centres. Scotland's ferries play a particularly important role in the social and economic life of the Western and Northern Isles and the island and peninsula communities on the River Clyde.

This briefing looks at who provides these services and how they are funded. It goes on to examine how EU legislation has affected the provision of ferry services and provides up to date statistics on ferry usage.

This briefing only looks at ferries serving destinations within Scotland and does not look at ferry services linking Scotland with Northern Ireland or continental Europe.



Photo: Good Shepherd IV - Shetland Islands Council

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KEY POINTS

- The majority of ferry services in Scotland are provided by companies directly owned by the Scottish Government, i.e. Caledonian MacBrayne and NorthLink
- Caledonian MacBrayne recently won a six year contract to provide Clyde and Hebrides ferry services, in the end they were the only bidder for this contract
- The contract to provide Northern Isles ferry services had to be re-tendered in 2006 when it became clear that the operator could not provide the service within the terms of its contract
- Total public sector financial support for Scottish ferry services amounted to approximately £85m in financial year 2006/07
- The National Transport Strategy commits the Scottish Government to undertaking a review of the entire Scottish lifeline ferry services network
- The Scottish Government has initiated a study into the possibility of establishing a Road Equivalent Tariff fares system for Scotland's ferry services

INTRODUCTION

Scotland's internal ferry services provide a key link between island and some isolated coastal communities on the mainland and major population centres. Service provision is dominated by public sector operators, particularly routes in the Clyde and Hebrides which are almost all provided by Caledonian MacBrayne. However, several private sector operators do provide services on an unsubsidised basis, sometimes in competition with subsidised services.

This briefing looks at who provides these services and the level of public sector support. It goes on to examine the tendering of Clyde and Hebrides ferry services and Northern Isles ferry services by the Scottish Executive/Government. It examines trends in ferry patronage and provides maps and a list of scheduled ferry services in Scotland.

This briefing does not look at ferry routes serving destinations outside of Scotland. In addition it only considers scheduled passenger ferry routes, excluding services principally aimed at the tourism or sightseeing market or 'on-demand' services.

FERRY OPERATORS IN SCOTLAND

Ferry services in Scotland are principally provided by publicly owned companies. A number of routes are served by private sector operators on an unsubsidised basis and there are two community owned services which operate small ferries to remote communities. A list of the major scheduled ferry service providers in Scotland along with brief details of company ownership and the routes they operate is provided below:

[Caledonian MacBrayne](#) Ltd (CalMac): A company owned by David MacBrayne Limited, which is itself owned by the Scottish Government and which provides ferry services to 22 islands and four peninsulas on Scotland's west coast. Caledonian MacBrayne was split into two separate companies on 1 October 2006, namely:

- Caledonian Maritime Assets Ltd (CMAL): Retains ownership of CalMac vessels and infrastructure, including harbours.
- CalMac Ferries Ltd: Provides Clyde and Hebrides ferry services under contract to the Scottish Government

[NorthLink Ferries](#) Ltd: A company owned by David MacBrayne Limited, which is itself entirely owned by the Scottish Government. NorthLink provides passenger and freight ferry services between Scrabster and Stromness (Orkney) and Aberdeen and Kirkwall (Orkney) and Lerwick (Shetland).

[Western Ferries](#): Privately owned operator of unsubsidised car ferry service between Dunoon (Hunter's Quay) and Gourock (McInroy's Point).

Strathclyde Partnership for Transport (SPT): SPT, the regional transport partnership for the west of Scotland, operates the [Renfrew ferry](#) that links the Clydeside communities of Yoker (north bank) and Renfrew (south bank). SPT also operates the [Kilcreggan ferry](#) which links the Clyde estuary communities of Helensburgh, Kilcreggan and Gourock.

[Orkney Ferries](#): Entirely owned by Orkney Islands Council, Orkney Ferries links the Orkney mainland with 13 of the smaller Orkney Islands.

[Shetland Islands Council](#): Shetland Islands Council operate a network of ferry services linking the Shetland mainland with Yell, Skerries, Bressay, Fair Isle, Foula and Papa Stour. A service also links Yell with Unst and Fetlar. The service to Foula is operated by Atlantic Ferries Ltd under contract to the Council.

Highland Council: Highland Council operates the [Corran ferry](#) car ferry, linking Nether Lochaber and Ardgour on opposite banks of Loch Linnhe, and the [Camusnagaul Ferry](#), which provides a foot passenger only link between Fort William and Camusnagaul again on Loch Linnhe.

Argyll and Bute Council: Argyll and Bute Council run car and passenger ferry services between Islay and Jura (operated by ASP Ship Management), Isle of Luing and Isle of Seil and Port Appin and Isle of Lismore.

[Pentland Ferries](#): Pentland Ferries is a privately owned company that runs unsubsidised scheduled ferry services between Gills Bay, near John O-Groats and St. Margaret's Hope on South Ronaldsay (Orkney).

[Skye Ferries](#): Skye Ferries is owned by the Isle of Skye Ferry Community Interest Company. It operates a car and foot passenger service between Glenelg on the Scottish mainland and Kylerhea (Skye). The service operates between Easter and October.

[Bruce Watt](#) (Knoydart ferry service): Bruce Watt Cruises, a privately owned company, runs a week day only, three days a week during winter, foot passenger ferry service between Mallaig and Inverie on the Knoydart peninsula. They also run a twice weekly service from Mallaig to Tarbet, which operates five days a week during the summer.

[John O'Groats to Orkney ferry](#): John O'Groats Ferry is a privately owned company which provides foot passenger only ferry services between John O'Groats and Burwick on the southern tip of South Ronaldsay (Orkney). This service only operates between May and September.

[Sound of Mull Transport Group](#): A community owned passenger ferry service is provided each Monday and Friday linking Laga (Ardnamurchan Peninsula) with Tobermory (Mull) and Drimnin (Morvern). The ferry service is supported by the Scottish Government, Argyll and Bute Council and Highland Council.

SCOTTISH GOVERNMENT FERRIES POLICY

As highlighted above, lifeline ferry services to the Western Isles and certain remote points on the Scottish mainland are provided by Caledonian MacBrayne Ltd (CalMac) while services to Orkney and Shetland are provided by NorthLink Orkney and Shetland Ferries Ltd. Both these companies are wholly owned by the Scottish Government.

