This subject profile provides an introduction to walking, cycling, road, rail, air, bus, waterborne and freight transport in Scotland.

It describes the legislative and administrative frameworks governing these modes of transport and identifies key agencies and organisations for each. It also summarises recent policy developments for each type of transport and identifies some key issues which are currently under debate.

Further, more detailed, briefings on specific issues in transport policy will be produced throughout the parliamentary session.
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INTRODUCTION

This subject profile examines the six main forms of transport in Scotland, namely:

- Walking and Cycling
- Rail
- Road
- Aviation
- Shipping
- Bus and Coach

Each mode of transport is considered under a separate heading below, with each section highlighting key statistics, legislative and administrative frameworks and major ongoing developments. In addition there is a short section highlighting key issues in freight transport. As well as looking at these six modes of transport the briefing outlines the roles of Transport Scotland and the Regional Transport Partnerships.

When considering the legislative and administrative framework governing each form of transport it is important to remember that the European Union has competency in the field of transport. The European Commission sets out its strategic priorities for transport across the EU in the White Paper Roadmap to a Single European Transport Area – Towards a competitive and resource efficient transport system (European Commission 2011), which was published on 28 March 2011. This replaced the previous White Paper European Transport Policy for 2010: Time to Decide (European Commission 2001).

TRANSPORT SCOTLAND AND THE REGIONAL TRANSPORT PARTNERSHIPS

Transport Scotland was established as an executive agency of the then Scottish Executive in January 2005. Its role was substantially expanded when it merged with the Scottish Government’s Transport Directorate on 2 August 2010. Transport Scotland’s main responsibilities include:

- management of the ScotRail franchise
- funding and strategic direction of Network Rail’s Scottish region
- management of the Scottish trunk road network
- management of the national concessionary fares scheme for elderly and disabled people
- funding and management of major trunk road capital projects
- involvement in the delivery of railway capital projects
- providing advice to Scottish Ministers on transport issues
- the National Transport Strategy
- liaison with regional transport partnerships, including monitoring of funding
- sustainable transport, road safety and accessibility
- local roads policy
- aviation, bus, freight and taxi policy
- ferries, ports and harbours
- the Blue Badge Scheme (disabled persons’ parking permits)

The Transport (Scotland) Act 2005 (asp12) required the establishment of a series of Regional Transport Partnerships (RTPs) covering the whole of Scotland. Seven RTPs were established on 1 December 2005:
RTPs are governed by boards which consist of councillors from each of the constituent local authorities, who have voting rights, and external members appointed by Scottish Ministers, who may only vote in certain circumstances. The main task of each RTP is the drafting of a Regional Transport Strategy. In addition SPT is responsible for the operation of the Glasgow Subway plus a number of other transport functions which were previously carried out by the Strathclyde Passenger Transport Executive. RTPs can formally request Scottish Ministers to transfer transport delivery powers from their constituent local authorities if these are required to deliver the outcomes set out in the Regional Transport Strategy, e.g. developing parking policy and taking over responsibility for parking enforcement.

WALKING AND CYCLING

Walking and cycling are healthy and environmentally friendly forms of transport; they produce near zero carbon emissions, minimal noise and require little road space. They are particularly suited to shorter journeys.

LEGISLATIVE AND ADMINISTRATIVE FRAMEWORK

As might be expected, walking is not subject to many legislative constraints. The only regulations govern the operation and use of zebra, pelican and puffin crossings and the ban on walking on motorways except in an emergency. These regulations are set out in the Road Traffic Regulation Act 1984 (c 27), the provisions of which are reserved.

Bicycle design and the health and safety of cyclists are reserved matters. Cyclists using public roads are subject to the provisions of the Road Traffic Acts, which govern all road users, the subject matter of which is reserved. The one cycling offence which falls within the remit of the Scottish Parliament is set out in Section 129 of the Roads (Scotland) Act 1984 (c.54), which makes it an offence to cycle on a pavement or footpath.

The construction of new footways, footpaths, cycle paths and cycle lanes are devolved to the Scottish Parliament and are regulated through the provisions of the Roads (Scotland) Act 1984.

The Scottish Executive consulted on a draft Walking Strategy for Scotland (Scottish Executive 2003) between February and July 2003. It published an analysis of the consultation responses (Scottish Executive 2004) in September 2004. However, a final version of the strategy was never published.

