

The Millennium Canal Project

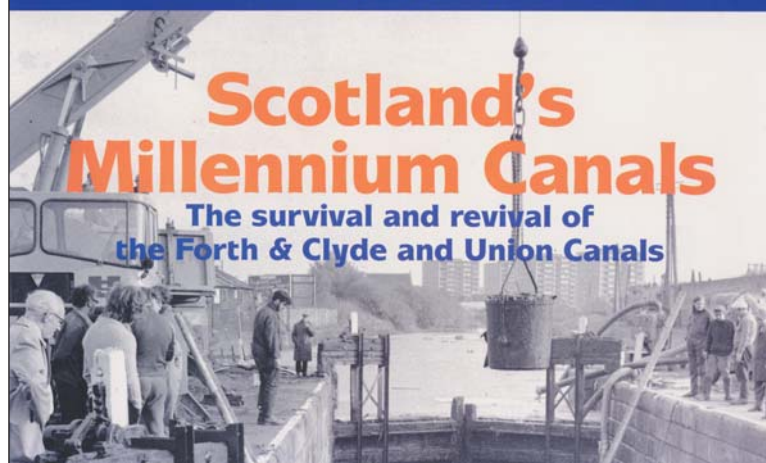
With funding from the Lottery and other sources, British Waterways Scotland has completed the restoration of the Forth and Clyde and Union Canals. This includes the spectacular Falkirk Wheel linking the Forth and Clyde Canal to the Union Canal extended for a mile further west from Falkirk and passing in tunnel under the Glasgow Queen Street - Edinburgh railway. A Visitor Centre has been established at the Wheel and there is an opportunity for a short boat trip from the Lower Basin to the Upper Basin. The project is designed to encourage mainly leisure activities including walking and cycling as well as boating. There is already evidence that it is encouraging sensitive development and greater activity along the two canals. The Wheel is a particular attraction.



Photos: Stenlake Publications

Timed to coincide with the formal opening by the Queen of the project as part of her Jubilee Tour, Stenlake Publishing have produced Scotland's Millennium Canals by Guthrie Hutton. This 160 page hardback has over 250 illustrations (38 in colour) and is available for £25 (with special introductory price of £22.50) from Stenlake Publishing, 54 - 58 Mill Square, CATRINE, Ayrshire KA5 6RD. Tel/Fax: 01290 551122 www.stenlake.co.uk

Order a signed copy of this major new book at the reduced price of £22.50, including p&p (usual price £25.00)



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accordingly to the type of organisation. These rates include multiple copies of the Review.

For all subscription and membership enquiries contact **Brian Weddell, STSG Organiser** email brian@stsg.org, fax 0131 455 5141 or write to Brian at Redwood House, 66 Spylaw Road, Edinburgh EH10 5BR stating your name, address and organisation you represent (if any). Cheques should be payable to the Scottish Transport Studies Group.

Scottish transport review

ISSUE 18
SUMMER 2002
ISSN 1462-8708

SPECIAL THEME Airports Consultation



Scottish transport studies Group

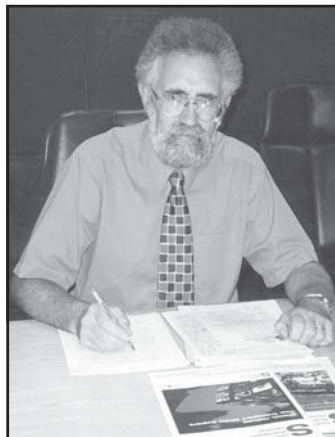
Other Features

Airport Rail Access
Factors Affecting use of Public Transport
Central Scotland Transport Corridor 2010 Reports
Transport Finance; CalMac Ferry Franchise, Borders Rail Project

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This Issue is dominated by the urgent debate on options arising from the Air Travel and Central Scotland Transport Corridor Studies. The Scottish Executive will have to reveal its thinking on these issues within weeks when the Spending Review is announced and in other decisions by December. Aspirations remain ahead of likely finance with similar problems in Wales and Northern Ireland. The STSG Conference on **Transport Devolution** on **19/20 September** will provide a unique opportunity for the three Transport Ministers to outline their views on priorities, delivery and monitoring.



Tom Hart (Editor)

As Scottish Transport Minister, Iain Gray has placed great stress on transparency as a means of promoting informed debate and decision-taking. In this respect, it is unfortunate that Caledonian MacBrayne has taken the view that it would no longer be appropriate to publish the former Quarterly Statistics for ferries which appeared in STR. One would have thought that openness, under EU rules, would have required all bidders for the ferry franchise and local interests to have access to data on existing carryings though not to full financial information.

Published by:
STSG, Redwood House, 66 Spylaw Road,
Edinburgh, EH10 5BR
mail@stsg.org, www.stsg.org

With Sponsorship from

Scottish Airports
First
Scottish Enterprise
Highlands and Islands Enterprise
and support from
Scottish Executive
TRI Napier University
The Robert Gordon University
Heriot Watt University

Cover Photos courtesy Scottish Airports and Glasgow Prestwick International

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The Scottish Transport Studies Group (STSG)

STSG was formed in 1984 and now has corporate and individual members from transport operators, industry, national government, local government, universities, and consultants. The aims of STSG are "to stimulate interest in, and awareness of, the transport function and its importance for the Scottish economy: to encourage contacts between operators, public bodies, users, academia and other organisations and individuals with interests in transport in a Scottish context; to issue publications and organise conferences and seminars related to transport policy and research".

Printed on chlorine-free paper, by **PARAGON Design and Print**, 10 Lawn Street, Paisley PA1 1HB.

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Contributions to the next issue of the review should be sent to the Editor at Redwood House (mail@stsg.org) by **Friday 11th October 2002**

Recent Events

28 August *Transport Delivery in Scotland*, Centre for Transport Policy, RGU This conference in Edinburgh examined issues relating to transport delivery in Scotland. Speakers included Donal Dowds, Scottish Airports and Richard Bowker, SRA

Coming Events

11 September *The Government's Programme of Multi-modal Studies*, Church House, Dean's Yard, Westminster - contact Centre for Transport Policy, RGU, ABERDEEN AB15 7AW o1224 263134 Fax 01224 263129 Costs £347 to £464

11 September *The First UK Regional Rail Conference*, National Railway Museum, York - Fees £229 to £323 - apply to Landor Conferences 020 7582 0128 Fax 020 7587 5308

18/19 September *Scottish Highways, Traffic and Transport Management 2002* - exhibition and conference in Edinburgh organised by TRL - contact Mary Treen 01344 770514 e-mail mtreen2@trl.co.uk

19/20 September *Transport Devolution and Integration*, STSG, Glasgow City Council High School Buildings, Charing Cross, Glasgow. This major conference, supported by Scottish Airports, Scottish Enterprise, HIE, SPT and Glasgow City Council has the Transport Ministers from Scotland, Wales and Northern Ireland as keynote speakers. Other speakers will deal with finance, the EU and UK frameworks and the experience of London. Costs £195 to £295 with discounts for STSG members - single day rates also available - contact Brian Weddell, STSG Organiser Phone 0790 073 5224 Fax 0131 220 5714 e-mail capitalconferences@talk21.com

19 September *Integrating Cycling with Public Transport*, University of Nottingham with support from ILT, CTC and DfT, contact Lynn Cooper at Institute of Urban Planning, Nottingham University 0115 951 4132 e-mail Lynn.Cooper@nottingham.ac.uk

25 September *Statistics for Transport Delivery in Scotland* TRI/TSUG Seminar at Redwood House, 66 Spylaw Rd, EDINBURGH - cost £30 - contact Debbie McEwan at Tri 0131 455 5140 e-mail d.mcewan@napier.ac.uk

11 October *Rail Stations Conference*, at 4 Hamilton Place, LONDON - deals with role of stations in national and local transport policy. Fees £264 to £370 - apply to Landor Conferences 020 7582 0128

22 October *Delivering Rail Infrastructure Projects* 1 Great George St. Westminster, London - hosted by Altheimer & Gray and sponsored by WSP Cost £293.75 - apply to Professional Solutions & Services Ltd, 3-7 Temple Av, LONDON EC4Y 0HP 020 7356 0838

LATE NEWS LATE NEWS LATE NEWS LATE NEWS

Deputy Transport Minister Lewis Macdonald announced an extra £750,000 for Home Zones on a visit to Aberdeen plus £800,000 for improved access to Aberdeen Airport. Community Transport in Scotland is also to gain the benefit of qualifying for Bus Fuel Duty Rebate.

Hauliers have been warned to use the SUPERFAST ferry from Rosyth or lose it. The value of this ferry may rise as new EU working hours regulations and motorway/trunk road charging come into play. However, this is unlikely for several years and poorly-performing ferries can be moved to other routes (H&BusAM16Aug)

Ryanair will get £2m of Regional Selective Assistance and £500,000 towards training in return for locating a new £10m aircraft maintenance base at Prestwick (BusAM16Aug).



Helen Liddell, Scotland Office & Michael O'Leary, Ryanair

Argyll and Bute Council has applied for a licence to allow North Connel airfield (near Oban) to be used for services to islands such as Coll and Colonsay. HIE is also interested in the project (BusAM22Aug).

Scottish Executive has issued a draft **Planning Framework for West Edinburgh** seeking to reconcile traffic, development and green belt issues. Includes land safeguards for direct heavy rail access through the airport and a tram route to the airport via Edinburgh Park and extending through to Newbridge. Extra road access is also safeguarded. (H 24 Aug).

Recent Publications

SCOTTISH POLICY

Guide to Transport Assessments for Development Planning in Scotland, Scottish Executive www.scotland.gov.uk/cru/kd01/gtta-pp.asp
Planning : 4th Annual Report of Planning Audit Unit, Scot.Exec.May 2002.
Air Quality(Scotland) Amendment Regulations 2002 – sets new targets, Scottish Executive
Directions and Guidance to the SRA (on ScotRail replacement franchise), June, Scottish Executive
Women and Transport : Guidance and Checklist, Scottish Executive
Decriminalised Parking Enforcement – Parking Attendants (Uniforms –Perth and Kinross Council Area) Regulations 2002 – allows council to introduce decriminalised parking

NATIONAL POLICY

Treasury Consultation Paper on Transport Appraisal (see LTT 1Aug, responses sought by **18 October**)
Your Region, your Choice DTLR White Paper on Regional Government (in England)
Consultation on Review of Track Access Charges, ORR www.rail-reg.gov.uk/docs/nr-intrev.pdf
Future Fares Policy – seeking your Views, SRA consultation uk/sra/publications/consultation/default.tl2
Transport Track and User Charges, SAPT discussion paper, August, £2 from 11 Queens Crescent, Glasgow G4 9BL
Microfranchising & micro-management – a new future for rural railways, TR&IN report with RPC support – urges SRA to develop 2 or 3 pilot schemes e.g. the Whitby line 01484 665273
Motoring towards 2050, RAC Foundation, £295 – urges action on both road and rail plus new technology and road pricing – suggests an end to rail freight on some routes to permit passenger growth
Initial Assessment Report on Ten Year Transport Plan, CfIT, is critical of progress and urges comprehensive road pricing from 2010, building on city schemes www.cfit.gov.uk.reports/10year/index.htm
Devolution in Practice, eds. J Adams & P Robinson, essays published by Institute for Public Policy Research – attacks ‘spatial insensitivity’ of DTI and calls for new ministerial arrangements to encourage devolution & spread of prosperity within the UK www.ippr.org

RESEARCH & INFORMATION

The Case for Rail, report by SDG for Transport 2000 – argues that rail has high leisure use by the less well-off, £20 020 7613 0743
Organisation, Competition and Regulation in British Rail Industry, University of Cambridge for ESSRC – argues that more spending on inter-urban roads could give better results than rail 01793 413122
Funding the Railways – Setting the Scene, report by Tim James, Sheffield University and Oxford Economic Research Associates - claims that, before the Hatfield accident – private company rail profits, excluding rail maintenance companies, were equivalent to two-thirds of public support given to rail
Planning for Passenger Growth – rail station policy research for SRA, Sheffield Hallam University 0114 225 3073
Integrated Transport and Land Use Planning : Facts, Fiction and Future Policy, Micol Klippel-Arden Publications 020 7637 8692
Rail Links to Glasgow and Edinburgh Airports – Information Document, July, Scottish Executive
Paving the Way –how to achieve clean, safe and attractive streets, Thomas Telford Ltd for the Office of Deputy Prime Minister, £25 020 7665 2464
TRI Napier University, Annual Report 2001
Travel by Scottish Residents : some NTS results for 1998/2000 and earlier years, Trn/2002/3 April £2 Scottish Executive
Household Transport : 1999 and 2000, Trn/2002/4. May £2 Scottish Executive
Key 2001 Road Accident Statistics, Trn/2002/5 June £2 Scottish Executive
Review of School Travel. Report by Derek Halden Consultancy for the Scottish Executive and Scottish School Travel Advisory Group .
Scottish Transport Statistics, Issue 21, 2002 edition, £2 Scottish Executive
Rural Accessibility, Report by Derek Halden Consultancy, Aberdeen University & Scottish Agricultural College to Scottish Executive www.scotland.gov.uk/cru/kd01/blue/ruac-00.asp
Edinburgh and the Lothians Street Map - includes street index, bus routes and summary bus timetables, Lothian Buses £2.50 www.lothianbuses.co.uk
Sustainability Report 2001, Scottish Airports – reports on current action and targets
The World of Glasgow Prestwick International Airport, reports on current activity and prospects, Aviation House, Prestwick KA9 2PL 01292 511000
Regional Transport Strategy for Northern Ireland 2002-12, Dept. of Regional Development, N Ireland
Welsh Transport Statistics 2001, www.wales.gov.uk/keypubstatisticsforwales/content/publication/publication.htm

CONSULTATION

Proposals for Tendering Clyde and Hebrides Lifeline Ferry Services, and Draft Tender Invitation, Scottish Executive
Review of Strategic Planning: Conclusions and Next Steps, Scot.Exec. June
National Waste Strategy: Scotland Ayrshire,Dumfries & Galloway Draft Waste Area Plan, SEPA
The Future Development of Air Transport in the UK, seven regional consultation papers and related questionnaires, DfT and relevant devolved governments, July (August for Northern Ireland)
West Edinburgh Planning Framework Consultation, Scottish Executive (Responses by **15 November**)
(For consultation on *rail fares and track access charges*, see National Policy)

OTHER

Scotland's Millennium Canals, 160 pages including 250 illustrations (38 in colour), hardback £25, Stenlake Publishing, 01290 551122 www.stenlake.co.uk
Forth and Clyde – the Comeback Canal, £6.99 and *Conquest of the Atlantic : Pioneer Flights 1919-39*, 96 pages, hardback £16.95 – also from Stenlake Publishing
Iron Road to the Highlands, M Pearson -a guide to the Highland Rail Line – Perth to Inverness, -includes many colour photographs and information on the route and places adjacent, £4.99 Wayzgoose 01283 713674
Making Tracks – Light Rail in England and France, report from Swedish National Road and Transport Research – finds links with land use policy poor in some cases in England – e.g Sheffield and Birmingham – but commends Manchester

LTT Features and Viewpoints:-
25Apr *Transport initiative (for integrated transport) attempts to boost Snowdonia's economy*
23May *Socially excluded get raw deal in transport stakes; Rethink needed on long-term transport strategies*
6June J.Biggs *Regions will only get real transport powers if Ministers can trust them to deliver*
1Aug *Treasury acts to contain costs of transport infrastructure projects; Airport Expansion proposals prompt national debate*
J Stewart *The aviation debate has all the makings of the battle over the 1989 roads programme*

AIR TRAVEL and MULTI-MODAL STUDIES

With publication of the Regional Consultation Papers, the future of air travel is achieving a long overdue public debate (pages 12-15). A further debate is arising from the reports from multi-modal studies including those for Central Scotland (pages 9-10) A key issue in both is the likely level of travel growth and its spatial and modal distribution. Stronger and more coherent connections still need to be made. The air documents focus on very high growth forecasts and related expansion of airport terminals and runway capacity to meet expected growth. This looks like the discredited ‘predict and provide’ approach. Some aspects of this are also evident in multi-modal conclusions that fairly high growth in road traffic (and in congestion) may be unavoidable unless more attention is given to road pricing, traffic management and transport assessments within land use planning (page 8).