The Scottish Government also provides financial assistance for the development and improvement of lifeline piers and harbour infrastructure within the Highlands and Islands. Ports policy is devolved to Scottish Ministers

The Scottish Government has never produced a separate ferry strategy document. However, the National Transport Strategy (Scottish Executive 2006) does briefly mention lifeline ferry services, stating:

Once the tendering of the Clyde and Hebrides ferry service has been completed in 2007 we will undertake a comprehensive review of lifeline ferry services to develop a long-term strategy for lifeline services to 2025. The review will include a detailed appraisal of routes to determine whether a better configuration could be developed in response to calls for new and faster connections serving these isolated communities and a review of fares structures as part of a broader review of the affordability of public transport.

Any such review of lifeline services would also have to consider the inter-island ferry services provided by Shetland Islands Council and Orkney Islands Council and the routes operated/subsidised by the Strathclyde Partnership for Transport, Highland Council and Argyll and Bute Council.

In addition, on 13 August 2007 the Scottish Government (2007) announced its intention to undertake a three stage pilot study into the possibility of establishing a 'Road Equivalent Tariff' (RET) fares system for ferries in Scotland¹. Stage 1 is a desk based study, aimed at designing a workable RET fares system. Stage 2 will be the operation of the RET fares system on a CalMac route and Stage 3 will be an evaluation of this trial and report to Ministers on how the scheme could be taken forward. The Scottish Government anticipates Stage 1 to be completed by the end of 2007, although timescales for stages 2 and 3 remain to be defined.

While ferry provision is dominated by public sector operators it is important to remember that the private sector does provide unsubsidised services in some locations, most notably Western Ferries on the Gourock-Dunoon route and Pentland Ferries on the Scottish mainland to Orkney route. Both these routes operate without subsidy and in competition with services provided by CalMac and Northlink.

¹ RET fares are set at a rate that is equivalent to the cost of driving the same distance as a ferry travels
providing research and information services to the Scottish Parliament

SCOTTISH GOVERNMENT SUPPORT FOR FERRY SERVICES

The great majority of ferry passengers in Scotland travel on services provided by the two companies directly owned by the Scottish Government, i.e. CalMac and NorthLink. None of the routes operated by these companies cover their operating costs and require ongoing subsidy from the Scottish Government. Details of fare revenue and government subsidy for these services are set out in Table 1 below:

Table 1: Fare Revenue (£000's) and Scottish Government Revenue Support for Ferry Services

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
CalMac											
Fare revenue	34,753	36,241	36,544	37,429	38,571	39,768	43,844	45,829	49,861	51,687	55,205
Subsidy	11,674	10,310	14,436	14,975	19,376	20,400	18,900	25,919	25,900	31,400	33,200
Northern Isles Ferry Services (P&O 1996-2002, NorthLink 2003-2006)											
Fare revenue	15,800	14,484	15,010	15,688	15,284	16,662	12,195	N/A	N/A	20,064	21,260
Subsidy ²	8,100	9,412	14,260	11,400	11,500	11,600	11,206	18,524	28,121	22,450	29,177
Real terms subsidy figures at 2006/07 prices (Calculated by SPICe using HM Treasury Sept 2007 Figures)											
CalMac	14,937	12,817	17,503	17,797	22,704	23,345	20,972	27,951	27,180	32,274	33,200
Northern Isles	10,364	11,700	17,289	13,548	13,475	13,275	12,435	19,976	29,511	23,075	29,177
Real terms fare revenue figures at 2006/07 prices (Calculated by SPICe using HM Treasury Sept 2007 Figures)											
CalMac	44,466	45,052	44,398	44,483	45,196	45,509	48,652	49,423	52,325	53,126	55,205
Northern Isles	20,216	18,006	18,199	18,644	17,909	19,068	13,532	N/A	N/A	20,623	21,260

In real terms CalMac fares revenue was approximately £10m higher in 2006 than in 1996. However, the real terms increase in Northern Isles ferry services fare revenue between 1996 and 2006 amounted to only £1m. Scottish Executive subsidy to CalMac more than doubled in real terms between 1996 and 2006 while the Northern Isles ferry service subsidy almost trebled.

In 2005 the amount of subsidy paid overtook the amount of fare revenue on Northern Isles services for the first time. There are of course, year on year fluctuations in both fare revenue and subsidy for each of the ferry services, however Scottish Executive subsidy is clearly increasing at a rate above that of fares.

A further increase in the subsidy for Clyde and Hebrides Ferry Services was [announced](#) (2007a) by the Scottish Government on 20 September 2007 with the award of the contract to operate those services. The subsidy for the first year of the contract 1 October 2007 to 30 September 2013 will be £43m, a 31% increase on the previous year.

OTHER PUBLIC SERVICE SUPPORT FOR FERRY SERVICES

In addition to the financial support that the Scottish Government provides for Caledonian MacBrayne and NorthLink ferry services, the following local authorities and regional transport partnerships provide direct funding for the provision of ferry services:

² Subsidy figures for 1996 until 30 September 2002 are recorded on a calendar year basis, from 1 October 2002 they cover the period 1 October to 30 September annually

- Strathclyde Partnership for Transport (2007) provided a subsidy of £667,000 to support the running of its two ferry services during financial year 2006/07.
- Orkney Islands Council (2007) provided £5.799m in revenue support for Orkney Ferries during financial year 2004/05, the latest year for which figures are available.
- Shetland Islands Council (2006) provided a subsidy of £11.23m during 2006/07 for the continued operation of its inter-islands ferry services.
- Highland Council provided £520,000 in revenue support for ferry services in 2006/07.
- Argyll and Bute Council provided £758,025 in revenue support for ferry services in 2006/07.

Assuming Orkney Islands Council provided a similar level of financial support to Orkney Ferries in 2006/07 as it did in 2004/05 then total Scottish Government and other public sector support for ferry services in Scotland during 2006/07 amounted to approximately £85m.

