This subject profile provides an introduction to walking, cycling, road, rail, air, bus, maritime and freight transport in Scotland. Further, more detailed, briefings on specific transport issues 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.

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, while remaining as a separate agency. Transport Scotland’s main responsibilities include:

- Management of the ScotRail and Caledonian Sleeper franchises
- 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).

Transport Scotland sets out the Scottish Government’s national transport policies and priorities in the National Transport Strategy (Transport Scotland 2016), which was refreshed in January 2016.
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:

- Zetland Transport Partnership (ZetTrans)
- Highlands and Islands Transport Partnership (HITRANS)
- North-East of Scotland Transport Partnership (NESTRANS)
- Tayside and Central Scotland Transport Partnership (TACTRAN)
- South-East of Scotland Transport Partnership (SESTRAN)
- Strathclyde Partnership for Transport (SPT)
- South-West of Scotland Transport Partnership (SWESTRANS)

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.

**SCOTLAND ACT 2016**

The Scotland Act 2016 contained a number of transport related provisions, which are summarised below:

**Railways:** The prohibition on a publicly owned organisation bidding to run a rail franchise let by Scottish Ministers, set out in the Railways Act 1993, is removed. This will allow public sector bidders to tender for the next ScotRail or Caledonian Sleeper franchise. However, these are not due to be retendered during Session 5 of the Scottish Parliament.

**Air passenger duty:** The Finance Act 1994 (air passenger duty) is amended to limit Air Passenger Duty to flights leaving from airports in England, Wales and Northern Ireland. The power to levy a tax on the carriage of air passengers is devolved to the Scottish Parliament. The SNP manifesto contained a commitment to “reduce Air Passenger Duty by 50 per cent during the course of the next Parliament”.

**Speed limits:** The power to set national speed limits, including the default 30mph limit applied to restricted roads (generally roads in urban areas that have street lighting), is devolved.

**Road signs:** Powers to make, or amend current, road signs are devolved to Scottish Ministers. The subject matter of section 36 of the Road Traffic Act 1988 (offence of failing to comply with a traffic sign) is also devolved.

**Parking:** The regulation of parking on roads, as set out in the Road Traffic Act 1988, is devolved. This gives the Scottish Parliament power to legislate on matters such as pavement parking, double parking and parking in front of dropped kerbs – which was the subject of the Session 4 [Footway Parking and Double Parking (Scotland) Bill](https://www.parliament.scot/bills/acts/4/2016/203) which fell on dissolution. The SNP manifesto (SNP 2016) contained a commitment to introduce a Transport Bill that would include provisions “to enable and enforce responsible parking”.
**Commissioners of Northern Lighthouses & Maritime and Coastguard Agency:** The Scottish Government and the Scottish Parliament will have a formal role in setting the strategic priorities for the Maritime and Coastguard Agency (MCA) and the Northern Lighthouse Board (NLB) with respect to their activities in Scotland. Scottish Ministers will have the power to appoint to both bodies. The MCA and NLB will lay their annual reports and accounts before the Scottish Parliament and submit reports to, and appear before, committees of the Scottish Parliament.

**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 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 Government published *Let’s Get Scotland Walking: The National Walking Strategy* (Scottish Government 2014) on 18 November 2014. The strategy sets three strategic aims, which are:

- Create a culture of walking where everyone walks more often as part of their everyday travel and for recreation and well-being
- Better quality walking environments with attractive, well designed and managed built and natural spaces for everyone
- Enable easy, convenient and safe independent mobility for everyone

The Scottish Government first set out its policies on cycling, in June 2010, in the *Cycling Action Plan for Scotland* (CAPS) (Scottish Government 2010a). This committed Transport Scotland, working with partner organisations, to 17 actions on issues such as cycle training, research, development of the national cycle network, professional development, cycle promotion and driver education. The key vision set out in this document was that 10% of all journeys made in Scotland would be made by bike by 2020.