The Scottish Government published the Cycling Action Plan for Scotland (CAPS) (Scottish Government 2010b) on 25 June 2010. This contains the vision that “by 2020, 10% of all journeys in Scotland will be by bike”. CAPS sets out 17 actions and outcomes categorised under the three broad headings of skills development, the network and delivery. The key themes explored under these three headings are as follows:
Skills Development: This heading covers cycle training for school children and additional cycle skills training for school teachers. It also focuses on increasing knowledge and awareness of cycling matters amongst built environment professionals and others with an interest in cycling, e.g. councillors and health professionals. It goes on to cover support for community cycling projects, cycling at school and mountain biking.

The Network: This section deals with the development of the National Cycle Network, planning and design policy and guidance, integration of cycling and public transport, improved road safety for cyclists and commissioning of research by the Scottish Government into the creation of a “hierarchy of care” for all road users.

Delivery: This section details direct Scottish Government investment in cycling over the last three financial years, the establishment of a Cycle Forum which will provide an annual progress report on CAPS implementation to the Scottish Government and other techniques for monitoring and evaluating cycle use.

MAIN AGENCIES AND ORGANISATIONS

Transport Scotland: Scottish Government agency responsible for national policy on cycling and walking.

Local authorities: responsible for local, and regional, transport policy and the development and maintenance of footways, footpaths and cycle paths plus associated infrastructure.

Cycling Scotland: a Scottish Government funded organisation which aims to encourage cycling.

Sustrans: charitable organisation which is developing the National Cycle Network and helping to promote sustainable travel.

Spokes (Lothian), Go Bike (Strathclyde), Highland Cycle Campaign and Aberdeen Cycle Forum: Regional cycle campaign organisations.

STATISTICS

The informal nature of walking and cycling does not lend itself to the collection of detailed statistics. However, the Scottish Household Survey does seek to collect some statistics on walking and cycling as modes of transport.

When asked as part of the 2009 Scottish Household Survey (SHS) (Scottish Government 2010a), 59% of adults confirmed that they had made a journey of over a quarter of a mile on foot within the previous seven days, with 48.4% stating they had walked for pleasure in the same period. The 2009 SHS indicated that 35% of Scottish households had access to one or more bikes that could be used by an adult. SHS statistics (Scottish Government 2009) for 2008 show that 4.7% of people had cycled for transport and/or pleasure during the previous seven days.

Living Streets and the Paths for all Partnership, charities which focus on improving the pedestrian environment and encouraging walking, have produced a useful summary of walking statistics and other information entitled Walkipedia (Living Streets and Paths for All Partnership 2010).

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1 Unless otherwise stated all statistics in this subject profile are taken from the Scottish Government publication Scottish Transport Statistics No 29: 2010 Edition (Scottish Government 2010c)
ONGOING DEVELOPMENTS

The Scottish Government and its partner organisations are committed to the delivery of the actions set out in CAPS. Information on progress will be made publicly available on the Transport Scotland website.

Development of cycling infrastructure is limited to the continuing development of the National Cycle Network by Sustrans and ad hoc infrastructure works by local authorities.

RAIL

Railways are best suited to (1) transporting high numbers of passengers between larger population centres over relatively long distances at high speed (2) the transport of very high numbers of people within a city region through metro-style services. Similarly, rail freight is best suited to transporting heavy bulk goods between ports, mines and end users, e.g. factories or power stations.

The Scotland Act 1998 defines the provision of rail services as a reserved matter. However, the Scottish Government is responsible for the letting and management of the ScotRail franchise and for providing the strategic direction, and funding, for the maintenance, renewal and expansion of Network Rail owned rail infrastructure in Scotland. In addition, the Scottish Parliament is able to consider Bills for the construction of new rail lines entirely within Scotland, e.g. the Stirling-Alloa-Kincardine Railway and Linked Improvements Bill (2003). However, it is likely that any new rail project would be approved under the Transport and Works Order system established by the Transport and Works (Scotland) Act 2007.

STATISTICS

In 2009/10 Scotland’s rail network extended to 2759 kilometres, of which 672 km were electrified. There were 349 passenger railway stations in Scotland, all of which are owned by Network Rail, except Prestwick Airport station, which is owned by the airport operators Infratil Limited. The re-opening of the Airdrie-Bathgate railway in December 2010, which is approximately 24 kilometres long and serves three new stations, means these figures now total 2783km and 352 stations, although official confirmation of this will not be published until later in 2011.

LEGISLATIVE AND ADMINISTRATIVE FRAMEWORK

The current privatised railway system was established by the Railways Act 1993 (c 43), which has been substantially amended by the Transport Act 2000 (c 38) and the Railways Act 2005 (c 14).