Air travel provides a particularly strong example of ‘predict and provide’ yet, for both road and air, there remains a real danger that an alliance of ‘predict and provide’ with institutional problems relating to rail and bus delivery will undermine integrated transport and land use planning. In the case of air trips to and from Scotland, it is evident that much of the predicted travel growth remains in the Anglo-Scottish sector (especially to London already experiencing substantial airport as well as road congestion) yet the Scottish Airport Study under-estimates the extent to which strengthened competition and improved rail infrastructure could make inroads into air travel between Central Scotland, London and other major centres in England and Wales.

Find Phone Numbers and Addresses Easily

The 2002 register of interests in Scottish transport should shortly be available in Microsoft Access database format. This will allow searches to be made by name, type of organisation, transport interest, etc. If you would like a copy of the database this can be issued free to STSG members by e-mailing Brian@stsg.org.

News Brief

New Green Book

Future transport investment could become much greener as a result of the proposals in the Treasury consultation on the new Treasury guide to appraisal.

The main changes from the 1997 Green Book are aimed at introducing more realistic cost estimates of capital projects at an earlier stage in project development, and greater attention to the distribution of impacts of schemes. Projects that deliver longer term social and economic benefits could also now show greater benefits due to a reduced discounting rate from 6% to 3.5%.

An assessment of the DfT 10 year plan by the Cabinet Office Social Inclusion Unit showed that high earners benefited most highlighting the need for assessing the distribution of benefits. With the publication of the new Treasury guidelines, Councils and the Scottish Executive could benefit from considering the distribution of impacts of their current transport spending programmes. If, as in the UK 10 year plan, transport spending favours the wealthiest members in society a fresh look at the balance of transport expenditure may be needed.

Costs of Poor Maintenance

Road and rail both suffered in recent floods and there have been many suggestions that damage could have been reduced through better routine maintenance.

Is is important that these warnings are heeded. Deferring maintenance can be perceived as a cost saving but research and practice have shown how to optimise action. Funding for maintenance needs to be protected as a first priority by those responsible for the condition of roads, railways, cycle routes and footpaths.

The results of the study by the Society of Chief Transportation Officers in Scotland into the state of repair of local authorities’ roads is therefore welcome. It should provide a more transparent mechanism for identifying funding needs to overcome the maintenance backlog on the local road, cycleway and footpath network.

Public Transport Perceived as Inconvenient by Car Drivers

In the Scottish Executive's review of Scottish Household Survey results (page 17) the most common reason that car commuters identify for not using public transport is that it not convenient. Much effort goes into making public transport faster, cleaner, and more available but, if people perceive convenience as a major hurdle, what can be done to tackle this?

Being able to buy tickets more easily and making information more readily available are two obvious areas where action by transport operators seems to be far too slow. In the 21st century people's perception of convenience is very different from what it was only a few years ago. The lessons from the household survey need to be built upon and the Executive is undertaking in depth research on barriers to public transport use. This should map out the importance of different components of inconvenience. In the meantime making public transport tickets as easy to buy as lottery tickets might be a good start in changing the willingness of car drivers to use public transport.



Highland Washout Scotsman 8 Aug. 2002

Planning Review

Major changes are being made to the planning system to support sustainability and regeneration aims. There are indications of moves towards greater enforcement of policy guidance and an emphasis on city regeneration. But regeneration and other non policy aims need to be fully integrated with transport policies (page 8). In recent years transport assessments have progressively replaced traffic impact assessments for individual developments. It is also important that national and regional strategy is consistent with transport aims. The forthcoming results of the Cities Review in the autumn will give signals of the extent to which transport aspects have been assessed at a strategic level.

JULY SPENDING REVIEW

The Chancellor's Spending Review announced a £61bn rise in government spending with education and transport among the gainers but several commentators considered that spending increases for transport were secondary to education and failed to take account of programmes needed to meet the Ten Year Transport Plan aspirations. Yet, with the economy weakening, there are doubts about Treasury ability to finance spending increases without controversial rises in taxation. Even if interest rates fall, recession will impact on levels of movement and make private investors more cautious about transport projects (H1&16Jul;BusAM16Jul).

Expected levels of private finance seem optimistic while there is concern that rising costs in maintaining the existing rail network and meeting EU safety requirements will leave little leeway for network enhancement. The CfIT, SRA, CBI, the House of Commons Transport Committee and a range of university professors of transport organised by Phil Goodwin have all increased pressure on government to deliver on transport targets. Most of these groups have agreed that earlier moves towards congestion and road user charging will be essential to prevent a worsening of existing congestion and to help fund a wider range of infrastructure works before and after 2010 (S24June, LTT9&23May,Rail1May).

The Treasury and SRA are both seeking big improvements in the cost control of major transport projects. The aim is to relate extra funding to proof of improved delivery against objectives. The Treasury is more sceptical

about the ability to do this for rail and more willing, despite Ten Year Plan Targets for 80% rail freight growth, to see shifts in corridor capacity from freight to passenger movement. The SRA is taking a more robust view of rail freight prospects (LTT6Jul) but has suggested that less-used passenger trains on busy routes may need to contract to provide more slots for express services. Criticised for an arms length relationship from many of the current multi-modal studies, the SRA has responded that such studies must look at the deliverability and financing of rail improvements at an earlier stage. Many proposals being made do not fit current SRA priorities and likely resources.

Another influence on the Treasury has been the desire to factor into transport appraisal greater weighting for longer term benefits and for social distribution benefits in transport funding – possibly diverting some transport funding towards buses (more used by those on lower incomes and with immediate potential to contribute to modal shift on key urban corridors) and rail schemes clearly fitting social inclusion and regeneration criteria. At the same time, existing levels of spending are not sacrosanct. Government has announced a review of the £1bn a year given in bus support to deliver better value. This will include change in the **Bus Service Operations Grant** (the former Bus Fuel Duty Rebate) so that it relates better to government priorities. Consultation, closing on 18 October, has started on a **new Treasury Green Book for transport appraisal**.(LTT1Aug, FT17May,H1&11Jul)

RAIL POLICY

Network Rail, a company limited by guarantee with a Board of 12 and around 100 members drawn from the various levels of government and with 40% being train operating companies is poised to replace **Railtrack** with responsibility for track maintenance and minor enhancements. Decisions on major enhancements will be a matter for the SRA and other major partners. Network Rail will be backed by £9bn of bank loans and a £4bn contingency funds from the SRA. Contrary to the view of the Office for National Statistics, the Treasury view is that these arrangements will not require Network Rail spending to count as public borrowing. Finalisation of the arrangements awaits clearance under EU state-aid rules (LTT4July,S28June,FT21June)

situation may justify upward revision of Rail Track Access Charges and of fares at busy periods – allowing fares and charges to make a greater contribution to rail costs while also cutting overcrowding. Price caps presently apply to 40% of all rail fares. **The Rail Passengers Council** has queried whether their easement or removal, without other changes, will advance the objectives of transport integration, consumer equity and modal shifts away from car use. Early rises in peak period fares may result though higher track access charges are not expected before 2004. As Transport Secretary, Alistair Darling has announced that a new body is to be set up to investigate **rail accidents**, replacing the present Rail Inspectorate within HSE (H3&5Jul). The Rail Regulator is to be replaced by a Regulatory Commission.

TRANSPORT DEVOLUTION

A government White Paper has proposed directly elected regional assemblies in England subject to local referenda. In addition to London, as many as eight bodies could be created but only limited transport powers are suggested. There would be an advisory role on transport with more powers added later. As an immediate step, the **SRA Rail Passenger Partnership Funds** would be devolved for decisions by the assemblies. In another move, the **SRA** has already transferred powers relating to the Merseyrail franchise to the local PTE, **Merseytravel** (LTT9May,BusAM29Apr). There have been calls for more substantial devolution and 'spatial sensitivity' in DTI policies, allowing for greater shifts of emphasis away from London and the South-east. The Institute of Public Policy Research has called for a review of regional funding formula, a spatial restructure within DTI and a review of the range of devolved transport powers to Scotland, Wales and Northern Ireland. In particular, Tom Wilson, Managing Director of Prestwick Airport, has called for devolution in the air transport sector (S5July,BusAM29Apr&22Jul)

AIRPORTS & AIR SERVICES

The SE England and other regional papers have now been published with a request for comment by 30 November. These take a bullish view of air traffic growth and relationships with the economy but are weaker on relationships with sustainable development. Some relative shift away from the south-east is encouraged but the main emphasis is on the need for decisions to facilitate the expansion of airport terminal and runway capacity in this region (see pages 12 to 15)

EU POLICY

The EU continues to adopt a higher profile on state aid regulation as a means of aiding competition but has admitted that its target of becoming the most competitive global economy by 2010 has been hit by concerns about economic conditions (BusAM24May). The European Court has overturned an EC decision to block the First Choice/Airtours merger. It has ruled that this will not weaken competition (H7June). EWS has taken its concerns about acute rail freight disruption through the Channel Tunnel to the European Parliament (BusAM23May). In regulations hitting lower income car owners, EU directives will require car owners to bear extra costs of car recycling until 2007 after which this will become the responsibility of car-makers (FT21June) EU proposals to load motor vehicle users will all costs arising from accidents involving cyclists have attracted controversy though there is agreement on the need to ensure cuts in accidents involving cyclists.

Prestwick Airport had a 62%£ rise in profits to £3.55m in the year following its sale by Stagecoach to Infratil. Chairman Phil Walker expects future growth to depend on success in attracting additional low-cost airlines with new routes geared to a long-term rise in in-tourism (BusAM14June) Dublin listed **Ryanair**, the main operator at Prestwick, has reported a 40% rise in profits despite the events of 11 September. Ann Gloag and Brian Souter of Stagecoach have personally invested a further £2m to safeguard the operations of troubled **ScotAirways** after pre-tax losses double to £7.1m (BusAM19June) **BAA** profits have fallen, reflecting the downturn in air travel, but profits at the **Scottish Airports** subsidiary are up 17% of last year – reflecting strong growth in domestic air travel and by low cost airlines (S7July)

Troubles with the Coach USA operation have led to the resignation of **Stagecoach** Chief Executive Keith Cochrane and a shares downturn. However, Stagecoach has emerged as preferred bidder for Boston's commuter railways. Stagecoach has also won a three-year battle for a 50% share in commuter rail services around Wellington, New Zealand. FirstGroup has had greater success in its US bus operations and share price is thought to be below potential. **Virgin Rail** achieved an operating surplus on WCML services, helping by compensation from Railtrack. WCML modernisation will not now include 140 mph running and further negotiations with the SRA will lead to adjustments in future franchsie payments. Virgin was due to be making premium payments to the SRA by 2003-04 (H15July)

National Express has reported increasing concern at the profitability of its **ScotRail** subsidiary. Despite extra franchise funding agreed earlier this year, industrial disputes and other factors have prevented a ScotRail return to profitability in the first half of 2002. Continued losses are expected until 2004 though National Express still intends to bid for the replacement ScotRail franchise. Orders for new trains has given the **Angel** train leasing division of the **Royal Bank of Scotland** one of the best profit margins in the rail industry for the past four years. Pre-tax profits were £87m on a £284m turnover in 2001. Profits at **Jarvis**, the rail maintenance company, have risen to a record £45.8m but share prices have been affected by the Potters Bar rail accident(S12June) **Forth Ports** report a doubling of property values in two years. London developer Bellhouse Joseph has taken a 10% share in the property subsidiary to push forward regeneration at Leith.

P&O has agreed to buy Stena's 40% share in their joint British ferry operations for £150m. This will lead to some route contraction, starting with withdrawal of the Dover-Zeebrugge service. Routes from Felixstowe to Zeebrugge and Rotterdam may follow (S24Apr)

Despite the bus war with FirstGroup, **Lothian Buses** improved profit margins for its local authority owners (mainly Edinburgh) last year. Pre-tax profits rose to £5m on a turnover of £56m in 2001. Sightseeing and coach operations outside Edinburgh had been sold but **MacTours**, the vintage bus tour operator in Edinburgh founded in 1999, was acquired early this year. Orders for new buses, slowed by the bus war, have been expanded with deliveries by January 2003 bringing the average of age of the fleet down to 6.3 years – one of the lowest in Britain (BusAM22Apr&9Aug)

Motherwell Bridge has sold its loss-making rail maintenance arm to AWE Morrison. **OrionRail** has chosen New Lanark as a signalling design centre well placed to serve central Scotland. Cendant has sold **National Car Parks**(NCP) to Parking International for £820m. **Blue Bank Express**, the parcel company based at Ecclefechan, has collapsed with the loss of 450 jobs (150 in Scotland) **Malcolm Group** reports good prospects for its logistics business but the construction arm has been performing less well. **Menzies** continues to expand activities in airport-related business and has acquired the Wyng Group of Leeds.

Computer Cab has increased its fleet of Aberdeen taxis by nearly 20% due to a technology tie-up with smaller rival, AbCabs. Computer Cab now has 230 cabs in the city and is part of a group with taxis in Edinburgh and London. GPS is used to control and direct vehicles.

With the resignation of Stephen Byers as DTLR Minister, Edinburgh MP **Alistair Darling** has been appointed to head a new Ministry for Transport (DfT). **Jim Steer** has moved from Steer Davies Gleave to be Director, Strategic Planning, SRA. The SRA is seeking a Team Leader & Project Manager for the ScotRail replacement franchise. Lord Berkeley, Chair of the UK Rail Freight Group, has been appointed to the EC Transport and Energy Forum.

The **Scottish Executive** has reorganised **Transport Division 1** to improve delivery. Branch 1 will deal with overall transport policy and delivery in the North and North-east. Branch 2 under Ken Lussey will deal with roads policy, road user charging and Delivery East. Branch 3 under Alan Clark will deal with network planning, transport appraisal, transport modelling and transport research. Branch 4 under Geoff Pearson will deal with transport group finance and Delivery West. The Executive has also established a **Sustainable Development Forum** for Scotland as part of the First Minister's commitment to sustainable development. The first meeting, chaired by Ross Finnie as Minister for the Environment, was held in Dundee on 24 July. **Sir Muir Russell** is to stand down as Head of the Civil Service in Scotland next year on becoming the new Principal of Glasgow University. **Harold Mills** has been reappointed CalMac Chairman for a further three years.

British Waterways Scotland has advertised for new members for the **British Waterways Scotland Advisory Group** set up in 2000. The **CalMac Ferry Users Committee** is also seeking replacement members. James King, Ann Glen, Tony Currie, Garry Brown, Ann-Marie Kane and Ann Henderson are new members of the **Rail Passengers Committee for Scotland**. George Littlejohn, Andrew Kesterton and John Hanlon leave the Committee.

John Elliot has been seconded from First to be Chief Executive of **Traveline Scotland**. Laura Sexton from the Scottish Executive will be Project Manager. **Malcolm Reed**, SPT Director General has been seconded to the Scottish Executive for 3 days a week to handle the ScotRail replacement franchise.

Ray Bentley (formerly Head of Transport for Plymouth City) and Veronica Palmer (ex CPT) have been appointed directors of the **Northern Ireland Transport Holding Co**. Brian Cox has retired as Executive Director of Stagecoach UK Bus – his position is being taken by **Les Warneford**. Bob Montgomery has moved from FirstScotland to be Service Performance Director at Stagecoach UK Bus. **Bill Davidson** has replaced John Horton as **Northlink** Chief Executive. John becomes project consultant

Peter Cotton from Gatwick Express has replaced Nick Brown as Acting Managing Director of ScotRail. **Keith Cochrane** resigned at Stagecoach Chief Executive with **Brian Souter**, Chairman, moving temporarily into this position. **Bill Speirs** has replaced Brian Souter as Chairman. **Malcolm Group** has appointed David Mackay, chief executive of Menzies, as a non-executive director. Chris Masters, newly stepped down from Aggreko, is to join the Glasgow-based **Babbie** board as non-executive Chairman.

David Jarman, an active promoter of transport and environmental projects, has retired from the Planning Department in West Lothian Council. **Ian McAllister** has joined the **MVA** Edinburgh office as Projects Director, Public Transport Operations.

Tim Steiner is the new Manager for Steer Davies Gleave in Scotland, replacing Keith Gowenlock who has joined consultant WSP. **Anne McGregor** (from Faber Maunsell), **Burio Nieto** and **Kirsty Morrison** have also joined the SDG team in Scotland. Consultant Atkins has appointed **Andy Lightowler** as Head of Transport Planning in Scotland.

