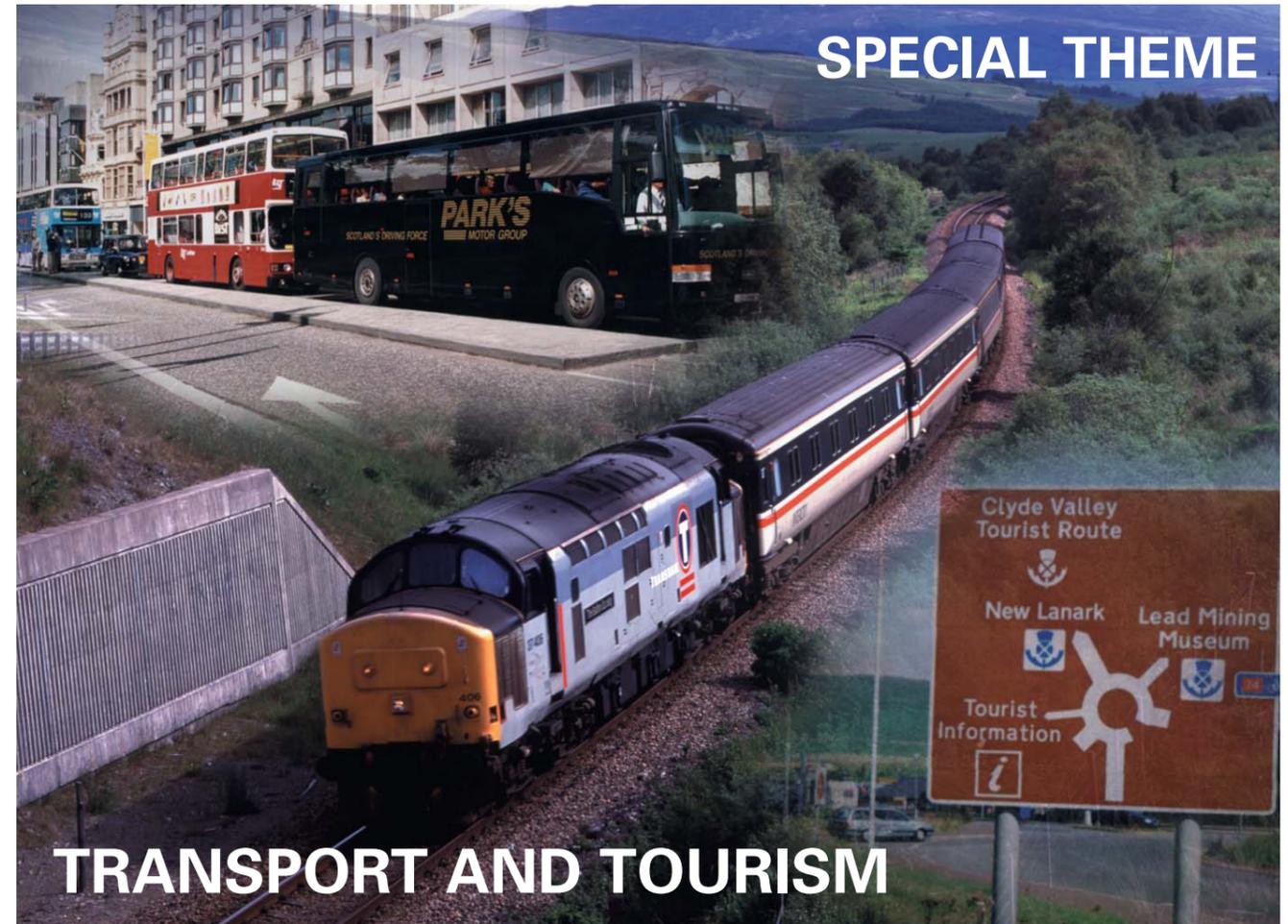


LATE NEWS Shipping Deputy Prime Minister and DETR Minister John Prescott has announced a more friendly tax regime to encourage ship registration in Britain. P&O has responded by bringing 50 ships back to the UK register and doubling the number of cadets it will train over the next 3 years. However, though restoring an emergency tug for Shetland, DETR has been criticised for confirming closure of the coastguard stations at Orkney and Oban. This is expected to lead to friction between the Scottish Parliament and Westminster (H 13Aug)