There are two major policy documents which relate to Scotland’s railways:

- Route Utilisation Strategy (Network Rail 2007): Published by Network Rail in February 2007, following a period of consultation, the Scottish Route Utilisation Strategy sets out a programme for the development of Scotland’s rail infrastructure over a period of 10 years. Network Rail published Scotland Route Utilisation Strategy Generation Two: Draft for Consultation (Network Rail 2010) in October 2010, consultation closed on 13 January 2011 and Network Rail intends to publish a new Route Utilisation Strategy in summer 2011.
Scotland’s Railways (Scottish Executive 2006b): This document, which supplements the Scottish Government’s National Transport Strategy, sets out a 20 year vision for the development of Scotland’s rail network.

In addition to these documents the Scottish Government is required, under the provisions of the Railways Act 2005 (c14), to produce a High Level Output Specification (HLOS) and an associated Statement of Funds Available (SOFA). These documents set out what ‘outputs’ the Scottish Government wished to purchase from the rail industry for a “control period” 3 (1 April 2009 to 31 March 2014) and what funds it will provide to buy these outputs. These documents were assessed by the Office of Rail Regulation (ORR) to ensure that the funds available were appropriate for the outputs being purchased. Following this exercise the ORR set the level of track access charges paid by rail operators to Network Rail for the use of the Scottish rail infrastructure.

MAIN AGENCIES AND ORGANISATIONS

Transport Scotland: Transport Scotland, acting on behalf of Scottish Ministers, is responsible for the letting and management of the ScotRail franchise, currently operated by First ScotRail. It is also responsible for setting the high level strategy for the maintenance and enhancement of the Scottish rail infrastructure by Network Rail. In common with other national rail networks, the Scottish rail network cannot cover its costs through fare and freight carriage revenue alone, so the Scottish Government provides funding to First ScotRail and Network Rail to allow them to carry out their respective tasks, e.g. £299.5m to First ScotRail and £426.1m to Network Rail in financial year 2011/12 (Scottish Government 2010d).

Department for Transport: The Department for Transport (DfT) is responsible for UK rail policy and the letting and management of English and cross-border rail franchises (excluding the Caledonian Sleeper services which form part of the ScotRail franchise), including the east and west coast mainline and cross-country franchises which extend into Scotland. The DfT provides funding to Network Rail for operations in England and Wales and is responsible for drafting HLOS and SOFA documents covering the network outside of Scotland.

Train Operating Companies (TOCs): Five passenger TOCs operate in Scotland, these are:

- **ScotRail**: Currently operated by Aberdeen based First Group, ScotRail operates approximately 95% of passenger train services in Scotland and the Anglo-Scottish Caledonian Sleeper services.

- **East Coast**: East Coast Main Line Company took over responsibility of the East Coast franchise, operating intercity services between Scotland, the north of England and London, on 13 November 2009. East Coast is a part of the UK Department for Transport owned Directly Operated Railways, providing services as “operator of last resort” following the collapse of the previous franchise agreement. The UK Government intends to re-tender the East Coast franchise later in 2011.

- **Virgin Trains**: Virgin Trains operates the west coast mainline services between Glasgow, the north west of England and London and Edinburgh/Glasgow and Birmingham. This franchise is currently being re-let, with the successful bidder assuming control on 1 April 2012 for a period of 14 years, with an option for a further one year extension.

- **CrossCountry Trains**: CrossCountry provides inter-regional rail services across the UK. It is part of the Arriva Group, which was recently purchased by German state railway operator Deutsche Bahn.

- **First TransPennine Express**: Operates services between Edinburgh/Glasgow and Manchester Airport. Operated by a company jointly owned by First Group and Keolis (majority owned by French state railway operator SNCF).
Freight Operating Companies (FOCs): Seven FOCs are licensed to operate on the UK rail network, the largest of which are DB Schenker, Freightliner, GB Railfreight, and Direct Rail Services (DRS).

Rolling Stock Leasing Companies (ROSCOs): Virtually all the rolling stock operating on UK railways is leased by TOCs and FOCs from three major ROSCOs. These are Porterbrook, Eversholt and Angel Trains.

Network Rail: Network Rail owns the national rail infrastructure, which includes track, signalling, bridges, tunnels and stations. Network Rail is also responsible for the development of the national rail timetable and the production of route utilisation strategies. Maintenance of Network Rail owned infrastructure is carried out by its own workforce, although major renewal and enhancement projects are normally carried out by third parties such as Balfour Beatty or Carillion.

Network Rail announced on 21 February 2011 that it was to devolve responsibility for safety, customer service, asset management, operations, planning and delivery of maintenance and some renewals and enhancements to a number of devolved business units. The Scotland unit is one of the first to receive such devolved powers along with the Wessex Unit.