At Napier TRI - **Howard Kirby** has been re-appointed as Director of TRI for a further five years. **Austin Smyth** has been appointed as Director of the Transport Research Institute (Northern Ireland Centre) - TRI-NIC - at Queens University Belfast. He remains a full-time employee of Napier University whilst contracted out to this part-time role.

For Policy in Wales and Northern Ireland, see p16

Research

SOME RECENT FINDINGS

A survey by the Scottish Accessible Transport Alliance (SATA) has found that fewer than 550 **taxis are available to disabled people** outside Scotland's three main cities. Of 8000 licensed taxis in Scotland, only 3219 are suitable for the disabled with 83% of these being in Glasgow, Edinburgh and Aberdeen (H9Apr).

In a new report, SMMT stated that **CO₂ emissions from new cars continue to fall**. Figures in UK New Car Registrations by CO₂ Performance show a fall of 1.8% on last year with emissions down 6.4% since 1997. It is expected that the voluntary target of a 25% cut by 2008 can be met. One of the main reasons for improvement has been the shift to ever-cleaner diesel cars. Diesels accounted for 39.4% of new car sales in 2001 (H7June).

A report by Napier University for Highland Council on **Skye Bridge Tolls** has concluded that, although the Bridge has been of benefit to Skye, the high level of the tolls has considerably reduced its positive impact upon the local economy. The results of this report relied primarily upon previous empirical research studies to provide information on consumer and business travel and expenditure patterns. (S25&26June).

The Scottish Executive should set **accessibility targets** for rural access to employment, hospitals, shops etc. according to a report to them by Derek Halden Consultancy, Aberdeen University and the Scottish Agricultural College. The report describes the dependency of many rural residents on their cars, the increasing problems for non-drivers, and the need for community action to manage trade-offs. Report is available at: www.scotland.gov.uk/cru/kd01/blue/urac-00.asp

SCOTTISH EXECUTIVE STUDIES

Scottish Transport Appraisal Guidance

The draft Guidance was issued in July 2001 and the Scottish Executive intend issuing a revised version for general use by the end of 2002. The consultation document has been used by practitioners for over 12 months and has allowed feedback on applying the guidance to a wide range of transport related proposals to be taken on board (see STR Issue 15, p10-11). Currently STAG is being used in its draft consultation form, on the Central Scotland Transport Corridor Studies, the City of Edinburgh's New Transport Initiative for congestion charging in Edinburgh and the 2002 round of bids for the Public Transport Fund. When issuing the revised version of STAG the Scottish Executive will consider all comments received by the end of September 2002. Whilst it is the intention to issue a final version of the guidance before the end of the year, STAG is a 'live' document and will be continually reviewed and updated to take on-board current best practice. As part of this process feedback from practitioners would be welcomed, at any time, for consideration in periodic reviews of the guidance.

The Scottish Executive have established a STAG mailbox: stag@scotland.gsi.gov.uk which has been available throughout the consultation process for users of the guidance to post questions and also provide feedback on using the guidance. In addition to the mailbox the Scottish Executive has carried out two specific consultation exercises. Firstly, in April 2002 they issued a questionnaire to users of the Guidance to encourage experience and recommendations for its review. Secondly, a seminar was hosted by them in May 2002 to present practitioners' experiences and feedback on using the draft guidance to a wide group of transport professionals.

Further details can be found on the STAG website at: <http://www.scotland.gov.uk/about/DD/TRAN1/00014788/STAG1.aspx>

Transport Model for Scotland and Transport Corridor Studies

The Transport Model for Scotland (TMfS) is currently being developed, based upon the multi-modal Central Scotland Transport Corridor Studies model and the existing Central Scotland Transport Model (CSTM). This enhanced model will be extended to cover north east Scotland and is being up-dated with local traffic and public transport data from the Aberdeen, Perth and Dundee areas as well as other parts of Scotland. This, and the 2001 census data, will provide reliable, robust and up-to-date transport data vital to the assessment of future major transport projects in Scotland. The first outputs from the extended model are expected in autumn 2003. The A8, A80 and M74 corridor studies are examining all the options for improving various modes of transport within the key corridors. Extensive surveys and consultation with voluntary and statutory bodies have been carried out, including focus groups composed of local residents and businesses in the corridors. Plans for 2005 and 2010 have now been submitted by the Consultants to the Scottish Executive (see p9-10).

Sustainable Freight Facilities and National Freight Strategy - MDS Transmodal completed a study for the Scottish Executive this Spring entitled "Opportunities for developing sustainable freight facilities in Scotland". This report is available at: www.scotland.gov.uk/library5/transport/odsff.pdf

Tariff Rebate Subsidy Review - The Tariff Rebate Subsidy is a small bulk freight and livestock shipping subsidy scheme. The review of the scheme is currently being considered by the Scottish Executive following an economic consultancy.

Survey of Local Authority Roads and Bridges - The Society of Chief Transportation Officers in Scotland (SCOTS) are undertaking a national survey of the state of repair of local authorities' roads. SCOTS believe this will produce a consistent methodology for assessing the condition of the local road network, similar to that currently used for the trunk road network. It will also provide a more transparent mechanism for identifying the amount of money required to recover the backlog in maintenance to the local roads network. The survey started in May 2002.

Scottish Policy Update

TRANSPORT DELIVERY

The amounts of public funding for transport delivery should emerge from the spending review due to be completed by the Executive in late September. Individual schemes will take longer to announce though the Minister has promised decisions on the Central Scotland studies by the end of the year (see p9-10). With the extra monies available via Gordon Brown's July Review, there will be increases in public spending on Scottish transport but the total amount, and the nature of the spend has still to be revealed. With education already having gained in Scottish spending, there is speculation that transport will be a bigger winner in Scotland than in England. However, the Barnett squeeze and changes in EU funding are working against Scotland while extra spending on health, the elderly, education and the Holyrood building has reduced available funds.

Despite apparent commitments to road schemes, road enhancement spending has been very low since 1999 with existing budgets underspent. Rail enhancement from Executive sources has been minimal yet ScotRail franchising costs will be a full responsibility of the Executive from 2004. This has produced considerable political pressure for delivery of both road and rail schemes plus further spending on air and ferry services and on fares support. PPP/PFI approaches have also come under increasing criticism despite the Executive being forced in this direction through the lack of borrowing powers. The

SNP and others have seen a possible solution in public trusts yet heavy borrowing for capital costs clashes with other demands for increases in revenue support e.g. for fares, maintenance and the replacement ScotRail franchise. It is a disappointing feature of the Scottish Parliament that public debate on real priorities in transport has hardly begun.

Jack McConnell has clarified some policy indicators in the Transport Delivery Report and by highlighting the social inclusion, youth, transport assessment (see p8) and sustainable development agendas. This may provide a firmer base for the aim of road traffic stabilisation which appeared to have been plucked from thin air in the Delivery Report (see STR17 p5). There is a new emphasis on smaller scale, projects deliverable in five years and complemented by a few larger projects, where a PPP approach and other contributions from developers could provide an acceptable basis for financing – particularly if linked with faster progress on both congestion charging and trunk road charging in the Scottish Central Belt (see p9-10). Yet there have been puzzling decisions - notably the priority given to road schemes such as the A1 dualling to Dunbar and the A78 Three Towns Bypass when neither appear to give a good fit with the Executive's own criteria while other road projects and improved rail delivery languish (H2 May 7 & 12 June, 15, 16, 17 & 31 Jul; 1 Aug; 16 Jul; Bus AM 6June, 11,16 & 17Jul; LTT 4& 18 July).

RAIL POLICY

The oral evidence to the Rail Inquiry by the **Transport and Environment Committee** and the Scottish Executive **Directions and Guidance to the SRA** on the replacement ScotRail franchise have produced a range of suggestions to improve lagging rail delivery. These vary from a restoration of full public ownership (with options for British or Scottish control) to changes in the present SRA or PTE framework. The Executive sees **Network Rail** as a British option which could leave in place Treasury guarantees while allowing the Executive an increasing role in infrastructure funding arrangements as well as passenger franchising. The Executive has also expressed support for greater rail transparency and for action to remove the present perverse effects of performance regimes on service improvements such as Edinburgh Park station and Milngavie-Larkhall rail schemes.

Following an interim report from the T&E Committee, the finalised Directions and Guidance sent to the SRA at the end of June contained a sharper focus on key priorities and added a requirement to consult with freight

FARES & PRICING

Higher costs to the Executive and councils will be a result of the free local bus travel to be available to **pensioners and the disabled** from October for travel (after 9.30am on workdays). The First Minister has also expressed a strong personal interest in improved **concession fares for children and young people** and for early reductions in **island air fares** (H2Jul). Some of this may be achieved by persuading operators to use cross-subsidy but an increase in direct public costs is more likely. Another option, commended by **SAPT** in comments on the Edinburgh road pricing consultation, is to use the proceeds of pricing to assist the reform and lowering of local transport fares and to accept this as a sufficient condition for the introduction of road charging. After adjustments in funding from the Executive, Edinburgh City Council is to continue present arrangements allowing pensioners and the disabled free travel all day on local buses rather than only after 9.30 am as in the Scottish Executive countryside scheme.

Amid often adverse press comment, **Edinburgh City Council's consultation on congestion charging** ended on 31 July with firm proposals likely later this year. Few alternatives to charging were suggested - apart from Malcolm Rifkind's flawed proposal to raise Council Tax – but the final scheme may vary the range of exemptions and the times and areas of charging. Freight interests are seeking a lorry exemption while there have been proposals to restrict charging to peak periods and either to the city centre or the city centre plus west Edinburgh (the area with the greatest problems of congestion). With elections due next May, groups previously supportive of the principle of charging – such as the **AA, Liberal Democrats** and **SNP** – have opposed the present Edinburgh proposals. On the other hand, a recent survey for the Herald has shown that charging would affect the travel patterns of almost half of present car users and would have an appreciable impact on cutting congestion (H 10 & 13 June, 19 Jul, 1 & 7 Aug; 12 & 25 June, 24 Jul Bus AM 20 May, 11 July, 1 Aug)

FERRY, BUS & AIR TRAVEL

The Executive is consulting on tendering arrangements for CalMac services (see p11) and has come under pressure from the SNP to re-regulate bus services(BusAM31Jul). **First** has argued that changes have already been made in the bus regulatory framework and that further change would divert attention from the measures needed to improve bus use. The Scottish Air Travel consultation has further intensified pressure in the Glasgow v Edinburgh debate (see p12 to 15)

Changes in Transport Services

AIR SERVICES

Changes continue to reflect responses to ‘no frills’ expansion. **BA** has cut fares while **British Midland** has shifted its emphasis to the low cost **bmibaby**. The latter will take over **Central Scotland-East Midlands** routes in October but with a reduced frequency. **British European** has been rebranded as **flybe** and aims to expand in the upper end of the low-cost market, including an interest in Inverness services. **easyJet** expects **Ryanair** may have to shift to higher cost yet more accessible airports but Ryanair has been exploring all options – including the possible use of the RAF air base at **Leuchars**. It has decided to increase services from **Prestwick** and to locate aircraft maintenance expansion there but talks with **HAL** on low-cost Ryanair services from **Inverness** and **Stornoway** have broken down (H 11 June 7 & 16 Aug S13 May 11, 13, 19 & 20 June 18 Jul, Bus AM 18 June, 30 Jul 2 Aug)

FERRIES & SHIPPING

The new **SUPERFAST Rosyth-Zeebrugge** service has attracted criticism for low loadings, high tourist fares and insufficient marketing but summer usage has been encouraging and the operator will judge results over a two year period. Much will depend on winter loading and freight attraction (BusAm12Jul) Napier/Heriot-Watt University studies have confirmed the feasibility of **fast ferry coastal links** within Britain (H18MayS28May;BusAM8Jul)

For **CalMac ferry franchise** specifications, see p11 & S28 June.In the interim, CalMac is operating only one vehicle ferry on the **Gourock-Dunoon** route with extra passenger capacity at peaks being provided by three additional passenger-only sailings put out to contract (H25July) **Northlink**, the CalMac/Royal Bank consortium taking on the Northern Isles service franchise from 1 October is facing freight competition from **Norse Island Ferries** (NIF) on the Shetland-Aberdeen route. This is a reaction to what are considered to be excessive freight rates on offer from Northlink (BusAM25July) Whisky interests in **Jura** are seeking compensation for ‘laughable’ service quality provided on the Argyll and Bute Council ferry to Islay (BusAM20June) The proposed fast ferry passenger only service from **Rothsay** to the **Broomielaw** has been delayed (H20 June) A local farmer has taken over the ferry which, until October 2001, operated with some aid from Highland Council across the firth from **Cromarty**. This has both tourist and local potential (H1June).

BAA has pledged £60m to attract international services to Scotland. Over the next five years, discounts will be offered to attract airlines to **Glasgow, Edinburgh** and **Aberdeen**. **easyJet** and **Go** have welcomed this action. Further aid from the Scottish Executive is expected subject to conformity with EU state-aid rules. **Continental** has pledged that transatlantic flights to **Glasgow** are safe but is again considering flights from Newark to **Edinburgh** (S25&30MayBusAM1Jul;BusAM29May&20June) **Eastern Airways** has started flying between **Dundee** and **Manchester**. **bmibaby** has selected **Cardiff** as its second mini-hub with **East Midlands** as the main base. This will lead to **Cardiff-Edinburgh** flights from 27 October, replacing services withdrawn by BA in May. Faced with bmibaby competition, **Air Wales** has dropped plans for Cardiff-Scotland services (S4 & 12 Jul; Bus AM 15 May & 26 July; H 10 Aug)

FARES

Support continues to rise for **lower air fares** (and longer airport opening hours) to aid access to the **Highlands & Islands** and open up direct services beyond Scotland (BusAM20&21May; 7June;S28May23Jul) High and concealed supplements for Scottish flights to holiday destinations have come under attack (SundayHerald9June) **SAPT** has criticised **SPT** for increasing fares by 2% in June when service frequencies were still below normal and reliability poor especially in the North Clyde area. In contrast, **ScotRail** has frozen fares elsewhere in Scotland (ET23May,H2May) ScotRail has introduced ticketless travel for e-mail bookings on sleeper services while GNER is offering £20 return tickets anywhere on its network if booked by e-mail (H20May,ET5Aug) A Special Fares Identity Card entitles the **unemployed** and certain benefit recipients to lower fares on Tyne and Wear. Glasgow is to introduce a **discount card for young people** up to 17 years in January 2003. The Card will halve the costs of existing local fares at weekends and during school holidays when there is spare capacity (H8July) In east Scotland, the pilot **SESTRAN** travelcard area now includes Midlothian. Day tickets are included but at rates varying by zone and appreciably higher for combined bus and rail travel. **Citylink** has increased Edinburgh-Glasgow 10 journey ticket from £18 to £23 in less than a year (though fares remain well below those by rail). **Safeway** has been criticised for offering cheaper fuel (as low as 54p per litre) to high-spending supermarket customers. This is seen as unfair to normal petrol retailers and contrary to social inclusion. OFT has been asked to investigate.

RAIL

An EWS freight train derailment near Gretna and serious damage after exceptional summer rainfall caused major service disruptions on the West Coast Main Line, in the Glasgow area and between Perth and Inverness. EWS has been able to resume whisky movement through the Channel Tunnel and is planning 125 mph premium freight services. Virgin Trains is to introduce new Edinburgh-Cardiff services in September.

Apart from some **North Clyde** services, ScotRail services were back to 2001 levels by mid August including the quarter-hourly Edinburgh - Glasgow Queen Street Service. Cross-city services to **Brunstane** and **Newcraighall** in east Edinburgh started in June (H4, 5 & 6 June, Bus AM 6 Aug) National Express has told Minister Iain Gray that Voyager trains could be offering extra capacity and better quality between Edinburgh and Glasgow by 2003, allowing stock to cascade to other services. **SPT** is ploughing back compensation from ScotRail for poor reliability into plans to improve timekeeping and cut overcrowding to the **Ayrshire Coast** and to **East Kilbride**. Sunday trains will also be provided to **Cumbernauld** (S 5 Aug).