TENDERING OF CLYDE AND HEBRIDES FERRY SERVICES

Possibly the biggest issue in the provision of ferry services in Scotland in recent years has been the competitive tendering of the Scottish Government subsidy for the provision of Clyde and Hebrides ferry services which have been provided by CalMac. The possible tendering of these services first became a serious proposition when Sarah Boyack MSP, the then Minister for Transport, [announced](#) (Scottish Executive 2000) the publication of a consultation on “[Delivering Lifeline Ferry Services – Meeting European Union Requirements](#)” (Scottish Executive 2000a) on 27 April 2000. This document stated that:

Following the introduction of Community guidelines on State aids to maritime transport, the Commission wrote to Ministers seeking information about the compatibility with Community law of our current arrangements whereby CalMac receives public subsidy to provide Western Isles and Clyde ferry services.

To comply with the guidelines, an open public tender will be necessary in all cases where financial compensation is being offered to a ferry operator for Public Service Obligations (PSOs). Other EU Member States are either already well down the road of tendering their subsidised ferry services or are currently bringing forward arrangements to do so. Failure to comply with Community rules could ultimately lead to 'infraction proceedings' by the Commission, which could involve, for example, the cessation of aid to these lifeline services. Non-compliance with the rules is not, therefore, an option.

In a separate development the Executive published a report by consultants Deloitte & Touche entitled “[Final Report: Options for the Ferry Services Between Gourock and Dunoon](#)” (Deloitte & Touche 2000) on 5 May 2000. This report did not consider the requirements of European law rather it focused on the technical and economic merits of operating a publicly subsidised ferry service on a route already served by an unsubsidised private sector company, i.e. Western Ferries.

Following consideration of the [responses](#) (Scottish Executive 2001) to the Delivering Lifeline Ferry Services consultation, the Executive (2001a) [announced](#) a package of provisional proposals on 23 January 2001, which it submitted to the European Commission for its consideration.

The European Commission responded on 14 November 2001, paving the way for the Executive to tender the entire CalMac network as a single bundle with the exception of Gourock to Dunoon. The Executive (2001b) issued a [news release](#) that day welcoming the Commission's views and, on 27 June 2002 launched a further consultation on "[Proposals for the Tendering of Clyde and Hebrides Lifeline Ferry Services](#)" (Scottish Executive 2002).

The Executive also published the "[Draft Invitation to Tender for Consultation](#)" (Scottish Executive 2002a), covering the whole of the CalMac network, that day.

Alongside the action being taken by the Scottish Executive, the Transport and Environment Committee of the Scottish Parliament had considered the Executive's proposals for the CalMac network at its meeting of 28 February 2001, where it agreed to appoint Des McNulty MSP and Maureen Macmillan MSP as reporters to investigate this issue further.

Following a series of meetings and visits the reporters presented an [interim report](#) (Transport and Environment Committee 2001) to the Committee at its meeting of 26 September 2001, which the Committee agreed to forward to the Executive for their consideration. The reporters concluded that they:

...have therefore come to the view that the competitive tendering of the current network of lifeline ferry services is necessary in order to allow for payments to be made in relation to PSO contracts in line with Community law.

The reporters presented their [final report](#) (Transport and Environment Committee 2002) to the Committee at its meeting of 2 October 2002.

Following consideration of the Committee's report and responses to the earlier consultations, the Executive held further discussions with the European Commission on a way to meet the desire to maintain the possibility of a passenger and vehicle ferry on the Gourock-Dunoon route within the requirements of EU law. An agreement was reached whereby:

- the Gourock to Dunoon passenger subsidy would be tendered separately from the rest of the network
- bidders would be allowed to bid on the basis of either passenger or a combined passenger and vehicle service
- operators would be allowed the freedom to bring their own vessel solutions, with no binding to Caledonian Maritime Assets Ltd vessels
- the restrictions on any vehicle service would be maintained (in terms of frequency and length of operating day applied to the Gourock to Dunoon service currently operated by CalMac)
- the outcome would be determined on the basis of the lowest cost bid (in line with the rules for Public Service Obligations) regardless of whether this was for a passenger-only or a combined service

The Executive (2003) fleshed out these proposals in a consultation paper, [Proposals for Tendering Gourock to Dunoon Ferry Services](#), published on 20 March 2003 alongside a "[Draft Invitation to Tender for Consultation](#)" (2003a). The consultation closed on 30 May 2003, by which time the Executive had received 50 responses.

There followed a year long lull in the tendering process which was only broken when Nicol Stephen MSP, Minister for Transport (Scottish Executive 2004a), announced on 25 June 2004

that, following discussion with the European Commission regarding implications of the Altmark case³, tendering of the entire CalMac network would proceed, stating:

This process should start by the end of the year and will be carried out after a short consultation on the service requirements. Bidders should be invited to tender in Spring next year with the new contract awarded in 2006.

Discussions are ongoing about separate proposals for the Gourock to Dunoon ferry service and a further announcement will be made in due course.

The Executive (2004b) launched a further consultation entitled "[Clyde and Hebrides Ferry Services: Service Specification](#)" on 8 December 2004, the closing date for responses being 16 March 2005. The Scottish Parliament held a debate on the Executive's proposals for lifeline ferry services that day in which the Executive motion and SNP and Conservative amendments were not agreed to. Ministers agreed to hold further discussions with the European Commission on the need to tender the Clyde and Hebrides Ferry Services.

The Scottish Executive issued a press release that day (8 December 2004) confirming its intention to begin tendering the Gourock-Dunoon service as soon as possible.

The Local Government and Transport Committee was updated on the progress of negotiations between the Scottish Executive and European Commission by the then Minister for Transport at its meeting on 15 March 2005. Following this meeting the Committee took evidence during May and June 2005 from academics on the necessity of tendering for the Clyde and Hebrides ferry services, some of which questioned the need to put the services out to tender. This evidence was submitted to the Scottish Executive along with a letter from the Committee asking the Executive to consider these issues.

In response to this evidence the Executive published two documents on 12 September 2005:

- [The Scottish Executive's Consideration of the Requirement to Tender](#) (Scottish Executive 2005): Summarised the Executive's consideration of the evidence submitted by the Local Government and Transport Committee. Set out the Executive's approach to CalMac staffing and employment issues. Included copies of correspondence between the Executive and the EC since December 2004.
- [Research and Advice on Risk Management in relation to subsidy of ferry services in EU Member States](#) (Scottish Executive 2005a): Summarised the work undertaken by Scottish Executive commissioned consultants on the application of the Maritime Cabotage Regulation in other Member States.