Buses On Friday 13 August at Hampden Park First Minister Donald Dewar, Transport and Environment Minister Sarah Boyack and the Chairs of SPT and Glasgow City Council Land Services joined in the First Glasgow launch of the 'Overground' concept to help ensure rising bus use and shifts away from cars in the Greater Glasgow area. It was confirmed that preliminary measures, including bus priorities supported by the City Council, had already stopped the long decline in city bus use (see STR ISSUE 5, p 12-13). The further plans would create 18 'five star' quality bus routes running at least every 10 minutes in the main daytime period. This core network would provide stability for the future with improved reliability, comfort and access. More routes are to be extended to 24 hour operation and fares are being revised to encourage usage and transfers between vehicles. Interchange will also be improved with work continuing on easy bus/rail transfers. Media publicity was being stepped up and extensive use will be made of the new 'Overground' map

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EDITORIAL

The Scottish Parliament is now operating under the coalition agreement between Labour and the Liberal Democrats and having to live up to the high expectations for openness and transparency which received cross-party support in the January agreement *Shaping Scotland's Parliament*. An extensive Transport Bill is included in legislation over the first session and an integrating Transport and Environment Committee has been established. As this Issue shows, however, the initial reaction to the Consultation Paper *Tackling Congestion* reveals a huge gulf between transport 'wish-lists', knee-jerk reactions to road pricing and the reality of acute budgetary pressures and repeated, and widely supported, government priorities to shift funding towards health, housing and education unless new sources of income can be found for transport. The imminence of such income is problematical, inevitably forcing attention on the tricky political issues of road traffic management and restructure within existing levels of public spending on transport. The content of the Final Report from SACTRA on *Transport and the Economy* (see inside rear cover) should assist Scottish debate on these issues.

Another important area for priorities within restricted funding will be Scotland's substantial, but under-performing, tourism industry, a sector specially important in many rural and remoter areas. Transport aspects of tourism and the ability to link these with other transport priorities are the subject of the principal feature in this issue and a far-reaching report to the Scottish Executive on *Tourism Futures* will be completed shortly, almost certainly in advance of the annual STB Tourism Conference on 12 October.

Lastly, I would like to thank readers for their comments in the survey forms included with ISSUE 5. These revealed a high level of satisfaction with the content and length of STR. The only significant criticism was a preference for an increased size of type and there was also some desire for increased use of colour provided that price was unaltered. Keep sending in your comments, letters and articles in these interesting and challenging times.

Tom Hart, Editor

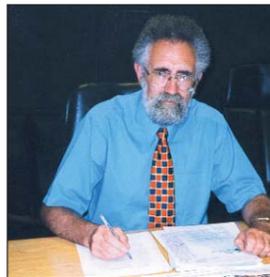
Editorial Board

T Hart, B Weddell, D Halden, I McMahon, S Lockley, Prof. H Kirby and R Pedersen

The aims of the Scottish Transport Studies Group 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."

Contributions to the next issue should be sent to the Editor at Redwood House by **Friday 29 October 1999** or by e-mail to thstsg@aol.com.

Cover Picture by courtesy of ScotRail, Edinburgh City Council and Tom Hart



TRI NEWS

The TRI Mission Statement is 'to develop in Scotland a Research Institute renowned throughout Europe and the world for the quality and breadth of its work in transport and related issues'

Jim Wentworth of the US Federal Highway Administration is currently visiting professor on intelligent transport systems and **Christiane Bielefeldt** has been appointed visiting professor in strategic transport management. She has served with the EU DRIVE secretariat and has led a number of European projects. She is putting together proposals for the Fifth Framework programme on behalf of TRI.

Joanne Sibbald has been appointed Information Officer, moving from her role as TRI Secretary. **Anke Sieker**, formerly Development Manager and member of the STR Editorial Board, has moved on to pastures new but **Jo Haynes** has joined the staff as Survey Administrator.

TRI has been asked to prepare a briefing document on transport for the Scottish Parliament's Transport and Environment Committee, helping members to understand 'the structure and framework of transport issues in Scotland'

New Research Projects across TRI

The commissioned report on methodology for measuring travel demands on mixed use sites has been completed (**Barry Hutton, Wafaa Saleh, Tom Rye**), Barry Hutton and Howard Kirby are working with the Environmental Change Unit at the University of Oxford on a study of **vehicle environmental ratings**, to be ready by late August.

The Sustainable Cities research project for the EPSRC is considering relationships **between transport, energy use and property location choice**. The work develops interdisciplinary modelling (**Austin Smyth**). Austin has also carried out research studies of **regional airport competition** for commercial sponsors.