BUS SERVICES

Lothian Buses have strengthened key routes in Edinburgh but there have been complaints of some areas losing out. Bus services in Midlothian have contracted, including loss of some services in the Penicuik area (EN18June,2,25&29Jul) **Stagecoach** is planning network improvements in Fife. In the west, it has withdrawn its Glasgow-East Kilbride service but launched a new 10 minute service, in direct competition with First Glasgow, from the city centre to Baillieston with 50p single fares and a £2 seven day ticket. **FirstGlasgow** is expanding bus miles by 1 million over the next year and recruiting 70 extra drivers (H27May) **Aberdeen** is studying plans to use dial-a-bus to fill gaps in the conventional network while, from early next year, remoter parts of **Angus** will be able to dial a number for computer directed minibuses which could revolutionise access opportunities in ,any parts of Scotland (see STR17, p16 & BusAM7Aug)

QUALITY of SERVICE

Air and ferry operators are again considering Sunday services to the Western Isles. Rail punctuality in Scotland is improving with major gains in Turbostar reliability and the near completion of delivery of the new Juniper electric sets. Rail and bus vandalism has shown a worrying increase.

Research

Research Summaries

Economic and Social Impacts Of No Frills Air Services In the Highlands and Islands (Joint commission between HIE and Highlands and Islands Airports) - Segal Quince Wicksteed is examining the economic and social impacts of the present easyJet service between Inverness and Luton. This involves a survey of passengers arriving and departing Inverness airport, including both local residents and inbound visitors. Completion is expected October 2002.

Fast Seafood Link Maritime Transport Project (international project including France, Norway, Aberdeenshire Council, Aberdeen City Council, SE Grampian, HIE, Peterhead Bay Authority and Harbour Trustees) - A study is now underway to examine the feasibility of developing a new fast container or RoRo sea link between Norway, northeast Scotland, primarily to move seafood to Boulogne. It is designed to promote modal shift from road to sea. It should be completed by October 2002. steve.taylor@aberdeenshire.gov.uk

A Tram Framework Study (Commissioned by The City of Edinburgh Council) - This study by Arup is to develop a strategic framework for a city-wide tram network. This includes development work on the concept of a Tram route linking the city centre and west Edinburgh (see Late News). Scottish Executive PTF funding is being sought for further development work on a Tram route serving South-East Edinburgh.

Travel behaviour in Strathclyde (Commissioned by SPT)

Derek Halden Consultancy analysed travel behaviour in Strathclyde using Scottish Household Survey data. The work was carried out between January and April.

Meeting the Rail Freight Growth Target (funded by Institute of Logistics and Transport) Allan Woodburn (TRI) has recently started a small project with the main objectives to: identify those attributes which have either led to rail being successful or unsuccessful in securing new freight flows; develop the understanding between the key players involved in moving freight that offers potential for mode shift to rail; and determine how scarce resources should be targeted in order to achieve the growth target for rail freight. Completion is due mid-2003.

New Crime Threats from E-tailing: Theft in the Home Delivery Channel (commissioned by Crime Panel of the DTI / Foresight Programme) In March Alan McKinnon and Deepak Tallam (Logistics Research Centre, Heriot-Watt) completed a study examining the current incidence on theft in home delivery channels, assesses the security of new ‘e-fulfilment systems’ being developed to support the growth of online shopping and reviews a series of measures which can raise the level of security. The final report can be downloaded from www.foresight.gov.uk.

Key Performance Indicators of Distribution in the Automotive Industry (commissioned by Department for Transport)

Alan McKinnon, Duncan Leuchars, Bob Markham (Heriot-Watt) completed the study in May. The transport operations of a group of automotive companies at different levels in the supply chain were monitored over a 48-hour period using a standard set of KPIs and reporting system. This yielded aggregated efficiency measures and permitted inter-company benchmarking. Final report can be downloaded from www.som.hw.ac.uk/logistics.

Other Developments

Co-ordinating Individual Action Programmes in Rural Transport Management (commissioned by EPSRC/DfT): DHC in conjunction with Aberdeen University has been awarded funding under the future integrated transport programme for this 12 month research project.

Barriers to mode shift (The Scottish Executive): Derek Halden Consultancy was commissioned in May to investigate barriers to mode shift. The survey work and analysis is focused on the Glasgow area.

Scoping a model travel behaviour dataset (DTLR): Marcus Wigan (TRI), £26,161, start March 2002, end February 2003.

Review of bus, coach and light rail statistics : W S Atkins for DTLR.

Effects of Speed Reduction Measures on Speed Distributions and Accidents (EPSRC): Mike Maher (TRI) and Linda Mountain (University of Liverpool) have been funded £149,193 for this project to August 2004.

Speed cameras project – extension (Strathclyde Police): Steve Stradling (TRI), £50,000, start July 2002, end June 2005.

Potential for sea-rail freight transfer at Aberdeen Harbour (Aberdeen Harbour Board): Allan Woodburn (TRI), May 2002 to October 2002.

Devolution and transport in the UK – workshop series (ESRC): Austin Smyth (TRI and Queen’s University), £20,000, start April 2002, end March 2004. **Business Attitudes to Transport and Education since Devolution** study by Geography Department at University of Reading for ESSRC. Contact Dr. Mike Raco. email: m.raco@reading.ac.uk

Carbon emissions reductions in tenements: feasibility study (Energy Saving Trust): – Howard Kirby (TRI), £10,000, start April 2002, end September 2003.

In a report to DTLR, **Halcrow** have concluded that ‘soft factors’ have limited value in cutting car trips (LTT25Apr) Research by **Oxera** (01865 253000) considers that rail passenger growth to 2010 is likely to be around 39% rather than the 40/50% DTLR target. However, bus use may rise by more than 15% compared to the DTLR forecast of 10% (LTT9May). Research on the role of the car in integrated transport strategies has been completed by **Colin Buchanan and Partners** and **Napier University** (LTT4July). **Glasgow City Council** has commissioned Scott Wilson (who conducted the previous Scoping Study) to carry out the **Clyde Corridor Transport Study** at a cost of £286,000 (LTT6June).

New research has called for the same value to be attached to **road and rail deaths** (LTT4July) while DfT says work is well advanced on putting monetary values on environmental benefits. However, this will not be done for job benefits from transport schemes (LTT4July) Prof Phil Goodwin has argued that, with synergy between linked packages, it should be easier that most people expect to cut road traffic by 20%. However, he may have underestimated the political realities hampering synergy and quicker moves to road pricing (LTT1Aug).

Dundee, Perth & Kinross, Angus and Fife Councils and **Scottish Enterprise Tayside** have appointed consultants for a Tayside Rail Study. This will include evaluation of options for a new station in west Dundee near Ninewells Hospital and other major employment along with other possible halts, extra rolling stock, improved frequency and a higher quality of access to Dundee Station with specific benefits for the disabled.

Statistics

SCOTTISH ECONOMY The fall in Scottish GDP growth in the last quarter of 2001 was repeated in 2002, putting the economy in technical recession for the first time in 20 years. The main reason has been weakness in what had been the high growth electronics sector very reliant on overseas investment and sales. The accuracy of GDP figures remains in doubt but the economy has been performing less well than England (BusAM8Aug) Cities, especially Edinburgh, continue to show a strong performance. Apart from Aberdeen, housing prices in Glasgow, Edinburgh, Dundee, Inverness and Stirling are running 10% to 20% above 2001 (H5July). Yet Mackay Consultants have argued that Aberdeen had the highest economic growth in 2001 at 3.2% - compared to 1.1% in Edinburgh and 1.5% in Glasgow (BusAM9Jul) However, the Fraser of Allander Institute has cut estimated Scottish economic growth in 2002 from 1.2% to 0.9% with 1.3% growth in 2003 - compared to expected UK growth of 1.7% in 2002 and 2.8% in 2003 (H4July), since downgraded to 2.3% (BusAM 22Jul ; H 24 Aug) In May, Business Strategies took a more optimistic view of Scottish growth, arguing for growth only slightly below the UK average and with the Borders as the fastest growing region in Britain (H22May)

TOURISM The poor summer has encouraged more Scots to holiday abroad (BusAM24July) yet bookings in Scotland are at a four-year high with Edinburgh and Glasgow performing strongly despite the events of 11 September (BusAM6June&9Jul) Ryanair's new service from Aberdeen to Dublin has gained most patronage from the Aberdeen area though Ryanair sees growing prospects for in-tourism to Scotland, aided by cheap flights.

RAIL Rail freight in Scotland over the past year is up 32% measured in tonne-kmns compared to 9% for the UK. However, freight by the Channel Tunnel is down 50% (SH9June) ScotRail passenger trips are also down by 2.5m to 60.7 m in 2001-02. The Hatfield aftermath and weaker leisure travel has cut GNER travel from 15.9m in 1999-2000 to 13.6m in 2000-01 with partial revival to 14.5m in 2001-02. Anglo-Scottish GNER trips and those on the WCML are being more severely affected by low-cost domestic flights. Lower fares have helped some passenger growth but major quality and frequency improvements will only become apparent over the next few years (BusAM19July) Railtrack maintenance spending in Britain has risen from under £700m a year in the late 1990s to an estimated £943m in 1001-02 and £1112m in 2002-03(LTT4Jul)

SCOTRAIL FINANCE The Table shows the relative performance of the Regional Train Operating Companies in 2000/01.

	Operating Profit	Financial Support	Pass. Revenue	Revenue as % of Support
NW Trains	-£23m	£146m	£62m	42%
Arriva North*	-£19m	£177m	£91m	51%
Central Trains	-£13m	£140m	£96m	69%
ScotRail	£5.5m	£206m	£137m	67%
Cardiff Railway*	-£4.6m	£17m	£8.5m	50%
Wales and West*	-£13m	£56m	£60m	107%

Source: Railway Strategies, Spring 2002, p3 * indicates profit/loss for less than full year

Considering the low population density over much of Scotland, ScotRail emerges well from this data and was the only Regional Company in profit. With annual payments for track and signalling over £150m, the direct loss on passenger train operation appears to have been around £50m against which economic and social benefits have to be assessed. However, operating losses have arisen since 2000/01 (see p21)

BUS Scottish Citylink reports a 10% rise in passengers in the first five months of 2002, 24% on the Edinburgh-Glasgow route most affected by rail disputes and reduced frequency. First and Lothian Buses have experienced significant passenger growth, especially in Glasgow and Edinburgh. Lothian Buses expects to carry 95m passengers in 2002 and over 100m by 2004 (S15July)

ROAD TRAFFIC GB road traffic rose 3% in the first quarter of 2002, mainly reflecting recovery from the effects of foot and mouth in 2001. Underlying growth is between 1% and 1.5% with higher rises in some areas due to land use changes and rises in trip length. 11.3m vehicles crossed the Forth Bridge in 2001/02 compared to 10.54m in 1997/98

SAFETY Road deaths in Scotland increased by 21 to 347 in 2001 but child deaths were down from 21 to 20. SRA and other rail experts have advised that automatic train protection should be delayed until more advanced systems are available. Full and early implementation of the Uff/Cullen recommendations could cost £6.5bn across Britain compared to alternative programmes costing £3.5bn. Uff/Cullen is estimated to avoid 82 death equivalents (a mix of fatalities and injuries) over 40 years compared to 74 under the SRA preferred option (Rail 1 May & LTT 9May). Funds saved could give greater safety gains used in other ways, including road safety programmes, high standards of rail and vehicle maintenance and more rapid delivery of rail enhancements encouraging shifts from car and lorry use

AIR PASSENGERS (thousands)			APRIL-JUNE 2002		(with % change on 2001)	
Sources: Scottish Airports, Glasgow Prestwick International and HIAL						
	ABERDEEN		EDINBURGH		GLASGOW	
Domestic	412	-6.9%	1291	17.7%	1098	11.4%
Internat. Scheduled	104	19.3%	340	7.0%	280	-13.4%
Internat. Charter	33	9.9%	124	-4.8%	686	10.1%
Helicopter	117	0.3%				
TOTAL	667	-1.5%	1754	13.6%	2064	6.8%
	PRESTWICK		INVERNESS		OTHER H&I	
TOTAL	375	21%	103	3.7%	116	1.5%

Comment: Overall, usage of Scottish Airports rose compared to 2001 with growth at Edinburgh and Glasgow largely underpinned by low-cost scheduled carriers. Glasgow's charter rise reflects the start of the main holiday period and fans attending the UEFA cup final. The fall in international scheduled passengers at Glasgow was mainly due to the loss of the Sabena service to Brussels. Services operating from Edinburgh and Aberdeen to destinations such as Amsterdam and Dublin also performed well. Aberdeen continues to be affected by lesser activity in the oil industry and by leakage of travellers to Central Scotland airports. Video conferences may also be affecting business travel from the area. Prestwick retains high growth based on Ryanair expansion.

SCOTTISH FERRY TRAFFIC CalMac has ended publication of quarterly data on the grounds that this could prejudice its position in bidding for the new franchise (see p11). This may lead to a permanent reduction in available data (useful for looking at trends in island economies and in area tourism) unless this is specified in the final franchise document.

Infrastructure

RAIL

WCML modernisation is leading to total line closures at weekends south of the border until Christmas despite calls by Virgin for at least 2 tracks to remain open. **ECML** mining subsidence at Dolphingstone near Tranent has led to severe speed restrictions and spending of £12m on an alternative section of route to open early next year. However, GNER is resisting plans for total closure over the very busy New Year period (S3May) SRA is determined to cap the cost of vital ECML works to raise capacity over the next seven years but has not ruled out new sections of 190 mph route in plans for the following decade. Meantime, 125 mph will be the maximum speed on ECML and the modernised WCML (Rail1 May; Bus AM 5 Aug)

Two-thirds of the Scottish rail network is now fitted with **Train Protection Warning** (TWPS) and the £45m Scottish programme should be complete by December 2003. However, HSE is pressing Railtrack Scotland to meet higher standards for points inspections (H 16 May & 11 Jul). Completion of the new high-speed route between Frankfurt and Cologne has been contrasted with continued delay in securing a step-change in Edinburgh-Glasgow services (BusAM 26July) Perthshire Chamber of Commerce is pressing for faster rail services to Edinburgh. For airport access plans and rail operation across Glasgow, see p15. Automatic

Road suffered less than rail in recent high rainfall yet it has been claimed that improved drain maintenance could have reduced delays from flooding. Complaints continue at poor levels of road maintenance and long cycles between major renewals on non-trunk roads. On the trunk A8, the start of the £23m major maintenance between **Baillieston** and **Newhouse** will mean 17 months of delays(BusAM9Aug) .

Plans have been approved for a £65m conversion of the A74 from **Carlisle to Gretna** to a 3-lane motorway. Work is expected to start in 2005 (BusAM18Jul) Work on an A66 **Temple Sowerby bypass** should start in 2004 with the NE England Regional Transport Strategy favouring complete dualling of the A66 from Penrith to Scotch Corner by 2012. Work has started on extending **A1** dualling from Haddington to Dunbar but, in England, the Newcastle-Berwick multi-modal study has recommended only limited further dualling on the A1. Further stages of design work on the **urban M74** are taking place despite arguments by TRANSform Scotland that the CSTCS shows

half barriers at the Allanfearn level crossing (on Inverness-Aberdeen route) have raised permitted rail speed from 40 to 70 mph while progress is expected on Aberdeen Crossrail by the autumn.

The Executive has granted £1m to design studies essential for the upgrading of **Waverley** station and a further £5m towards progressing a **tram link to west Edinburgh**. The four-year Waverley reconstruction plan may not now be finished until 2009 (H&S23May;S&BusAM 30July). Iain Gray has stated a determination to have **Edinburgh Park** station open by 2003 (SH9June) Railtrack is modernising track on the south Edinburgh freight line in a £4m project. (EN21June) **SPT** members are to visit five French cities with light rail schemes. Rail expansion plans figure in the Final Reports from CSTCS (see p9-10) Concern has been expressed that such schemes plus airport rail links could work against priority for a reopened railway to the **Central Borders**. The latter scheme continues to attract vigorous support though crunchtime will come when financial priorities emerge. While some commentators have doubted the value of spending public funds on railways and urged rural rail closures and an early death for the Borders project, published political opinions and local consultations have backed this project (see p16).

ROADS

that building this route would leave inner Glasgow and the M8 west from the Kingston Bridge more congested than at present. TRANSform favours an emphasis on smaller schemes (including the A8 and A80), fares reform, road pricing and greater incentives to walk, cycle and use public transport (Surveyor20June). TRANSform, SAPT and FOES are also seeking a review by the Auditor-General of the role of the proposed **A78 Three Towns Bypass** (for which Compulsory Purchase Orders have been approved following last year's inquiry). They argue that, on the inquiry evidence, this bypass gives a poor fit with the Executive's stated objectives and would take funding away from more beneficial projects (ASSHerald2Aug). However, Tom Sunter of the Institute of Directors Scotland and George Kerevan have argued that improved roads must be the main feature of transport programmes (S13May&19Jul) Tenders for the **M77Extension/Glasgow Southern Orbital** PFI project have been received by the Executive. An award is expected by the end of the year with construction starting spring 2003 (BusAM1Aug).