Network Rail is a company limited by guarantee which means that, while it is a private organisation and operates as a commercial business, it has no shareholders. Instead it is accountable to members, who hold the board to account and who do not receive dividends or share capital.

REGULATORY BODY

Office of Rail Regulation: The ORR is the economic and safety regulator for the UK rail industry. Its main tasks are:

- to ensure that Network Rail manages the network efficiently and in a way that meets the needs of its users
- to encourage continuous improvement in health and safety performance
- to secure compliance with relevant health and safety law, including taking enforcement action where necessary
- to develop policy and enhance relevant railway health and safety legislation
- to license operators of railway assets
- to set the terms for access to the network and other railway facilities by operating companies
- To enforce competition law in the rail sector.

ONGOING DEVELOPMENTS

The following rail schemes are about to enter their construction phases:

- **Borders Railway Project**: A project to reopen 35 miles of dismantled railway between Edinburgh and Tweedbank on the outskirts of Galashiels. Preparatory work along the route is underway, with the main contract due to be let soon with the line due to open in 2014.
- **Edinburgh-Glasgow Improvement Programme**: A project, funded through borrowing by Network Rail, to improve capacity and journey times on Scotland’s busiest rail corridor. The programme includes electrifying the railway between Edinburgh and Glasgow Queen Street, Stirling, Dunblane and Alloa. This will allow for six trains per hour to operate
between Edinburgh and Glasgow via Falkirk High and allow for a fastest city to city journey time of around 37 minutes. The project is due to be completed by 2016

**ROAD**

The private car is the dominant form of transport in Scotland (both by number of trips taken and number of miles travelled), despite the fact that in 2009 some 30.7% of households in Scotland did not have access to a car.

The UK Government retains responsibility for road traffic law, vehicle and driver licensing and taxation, public service vehicle operators and goods operators licensing and the regulation of road safety. Responsibility for all aspects of road building and maintenance is devolved.

**STATISTICS**

The total number of vehicles in Scotland stood at 2,707,000 in 2009, an increase of approximately 576,000 since 1999. The number of private cars and light goods vehicles totalled 2,381,000 in 2009, an increase of approximately 323,000 since 1999. There were 7,758 licensed operators of heavy goods vehicles in Scotland in 2009-10, a decrease of 202 since 2001. There were 274,083 blue badges (blue badges provide a range of parking benefits for disabled people who travel as drivers or passengers) on issue at the end of March 2010, an increase of 53,737 since 2003. The total amount of miles travelled by all vehicles in Scotland has increased from 39,770,000 in 1999 to 44,219,000, an increase of 11%.

Details of the size of Scotland’s road network, as of 1 April 2009, are as follows:

<table>
<thead>
<tr>
<th>Road Type</th>
<th>Distance (KM)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Motorways (inc slip roads)</td>
<td>559</td>
</tr>
<tr>
<td>A,B and C Roads</td>
<td>28,419</td>
</tr>
<tr>
<td>Unclassified Roads</td>
<td>26,442</td>
</tr>
<tr>
<td>All roads</td>
<td>55,420</td>
</tr>
</tbody>
</table>

**LEGISLATIVE AND ADMINISTRATIVE FRAMEWORK**

The main pieces of road transport related legislation reserved to the UK Parliament are: the Motor Vehicles (International Circulation) Act 1952 (c 39), the Public Passenger Vehicles Act 1981 (c 14), the Transport Act 1985 (c 67), certain sections of the Road Traffic Regulation Act 1984 (c 27), the Road Traffic Act 1988 (c 52), the Road Traffic Offenders Act 1988 (c 53), the Vehicle Excise and Registration Act 1994 (c 22), the Road Traffic (New Drivers) Act 1995 (c 13) and the Goods Vehicles (Licensing of Operators) Act 1995 (c 23).

There are three main roads-related Acts which fall within the competence of the Scottish Parliament, these are:

- **Roads (Scotland) Act 1984**: Governs the development, maintenance, improvement and operation of public roads in Scotland.
- **Transport (Scotland) Act 2001**: Allows local authorities to establish statutory bus quality partnership and quality contract schemes, introduce local road user charging schemes and other more minor transport related matters.
- **Transport (Scotland) Act 2005**: Established Regional Transport Partnerships, the Scottish Roadworks Commissioner and allowed for the development of national concessionary travel schemes and other more minor transport related matters.
MAIN AGENCIES AND ORGANISATIONS

Driving Standards Agency (DSA): An agency of the Department for Transport (DfT) the DSAs main responsibilities are: conducting driving tests, maintaining a register of car driving instructors and checking their standard of tuition, and supervising compulsory basic training for motorcyclists.