Transport Scotland published an updated version of CAPS (Transport Scotland 2013) on 19 June 2013. The key vision set out in the original CAPS was amended to state that “10% of everyday journeys taken in Scotland will be by bike”. The updated CAPS does not define what constitutes an “everyday journey”.

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The updated CAPS committed Transport Scotland, working with partner organisations, to 19 actions, such as a national cycle summit, cycle training, cycle promotion and infrastructure development.

In addition to the policy documents mentioned above, Transport Scotland (2014c) published *A Long-Term Vision for Active Travel in Scotland 2030*, which sets out the Scottish Government’s long term ambitions for the development of walking and cycling as means of transport until 2030.

**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**¹

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.

During 2014 (Transport Scotland 2015), 67% of adults confirmed that they had made a journey of over a quarter of a mile on foot within the previous seven days, with 58% stating they had walked for pleasure in the same period. During 2014 some 34% of Scottish households had access to one or more bikes that could be used by an adult and 6.1% of people had cycled for transport and/or pleasure during the previous seven days.

**ONGOING DEVELOPMENTS**

The Scottish Government and its partner organisations are committed to the delivery of the actions set out in CAPS and the National Walking Strategy. Many local authorities, working with Sustrans and other partners, are delivering new and upgraded cycle and walking infrastructure. This work is supported by Scottish Government funding, with individual projects and investment priorities identified at a local authority level.

**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

¹ Unless otherwise stated all statistics in this briefing are taken from the Transport Scotland publication *Scottish Transport Statistics: 2015 Edition* (Transport Scotland 2015)
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 Borders Railway which was authorised by the Waverley Railway (Scotland) Bill (2006). However, it is likely that any new rail lines would be approved under the Transport and Works Order system established by the Transport and Works (Scotland) Act 2007.

STATISTICS

In 2013/14 Scotland’s rail network extended to 2763 kilometres, of which 709 km were electrified. There were 351 passenger railway stations in Scotland, all of which are owned by Network Rail, except Prestwick Airport station, which is owned by the airport operators – currently the Scottish Ministers. The re-opening of the Borders Railway in September 2015, which is approximately 48 kilometres long and serves seven new stations, means these figures now total 2811km and 358 stations, although official confirmation of this will not be published until later in 2016.

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).

Key documents which relate to Scotland’s railways include:

Scotland Route Study – Draft for Consultation (Network Rail 2015): The consultation draft of the Scotland Route Study, produced by Network Rail in collaboration with key industry partners, aims to provide Scottish Ministers and other industry funders with information on the Scottish rail network and possible options on its long term development, up until the 2040’s.

High Level Output Specification (HLOS) and an associated Statement of Funds Available (SOFA) (Transport Scotland 2012a). These documents set out what ‘outputs’ the Scottish Government wished to purchase from the rail industry for “control period 5” (April 2014 to March 2019) and what funds it will provide to buy these outputs. These documents were assessed by the Office of Rail and Road (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.

ScotRail franchise agreement (Transport Scotland 2014a): This sets out the terms of the franchise agreement between Scottish Ministers and Abellio, governing the operation of the ScotRail franchise. The franchise commenced on 1 April 2015 and is due to run until 31 March 2022, with the option of an extension until 31 March 2025.

Caledonian Sleeper franchise agreement (Transport Scotland 2014b): This sets out the terms of the franchise agreement between Scottish Ministers and SERCO, governing the operation of the Caledonian Sleeper franchise. The franchise commenced on 31 March 2015 and is due to run until 31 March 2030.
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 Abellio, and the Caledonian Sleeper franchise, currently operated by SERCO. 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 ScotRail and Network Rail to allow them to carry out their respective tasks.