BUS LANES & BUSWAYS

Complaints have been made about poor enforcement of bus lanes in Glasgow and Edinburgh. Parked vehicles have been allowed to block lanes for significant periods while scaffolding has also encroached on bus lanes (H14June,EN15July) Glasgow City Council has promoted further orders for the Fairley-Baillieston Quality Bus Corridor (H14June) and has publicised revised designs for a new bridge at Finnieston with priority lanes for public transport plus general purpose lanes.



Proposed Finnieston Bridge H 26 July

AIRPORTS

For airport expansion options, see p . The NATS air traffic control base at Prestwick is to assume an increased share of transatlantic traffic but doubts remain about the ability of NATS to proceed with the long-planned major upgrade at Prestwick (S1May,EN30Jul).

WALKING, CYCLING & CANALS

The **Millennium Canal Project** is now complete see rear cover (S4Jul). **Aberdeen City Council** is studying a partial pedestrianisation of Union St while **Glasgow** is to close George Square to vehicles as part of car-free day on 22 September.

Campaigners have attached the excessive scale of a new roundabout on the **A701**, saying that this anticipates further business park expansion which could encroach on greenbelt between Penicuik and Edinburgh (EN10June) There are rising hopes by Falkirk and West Lothian Councils that the Executive will help fund a £9.5m plan to realign the A801 at the **Avon Gorge** (EN1Aug) The NFU has added its weight to campaigns for extra local roads to take local traffic off the **A90 Perth-Dundee** trunk road at Inchture (S23Jul) Argyll and Bute and Highland Councils have sent a detailed submission to the Executive on improving the **A82** trunk road on economic, social and safety grounds. Highland Council has invited tenders for a £2.8m improvement of the **A832** near Achnasheen.

TUNNEL TO REPLACE FERRY?

Shetland Council is considering whether a £37m Yell-Unst road tunnel might be more effective than the existing ferry. Advice is being taken from Norway (LTT25Apr)

Property and land Uses

PLANNING - NEW DIRECTIONS?

Under the biggest changes for 30 years, the Scottish Executive is proposing to refocus planning strategy on the four city regions centred on Glasgow, Edinburgh, Dundee and Aberdeen while abolishing two-tier planning in other areas (H,S&BusAM27June). The intention is to make planning more flexible and supportive of opportunities for sustainable development and regeneration. The Scottish Planning Framework will be strengthened but with more accessible procedures to encourage community interest without delayed decision-taking. Boundaries for city region planning have not yet been set but are certain to provoke battles over a split of Fife between Forth and Tayside strategic planning regions.

RTPI in Scotland has welcomed these changes and looks forward to consultation on the forthcoming legislation and a rise in trained planning staff (S15July). Business remains to be convinced of desires for simplified, faster procedures (BusAM2May) and has also queried interpretations of sustainable development constricting greenfield opportunities. RTPI sees some scope for greenbelt encroachment within an appropriate framework but the National Trust for Scotland has taken a much stronger line on preventing ‘dismantling of the countryside for short-term development gain’ (H1Aug).

In many respects, the new planning strategy incorporates much of what was already in previous planning guidance, notably **NPPG17 on Transport and Planning**. Th new features, which may become more apparent when the Cities Review is published, are an apparent intention

to enforce policy guidance and improve the delivery of integration with an emphasis on city regeneration and disciplined corridor expansion rather than sprawl – while not neglecting the particular problems of more rural regions and pockets of deprivation away from cities. The new requirement for **Transport Assessments** rather than Traffic Assessments in new developments confirms a determination by the Executive to move away from ‘predict and provide’ and a replication of past trends. Instead, discussions on planning applications are to cover mode share targets and the measures needed to aid shifts to walking, cycling and public transport (LTT25Apr)

Whether the Executive will take a stronger line on employment and population distribution as between the four city regions is not yet evident. There is still a tendency to rely on normal market pressures to produce spillovers from overheated regions such as SE England and Edinburgh within Scotland to areas combining opportunity and deprivation e.g. Glasgow and Dundee. Elements of such spillover are being detected (H27 May, 1 June; S27 June; Bus AM 9 Jul) yet it may be insufficient to meet political priorities such as affordable housing or commuting by improved public transport to ease immediate labour market pressures. There are also signs that the stock market collapse may soon extend into the property and shopping sector cutting prospects for spillover. Already, the booming commercial property market in Edinburgh is showing some evidence of being on the turn (BusAM10July)

URBAN HINTERLANDS

Further expansion between **Braehead** and **Renfrew** and along the Clyde west from central Glasgow has been approved and will aggravate traffic conditions in the absence of alternative strategies. The **Glasgow Fort** retail development in east Glasgow off M8 Junction 10 is expected to deflect some shopping from central Glasgow but is likely to have a bigger impact on other shopping outlets in east Glasgow and parts of Lanarkshire. Phase 1 is due to open in autumn 2003 (BusAM23July) A £15m speculative expansion of **Strathclyde Business Park** in Lanarkshire has started and a second phase of office development at **Eurocentral** started in June. 500 call centre jobs have been gained at nearby Tannochside. Renamed **Westway**, the former Babcock site at Renfrew close to Glasgow Airport is being refurbished for business use while **Rolls Royce** has confirmed that the replacement for its Hillington factory is to be built at Inchinnan on the north side of the airport. Housebuilders are expanding plans for new housing in Lanarkshire, at times on derelict industrial sites but also in higher amenity zones like Bothwell and Biggar. In Edinburgh, the south side **Cameron Toll** shopping centre is to have a £20m refurbishment, including enlargement of the Savacentre supermarket.

Heriot-Watt University is hoping to expand into greenbelt to create a 4000 job Science Park between its Riccarton campus in west Edinburgh and the A71. Having lost the Gogarburn Hospital site to the Royal Bank, **Queen Margaret College** may move from Edinburgh to a greenbelt site close to the A1 at Musselburgh. A new rail station could be provided but Granton Waterfront is another possible site (EN11Apr)

Asda has opened its first (and last?) Wal-Mart size Scottish store at **Livingston** town centre (H 14 Aug). Asda is also planning expansion in smaller Scottish towns. The aim is convenience-style stores with Fraserburgh and Arbroath as initial targets (BusAM23Jul)

Plans for 5000 houses in two new housing developments near **Drem** have attracted substantial opposition though the housing would be close to the ECML and North Berwick rail line and conforms to the general Structure Plan principle of expansion along this corridor (EN13June). Morston Assets are seeking to build a 1000 home village near **Linlithgow** and are also keen to accelerate the **Shawfair** development to the south-east of Edinburgh. They

City evidence, planning objectives and changing consumer patterns are revealing trends away from large supermarkets towards more modest developments and some expansion of the convenience store/corner shop (H9&14May25July; BusAM23Jul). **Dundee** has seen significant improvement in the local economy, combining city centre shopping/leisure growth with more diffuse employment (BusAM27June). **Aberdeen** is seeking to counter slippage in the relative importance of Union St as a shopping/leisure focus while **Edinburgh** city centre is fighting back with the opening of **Harvey Nichols**, a Jenners revamp, Waverley reconstruction and revised plans for a shopping mall under Princes St. Though growing, usage of the **Ocean Terminal** shopping/leisure complex in Leith is well below Edinburgh City Centre and Braehead in outer Glasgow which itself has activity well below central Glasgow BusAM22July). Compared to Braehead, central **Paisley** has achieved some recent revival. Under the impact of Ikea at Braehead, **Habitat** is downsizing to smaller premises away from Buchanan Galleries in central Glasgow but overall activity at the latter is rising. Two more hotel groups have announced expansion in central Glasgow. Sites at **Granton** in Edinburgh and Tradeston in Glasgow are competing for selection as the first World Trade Centre in Scotland (BusAM9Aug) However, **rising sea levels and rainfalls** have become a bigger challenge to developments in Glasgow with particular problems on the tidal Clyde and in stormwater drainage design. A barrier like that on the Thames may become desirable but could cost £1bn (ET5Aug)

have offered to finance a new halt on the existing rail formation south of Newcraighall but the Border Rail Consortium, including Midlothian Council, prefer building a new stretch of line to permit a station in the centre of the development and aligned for an easier crossing of the Edinburgh bypass as part of the planned route to Tweedbank (see p16 & S 29 Jul, SoS 21 July) In **Aberdeen**, controversy continues on plans for a Euro 2008 greenfield stadium at Kingswells, replacing Pittodrie. The developers are offering a £2m plus contribution towards the proposed Western Peripheral Road but the proposal is likely to be called in for a Scottish Executive decision (BusAM16June&1Aug). Faced with heavy funding to raise existing water and sewer systems to EU standards, **Scottish Water** is acting to constrain new developments which cannot be accommodated within existing capacity. This has led to the shelving of some greenfield developments but could also impact on urban regeneration (BusAM11June)

Loch Lomond Shores, the £45m tourist and retail development at the south end of Loch Lomond has opened (BusAM1Aug).

CITIES

REASONS FOR NOT USING PUBLIC TRANSPORT TO TRAVEL TO WORK

: SOME SCOTTISH HOUSEHOLD SURVEY RESULTS A note by the Scottish Executive Development Department

1 Usual means of travel to work: (based on 1999 to 2001 results)

The interviewer asks the randomly chosen adult about his/her usual means of travel to work. 67% of employed adults said that they usually travelled to work by car or van, 13% walked, 12% went by bus, 2% by rail, and 2% by bicycle. Commuters who usually travelled by car or van were asked whether they could use public transport. 46% of them (44% of drivers and 56% of passengers) said that they could use public transport but did not normally do so. Earlier results on travel to work and modal choice were given in STR 8, Winter 1999/2000 p 16.

2 Car / Van commuters who said they could use public transport: reasons for not doing so

People who said that they could use public transport to travel to work were asked why they did not do so. The main reasons they gave were that it would be “inconvenient” (52%), “takes too long” (35%), “use my own car” (33%), and “no direct route” (23%). Each of the other reasons was given by at most 10%. There were some differences between the **sexes** in the reasons given for not using public transport. Those reasons with the largest variation were: “need a car for/at work” (15% of men in this sub group said this compared with 7% of women), “use my own car” (35% of women compared with 30% of men), “no direct route” (25% of men, 22% of women), and “work unsociable, unusual hours” (10% of men, 8% of women).

Reasons given for not using public transport did not vary much by **age**. “Cost” was said to be a reason for not using public transport by 12% of those aged 16-19, 10% of those aged 30-39, and slightly less (8- 9%) of those aged 40 and over. 7- 8% of 16-29 year olds and those 60 and over said they “need a car for/at work” compared with 11-12% of other age groups. Some of the reasons for not using public transport vary with annual net **household income**. The reasons with the largest variation were: “takes too long” (28% of those in the group with an annual net household income of up to £10,000 in contrast to 43% of those in the “over £40,000” band), “no direct route” (19% of those with an annual net household income of up to £10,000 compared with 31% of those in the “over £40,000” band), and “need a car for/at work” (2% of those in households with an annual net income of up to £10,000 compared with 17% of those in “over £40,000”).

Some of the reasons given for not using public transport vary with the **type of area** the adult lived in. 37% of those living in large urban areas said they “use their own car” compared with 33% in remote small towns/rural areas, 30% in other urban areas and 26% in small accessible towns. 13% of those living in remote small towns/rural areas said public transport was “too infrequent” compared with 6-7% of those in large urban areas (with population over 125,000) and small accessible towns respectively, and only 4% in other urban areas. 7-8% of those living in urban areas said there was “a lack of service” compared with 14-15% of those in remote small towns/rural areas. However, between areas there was little variation for other reasons with ranged only from 51-54% (“inconvenient”), 34-36% (“takes too long”), 21-25% (“no direct route”), 9-12% (“Cost”), 8-12% (need a car for/at work”), and 7-11% (work unsocial/unusual hours”).

Some of the reasons vary with **distance** from home to work. Almost one fifth (19%) of people in the group who live less than 1km from work said public transport “takes too long” compared with half of those living over 20km from work. Almost two fifths (39%) of those who live less than 1km from work said public transport was “inconvenient” compared with almost three fifths (57%) of those who live over 20km from work. 44% of those who live less than 1 km from work said they “use their own car” in contrast to 26-28% of those who live over 15km from work. 9% of those living less than 1km from work said there was “no direct route”, compared with 14% living between 1 and 3km from work, 23-25% of those living 3 to 10km from work and 28-31% of those living 10km or over from work. 3% of those living less than 1km from work gave “cost” as a reason for not using public transport compared with 9-11% in the “middle” categories and 16% of those who live over 20km from work.

3 Car / van commuters who said they could not use public transport: reasons for not doing so

The main reasons they gave were that there was “no direct route” (36%), “lack of service” (34%), it was “inconvenient” (28%), “need a car for/at work” or “work unsociable hours” (both 20%), “use my own car” (16%), and “takes too long” (15%). There were some differences by **sex**. Those reasons with the largest variation were: “need a car for at, work” (24% of men compared with 16% of women), “work unsocial, unusual hours (24% of men compared with 15% of women), and “lack of service” (32% of men compared with 37% of women). With respect to **age**, the reason with the most difference was “need a car for/at work” with 14% of those aged 16-29 and 17% of those aged over 60 giving this as a reason, in contrast to 20% of aged 30-39 and 24% of aged 40-49.

By annual net **household income**, 10% of those in the group with income of up to £10,000 said public transport “takes too long” compared with 18% of those in the “over £40,000” band. There was not much variation for those who said there was a “lack of service” (33-36% of each category), or that public transport was “inconvenient” (26-31%). Similarly there was only a little variation by annual net household income for those who said there was “no direct route” (34-37% of those with annual net household income of less than £40,000, and 40% of those in the “over £40,000” band).

There was a lot more variation by the **type of area** lived in. For example, 18% of those living in urban areas said there was a “lack of service” compared with 56% of those living in remote small towns/rural areas. 5% of those living in urban areas said public transport was “too infrequent” compared with 11% of those living in small remote towns/rural areas. There was variation between areas in those who thought public transport “takes too long” (20% of those in urban areas compared with 10% in small remote towns/rural areas). The reasons given for not using public transport vary by the **distance** from home to work. 6% of those of the group who live less than 1km from work said public transport “takes too long” compared with 24% of those who live over 20km from work. 21% of those who live less than 1km from work said public transport was “inconvenient” compared with 32-33% of those over 15 km from work. 29% of those who live less than 1km from work said there was “no direct route” compared with 41% of those who live over 20kmaway.

4 Background and Further Information

As with all such surveys, factors such as sampling variability and non-response bias may affect the results. SHS questions on transport were listed in issue 5 of “STR” (page 19) and some results have appeared in each of Issues 6 to 17.

The following SHS publications are available from HMSO:

- “Scottish Household Survey Bulletins” (£5 each - ISSN 1467 7393)
- “Scotland’s People - Results from the 1999/2000 Scottish Household Survey”, volume 3 - annual report (£20 - ISBN 0-7559-0230-0) and volume 4 - technical report (£15 - ISBN 0-7559-0231-9)
- “Scotland’s People - Results from the 1999 Scottish Household Survey”, volume 1 - annual report (£20 - ISBN 1-84268-026-9) and volume 2 - technical report (£15 - ISBN 1-84268-066-8)

The annual report volumes of “Scotland’s People” and the “Bulletin” provide figures on a range of the topics covered by the survey, and brief background notes on the survey and the SHS urban/rural classification. The technical report volumes of “Scotland’s People” provide a detailed description of (e.g.) the method of selecting the sample, the questionnaire, fieldwork and response rates, etc.

Some SHS results have been published in “Scottish Transport Statistics”. More detailed transport-related results have appeared in Transport Statistics bulletins of SHS results: “Household Transport: some Scottish Household Survey results” (latest edition: May 2002; ISBN 1-84268-780-8), “Transport across Scotland: some SHS results for parts of Scotland” (December 2001; ISBN 0-7559-3287-0), and “Scottish Household Survey Travel Diary results” (February 2002: ISBN 0-7559-2171-2), HMSO at £2 each. An anonymised copy of the SHS data for 1999/2000 is available from the UK Data Archive (www.data-archive.ac.uk). Further information about the SHS, can be found on the SHS website, at http://www.scotland.gov.uk/shs. Enquiries should be made to the SHS Project Team: Tel: 0131 244 8420 FAX: 0131 244 5393 Email: shs@scotland.gsi.gov.uk.