TRI has been awarded a DETR contract for **predicting future car fuel consumptions** and has been invited to bid for a Foresight project on **neighbourhood shopping** in conjunction with Edinburgh City Council. A research team headed by **Dr Tariq Muneer** with **Anna Esteves** as assistant will be studying **traffic related pollution** over the next three years. The project is partly supported by Edinburgh City Council and aims to see how variations in driving techniques affect pollution. Results will be relevant for the city air quality strategy and the government intention to relate vehicle excise duty to actual emissions. The consortium bid made to the EU for a large-scale study into **road user charging** has been progressed in Brussels and is now part of a prospective larger study (**Christine Bielefeldt**).

TRANSPORT and the ECONOMY

The comprehensive and long-awaited SACTRA Final Report was published by government on 9 August. Conclusions include the view that 'the circumstances where reducing traffic could contribute usefully to economic performance are those where transport prices are currently below marginal social costs, primarily because of the existence of external costs of congestion and environmental damage' (p18). It also recognises that there are 'winners and losers' in relation to transport projects and area development and that the evaluations of transport interventions expected, or intended, to have economic impacts on any particular area should also take into consideration the impacts on other competing areas as an integral part of appraisal (p22).

The Scottish implications of this report and other developments in business views and research will be considered at an **STSG Conference on Transport and the Economy** to be held in Dundee on **1 October 1999** with support from Scottish Enterprise and Scottish Enterprise Tayside. For further details, contact STSG organiser, Brian Weddell at Redwood House, 66 Spylaw Road, EDINBURGH EH10 5BR, Fax: 0131 455 5141 or mobile phone 0780 387 3536. Speakers will include Prof. Nick Crafts, one of the 8 members of SACTRA, and business representatives giving Scottish and global views on the future pattern of freight logistics and the scope for efficiency and environmental gains from revised approaches to passenger movement and workplace access.

OTHER COMING EVENTS

- 3 September** Annual Meeting of Community Transport Association and the Association of Transport Co-ordinating Officers (Scotland), West Lothian Council Buildings, LINLITHGOW (contact CTA at Annat House, South Quay, Ferryden, MONTROSE DD10 9SL)
- 23 September** 2nd UK Local Authority Chairs of Transport Conference, Covent Garden Exhibition Centre, London (sponsored by Railtrack and Virgin Trains, details from Karen Lynch, Centre for Transport Policy, The Robert Gordon University, Kepplestone Mansion, Viewfield Rd, ABERDEEN AB15 7AW Tel 01224 263134 Fax 01224 263100 Fees £95 to £295)
- 23 September** Scotland's Health and the role of the Environment, the National Stadium, Hampden Park, GLASGOW. Organised by NSCA (National Society for Clean Air) and SCIEH - details from NSCA c/o Glasgow City Council, Floor 10, Nye Bevan House, 20 India St, GLASGOW G2 4PF Tel 0141 287 6530 Fax 0141 287 6582 Fees £55 to £80 +VAT
- 6-7 October** Urban Transportation - The Future, Glasgow Thistle Hotel, promoted by Scottish Executive, IHT, ICE and Glasgow City Council as part of the Glasgow 1999 UK City of Architecture and Design. Fees £375 inc. VAT, details from Land Services, Glasgow City Council, 20 Cadogan St, GLASGOW G2 7AD Tel 0141 287 9334 Fax 0141 287 9059. A related exhibition will be held in the Glasgow Museum of Transport, remaining open for 9 months.
- 12 October** Annual Scottish Tourist Industry Conference, SECC, Glasgow - £42.30 inc. VAT. Other details from STB, 23 Ravelston Terr, EDINBURGH EH4 3TP Tel 0131 332 2433 Fax 0131315 2906. Seminar topics include 'Getting there - the Transport Challenge'.