The then Minister for Transport appeared before the Local Government and Transport Committee on 13 September 2005, where he stated that after consideration of the evidence, and further discussions with the European Commission, the Executive had concluded that tendering was a legal requirement.

A full parliamentary [debate](#) was held on the tendering issue on 14 September 2005. The Executive motion, supporting the tendering of Clyde and Hebrides Ferry Services was put to a vote; 63 members agreed to the motion, 53 voted against and one abstained.

³ The Altmark case relates to a local bus company subsidised by a German State Government. The European Court held that the subsidies were allowed if the service provided fulfilled certain criteria, essentially a test of whether the service would be uneconomic without the subsidy, or whether the subsidies were funding activities which could be competitive

Following this vote the Executive began the tendering process in earnest with the publication of adverts in the Official Journal of the European Union on 12 October 2005 (Notice 2005-194541-EN), seeking expressions of interest from potential operators.

Nine organisations expressed an interest in operating these services. These organisations were subsequently issued with Pre-Qualification Questionnaires in November 2005. Three organisations (Western Ferries, Caledonian MacBrayne and V-Ships) completed and returned a Pre-Qualification Questionnaire by the closing date of 15 December 2005. Subsequently Western Ferries withdrew from the tendering exercise.

The Executive issued the formal Invitation to Tender to the two remaining bidders on 14 December 2006. V-Ships subsequently withdrew from the tendering process on 29 January 2007, stating that:

V.Ships believes that various constraints within the tender do not enable the company to maximise its services to the communities directly involved and that with no direct control over the assets themselves, there would be little opportunity for added value via creative management and innovation.

This left CalMac as the sole bidder to operate the Clyde and Hebrides Ferry Services. Despite there being only one bidder the Executive was required under EU legislation and state aid rules to complete the tendering exercise. The Scottish Government announced on 20 September 2007 that CalMac had been awarded a six year contract to operate Clyde and Hebrides Ferry services from 1 October 2007 until 30 September 2013.

However, the separate tendering exercise for the Gourock-Dunoon route proved unsuccessful, with no formal tenders submitted. Cowal Ferries Ltd (CalMac) continues to provide the service on a subsidised basis.

TENDERING OF NORTHERN ISLES FERRY SERVICES

In 1998, following an open tender exercise, the Scottish Office [announced](#) (Scottish Office 1998) the decision to award a five year contract for a subsidy to operate passenger ferry services to the Northern Isles to P&O Scottish Ferries (P&OSF). P&OSF had previously operated these subsidised services since the late 1970s. In October 1998 the Scottish Office announced the start of the tender process for the award of the next contract from 2002.

During April 1999 the Scottish Office [announced](#) (Scottish Office 1999) a short list of six bidders which had submitted initial proposals to run the service. From this list of six the Scottish Executive (1999) [invited](#) formal tenders from four companies:

1. P&O Scottish Ferries
2. Sea Containers Ltd
3. Serco/Denholm Ltd
4. Caledonian MacBrayne and Partners

In October 2000 the Scottish Executive chose Northlink Orkney and Shetland Ferries, a joint venture between Caledonian MacBrayne and the Royal Bank of Scotland, as preferred bidders for the subsidy to operate the service. The contract for the payment of the subsidy to Northlink was signed on 22 December 2000. Northlink ordered three new vessels to provide the service and agreed to operate more sailings with shorter journey times and cheaper fares than those

provided by P&O. Northlink took over the provision of Northern Isles ferry services from 1 October 2002.

However, Northlink quickly got into financial difficulty due to increased competition for passenger and freight services which reduced income and the fact that some of its costs were greater than anticipated, e.g. higher costs for staff transferring from P&O and the fact that it had to lease an alternative ship to access Scrabster harbour while improvements to the harbour were being carried out. The Scottish Executive provided considerable additional subsidy to Northlink as required under the terms of the subsidy contract to ensure continuity of service. However, it soon became clear that the service could not be provided under the terms of the subsidy contract awarded and the Scottish Executive (2004) [announced](#) on 8 April 2004 that the service would be re-tendered, while Northlink continued to provide a service under an interim agreement. By the time of this announcement the Scottish Executive had made additional payments of £13.4m to Northlink over and above the agreed subsidy payment level.

A contract notice was published on 17 April 2004 in the Official Journal of the European Union (2004-64997-EN) advertising the subsidy for the provision of the Northern Isles ferry service. Ten operators submitted a Pre-Qualification Questionnaire to the Scottish Executive. At the same time the Scottish Executive held a consultation on the new service specification. On 19 July 2005 the Scottish Executive published the revised tender documents and announced that V Ships, Irish Continental Ferries and Caledonian MacBrayne had been invited to tender for the subsidy to provide the Northern Isles ferry service.

Irish Continental Ferries withdrew from the tendering process on 9 October 2005. Bids from CalMac and V Ships were received on the closing date of 1 December 2005. Both bids complied with the tender requirements. Caledonian MacBrayne, which submitted the lowest price bid, was appointed preferred bidder on 9 March 2006. The Scottish Executive concluded negotiations and signed a six-year contract with Caledonian MacBrayne, which had formed a separate company called NorthLink Ferries Limited, on 6 July 2006. Northlink Ferries Ltd began operating the Northern Isles ferry service on 6 July 2006.

Audit Scotland conducted an investigation (requested by the Auditor General in August 2005 following concerns about the cost of subsidising Northern Isles ferry services) into the tendering of the subsidy contract for the Northern Isles ferry services contract awarded for the period from October 2002. This resulted in the publication of [Scottish Executive: The Northlink Ferry Services Contract](#) (Audit Scotland 2006) on 22 December 2006. The report concluded that the Scottish Executive "...carried out an adequate tendering exercise". It also highlighted the need for maximum flexibility in contract negotiations and the provision of adequate information by the Scottish Executive to potential bidders to allow them to accurately cost the provision of services.