Driving and Vehicle Licensing Agency (DVLA): An agency of the DfT, the DVLA maintains registers of drivers and vehicles and collects vehicle excise duty.

Vehicle and Operator Services Agency (VOSA): VOSA is responsible for MoT testing, the Statutory Testing of HGVs, buses and coaches, plus associated investigation and enforcement action in support of the work of the independent Traffic Commissioners.

Traffic Commissioners: The Traffic Commissioners are appointed by the Secretary of State for Transport and have responsibility in their area for licensing the operators of HGVs, buses and coaches; the registration of local bus services; and disciplinary action against drivers of HGVs and PSVs. The Traffic Commissioner for Scotland is also responsible for dealing with both appeals against decisions by Scottish local authorities on taxi fares and with appeals against charging and removing improperly parked vehicles in Edinburgh and Glasgow.

Transport Scotland: See page three for a full description of Transport Scotland’s role. Transport Scotland is responsible for the development, management and maintenance of the trunk road network. It has contracted out the maintenance of the trunk road network to three private companies:

- Scotland TranServ: Holds the contract for North West Scotland
- Amey Highways: Holds the contract for South West Scotland
- BEAR Scotland Ltd: Holds the contracts for North East and South East Scotland

Local Authorities: Each local authority is, under the Roads (Scotland) Act 1984, designated as the roads authority for their area. They are responsible for all aspects of the non-trunk road network within their jurisdiction.

ONGOING DEVELOPMENTS

The following Scottish Government supported strategic road projects are currently being built, are about to enter construction or have been authorised.

M74 Completion: The M74 completion project involves the construction of a five mile long, three-lane motorway with hard shoulders between the Fullarton Road junction near Carmyle to the M8 motorway just west of the Kingston Bridge. This new section of the M74 is due to open in June 2011.

Forth Replacement Crossing: A project to build a cable-stayed dual two lane road bridge with hard shoulders adjacent to the current Forth Road Bridge plus associated connecting roads and electronic traffic management system. The project is to be directly funded by the Scottish Government, with the most recent cost estimate of being between £1.47bn and £1.62bn. Construction is due to start in 2011 and be completed in 2016.

Aberdeen Western Peripheral Route (AWPR): A bypass around western Aberdeen between the A90 (south) at Charleston and the A96 to Inverurie. Scottish Ministers granted permission for the construction of the AWPR on 21 December 2009. The Scottish Parliament’s Transport, Infrastructure and Climate Change Committee recommended that the necessary Road Orders
be approved by Parliament at its meeting of 23 February 2010. The Scottish Parliament approved these Orders at its meeting of 3 March 2010. No project timetable is available at present.

AIR

Regulation of aviation and air transport is a reserved matter, with the Department for Transport taking the lead role in policy making. However, as the planning system is a devolved matter decisions regarding development at airports will be taken by the appropriate authorities within Scotland, usually the appropriate local authority, or occasionally the Scottish Ministers where an appeal has been lodged or an application called-in. The Scottish Government also has powers to designate particular routes as Public Service Obligations\(^2\) (PSO), a scheduled air service on routes serving a peripheral region. The rationale for imposing a PSO should be based on the fact that the maintenance of regular air services is considered vital for the economic development of the region where the airport is located. Furthermore a PSO should be imposed where adequate provision of air services in terms of continuity, capacity and pricing could not be possible if the service operators were solely taking into consideration their own commercial interests. In addition, the Scottish Government operates an air discount scheme for residents of remote rural areas. This scheme offers eligible people discounted air fares on routes between certain highland and island airports and Aberdeen, Edinburgh, Glasgow and Inverness.

STATISTICS

There were 22.5m air terminal passengers in Scotland in 2009. 6% of these travelled to/from other Scottish airports, 48% to/from other parts of the UK, and 34% between Scotland and Europe. In 2009, 490,000 aircraft movements, and 45,659 tonnes of air freight passed through Scotland's airports.

LEGISLATIVE AND ADMINISTRATIVE FRAMEWORK

The current UK civil aviation system operates under the Carriage by Air Act 1961, the Carriage by Air (Supplementary Provisions) Act 1962, the Carriage by Air and Road Act 1979, the Civil Aviation Act 1982, the Aviation Security Act 1982, the Airports Act 1986, the Transport Act 2000 and the Civil Aviation Act 2006.

MAIN AGENCIES AND ORGANISATIONS

**International Civil Aviation Organisation (ICAO):** The ICAO, now an agency of the United Nations, was established by the Convention on Civil Aviation (Chicago Convention) which was signed in December 1944. The ICAO is responsible for developing international aviation standards.