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), 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 Abellio, a commercial offshoot of Nederlandse Spoorwegen (Dutch Railways). ScotRail operates approximately 95% of passenger train services in Scotland
- **Caledonian Sleeper**: Currently operated by SERCO, the Caledonian Sleeper provides overnight rail services linking northern and central Scotland with London.
- **Virgin Trains East Coast**: Virgin Trains East Coast assumed responsibility for the East Coast franchise, operating intercity services between Scotland, the north of England and London, on 2 March 2015. Virgin Trains East Coast is 90% owned by Stagecoach Group with Virgin owning the remaining 10%.
- **Virgin Trains**: Virgin Trains operates the west coast mainline services between Glasgow/Edinburgh, the north west of England and London. Virgin Trains is 49% owned by Stagecoach Group, with the other 51% owned by Virgin Rail Group. The franchise is due to be re-tendered later in 2016, with the successful bidder being announced in November 2017 and the franchise beginning in April 2018.
- **CrossCountry Trains**: CrossCountry provides inter-regional rail services across the UK. The current franchise is due to expire in November 2019. CrossCountry is part of the Arriva Group, which is owned by German state railway operator Deutsche Bahn.
- **First TransPennine Express**: TransPennine Express operates services between Edinburgh/Glasgow and destinations in northern England. The most recent franchise began on 1 April 2016 and is operated by Aberdeen based First Group.

Freight Operating Companies (FOCs): Seven FOCs are licensed to operate on the UK rail network, the largest of which are DB Cargo, 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, operates and maintains 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 long term planning for the development of the rail network. Network Rail was re-classified as an arms-length body of the UK Government in 2014. Scottish Ministers remain responsible for specifying and funding Network Rail operations in Scotland.
REGULATORY BODY

Office of Rail and Road: 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 currently under development or in preparation:

- **Edinburgh Glasgow Improvement Programme** (EGIP): A programme to upgrade and electrify the main line between Edinburgh, Falkirk High and Glasgow Queen Street plus lines to Alloa, Stirling and Dunblane. The project is due to be complete by December 2018, with a major redevelopment of Glasgow Queen Street complete by March 2019.
- **Aberdeen to Inverness Rail Improvements**: This project aims to provide a two-hour end-to-end journey time on this route, with an hourly service, enhanced commuter services into Inverness and Aberdeen and new stations at Kintore and Dalcross. The project is not due for completion until 2030, although initial work will be completed by 2019.
- **Highland Main Line**: This project aims to allow for a journey time of 2 hours 45 minutes between Inverness and the Central Belt. Current targets are the provision of an average Inverness-Central Belt journey time of 3 hours operated an hourly basis by 2025.
- **Shotts Line Electrification**: Network Rail is currently undertaking work to structures on the line between Holytown and Midcalder, to allow for the erection of overhead line equipment. The electrification of the line is due to be completed during 2019, providing another electrified route between Edinburgh and Glasgow.

There are also well established campaigns to reopen the railway lines between Leuchars and St. Andrews (StARLink), Tweedbank and Carlisle (Campaign for Borders Rail) and Thornton and Leven (LevenMouth Rail Campaign).

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 2014 some 30.8% 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, maintenance, speed limits and road signs are devolved.
STATISTICS

The total number of vehicles in Scotland stood at 2,821,000 in 2014, an increase of approximately 373,000 since 2004. There were 6333 licensed operators of heavy goods vehicles in Scotland in 2014-15, a decrease of 1627 since 2001. There were 231,827 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 2015. The total amount of miles travelled by all vehicles in Scotland has increased from 42,705,000 in 2004 to 44,789,000 in 2014, an increase of 4.9%.