TRENDS IN SCOTTISH FERRY PATRONAGE

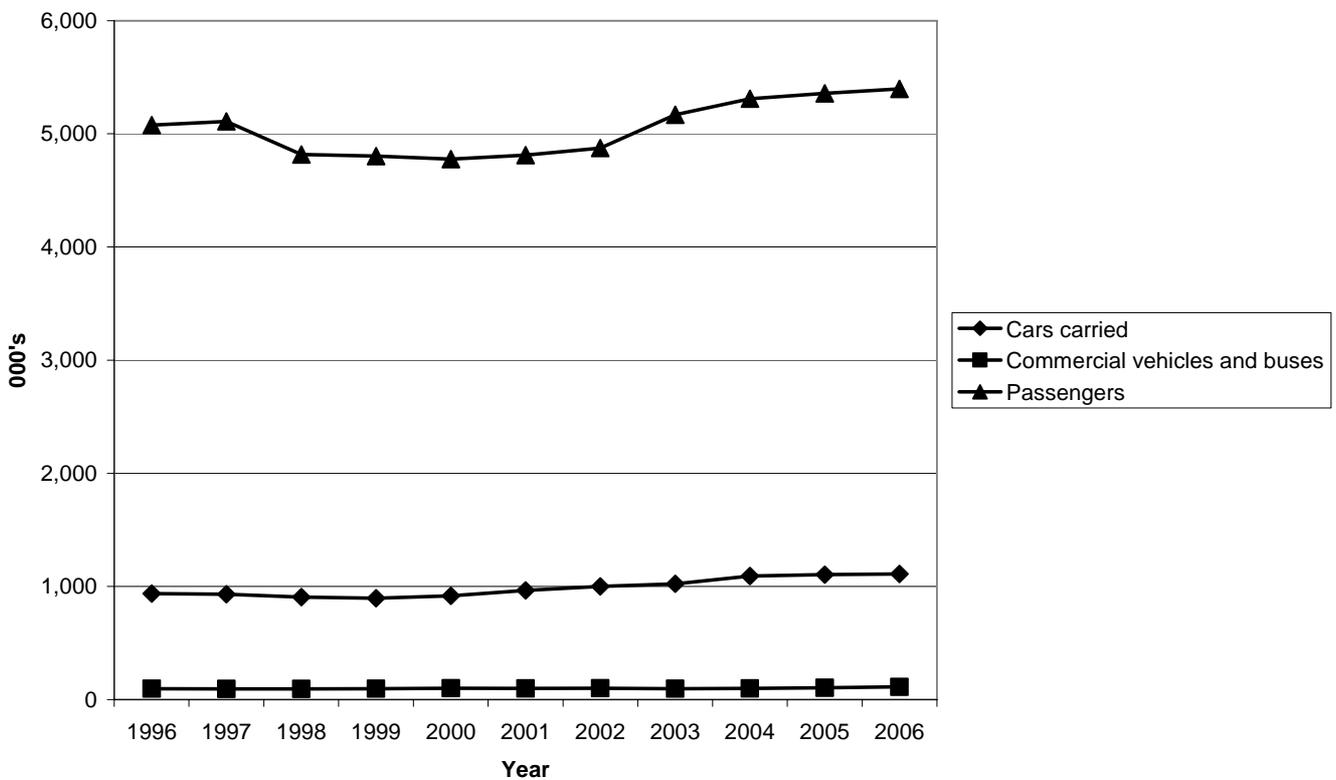
This section provides an overview of the annual number of passengers, private cars and commercial vehicles carried by Scotland's largest ferry operators, i.e. Caledonian MacBrayne, Northlink, Orkney Ferries and Shetland Island Council Ferries, between 1996 and 2006. It is important to note that these aggregated figures may not accurately reflect changes to passenger numbers on individual ferry routes. Details of passengers and vehicles carried on individual ferry routes and routes provided by other operators can be found in Scottish Transport Statistics (Scottish Executive 2006a), although more up to date figures can be found [online](#).

PASSENGERS AND VEHICLES CARRIED BY CALEDONIAN MACBRAYNE

Figure 1 below shows that CalMac carried 6.3% more passengers in 2006 than 1996, while commercial vehicle traffic was 15.6% higher and car traffic 18.4% greater. However, passenger and vehicle carryings actually decreased year on year between 1996 and 1999 with the period of steady annual growth only beginning in 2000/2001.

Virtually all CalMac routes carried more passengers, cars and commercial vehicles in 2006 than in 1996. The only route to suffer a decrease in all three types of traffic was Gourock-Dunoon, which is in direct competition with the Western Ferries service. The Mallaig-Armadale and seasonal Lochranza-Tarbet/Claonaig services both saw a reduction in passenger and car traffic. The reduction in the use of the Mallaig-Armadale service is likely to be linked to greater use of the Skye Bridge.

Figure 1: Passengers and Vehicles Carried by Caledonian MacBrayne



PASSENGERS AND VEHICLES CARRIED ON NORTHERN ISLES FERRY SERVICES

Between 1996 and 2006 Northern Isles Ferry Services have been provided by three separate companies:

- 1996 to 30 September 2002: P&O Scottish Ferries
- 1 October 2002 to 5 July 2007: Northlink Orkney and Shetland Ferries
- 6 July 2007 onwards: Northlink Ferries Ltd