THE BORDER (WAVERLEY) RAIL PROJECT

by **David Southern**, Communications Manager, Waverley Railway Project

Introduction

The Waverley Railway Partnership aims to re-establish a rail link to provide a passenger service from Edinburgh to the central Borders by 2008. The project is seen as the first phase of re-instating the entire rail link from Edinburgh to Carlisle. The joint promoters are Scottish Borders Council, the City of Edinburgh Council and Midlothian Council who, along with Scottish Enterprise Borders, form the Waverley Railway Partnership. Following the feasibility study carried out by Scott Wilson (see STR, Issue 9, Spring 2000), the Partnership has embarked on preparation of a Bill to be submitted to the Scottish Parliament early in 2003. The impetus is also based on economic studies and a wealth of public opinion that believe that re-establishing the rail line will bring significant benefits to the three regions through which the Waverley line will travel.

Benefits

Some of the key benefits are seen as:

- * creation of 900 jobs in the Scottish Borders over a period of ten years once the railway opens with a further 450 jobs in Midlothian region over the same period.
- * increasing availability of housing options in the Borders and Midlothian, in turn reducing the pressure on Green Belt land around Edinburgh.
- * reduction of road traffic on the A7 and / or A68 given a direct and time efficient rail route to and from Edinburgh and the Scottish Borders.
- * increased opportunities for the transfer of tourists to and from Edinburgh, Midlothian and the Scottish Borders.

The Schedule

The Waverley Railway Project is currently on schedule and the expected programme is:-

Current - Early 2003:	Technical assessments including public consultation on route
Early 2003:	Submission of Bill to Scottish Parliament
Rest of 2003	Post submission of Bill including Parliamentary Inquiry and confirmation of powers to construct.
Current to March 2004:	Obtain funding for the Scheme
End 2003 - End 200	Construction consortium procurement
Spring 2005:	Start Construction
2008:	Opening of the Waverley Railway Line

The Outline Route

Following technical assessments, an initial route plan for Phase 1 was recommended which covers the 35 miles (56km) from Edinburgh to Tweedbank, just south of Galashiels. A 30-minute frequency service is proposed with stations at Shawfair, Eskbank, Newtongrange, Gorebridge, Galashiels and Tweedbank. Current estimates for train times are 59 minutes from Tweedbank to Edinburgh Waverley. The first section of the Waverley Railway Line exists with the recent opening of Edinburgh CrossRail which extends the existing Dunblane to Bathgate line through Edinburgh Waverley to Brunstane and Newcraighall. The key features of the stations proposed in the outline stage, which is subject to public consultation up to the end of August (2002), and further assessments, are:

Shawfair:

- a new development of some 3,500 homes situated in the 'South East Wedge' with a proposed town centre station location which maximises walk-in patronage and facilitates interchange with buses, taxis, etc and assists security of pedestrians
- new direct rail route allows for a "square" crossing of the Edinburgh city bypass minimising construction costs at this point and cutting train-running time
- minimises interface with rail freight traffic at Millerhill

Eskbank

- good access leading from the A7 with car parking available near platform; potential to have large car park (Park & Ride)
- located close to key population centre of Bonnyrigg, Jewel & Esk Valley College and proposed Community Hospital nearby; adjacent to Tesco

Newtongrange

- adjacent to key tourist attraction of the Mining Museum
- direct access from A7; additional parking opportunities available without inconvenience to residents

Gorebridge

- no obvious alternative available that allows for serving the town centre

Galashiels

- close to town centre, maximising pedestrian usage.
- allows a 'Modal Interchange' with the proposed revised bus station site
- facilitates future development (retails etc), which could effectively man the station and enhance security.

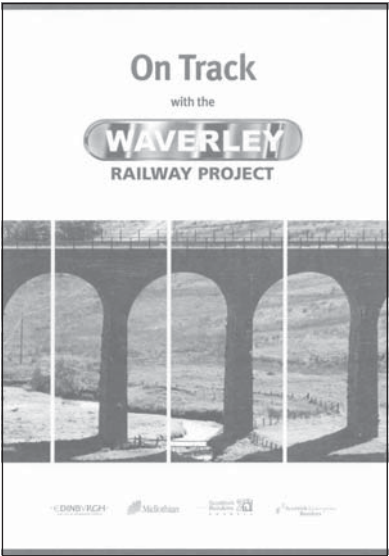
Tweedbank

- offers a 'Park & Ride' opportunity, with good access from the A6091
- close to significant residential areas in and around Tweedbank and Melrose
- close to new Pensions Agency Offices
- opportunities for bus services to and from other Borders towns to integrate with the rail service.

Conclusion

Communications are continuing with the Scottish Executive prior to Bill submission and the results of the consultation process are currently being considered in line with ongoing technical, environmental and economic impact studies.

Further information is available at the Project's website - www.waverleyrailwayproject.co.uk - or on information line 0131-623 2008.



CENTRAL SCOTLAND TRANSPORT CORRIDOR STUDIES : CONSULTANTS' FINAL 2010 REPORTS

*The Final Reports from CSTCS for the period to 2010 were submitted to the project Steering Group by MVA as lead consultants in June. Some further changes may be made in the light of comments from the Steering Group but Public Exhibitions are now being held on the main aspects of the proposals as they affect each corridor. Presentations have also been made to MSPs and local authorities. The Scottish Executive has invited public comments by **30 September** and, as Minister for Transport, Iain Gray plans to announce decisions on the Reports by the end of 2002. The procedures for report preparation were outlined by Steve Williamson of MVA in STR Issue 16 Winter 2001/02, p20. The full Reports are available on the project website www.cstcs.co.uk*

Background

Following on from the Strategic Roads Review of November 1999 which called for multi-modal appraisal before transport decisions affecting Central Scotland, the Scottish Executive commissioned the CSTCS in late 2000 with particular reference to a multi-modal approach to those sections of the A8 and A80 not upgraded to motorway and to the implications for multi-modal approaches of the decision, to be taken as given by the consultants, to construct the urban M74. A Kelvin Valley route for the M80 was also ruled out of consideration. The remit was to bring forward proposals for extra road capacity only if alternatives were shown to be unsatisfactory. The Steering Group agreed that account be taken of the assumptions of the Glasgow and Clyde Valley Structure Plan. Recommendations had to be deliverable in 5 year, 10 year and 20 year timeframes and based on STAG appraisals.

Demand Forecasts

After extensive modelling of demand and testing for robustness on lower assumptions about economic growth than those in the GCV Structure Plan, the steering group concluded that - in the absence of other policy changes - road traffic growth on the corridors examined to 2010 is likely to be considerably higher than recent trends for Scotland as a whole even with maximum efforts to reduce the need for travel and to encourage shifts to public transport within existing frameworks. Indeed, modelling indicated a continuing decline in the modal share of public transport (especially for bus use) though with some prospects for absolute increase in scenarios of higher economic growth. Changes in public transport fares and service levels were found to have only marginal influences on road traffic growth though these would be larger for peak trips to Glasgow and Edinburgh city centres - more severely affected by parking problems and congestion. Even with developed alternatives, road traffic growth of around 65% to 110% on 2000 levels is forecast for the A8 and A80 by 2010 though growth would be lower on the inner section of the M80 (Stepps Bypass) and on the M8 through Glasgow due to diversions via the urban M74 and M73.

This level of traffic growth is partly influenced by available spare capacity, especially off-peak, on the existing road network and by the corridor land use development anticipated in the GCV Structure Plan. Despite the city and town regeneration emphasis of the Structure Plan and Scottish Executive Planning Advice, the Study results point to major difficulties in reversing the trend to increased trip length and to intensified development close to major roads and junctions. Present levels of congestion are expected to increase and spread with particular problems on the M8/M77 to the west of the junction with the urban M74 and spillovers from A8 and Shawhead Junction improvements affecting the Raith interchange where the Bellshill Bypass/East Kilbride Expressway crosses the M74 at Bothwell.

Moderating Traffic Growth : Improving the Environment & Access

The Reports suggest how these problems can be ameliorated by measures such as ramp metering (entry or main corridor flow controls using traffic lights), priority lanes for coaches/lorries/high occupancy vehicles and possible segregated tolled lanes for users once capacity has been increased. Considerable attention is also given to measures to prevent a re-growth of traffic on roads relieved by improvements on

the M8, M80 and M74. These are included in assessments of changes in local air quality, overall greenhouse gas emissions, noise, community disruptions and environmental quality. Time savings remain the main measure of economic benefits.

It is recognised that time savings from road improvements could accelerate shifts away from public transport (and towards longer car trips) unless measures are also taken to improve public transport networks. This is the main justification for the substantial, but mainly rail-based, public transport improvements listed. Some park-and-ride schemes are included after sifting to ensure that these do not abstract significant numbers of existing public transport users or encourage more car trips on busier sections of road. The institutional structure of the bus industry is seen as a major barrier to bus improvements and to fully integrated ticketing.

Though not presently acceptable to local authorities in the west of Scotland, it is concluded that congestion charging in the west as well as around Edinburgh could help in reducing traffic and levels of congestion. The greatest impacts would be on the urban M74 and on other traffic volumes closer to city centres. Impacts on the A8 between Baillieston and Easterhouse would be modest unless road user charging was extended to include motorways and trunk roads and an extensive zone in Glasgow reaching as far as the M73. The Executive has authorised MVA to consider the possible direct impacts of such charges on traffic flows and forecasts between 2010 and 2020. There will be separate evaluations to ascertain the further impacts on flows and modal share of options for use of the proceeds of more extensive charging.

Corridor Recommendations (for Maps, see p13)

1 Common Features

Greater use of bus priorities, quality networks, demand responsive transport, travel plans, enhanced interchanges, integrated ticketing and improved access for walkers and cyclists to bus and rail is recommended though with recognised problems in implementation.

2 A8/M8 Corridor

- Up-grade of A8 to 3-lane motorway between Baillieston & Newhouse (£105m)
- Rail improvements from Glasgow to Whifflet and Carfin/Ravenscraig.
- extension of North Clyde electric services to Edinburgh with a restored Airdrie - Bathgate rail link providing a quarter-hourly intermediate service to Edinburgh Park and central Edinburgh (£105m)

3 A80/M80 Corridor

- Up-grade of A80 between M73 Junction and Haggs to combinations of 3 and 4 lane motorway plus a 2-lane motorway Muirhead Bypass (joining the existing M80 Stepps Bypass) (£190m)
- Quarter-hourly electric rail service from Queen St Low Level Line via new Garngad chord and the Stepps line to Falkirk with a major park-and-ride site and bus interchange at Castlecary (£82m)
- direct rail service from Stirling to Motherwell via Cumbernauld
- options for some Stirling and north services to use St Enoch Bridge for access to Paisley and Glasgow Airport (costs shared with A8/ M8 / M74 corridor)

TRANSPORT POLICY : WALES AND NORTHERN IRELAND

Free travel for the elderly and disabled is now available throughout **Wales** on local buses though there are pressures for extra help for those living in rural areas with very few, or no, bus services (LTT9May). A public transport unit is being established within the transport directorate and a National Public Transport Alliance is being formed to overview public transport activity. The Assembly is seeking further powers to allow it to give Directions to the SRA as in Scotland. A consultation paper on walking and cycling policy is to be published in the autumn.

The finalised Regional Transport Strategy for **Northern Ireland** has increased planned spending to 2012 from £3bn to £3.5bn. Funding from previous patterns of spending is just over £2bn but additional spend is expected from the UK spending review and from expected consents from the Treasury to borrow at advantageous rates of interest by 2004/05. Prospects for developer contributions and for PPPs are also being explored, including shadow or real tolls in the Belfast area. Consultation on this is planned from September. The final strategy includes an extra £64m for public transport, delivering more quality bus corridors, bus-based park and ride, increased coach frequency and extra rail capacity. The proposed spending divide is 63% for roads, 35% for public transport and 2% for walking and cycling. Consideration is being given to a new regulatory body to oversee public transport currently provided by state-owned Translink. This new body could have a tendering function, allowing Northern Ireland to meet proposed EU regulations requiring tendering for public transport passenger services (LTT 1May & 18 July)

CENTRAL SCOTLAND TRANSPORT CORRIDOR STUDIES : CONSULTANTS’ FINAL 2010 REPORTS

4 M74 Corridor

MVA recommendations are limited since separate studies for the Executive are investigating detailed design of the urban M74 and means of easing congestion intensified by completion of this route - especially west from the Kingston Bridge. MVA recommendations deal with approach junction modifications and traffic calming measures on existing roads relieved. Improved rail services to Hamilton, Larkhall and Carfin/Ravenscraig are seen as priorities together with various bus priorities and public transport schemes to provide alternatives to the western M8 These will be influenced by other current studies.

Delivery and Phasing

- Due to institutional and financing problems, modest spending is expected to limit schemes completed by 2006/07 to:-
- the present A8 major maintenance programme (including hard shoulders) plus Phase 1 of improvements at Shawhead interchange
 - initial stage of A80 improvement between M73 and Castlecary (including grade separation at Auchenkilns)
 - Edinburgh-Glasgow Queen St rail improvements (including Edinburgh Park station, extra train capacity and enlarged car park/ bus feeders at Croy)
 - extension of all present Glasgow Queen St High Level-Cumbernauld services to Falkirk Grahamston with Castlecary park-and-ride
 - rail improvement to Hamilton and extension to Larkhall plus improved services from Glasgow to Carfin/Ravenscraig (possibly via Whifflet)

Central Scotland Transport Corridor Studies

COMMENTS

As yet, reactions to the Final Reports have been muted due to the lack of convenient summaries and limited media coverage. The public exhibitions should improve on this position and there is certainly interest in how the outcomes of the Executive spending review due in September may affect the level and bias of funding. There is doubt about the policy inputs used in the forecasts of high levels of road traffic growth. Given recent experience and the Executive’s Delivery Plan aspiration to tackle congestion and stabilise Scottish traffic levels over the next 20 years, doubt has been cast on the realism of a doubling of traffic at key corridor locations. TRANSform Scotland has criticised the forecasts as excessive - especially in relation to the A80 corridor. It has argued that extra capacity leads to extra traffic and has claimed that the Study supports the view that, unless road pricing and other traffic demand management measures are introduced by 2007, congestion (including the Kingston Bridge) will be worse in 2010 than it is now even with the urban M74 open. Greenhouse gas emissions would also rise rather than fall.

In general comments on multi-modal studies, the SRA sees a failure to ensure that rail elements are properly costed and deliverable within national and regional strategies. Though arguing that a greater shift to public transport (even without road user charging) is achievable than under MVA’s estimates for modal shift, SPT and SAPT have taken the view that public transport revenue support may have to be increased to secure optimum modal shift and social inclusion. These bodies feel that there are neglected opportunities to use fares and other policies to encourage greater use of public transport, combining social inclusion priorities with fare levels and service quality inducing car users to switch mode. In addition, they see a need for greater emphasis on the institutional changes needed to improve rail delivery in Scotland.

There have been reservations about whether the Airdrie-Bathgate rail reopening and electrification through to Edinburgh can be achieved at

Other rail and road improvements may also take place in the period to 2007 but these depend on priorities from other studies (Scottish Strategic Rail Study, Airport Rail Links Study, Clyde Waterfront Study). Work on the urban M74 would be expected to be well under way with the M77 Extension, Glasgow Southern Orbital Road and Finnieston Bridge completed. Rail priorities may include the St Enoch Bridge Crossrail north to south link and related access to Glasgow Airport. Work on other components of the 2010 scheme elements would also have started with staggered completion between 2007/08 and 2010.

Total capital costs, including the urban M74 and M77, an airport rail link, the St Enoch Crossrail, Strathbungo link and Larkhall extensions are estimated at some £1.2 bn (of which some £600m relate directly to CSTCS) over 8 years - well above present levels of spending. Some increase in public funding is expected but, even with a PPP approach to major projects and possible contributions from developers, the financial deliverability of such a programme within the totality of Scottish transport spending is not assured. Reviews of the need for extra revenue support for public transport may also increase total financial demands.