Details of the size of Scotland’s road network, as of 2014, 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>600</td>
</tr>
<tr>
<td>A,B and C Roads</td>
<td>28,556</td>
</tr>
<tr>
<td>Unclassified Roads</td>
<td>26,832</td>
</tr>
<tr>
<td>All roads</td>
<td>55,987</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

**Driver and Vehicle Standards Agency** (DVSA): Formed on 1 April 2014, following a merger of the Driving Standards Agency and Vehicle and Operator Service Agency, the DVSA is an agency of the UK Department for Transport (DfT). Its main responsibilities include: conducting driving tests, maintaining a register of car driving instructors and checking their standard of tuition, supervising compulsory basic training for motorcyclists, 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 Public Service Vehicles (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 South West Scotland
- **Amey Highways**: Holds the contract for South East Scotland and the Forth Bridges
- **BEAR Scotland Ltd**: Holds the contracts for North West and North East Scotland

Transport Scotland has contracted out responsibility for certain major trunk road projects to private concessionaires, under Design Build Finance Operate (DBFO) contracts, which are:

- **DBFO Autolink**: A74(M) from Junction 12 to the English Border
- **PPP Connect**: M77 from Junction 5 to Fenwick (PPP Connect)
- **Highway Management (Scotland) Ltd**: M80 from Stepps to Haggs

**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 major strategic road projects are currently being built, are about to enter construction or have been authorised.

**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 directly funded by the Scottish Government, with the most recent cost estimate of between £1.325bn and £1.35bn. Construction started in summer 2011 and was due to be completed in December 2016. However, the Scottish Government announced on 8 June 2016 that the completion date had slipped and the revised opening date was now planned for May 2017.

**Aberdeen Western Peripheral Route (AWPR)**: A bypass around western Aberdeen between the A90 (south) at Charleston and the A96 to Inverurie. The scheme is currently under construction and is due to fully open by winter 2017. The project is being delivered through the Non-Profit Distributing Model by Aberdeen Roads Ltd, a consortium of Balfour Beatty Investments Ltd, Carillion Private Finance (Transport) Ltd and Galliford Try Investments Ltd. The overall estimated project cost is £745m.

**A9 Dualling**: The A9 dualling project aims to dual 80 miles of single carriageway between Perth and Inverness, plus associated upgrades, by 2025. The project will be completed in 11 sections and is due to cost £3bn.

**A96 Dualling**: The A96 dualling project aims to dual 86 miles of single carriageway road between Aberdeen and Inverness, by 2030. The scheme is currently under development and is due to cost £3bn.

**M8 M73 and M74 Motorway Improvements Project**: This project aims to complete the motorway link between Edinburgh and Glasgow and upgrade key locations in the central Scotland
motorway network. The project is being delivered through the Non-Profit Distributing Model by the Scottish Roads Partnership (SRP), a consortium with a construction joint venture of Ferrovial Agroman and Lagan. SRP will be responsible for the management, operation and maintenance of this section of the motorway network for 30 years following completion of the new roads by Amey. The overall project cost is approximately £500m.

Information on all current and planned trunk road projects is available on the Transport Scotland website.

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 air routes, which serve a peripheral region, as a Public Service Obligation² (PSO). A PSO can only be created where the maintenance of regular air services is considered vital to the economic development of the peripheral region where the airport is located. A PSO can be imposed where adequate provision of air services in terms of continuity, capacity and pricing cannot be provided on a commercial basis. 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 24.1m air terminal passengers in Scotland in 2014. 6% of these travelled to/from other Scottish airports, 44% to/from other parts of the UK, and 38% between Scotland and mainland Europe. In 2014, 483,000 aircraft movements, and 59,878 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.

² PSO can also apply to ferry services
**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 44 members and its main aim is to harmonise civil aviation policies and practices between member states.

**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%, LHR Airports 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 14 UK 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**


**Air Passenger Duty**: The SNP manifesto contained a commitment to “reduce Air Passenger Duty by 50 per cent during the course of the next Parliament”.

**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 Public Service Obligation (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. The Scottish Government sponsors Scottish Canals, the public corporation which manages the Scottish canal network.

**STATISTICS**

In 2014, a total of 45 million tonnes of freight was moved by water transport in Scotland: 11.8 million tonnes of "coastwise" traffic to other ports in the United Kingdom (including some in Scotland), 2.2 million tonnes of "one port" traffic to offshore installations, and 30.8 million tonnes of exports from the major Scottish ports. Only 9.4 million tonnes of waterborne freight was carried for part of its journey on inland waterways.