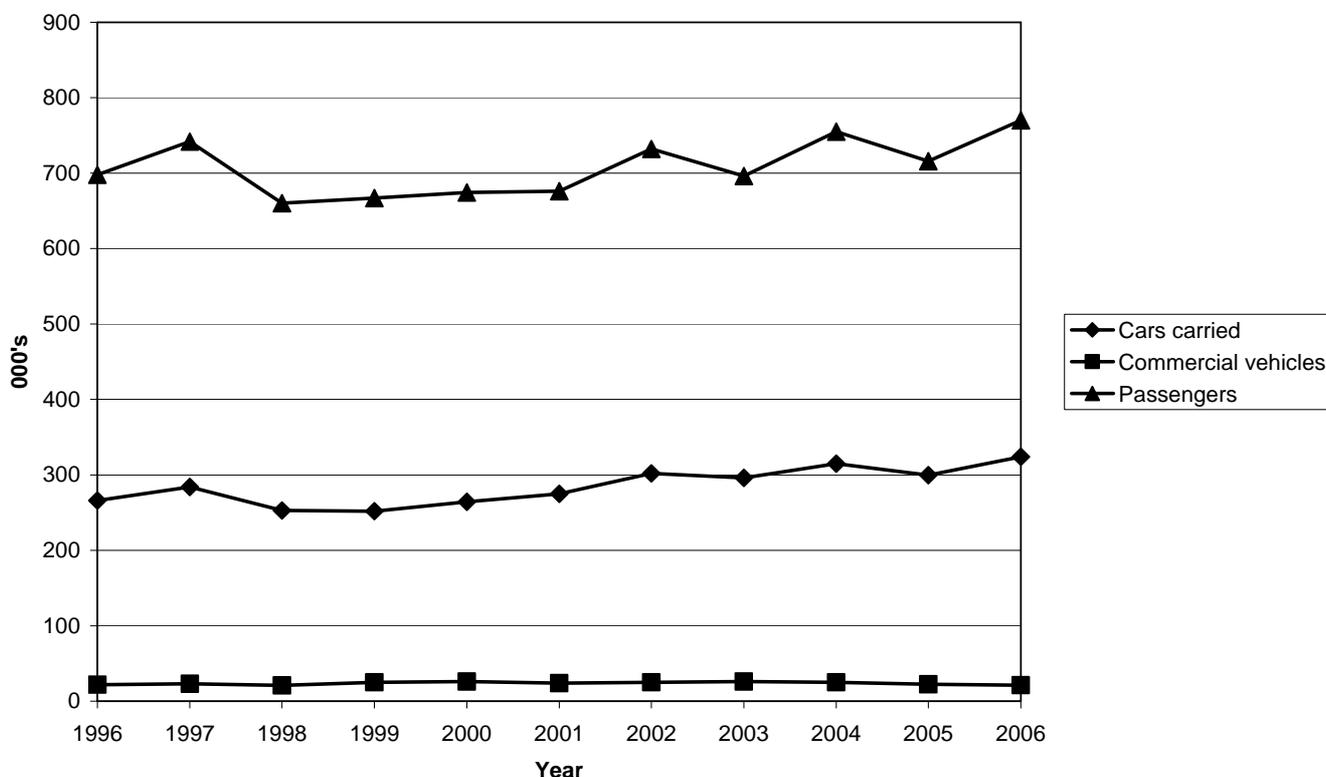
Differences in the way these companies recorded statistics, especially commercial vehicles, would make any graph give a misleading impression of traffic on these routes. Between 1996 and 2006 there has been an increase in passenger and vehicle traffic carried on these routes, although there is considerable fluctuation on a year to year basis.

The services linking Aberdeen with Lerwick and Kirkwall (Stromness until 2002) both carried more passengers in 2006 than 1996, i.e. 69.5% and 63.9% more passengers respectively. The service linking Scrabster and Stromness carried 2% fewer passengers in 2006 than in 1996, although the number carried on this service does vary considerably year on year.

PASSENGERS AND VEHICLES CARRIED BY SHETLAND ISLAND COUNCIL FERRIES

Shetland Islands Council list passenger statistics for some of their more popular services in [Shetland in Statistics](#) (Shetland Islands Council 2006). However, detailed statistics are only now being collected for the smaller routes so it is difficult to draw any detailed conclusions on passenger figures. Nevertheless, there is a clear upward trend in the total number of passengers, and cars being carried by Shetland Island Council Ferries with the number of commercial vehicles appearing to run at a fairly stable rate. All three categories appear to be susceptible to a considerable annual fluctuation in numbers.

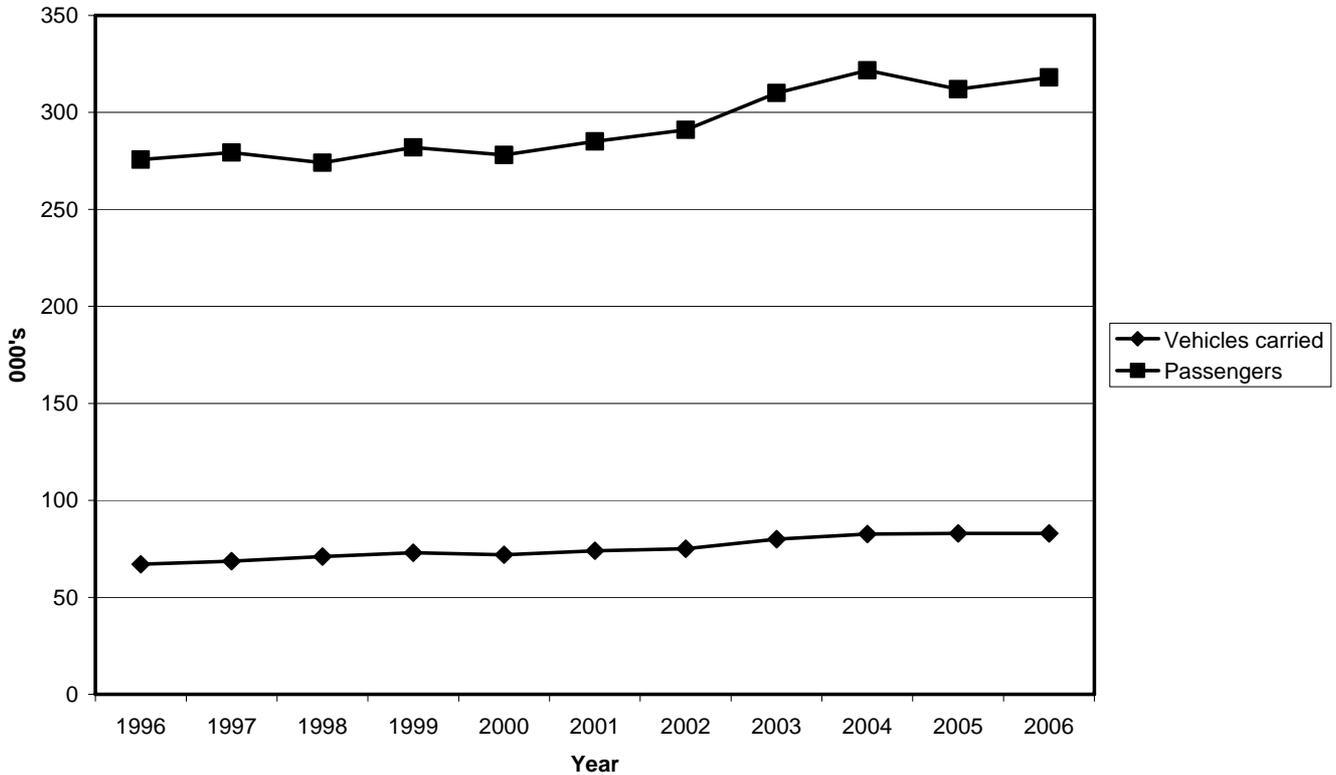
Figure 2: Passengers and Vehicles Carried by Shetland Island Council Ferries