Scottish Transport Statistics, No18, 1999, Scottish Executive, HMSO £10

Scottish Household Survey Bulletin No.1, £5, HMSO

Tackling Congestion: The Scottish Executive's Consultation Paper on fighting traffic congestion and pollution through road user and workplace parking charges, July 1999, free from Scottish Executive 0131 244 7279

Transport and the Economy, SACTRA Final Report (Chairman: Eileen Mackay). £30. DETR, HMSO

Towards an Urban Renaissance : Urban Taskforce Report, E & F Spon, £19.99 - places accent on sustainable transport; free summary from DETR 0870 1226 236

F Hildebrand (University of Strathclyde) **Designing the City : Towards a more sustainable Urban Form**, E&F Spon, 1999 £32.50 - includes a case study of Glasgow

I Turok, N Edge **The Jobs Gap in Britain's Cities: Employment Loss and Labour Market Consequences**, Bristol, The Policy Press for the Joseph Rowntree Foundation, 1999

Another Country by K Madelin, ex County Surveyor, Shropshire for Social Affairs Unit, £22.50 - argues that it remains important and justifiable to increase road spending in rural and lower density areas not well served by public transport

A Safer Journey to School : A Guide for Parents and Teachers, Transport 2000 Trust with support from DETR and the Dept of Education and Employment - free from DFEE, PO Box5050, Annesley, NOTTINGHAM NG15 0DJ - see also LTT 15 July, p 7

Slow Down: Save Lives - Glasgow Road Safety Action Plan, 1999-2001, Land Services Dept., Glasgow City Council

WHO Charter for Transport, Environment and Health - available at www.who.dk/London99/

Personal Security Issues on Pedestrian Journeys and Young People and Crime on Public Transport, both available from DETR Mobility Unit 0171 890 3000 - the first document stresses need for quality walking routes/networks in addition to quality corridors for public transport

Preparing your Organisation for Transport in the Future - the Benefits of Green Transport Plans, free from DETR 0870 1226 236

National Cycling Strategy, 2nd Report DETR 0171 676 2478 - notes that parallel walking strategy has been delayed but sees advantages in integrating strategies for walking and cycling

Cycle Helmets, BMA Report £6.95 - argues against compulsory helmets and that single issue campaigning is less effective than more holistic approaches

A Better Quality of Life - a Strategy for Sustainable Development, DETR, HMSO £11.80 - outlines 14 headline indicators (including levels of road traffic) and other subsidiary indicators (yet government has rejected proposals by the London and SE Regional Planning Conference that targets should be set for road traffic stabilisation within this area; London within the M25 has been seeking absolute cuts in traffic volumes with the highest reductions in central London)

A Route to Prosperity? Alternatives to the M74, available from JAM74, PO Box 3751, GLASGOW G42 8WR

Examination of the Operation and Effectiveness of the Structure Planning Process - argues for greater integration within regions see www.detr.gov.uk

Rail Freight Growth and the Land Use Planning System, Centre for Economic and Social Research, Sheffield Hallam University £12-50 0114 225 3073 - argues for the importance of selecting and safeguarding sites with easy access to the existing rail network

No Truck with the Truckers, by David Spaven and Colin Howden, TRANSform Scotland, July 0131 554 8656 - presents evidence suggesting that the road haulage campaign for lower taxes will be a losing one

Review of Research on Freight Transport and Logistics, third annual review compiled and edited by Prof Alan McKinnon, Heriot-Watt University with assistance from Francis Vanek, Clive Marchant, Jim Campbell and Alf Baird, FTA, June in association with Forward Trust

UK views on the Commission communication 'The Common Transport Policy - sustainable mobility' - states that the EU should confine itself to international issues and queries the view that combined transport can lead to significant shifts from road to rail www.detr.gov/itwp/cpt/

Annual Report from the Office of Rail Regulation, available at www.rail-reg.gov.uk (future reports will come from the Strategic Rail Authority)

The Momentum Continues, Railtrack 1998/99 Annual Report and Accounts

Rail Passenger Partnership : Bidding Guidance, OPRAF 0171 940 4200

Planning Criteria : A Guide for the Appraisal of Support for Passenger Rail Services, OPRAF 0171 940 4200

Cities on Rails: the redevelopment of rail stations and their surroundings, L Bertolini and T Spit, University of Utrecht, E&F Spon, 1998,

Rating Review: Actuals of Local Authority Income and Expenditure, 1997-98, CIPFA - Scottish Branch, August, 1999 0131 220 4316