In 2014, 1.8 million passengers were carried on ferry services between Scotland and Northern Ireland. Caledonian MacBrayne ferries carried 4.7 million passengers (plus 1.2 million cars,
commercial vehicles and buses). SERCO Northlink Ferries services between northern Scotland and the Northern Isles carried 289,000 passengers, Shetland Islands Council services carried 761,500 and Orkney Ferries services carried 320,300.

LEGISLATIVE AND ADMINISTRATIVE FRAMEWORK


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.

CalMac Ferries 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 Ferries won the recent tendering exercise for the Clyde and Hebrides ferry service contract, which runs from 1 October 2016 for a period of eight years. The contract is worth £900m.

Caledonian Maritime Assets Ltd: Owns 31 ferries, and leases one other, which are let to CalMac Ferries. It also owns 26 Clyde and Hebrides harbours and associated infrastructure.

Western Ferries: Private operator of unsubsidised car ferry service between Dunoon (Hunter’s Quay) and Gourock (McInroy’s Point). Submitted initial prequalification 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.

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.

Northlink Ferries: SERCO Northlink won the contract to operate ferries from Aberdeen and Scrabster to Orkney and the Shetlands. The contract runs from July 2012 until April 2018.
DFDS Seaways: Operates a three times a week freight only ferry service between Rosyth and Zeebrugge.

In addition there is 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.

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 but operates on a purely commercial basis at arms-length from its owners. 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


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 [SNP manifesto](#) for the 2016 Scottish Parliament elections contains a commitment to bring forward a Transport Bill “…to improve bus services in Scotland…”

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 mining.

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 2014 a total of 123.4 million tonnes of road freight was lifted in Scotland and transported to a Scottish destination. A further 13.9 million tonnes of goods were lifted in Scotland and delivered to elsewhere in the UK and 0.2 million tonnes outside the UK. 18.4 million tonnes of goods were moved into Scotland from elsewhere in the UK and 0.1 million tonnes from outside the UK.
In 2014-15 a total of 6333 companies were licensed in Scotland to operate goods vehicles with a gross weight of 3.5 tonnes or more. 3104 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. 2704 of these hauliers had ‘standard national licences’ allowing them to trade in the UK, the remaining 525 having international licences. The Scottish road haulage industry is highly fragmented, with 84% 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 2012-13 the Scottish rail network carried 8.43 million tonnes of freight, a 35% fall from the recent high of 12.96 million tonnes in 2006-07. The fall is largely due to a reduction in coal traffic to major coal fired power stations. The closures of Cockenzie power station in 2013 and Longannet in March 2016 are likely to have resulted in a considerable decrease in rail freight that is not reflected in the statistics quoted above.

48% of the tonnage lifted was minerals, mainly coal. Since 2002-03, rail has been reasonably 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 grants awarded by the Scottish Government. However, this increase is not been enough to offset the reduction in mineral traffic.

The Scottish rail freight market is dominated by DB Cargo, 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 2014 a total of 44.89 million tonnes of freight were lifted by water-borne transport in Scotland, of which 30.8 million tonnes were exported from the UK, 11.8 million tonnes were shipped to other UK ports and 2.2 million tonnes were shipped to offshore installations. Imports totalled 23.6 million tonnes, 7.05 million tonnes of which were shipped into Scotland from other UK ports.

Scotland has only one direct freight ferry link with mainland Europe, the three 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 2014 stood at 59,878 tonnes, an increase of 5653 tonnes on the previous year but a fall of 21,078 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 Infrastructure and Capital Investment Committee conducted an inquiry into freight transport during 2015. The [final report](Scottish Parliament 2015a) of this inquiry was published in June 2015. At the same time, the former Economy, Energy and Tourism Committee conducted an inquiry into [Internationalising Scottish Business](Scottish Parliament 2015b), which looked at international exports. This inquiry had a substantial transport element.
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