PASSENGERS AND VEHICLES CARRIED BY ORKNEY FERRIES

Orkney Ferries' statistics do not differentiate between cars and commercial vehicles. The number of vehicles carried on Orkney Ferries has increased annually since 1996, with 23.9% more vehicles carried in 2006 than in 1996. The number of passengers carried fluctuates annually, reaching a high of 322,000 in 2004 from a low of 274,000 in 1998, although the trend over the 11 years is clearly one of passenger growth with 15.2% more passengers carried in 2006 than in 1996.

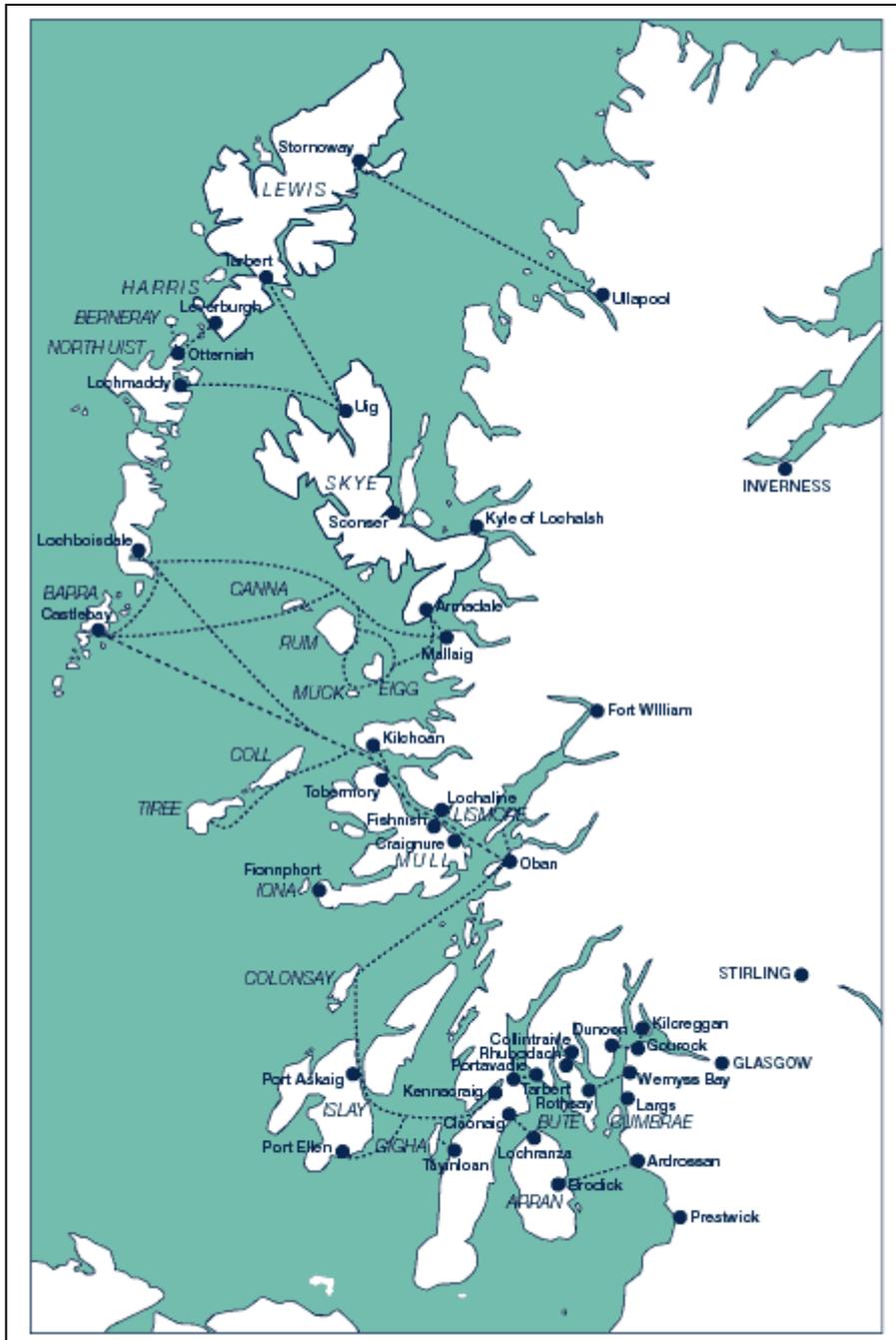
Figure 3: Passengers and Vehicles Carried by Orkney Ferries



FERRY ROUTES AND MAPS

This section provides maps of the services provided by Caledonian MacBrayne, NorthLink, Shetland Island Council Ferries and Orkney Ferries plus a list of the routes operated these and other smaller ferry companies.