Spatial Impacts and Regeneration Priorities

The Study concludes that, on balance, the schemes proposed would aid economic growth in the relatively depressed zone from Falkirk to mid-Lanarkshire but this conclusion has to be read in conjunction with separate assessments that construction of the urban M74 - provided that congestion west from Glasgow can be kept at levels no more severe than at present - will tend to encourage economic activity in relatively depressed zones (but with development opportunities) to the west of central Glasgow and into Inverclyde and Ayrshire.

the projected £105m capital cost and with a reduction in revenue support. This project is unlikely to be completed before 2009 and offers longer trip times than the present service between Glasgow Queen St and Edinburgh. In addition to interim improvements on this route, SAPT has expressed surprise that more attention has not been given to the introduction within three years of an intermediate express service from Edinburgh to Glasgow Central via Shotts. This would remove the need for passengers to and from Glasgow south side and the south-west to walk or taxi across to Queen St and open early prospects for Edinburgh trains to reverse at Central High Level and proceed through to Prestwick Airport and Ayr by 2005. By 2010, as MVA suggest, further improvements in cross-city services could use the St Enoch Crossrail link to give a wider range of direct services to Paisley and to Glasgow Airport. Bus operators have pointed out that bus usage in Greater Glasgow and Edinburgh has been rising - contrary to CSTCS model predictions - with potential for further growth as part of quality partnerships.

Business views have emphasised doubt about actual financial allocations for improvements and strong preferences for accelerated work in the 2002-07 period as part of strategies to reduce congestion. This may point towards an earlier introduction of road user charging given the changed views of Glasgow City Council that this could be acceptable as part of a strategy including charges on motorways and a further up-rating of transport investment. There is concern at added disruption during the major reconstruction proposed on the A8 and A80 corridors. Academic views have stressed the importance of Glasgow as the powerhouse for the west of Scotland economy with a greater need for transport policies and the GCV Structure Plan to highlight the potential of Glasgow itself, some selected quality corridors across to Edinburgh and an end to the land use sprawl and public transport fragmentation which has increased trip lengths and encouraged shifts to car use.

Even as such lower levels of growth, surface access and parking problems would need to be addressed. There is a lack of credibility in the widely different forecasts of modal share made for Edinburgh and Glasgow Airports (with 20% and 4% rail by 2030 respectively). There are grounds for expecting a lower share at Glasgow but not by such a margin and not with such long time-lags. A 15% rail share for Glasgow and 30% for Edinburgh seems more realistic by 2020. Prestwick, already with a 30% rail share, may be capable of rising to 50% (for press comment, see FT 24 July, Bus AM 23, 28 May, 21 June, 3, 24, 27 July, H 23 Apr 7, June 10, 22, 24, 25, 26, 27, 29, 30 July 3 Aug, S6, 12 June, 5, 8, 12, 22, 24, 25, 27 July, EN 24 Apr, 24 July, SH 9 June)

COMMENT by Donal Dowds
Managing Director, Scottish Airports

BAA Scottish Airports welcomes the government’s airports consultation and recognises the importance of taking a long-term view of airport capacity and the need to meet rising demand. In common with other consultees, we are carefully reviewing the content of the consultation documents and supporting studies. Based on the DfT figures and forecasts, we believe that the Scottish demand for air travel will continue to grow strongly over the next 30 years, and we believe that the economic and social case supporting this growth is compelling.

We are genuinely open-minded on where future runway capacity should be built in Scotland but, when there is demand for a new runway at either Glasgow, Edinburgh or both airports, we would be keen to build it with due consideration for the environment and communities. It is important that the best use is made of existing airport infrastructure before new runways are built and we will continue investing in, and growing, all our airports to meet demand where and when it arises.

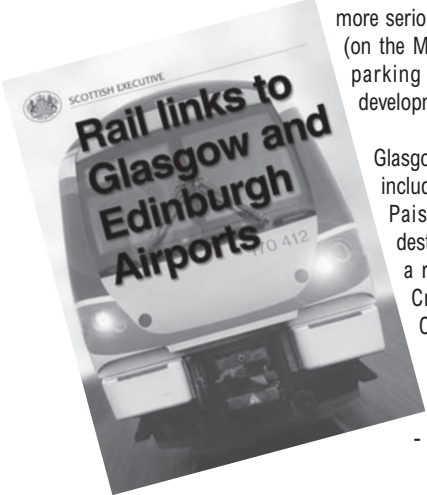
COMMENT by Tom Wilson
Manager, Glasgow Prestwick International

I welcome this consultation and will query the interest in building new runways in Scotland when there is already sufficient capacity - notably at rail-connected Glasgow Prestwick - to meet likely demand over the coming decades. Glasgow Prestwick with its 2,987m runway and full-length parallel taxiway, has a capacity of 3m passengers per year without need for significant investment and currently handles 1.3m passengers per year. The Airport has a proven record of strong growth and a determination to continue this and

Rail Links to Glasgow and Edinburgh Airports

The Scottish Executive has issued a progress report on the rail link studies by Sinclair Knight Merz. This outlines selected for further study with a final report this autumn. Frontrunners are being assessed in compliance with STAG.

At present, airport access by public transport (all bus) is modest at Edinburgh (16%) and low at Glasgow (8%). Rail access could help improve this figure with best prospects depending on fast, frequent and reliable access and congestion on parallel roads. Airports further from city centres (like Prestwick) tend to attract higher modal share if rail connected (as Prestwick is) but, closer in, public transport use at Edinburgh - compared to Glasgow - is favoured by high proportions of airport travel starting or ending in the city centre and higher proportions of travellers away from home. Edinburgh also has the potential advantage of being directly served by existing Scottish network trains whereas Glasgow Airport requires a spur branch and other work to provide direct services to the north and east of Scotland. On the other hand, Glasgow airport has more serious problems of road congestion (on the M8) and more restricted land for parking and other airport-related development.



Glasgow options being carried forward include services from the Airport via Paisley Gilmour St to possible destinations at Glasgow Central or via a reopened St Enoch Bridge City Crossrail link to Queen St and Charing Cross and/or direct to the north and east. Edinburgh options involve 3 variants of a tunnel under Edinburgh Airport - diverting Edinburgh-Glasgow

AIRPORT AND AIR SERVICES CONSULTATION

attract a wider range of airlines. It might be difficult to justify using taxpayers money towards a rail link to BAA’s Glasgow Airport ahead of the much smaller investment required to provide express services to Glasgow Prestwick.

COMMENT from HIAL
HIAL welcomes the air transport consultation document. This far-sighted initiative by Government provides opportunities to establish clear policies for future growth, maximise the benefits from expanding air services and develop lifeline services to remote communities. Lifeline services include our links with London which are vital to the economic and social well-being of the area. There is an urgent need to ensure their continuity. Since the consultation document is considering the loner-term, we would encourage Government to develop interim solutions to protect regional links to the capital. Consultation will be an open and exhaustive process and HIAL would encourage the people of Scotland - and especially the Highlands & Islands - to study the document and make their views known.

COMMENT from Colin Howden
TRANSform Scotland

The consultation is remarkable in not recognising the scale of the environmental problem posed by uncontrolled growth in air transport. ‘Predict and provide’ has been rejected for roads so why is it accepted for air a polluting and energy-intensive mode? Demand will certainly grow so long as external impacts are not reflected in the price of flying - yet one has to delve deep in the documents before finding anything about pricing instruments - such as an international aviation fuel tax or an EU-wide emissions charge - and their impact on demand.

Aviation is the fastest growing source of greenhouse gas emissions, already accounting for 3.5% of man-made climate change. While technology can cut emissions per flight, the projected expansion of aviation will exceed any savings made with the sector contributing 15% to man-made climate change by 2050. Depending on scenarios, air travel could account for 10% to 28% of UK energy use by 2050 yet the consultation questionnaire fails to list climate change as an unacceptable impact! The treatment of the potential of rail to substitute for domestic air trips is inadequate and there needs to be a policy objective to promote the use of rail for such trips (as in Germany).

The consequences of meeting projected aviation growth would be felt everywhere: locally around airport sites; nationally, as air travel is allowed to compete unfairly with other forms of transport and prejudice the objectives of sustainable development; and globally, as aviation makes increasing contributions to devastating climate change.

trains via the Airport, diverting Fife trains via the Airport or diverting both under the Airport. In the case of both cities, frequencies would vary from 4 to 6 or 8 trains per hour.

Comment: These proposals lack costings though it is clear that, with tunnelling work, the Edinburgh plans would involve higher capital costs while Glasgow would be likely to require higher annual support costs for services. Realistic timings for financing and completion are not discussed yet there are major problems in these areas - especially if both projects proceed in tandem. There is substantial pressure for political commitments yet also a desire for the Executive to speed the delivery of other rail and road projects in the next five years.

None of the options outlined seem capable of delivery by 2007 though, with more attention to synergy with other projects and objectives, both airports may achieve rail connections by 2008 with other phases following by 2015. In the Edinburgh case, there is a surprising omission of any reference to the west Edinburgh tram scheme (see Late News) even though this could provide an early connection to the Airport and serve other needs by 2008. Interchange with conventional rail could be provided at a new Gogar/Maybury station on the Fife line and at Edinburgh Park for the Falkirk and Bathgate lines. In Glasgow, there are opportunities for synergy by accelerating plans to restore quadruple track from Ibrox to Paisley (of benefit for Ayrshire Coast and Inverclyde passenger trains plus rail freight), reopening the St Enoch Bridge (for City Crossrail services) and/or providing a direct link from the Paisley line at Ibrox via the priority Finnieston Bridge to Pacific Quay, SECC, Charing Cross and Queen St. A continuing problem is local political opposition to a new railway across the playing fields at Paisley St James yet SPT now seems determined to take the initiative in securing legal powers for constructing this route - much cheaper on the surface than in tunnel and as part of a deal including relocated playing fields.

AIRPORT AND AIR SERVICES CONSULTATION

along with Aberdeen) is mentioned. There are also problems is seeing the business and ‘no frills’ air markets as totally separate. Business flights can themselves depend on marginal income from leisure travellers while business itself has been drawn to the ‘no frills’ carriers as a means of cost-cutting - even at the risk of reducing the quality of links to international hubs.

Comparing the evidence for and against *‘fly local’* or *‘regional concentration’* in Scotland, the consultation document leans towards concentration. The case for a new Central Scotland Airport at Airth between Stirling and Grangemouth is considered but rejected on the grounds that the best prospects for developing direct services to a wider range of destinations lie with improved surface access to the existing airports in Central Scotland with Edinburgh perhaps becoming dominant. Aberdeen, and Dundee, may be relative losers in this process though with continued absolute growth. In the case of Dundee, some shift to the RAF base at Leuchars may be a consequence of MoD policies to encourage commercial flights without prejudice to military capability.

Lowland Airport Surface Access

The document illustrates the land reservations and building plans which could safeguard heavy rail access to Edinburgh and Glasgow Airports (see p15). Light rail access is also mentioned though no detailed routes are shown - the preference is for heavy rail placing these airports directly on the Scottish rail network. The Table shows that expected results are much better at Edinburgh than at Glasgow.

Modal Split for Airport Access	Edinburgh			Glasgow		
	Car/taxi	Bus	Rail	Car/taxi	Bus	Rail
1999/2000	84%	16%		91.5%	8.5%	
2030*	74%	6%	20%	90%	6%	4%

* these proportions vary to a small degree depending on options selected

Prestwick would continue to benefit from existing rail access with a much higher modal share for rail. However, maximum growth at Glasgow Airport could require a expensive widening of the M8 to 4 or 5 lanes in west Glasgow plus efforts to find land for 15,000 extra parking places. Edinburgh could require 22,000 extra spaces, Aberdeen 8,500 and Prestwick 4000.

Highlands and Islands Air Services

Good air links are seen as a key driver in economic growth yet the costs of meeting national and EU standards may prevent desirable improvements. A shift to faster and more comfortable 50 seat regional jets would also require runway lengthening. Views on these issues are invited with the possibility of modified conditions for air traffic control, fire cover and longer opening hours. The Norwegian example of cross-subsidy from larger airports and levies on busier routes is mentioned but conflicts with the UK pattern of competitive private ownership. Views are also sought on where extended PSOs (Public Service Obligations) e.g Inverness to Gatwick - may be appropriate to protect access to hubs in ways acceptable to the EU. Other options might be a new framework for HIAL outwith the public sector and/ or a transfer of Sumburgh to Shetlands Council.

Other Issues

The Scottish consultation concludes by inviting comments on how decisions on policies in England might affect Scotland. There is the suggestion that Scotland could benefit from the improved inter-linking allowed by increased airport capacity in SE England. However, this also involves consideration of potential benefits from a niche hub approach in Scotland and improved links and fare packages to continental European international hubs. Finally, comments are sought on the funding of improved surface access.

EDITORIAL COMMENTS

The UK document have already produced heated controversy about the scale of airport expansion likely to be acceptable, especially in SE England, while the Scottish document has intensified the rivalry between Glasgow and Edinburgh. Discussion of the totality of the documents has, as yet, been limited. Major concerns have, however, surfaced in three areas. The first concerns the focus on a 30 year timescale with much less attention given to the coming 10 to 15 years. The second relates to the weakness of a ‘predict and provide’ approach giving slim consideration to the links between air travel policy and public policy aims for improved local environments and for major cuts in greenhouse gas emissions in coming decades. There is no clear statement of the expected contribution of air travel to increased emissions and of the related measures which may be required, either to cut air travel growth, or to explain how growth might be accommodated through actions within air travel - e.g. moves to larger, more fuel efficient aircraft with higher load factors - and by intensified steps to cut emissions from other transport modes and from other sectors.

The third concern relates to a lack of rigour is assessing the impacts of air travel on the economy. Contrary to the advice in STAG, there is an underlying assumption that economic growth has a strong positive connection with the expansion of air travel. STAG rejects this approach on the basis that much economic growth can be explained by factors other than transport and that a considerable part of the growth in air travel may be a response

to real incomes rising for other reasons rather than a cause of growth. Quoting air shares in GDP does NOT provide direct answers to these important issues. Some airport developments also move jobs around in a spatial context rather than increase jobs. There is a need for clearer justification of those air travel developments (including taxation and higher charges at congested airports) with particular value for global, national and regional priorities.

Despite these caveats, there is still a powerful logic in the Scottish consultation argument that, proportionate to population, growth in air travel to and from Scotland will be higher than overall UK growth. However, this growth under sustainable scenarios may well be less than a tripling by 2030 with Scottish growth perhaps no more than 70% to 100% up on 2000 by 2020. Closer study of the impact of high-speed rail on Anglo-Scottish air travel and growing pressures to increase average ‘no frills’ fares may confirm lower estimates of growth. On this basis, Glasgow and Edinburgh could be handling some 20/25m passengers between them by 2020 (compared to 12.4m in 2000), well within the capacity of modified single runways and spillover to Prestwick, especially if it secures direct rail services to Edinburgh. This scenario could incorporate a niche role for Edinburgh as a business hub but with lower cost flights expanding elsewhere.

Transport Financing : An Alternative to Public or Private Funding

By Roy Pedersen, Transport Consultant and former Head of Transport, HIE

The Scottish Executive has no borrowing powers. It came as a surprise, therefore, that when the powers of the proposed new English regional assemblies were outlined recently; they are to have the power to borrow. Without this power in Scotland, the implication is that large transport projects have to be funded either from the existing public purse, or by the private sector, or through a partnership of the two. All these options present problems:-

- Public funds are severely limited
- The profit motive in private sector may work against the public good
- Public private partnerships perceived as poor value e.g. Skye Bridge

The Not-for-Profit Option

There is an alternative that could liberate potentially many £ millions to fund key Scottish transport investments. This is the not-for-profit company - a structure able to raise substantial funds at arms length “off the public sector balance sheet”. In other countries, e.g.USA, the not-for-profit corporation is commonplace as funder, owner, operator of key transport facilities such as ports, airports, metro systems, etc. Even in Scotland social housing is now increasingly provided by not-for-profit housing associations rather than local authorities. Elements of this approach are also found in the plans for **Network Rail**. However, the not-for-profit model has not been used to fund and manage transport investments in Scotland apart from some notable transport heritage projects.