**European Civil Aviation Conference (ECAC):** Established in 1955 ECAC provides a focus for inter-governmental co-operation in air transport matters in Europe. It currently has 41 members and its main aim is to harmonise civil aviation policies and practices between member states.

\(^2\) PSO can also apply to ferry services
Department for Transport (DfT): The DfT is the UK Government department responsible for aviation policy.

Civil Aviation Authority (CAA): The CAA is a public corporation responsible for safety and economic regulation of aviation industries; including airlines, airports and national air traffic services. It also manages the Air Travel Organiser’s Licensing (ATOL) scheme.

National Air Traffic Services Ltd (NATS): NATS, a public/private partnership between the Airline Group, a consortium of seven UK airlines, which holds 42% of shares, NATS staff who hold 5%, BAA which owns 4% and the UK government which holds 49%, provides ‘en-route’ air traffic control over the UK and air traffic control services at 15 UK airports.

BAA Scottish Airports: BAA owns and manages Glasgow, Edinburgh and Aberdeen airports – Scotland’s three largest airports. A recent ruling by the Competition Commission means that, pending any further legal challenges, BAA will be required to sell one of either Edinburgh or Glasgow airports.

Highlands and Islands Airports Ltd (HIAL): HIAL, a company owned entirely by the Scottish Government, owns and manages eleven airports throughout the Highlands and Islands of Scotland.

ONGOING DEVELOPMENTS

Review of UK air transport policy: The Department for Transport published a White Paper entitled The Future of Air Transport on 16 December 2003. This set out a vision for the development of the UK’s air services and airports over a period of 30 years. Chapter 5 of the White Paper, which was written in conjunction with the then Scottish Executive, dealt with the development of Scotland’s air services. The UK Government announced on 30 March 2011 that it was launching a review of UK aviation policy, with the publication of Developing a sustainable framework for UK aviation: Scoping document (Department for Transport 2011). This document poses a series of questions on the development of aviation policy and is open for comments until 30 September 2011. It is worth noting that changes to aviation policy in other parts of the UK, particularly regarding London Heathrow Airport, can have a significant impact on Scottish aviation as many Scottish passengers pass through these larger airports as part of their journey.

SHIPPING

Regulation of shipping is a reserved matter, with the Department for Transport taking the lead role in policy-making and implementation. However, the Scottish Government retains control of the planning system and PSO designation both of which affect ports, harbours and ferry routes, as described in more detail in the Air section above. The Scottish Government also has the power to award freight mode shift grants to support the switch of freight transport from road to water.

STATISTICS

In 2009, the latest year for which statistics are available, a total of 61.8 million tonnes of freight was moved by water transport in Scotland: 19.8 million tonnes of "coastwise" traffic to other ports in the United Kingdom (including some in Scotland), 3.6 million tonnes of "one port" traffic
to offshore installations, and 38.3 million tonnes of exports from the major Scottish ports. Only 10.1 million tonnes of waterborne freight was carried for part of its journey on inland waterways.

In 2009, 1.9 million passengers were carried on ferry services between Scotland and Northern Ireland. Caledonian MacBrayne ferries carried 5.3 million passengers (plus 1.2 million cars and 108,000 commercial vehicles and buses). Northlink Ferries services between northern Scotland and the Northern Isles carried 309,000 passengers, Shetland Islands Council services carried 637,000 and Orkney Ferries services carried 329,000.

**LEGISLATIVE AND ADMINISTRATIVE FRAMEWORK**


UK ports policy is set out in the Department for Transport (2005) policy document [Modern Ports](#).

**MAIN AGENCIES AND ORGANISATIONS**

- **International Maritime Organisation (IMO)**: The IMO is a United Nations specialised agency responsible for improving maritime safety and preventing pollution from ships. It is also responsible for technical co-operation between members.
- **Department for Transport**: Responsible for formulation and implementation of UK shipping, and certain aspects of Scottish ports, policy.
- **Maritime and Coastguard Agency (MCA)**: The MCA is responsible for search and rescue operations, vessel safety inspections and marine pollution reduction and response.
- **Caledonian MacBrayne Ltd (CalMac)**: A company wholly owned by the Scottish Government which provides ferry services to 22 islands and four peninsulas on Scotland’s west coast, including ‘lifeline’ services. CalMac was split into two separate companies on 1 October 2006, namely:
  - Caledonian Maritime Assets Ltd: Retains ownership of CalMac vessels and infrastructure, including harbours.
  - CalMac Ferries Ltd: Holds the contract to provide Clyde and Hebrides ferry services, which runs until September 2013.
- **Western Ferries**: Private operator of unsubsidised car ferry service between Dunoon (Hunter’s Quay) and Gourock (McInroy’s Point). Submitted initial pre-qualification documents for the running of the Clyde and Hebrides ferry services currently provided by CalMac to the Scottish Executive; however they withdrew from the process before the formal invitation to tender was issued.
- **Northlink Ferries**: The company responsible for operating ferries from Aberdeen and Scrabster to Orkney and the Shetlands.
- **DFDS Seaways**: Operates a four times a week freight only ferry service between Rosyth and Zeebrugge.
In addition there are a number of major private sector port operators, which can exercise some statutory functions inherited from their public sector forerunners. These include Forth Ports and Clydeport which is part of the Peel Ports group.