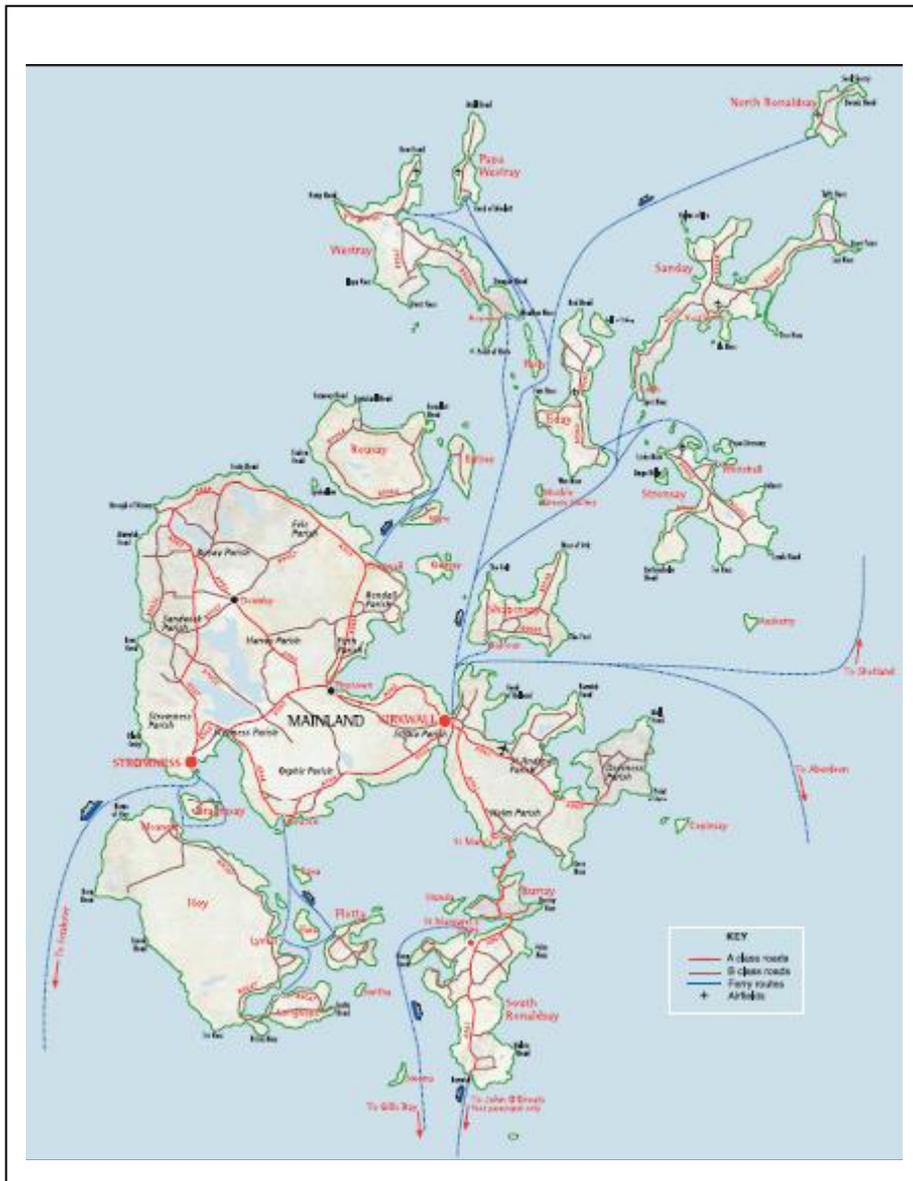
CALEDONIAN MACBRAYNE



- Tarbert (Loch Fyne)-Portavadie
- Tarbert (Loch Fyne)-Lochranza (winter only)
- Wemyss Bay-Rothesay
- Colintraive-Rhubodach
- Ardrossan-Brodick
- Claonaig-Lochranza (summer only)
- Largs-Cumbræ Slip
- Tayinloan-Gigha
- Oban-Colonsay
- Kennacraig-Port Askaig
- Colonsay-Oban (summer only)
- Kennacraig-Port Ellen/Port Askaig
- Oban-Craignure
- Lochaline-Fishnish
- Fionnphort-Iona
- Tobermory-Kilchoan
- Oban-Lismore
- Oban-Coll-Tiree
- Sconser-Raasay
- Mallaig-Armadale
- Mallaig -Small Isles
- Oban-Castlebay-Lochboisdale
- Barra-Eriskay (Sound of Barra)
- Uig-Lochmaddy
- Berneray-Leverburgh (Sound of Harris)
- Uig-Tarbert (Harris)
- Uig-Tarbert-Lochmaddy (winter only)
- Ullapool-Stornoway
- Oban-Tiree-Castlebay

Map: Scottish Executive (2004c)

ORKNEY FERRIES



Map: Orkney Islands Council (2007a)

Stromness (Orkney mainland) to islands of Graemsay and North Hoy
 Houton (Orkney mainland) to islands of Flotta and Lyness (Hoy)
 Tingwall (Orkney mainland) to islands of Rousay, Egilsay & Wyre
 Kirkwall (Orkney mainland) to islands of Shapinsay, Stronsay, Eday, Sanday, North Ronaldsay,
 Westray and Papa Westray

NORTHLINK FERRIES LTD



Scrabster-Stromness (Orkney)
Aberdeen-Kirkwall (Orkney)-Lerwick (Shetland)

Map: [NorthLink Ferries Ltd](#)

SHETLAND ISLANDS COUNCIL FERRIES



Toft (Mainland)-Ulsta (Yell)
 Gutcher (Yell)-Belmont (Unst)-Hamars Ness (Fetlar)
 Lerwick (Mainland)-Skerries
 Vidlin (Mainland)-Skerries
 Lerwick (Mainland)-Bressay
 Laxo (Mainland)-Symbister (Whalsay)
 West Burrarfirth (Mainland)-Papa Stour
 Grutness (Sumburgh) (Mainland)-Fair Isle
 Walls (Mainland)-Foula

Map: [Shetland Islands Council](http://www.shetlandislands.gov.uk)

SERVICES PROVIDED BY OTHER OPERATORS

Table 2 below lists other scheduled ferry services provided in Scotland that are not operated by the four large operators listed above. It does not include routes operated as leisure cruises or on an 'on-demand' basis.

Route	Operator
Mcnroy's Point (Gourock)-Hunter's Quay (Dunoon)	Western Ferries
Yoker-Renfrew	Strathclyde Partnership for Transport
Gourock-Kilcreggan-Helensburgh	
Nether Lochaber-Ardgour	Highland Council
Camusnagel-Fort William	
Easdale Pier-Ellenbeich (Seil)	Argyll and Bute Council
Port Askaig-Feolin	
North Cuan (Seil)-South Cuan (Luìng)	
Port Appin-Lismore	
Gill's Bay-St Margarets Hope	Pentland Ferries
Glenelg-Kylerhea (Skye)	Skye Ferries
John O'Groats-Burwick	John O'Groats-Orkney Ferry
Laga (Ardnamurchan Peninsula)-Tobermory (Mull)-	Sound of Mull Transport Group

Drimnin (Morvern)	
Mallaig-Inverie	Bruce Watt Cruises
Mallaig-Tarbet	

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