The VESCO

The issue was, however, raised following the publication of the Scottish Executive's consultation paper on EU requirements for delivering lifeline ferry services. These require the operation of all state subsidised ferry services to be open to competitive public tender and subject to Public Service Obligations (PSOs). The limitation of PSO contracts to only five years makes it unattractive for operators to own vessels. For that reason a separate vessel owning company (VESCO) to lease vessels to the operators is proposed - an arrangement similar to that prevailing on the railway where train operating companies (TOCs) lease their trains from ROSCOs.

It was suggested in the consultation document that the Executive itself could own the VESCO. The disadvantage of this is that it would, as with present arrangements, be constrained by public expenditure borrowing rules. As an alternative, a number of bodies suggested that the VESCO be created as an arms length not-for-profit company, thereby freeing it from public expenditure rules and allowing it to raise capital at competitive rates on the commercial markets. If such an option were adopted the VESCO would be incorporated as a company limited by guarantee, tightly controlled under its Memorandum and Articles of Association. These would govern, in particular, the company's objectives, procedures, membership use of surpluses (i.e. all surpluses to be used to maintain the existing fleet and commission new vessels in the interests of sustaining lifeline ferry services) and procedures, including disposal of assets. In short the constitution would protect the public interest and prevent profiteering.

The make up of the board would determine whether or not companies were independent from the public sector. To strike the right balance between sound management whilst protecting key stake holders, a possible board structure might include representatives of passenger and freight users, business/shipping/financial experts and public interests. It would be necessary to distance the board from actual or potential operators and from short-term political influence.

Raising the Cash

Financing the acquisition of assets would appear to present few difficulties in principle. The capital markets and banking sector have demonstrated enthusiasm for long dated bonds, e.g. in funding housing. Financial sector insiders anticipate that a capital market issue or syndicated loan for this type of project would find demand. The key issues on which any prospective lender will focus are:-

- the sustainability of cash flow;
- the credit rating of the company;
- strong governance and management capacity;
- the appropriate use of private sector skills - i.e. delivering capital investment (commissioning new vessels) and ongoing maintenance;
- a good regulatory framework.

Although there is as yet no strong signal from the Executive that the not-for-profit alternative is under serious study, the VESCO is but one example of what may be possible in transport.

Trains and Ports and Planes

In the maritime field, the Executive has indicated that VESCO may be extended to include Highland ferry terminals. The not-for-profit approach could be extended to other ports and terminals. These assets may then be operated direct or leased under competitive tender to third parties, such as private operators, community enterprises or local authorities. This principle of asset ownership and lease to operators may well be extendable to other state owned transport assets in Scotland. HIE has suggested that it could apply to the Cairngorm Funicular Railway while the airports owned by HIAL could be transferred to a similar not-for-profit owing company with the operation of the airports leased out under competitive tender to independent operators.

An even more exciting prospect is the concept of creating an independent not-for-profit company to issue bonds to build and own the proposed Borders railway. In this way there would be no need for significant up-front cash from the public sector. Bond interest and repayments and maintenance costs would be funded from track access charges paid by the TOC. These charges would presumably be less than under private ownership as there would be no requirement for a return to shareholders, reducing the on-going subsidy to the train operator(s).

The End of Frustrated Investment

Not for profit “off balance sheet” companies are independent of both the public and private sectors, free from political interference, free of vested interest (e.g. in any operator), capable of being financed at competitive rates, soundly managed and flexible in their ability to provide focussed management for the operation of many of Scotland's transport facilities. Finally the potentially large sums released to the Executive by transfer of public assets, or removal of the need for some new public capital investments, could finance many of the desired transport infrastructure projects at present frustrated by the limitations of existing budgets.

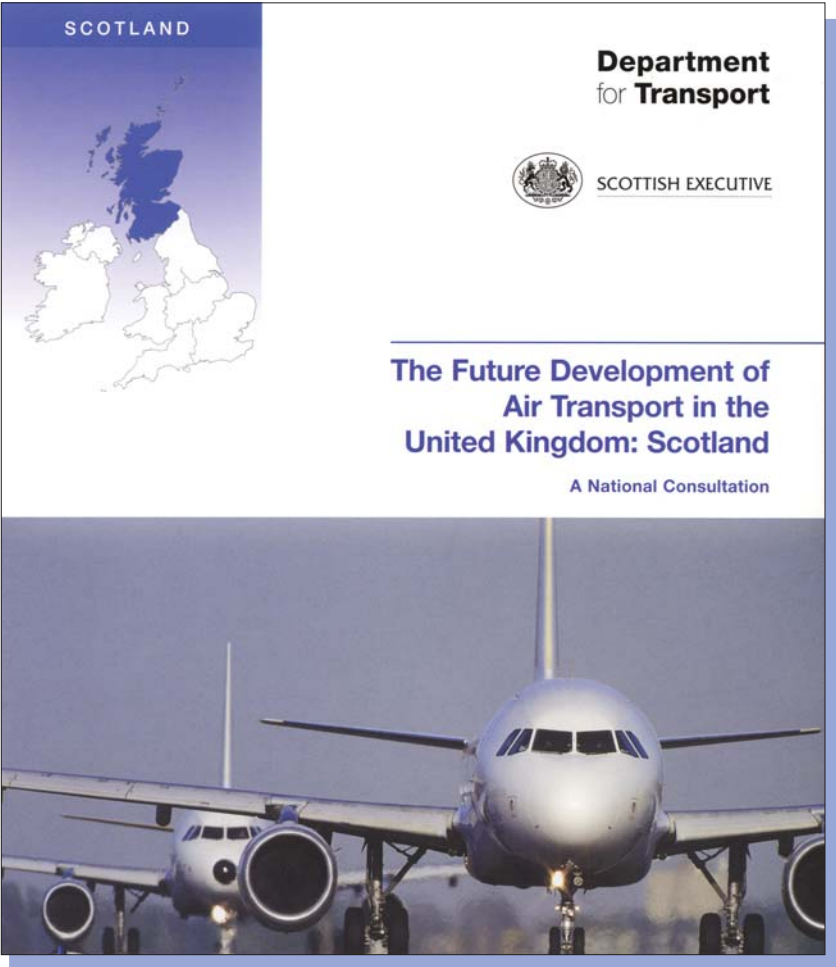
CalMac Ferry Franchising Consultation

The Scottish Executive is consulting on both the principles and detailed franchising specifications for the tendering for present CalMac services. Responses are sought by 27 September 2002. The main proposals are outlined below.

Now that the EU has approved a single tender approach for the Clyde and Western Isles network, the Executive is inviting tenders for 5 years from 2003. To provide a fair and certain basis for tendering, tenders are to be for a specified service network with bidders undertaking to use vessels placed in a new public company, VESCO, to be set up by the Executive and possibly including certain terminals. While this may discourage route and management innovation, priority has been attached to a stable network. Provision is made for bidders to indicate some new ideas in their proposals but major changes are expected at the time of the five-yearly franchise reviews. Performance standards are included.

The specification suggests a revenue maximising approach to fares subject to concessions for island and ‘remote peninsulæ’ residents. Peak tourist fares will be higher but bidders may reduce fares and charges at other times if they perceive commercial advantage. Apart from the requirement that the **Gourock-Dunoon** route should be passenger only, the present network is safeguarded for five years with added provisions for winter services between **Tobermory** and **Kilchoan** and **Portavogie** and **Tarbert**. New **overland/short ferry routes** via Mull to **Coll** and **Tiree** and to **Islay** via **Jura** are not included though may be included in a future franchise. This could also apply to the suggested **Ardrossan-Tarbert** service (see STR17 p9) Specific views are invited on the **Lismore** route - should this continue to be from Oban or a shorter ferry from Port Appin?

Immediate public reaction has centred on the proposal for a passenger-only **Gourock-Dunoon** service. The Executive view of the EU position is that tenders cannot be invited for vehicle ferries where another operator is providing an unsubsidised service but some Cowal interests have argued in favour of continued competition for **Western Ferries** if bidders take the view that that adding a vehicle facility to a passenger service would improve commercial results. As an alternative, a new regulatory framework could be applied to all ferries. Local opinion is concerned that the whole process is delaying much-needed improvement of the Gourock and Dunoon interchanges and related regeneration. Western Ferries is already the dominant vehicle ferry operator to Cowal and has taken steps to order a new vessel to cope with rising traffic (H8,12, 13, 15, 16, 19, 24 July; Bus AM 28 June).



UK OVERVIEW

The documents suggest that a substantial expansion of air travel is likely and desirable over the next 30 years. A near tripling of passenger traffic from 180m in 2000 to 500m by 2030 is anticipated plus strong growth in freight. Stress is placed on the benefits for the UK economy of preventing a loss of direct and secondary employment because of lags in providing the capacity already available, and planned, at major airports in France, the Netherlands and Germany. Means of handling environmental issues are also examined.

SE England is expected to continue as the most important air travel zone but encouragement is given to relative shifts away from this area. Quite small shifts can have much larger impacts on levels of usage at regional airports. Various options for the scale and location of expansion are outlined for each region with a view to future decisions. Options include four national scenarios and two alternative approaches within each region. The National Options are:-

- continuation of current policies including extra runway capacity in the south-east allowing up to 300m passengers a year (RASCO Reference Case)
- growth to meet demand outside London but London area constrained to 150m passengers a year (SEConstrained)
- airport growth constraint throughout the UK (UKConstrained)
- a scenario facilitating growth, including London area growth (FG)

The regional variants compare 'Fly Local' policies (encouraging use of local airports) with 'Regional Concentrated' encouraging particular airports and hubs within regions (LTT1&15Aug;FT24July)

Department
for Transport



The Future Development of
Air Transport in the
United Kingdom: Scotland

A National Consultation

The six regional consultation documents on the future of Air Transport in Britain were published by the Department for Transport in July with the document for Northern Ireland following in August. Responses to these consultations are requested by 30 November with a view to publishing an Air Transport White Paper in 2003 looking forward 30 years.

Propensity to Fly 2000

Source: Scottish Report Table 2.2

UK average	1.26	Midlands	0.75
London	2.94	SWest	0.73
Scotland	1.72	York/Humber	0.72
N Ireland	1.44	Wales	0.58
SEast	1.44	NEast	0.57

THE MAIN REGIONAL OPTIONS outside Scotland

SE England

- varied degrees of terminal and runway expansion at Heathrow, Luton and Stansted with possible new hubs at Cliffe in Kent and at Alconbury (for freight and 'no frill' passengers) near Peterborough and Cambridge. A further runway at Gatwick is ruled out at least until after 2019

The Midlands

- a second runway at Birmingham or relocation to a new triple runway airport between Coventry and Rugby

South-west

- development of better sited new airport to the north of Bristol plus some expansion at Exeter, Plymouth and Newquay

Wales

- effective catchment area considered too small for a hub airport - some expansion at Cardiff possible plus other regional airports and improved rail links direct to Heathrow and/or a new Bristol hub.

North of England

- possible fourth terminal at Manchester making it the UK's second international hub plus some expansion at Newcastle, Teesside and Leeds/Bradford (though all airports in this zone may lose out on domestic air use to high-speed rail services including direct access to Heathrow)

Northern Ireland

- strong domestic potential plus other flights linking to hubs could raise traffic from 4.6m passengers in 2000 to 12.9m by 2030 under high growth - accommodated at existing airports though an internal rail link to Belfast International might just become justifiable by 2030

The Scottish Consultation

Demand Expectations

Though Scotland is expected to have lower (and probably negative) population growth than most other parts of the UK, Scottish growth in air travel is likely to be at or above the UK average. This is attributed to the high propensity to fly (trips divided by population) found in Scotland and likely to continue. The high Scottish propensity (see table on p12) is affected by the attraction of air for Anglo/Scottish travel (also boosting Anglo/NIrish) and by much more extensive use of holiday flights than in southern England (where more users opt for ferry or Channel Tunnel trips). Much long-haul travel 'leaks' from Scotland to English international hubs yet Scotland has much smaller leakage of leisure flights than other regions outside SE England. Most of this leakage is via surface travel to Manchester and Newcastle in the main holiday period yet total volumes are modest compared to flights to and from Scotland. Over time, direct in-tourism to Scotland is also expected to rise.

The models used suggest growth in Scottish air travel (excluding travel within Scotland) from 16m passengers in 2000 to an upper range forecast of 51m by 2030. Refined analysis of likely distribution within Scotland indicates usage of Edinburgh above Glasgow usage, increased further if Edinburgh became a mini-hub

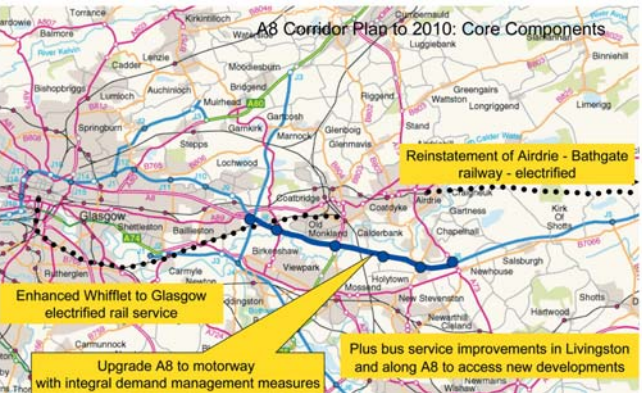
Forecasts of Airport Usage : High Growth (million passengers)

Source: Scottish Report Tables 4.1&3

	2000			2030		
	TOTAL	Dom.	Internat.	TOTAL	Dom.	Internat.
Edinburgh	5.5	4.0	1.5	19.9	9.7	10.2
Glasgow	6.9	3.6	3.3	16.2	6.9	9.3
Prestwick	0.9			2.8		
Aberdeen	2.5			5.2		
Inverness	0.3			0.8*		

* HIAL business plan argues for substantially higher growth

Further analysis and policy decisions may vary these estimates and add further information related to the phasing of airport and air service expansion. There is reference to the possible impact of high-speed rail services (giving 3 hour trip times between Central Scotland and London) but this is not expected to divert more than about 15% of Anglo-Scottish trips and such times are not likely to be available until after 2015. Air would retain very substantial advantages for access from Aberdeen and Inverness to England. High capital costs for rail plus environmental disturbance could also make high-speed rail an unattractive option in Scottish policy though having a greater potential influence on air travel policy in England and Wales.



A8 Corridor

Terminals Runways and Service Patterns

The Scottish consultation maintains the UK theme that direct Scottish air services and good links to international hubs are important for the Scottish economy - including the electronic and financial services sectors, other high value added activities and tourism. Nevertheless, Scotland lacks the population to have an international hub in the English sense - hence the emphasis on a mini-hub or niche hub in Central Scotland offering good links between surface access, internal Scottish air services, regional jet links from other areas or countries (Ireland, Scandinavia), access to international hubs and an increasing range of direct services

The mini-hub concept is seen as the main factor in considering land reservations for a second runway at either Glasgow or Edinburgh. While single runways served by large and evenly spaced planes can handle 30m passengers a year, effective regional hubs need to be capable of handling larger flows of smaller jets around the peaks when key connections are made to longer flights. Single runway airports cease to work effectively if more than 25 to 30 routes need to be connected at peak times. A Scottish mini-hub could reach this position in some 15 years but there would need to be a Scottish consensus on a two runway approach (Ch9.9). The consultation includes details of interim options to improve runway and terminal capacity at Edinburgh and Glasgow while also referring to a need for increased terminal capacity at Prestwick. Glasgow is seen as requiring major spending if capacity was to exceed 14 m passengers a year while Edinburgh could rise to 17m a year. With two runways, either airport would have a capacity around 35/37m a year. While keeping options open, the Scottish study inclines to Edinburgh as the favoured choice for a second runway. Reasons behind this are the geographical position of Edinburgh (making it more accessible than Glasgow) and more severe land constraints, road congestion and environmental constraints around Glasgow Airport. Edinburgh is stated to have lower road congestion and lower levels of airport-related traffic than on the western M8 at Glasgow Airport.

The study calls for investigation of complementary rather than competitive relationships between Edinburgh and Glasgow Airports with the latter having a stronger focus (possibly with some spillover to Prestwick) on 'no frills' flights. However, it notes the difficulties of both enforced complementarity and excessive competition under conditions requiring 'open access' and largely dependent on the decisions of the private sector owners of airports and airlines. Nevertheless, land use planning policy and some public sector and surface access aid within 'state aid' rules could nudge the private sector towards complementarity if this is seen as best for Scottish interests. Yet the option of introducing competition between Glasgow and Edinburgh Airports (presently operated by Scottish Airports



A80 Corridor

Maps supplied by MVA