ONGOING DEVELOPMENTS

The Scottish Government is currently undertaking a major review into all aspects of the provision of ferry services in Scotland. A major public consultation on the initial outcomes of the review ran from 10 June until 30 September 2010. The Scottish Government intends to publish a consultation draft of its ferries plan at some point in 2011.

BUS AND COACH

Scotland's local bus and inter-city coach services are provided by private sector operators, with the exception of Lothian Buses which is local authority owned. Services are provided on a purely commercial basis, unless a local authority wishes to offer a subsidy for the operation of a socially necessary service which cannot be provided on a commercial basis.

STATISTICS

There were 467 million local bus journeys in Scotland during 2009-10, a fall of 26 million from 2008-09 but an increase of 12 million from 1999-00. Bus fares in Scotland increased by 7.3% above inflation between 1999 and 2010. Local authorities spent £61 million on subsidising socially necessary bus services during 2009-10, a cash value increase of £23 million from 2004-05. The Scottish Government spent £201 million on concessionary fares during 2009-10, a cash value increase of £111 million from 2004-05.

LEGISLATIVE AND ADMINISTRATIVE FRAMEWORK

Many aspects of the regulation of bus and coach services, including matters such as health and safety, vehicle design, driver working conditions and vehicle inspection are reserved. The Scottish Government is responsible for concessionary fares and legislation governing the regulation of bus service provision, e.g. through bus quality contracts.

The main pieces of bus and coach related legislation are:

Transport Act 1985: The three key features of the 1985 Act are:

- Bus operators are required to register each local bus service with the Traffic Commissioners
- Local authorities must only award subsidies for the provision of socially necessary bus services, which are commercially unattractive, after tenders have been sought from different bus operators
- Local authority bus operations, i.e. those owned by the regional councils and Strathclyde Passenger Transport Executive, had to be formed into separate passenger transport companies operating at arm's length from the local authorities/SPT, with a view to privatisation.

Transport (Scotland) Act 1989: The 1989 Act authorised the break-up of the Scottish Office owned Scottish Bus Group into several regional companies, which were then privatised.
**Transport (Scotland) Act 2001:** The 2001 Act established systems for setting up formal bus quality partnerships and bus quality contract schemes.

**Transport (Scotland) Act 2005:** The 2005 Act provided the legislative basis for the national concessionary fares scheme for elderly and disabled people, which is administered by Transport Scotland.

**MAIN AGENCIES AND ORGANISATIONS**

**Department for Transport:** The DfT is responsible for bus operator licensing and enforcement, which is mainly provided through the offices of the Traffic Commissioners and associated agencies.

**Transport Scotland:** Transport Scotland sets the policy framework for the provision of bus services in Scotland. It also administers and funds the national concessionary fares scheme for elderly and disabled people and provides other funding streams for the provision of local bus services, e.g. bus service operators grant.

**Local Authorities:** Local authorities are responsible for the provision of bus infrastructure, e.g. bus shelters and bus priority measures, and the provision of subsidies for socially necessary, non-commercial bus services.

**Bus Operators:** Bus services in Scotland are provided predominantly by private sector companies, including international bus giants such as First and Stagecoach and many smaller local companies.

**ONGOING DEVELOPMENTS**

The then Scottish Executive published *An Action Plan for Buses in Scotland* (Scottish Executive 2006d) on 5 December 2006. This document, a supplement to the National Transport Strategy, sets out the Government’s thinking on the development of local bus services in Scotland over a 20 year period. The Plan does not recommend any substantial new developments in bus policy and legislation, rather greater partnership working between the industry and government and better use of existing legislation and enforcement powers.

**FREIGHT TRANSPORT**

The average company may only spend 3-4% of sales revenue on freight transport (European Logistics Association 2004), but without it their operations would soon come to an abrupt halt. To be able to compete effectively in national and international markets, businesses must be able to provide rapid, reliable and efficient delivery. In recent years their dependence on the freight transport system has increased as globalisation has extended supply lines and as the adoption of the ‘just-in-time’ principle has greatly reduced inventory levels across the supply chain. For a relatively geographically peripheral country with strong trading links, such as Scotland, these trends present a major challenge, particularly to organisations involved in manufacturing or the extraction, processing and use of bulky raw materials such as forestry or electricity generation.

The following sections outline key facts and statistics for the four main modes of freight transport in Scotland.
Road Freight

Nearly all freight is transported by road at some point in the logistics chain, even where it is primarily transported by other modes. Road haulage accounts for approximately 70% of Scotland’s freight tonnage, making it the most important mode of freight transport in Scotland.

In 2009 a total of 125 million tonnes of road freight was lifted in Scotland and transported to a Scottish destination. A further 13.4 million tonnes of goods were lifted in Scotland and delivered to elsewhere in the UK and 16.8 million tonnes of goods were moved into Scotland from elsewhere in the UK.

In 2009-10 a total of 7758 companies were licensed in Scotland to operate goods vehicles with a gross weight of 3.5 tonnes or more. 46% of these licences only allowed the operators to carry their own products. The remaining licences were issued to ‘hire and reward’ operators who provide transport services on a ‘third-party’ basis to other companies. Approximately 80% of these hauliers had ‘standard national licences’ allowing them to trade in the UK, the rest having international licences. The Scottish road haulage industry is highly fragmented, with 86% of hauliers running five or fewer vehicles.

Rail Freight

Rail freight is particularly suited to the transport of heavy, bulk goods and long distance haulage. The Scottish Government encourages the transfer of freight from road to rail through freight mode shift grants, which provide financial support for the use of rail where this yields environmental benefits.

In 2007-08 the Scottish rail network carried 11 million tonnes of freight, a 61% increase since 1997-98. 64% of the tonnage lifted was minerals, mainly coal. Indeed coal has accounted for a large proportion of the growth in rail freight traffic over the past 10 years. Rail has also been successful in capturing new retail traffic from companies such as ASDA, IKEA and Tesco for distribution to their warehouses and shops in Scotland. This has been done in partnership with road-based logistics companies and, in some cases, with the assistance of Freight Facilities Grants awarded by the Scottish Government.

The Scottish rail freight market is dominated by DB Schenker, although services are also provided by other operators, including Freightliner and Direct Rail Services.

Water-borne freight

Most of the UK’s imports arrive, and exports depart, by sea. Although Scotland has several large ports on the east and west coasts, the UK’s deep-sea container ports are all located in England. The Scottish Government supports the transfer of freight from road to shipping through freight mode shift grants.

In 2009 a total of 61.8 million tonnes of freight were lifted by water-borne transport in Scotland, of which 38.3 million tonnes were exported from the UK, 19.8 million tonnes were shipped to other UK ports and 3.6 million tonnes were shipped to offshore installations. Imports totalled 13.53 million tonnes, 6.3 million tonnes of which were shipped into Scotland from other UK ports.

Scotland has only one direct freight ferry link with mainland Europe, the four times a week DFDS Seaways ferry services between Rosyth and Zeebrugge.
Air Freight

Air freight accounts for a tiny fraction of the total freight tonnage moving to and from Scotland. However, as air freight services cater for high value traffic it accounts for a much larger share of the value of Scotland’s trade. The Scottish Government does not directly support the development of air freight services.

Total airfreight tonnage passing through Scottish airports in 2009 stood at 45,659 tonnes, an increase of 105 tonnes on the previous year but a fall of 33,446 tonnes from that carried in 2004. The nature of the freight carried and the airports used have changed considerably over that time. There has been a reduction in large dedicated airfreight flights, mainly to Prestwick Airport, and an increase in express parcel and mail flights to Edinburgh Airport.

ONGOING DEVELOPMENTS

The former Local Government and Transport Committee conducted an inquiry into freight transport in Scotland during 2006. Their Report on Freight Transport in Scotland (Scottish Parliament Local Government and Transport Committee 2006), published on 4 July 2006, made a series of recommendations to the then Scottish Executive on how the freight transport industry in Scotland could be better supported by government.

The then Scottish Executive published a Freight Action Plan for Scotland on 5 December 2006 (Scottish Executive 2006e), jointly written with Scottish Enterprise and Highlands and Islands Enterprise, as a supplement to the National Transport Strategy. This set out the then Scottish Executive’s views on the development of the freight transport industry in Scotland.
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