EU

Ms **Loyola de Palacio** has replaced **Neil Kinnock** as EU Transport Commissioner, with added responsibilities for energy and relations with the European Parliament. Neil Kinnock is now the senior EU Vice President with responsibilities to tackle fraud and corruption. After protracted discussions to review Assisted Areas in the UK under EU guidelines, Scotland has suffered some loss of funding and a reduced area qualifying for assistance. The final outcome has been less serious than originally anticipated; all of the Highlands retain **Assisted Area Status** and, though the area eligible within Glasgow has been reduced, the Edinburgh shoreline has been included for the first time. However, considerable sections of the Borders and Galloway, together with parts of Fife, have lost assisted area status (Herald 9,13 & 16 July). There continues to be concern that the EU may require the UK to apply the £10 UK air **passenger duty** to return trips within the UK. A stronger EU line favouring competition is evident in the recent decision to fine **British Airways** £4.5m for operating a bonus scheme with travel agents which kept potential competitors out of the market (Herald 15 July). **Airtours** has allowed a £950 m bid for First Choice to lapse after an EU decision to mount a full investigation of the bid (Herald 11 June)

UK Policies

DETR is being criticised for slow progress in following through last year's Transport Policy White Paper. Consultative and advisory documents have multiplied with little sign of achievable targets for short and longer-term developments in integrated and sustainable transport (Herald 28 May & 7, 8,14 & 28 July). **John Prescott** was able to protect his extensive DETR from encroachment in July's minor reshuffle but had to accept changes in junior ministers which may imply a further toning down of the Transport White Paper. Transport has now had three Ministers in less than six months with **Helen Riddell**, in office only two months, replaced by **Lord Macdonald** (formerly at the Industry Department in the Scottish Office). Reviewing the White Paper one year on, **Professor Phil Goodwin** has concluded that there is still substantial support for the key principles of the White Paper, including road traffic restraint and pricing measures (LTT 29 July).

The **Railways Bill** has been published and includes provision for the setting-up of the **Strategic Rail Authority (SRA)** and for the transfer of supervisory powers over railways in Scotland to the **Scottish Executive**. Much tougher action has been promised to ensure higher levels of rail investment and counter strong complaints about excess profits and under-investment by Railtrack (Scotsman 28 May, 8 & 10 July). Rail track access charges can already be altered under existing powers but there is no apparent 'fast-track' towards increasing rail investment where Railtrack has reservations about the commercial return. New fines are proposed to ensure higher investment yet this mechanism could itself be a recipe for further delays. There is an urgent need for packages, incentives and 'sticks' which can produce a faster rate of increase in appropriate investment in vehicles and track. Under transitional **Rail Passenger Partnership** proposals (see p 22), OPRAF has £105 million of public funding over three years for projects offering less than normal commercial returns but yielding other benefits for integration. This scheme will transfer to the SRA.

The full **Commission for Integrated Transport**, with **David Begg** as Chair, has been appointed (see p20). The first meeting was held in July with priority issues identified and the promise of reports every two months. Early topics include comments on what constitutes a good Local Transport Plan, advice on the suitability of national targets for road traffic reduction, value for money in bus support, progress towards clean vehicles and a review of the possible impact of 44 tonne lorries. A surprising omission is the lack of reference to integrated fare and information systems, applying across the country and avoiding the dangers of fragmented technology as smartcards and IT develop further. In terms of action, the CITT faces the problems of being an advisory body with no teeth apart from the effects of persuasion and a significant research budget.

David Begg has also identified the particular challenge of connecting the Commission with views throughout the UK. Apart from Begg himself, all the appointed members are from England and, with devolution in Wales, Scotland and Northern Ireland, the Commission will have to work hard to gain support from across the UK. This process could be helped if the Commission took an active and useful interest in air and ferry issues within integrated transport (LTT 15 July)

The **Road Haulage Forum**, while condemning road disruption by lorry drivers, is pursuing arguments for policy adjustments to recognise the economic value of road haulage. Ultra low sulphur Diesel (ulsd) involved higher CO2 emissions in the production process and worsened fuel consumption with companies facing higher fuel costs despite the 3p per litre tax cut by government on ulsd. Foreign-registered trucks now took 57% of cross-Channel trips compared to 48% in 1996. Very little progress had been made towards priority lanes for trucks and the industry was being penalised by the rise in car traffic and congestion. The **FTA** argues that government emphasis on freight shifts to rail fails to recognise fundamental problems in rail freight and its small contribution to localised movement even if rail modal share could be increased over longer distances. The FTA considers that policies and action do not march the realities of the freight transport market (Freight, FTA Journal June and August) However, **TRANSform Scotland** claims that lorries do not cover their full costs with most ignoring the 50mph speed limit on dual carriageways. A doubling of long-haul rail use could cut lorry flows on key routes by 40% (see p22 and Scotsman 30 July)

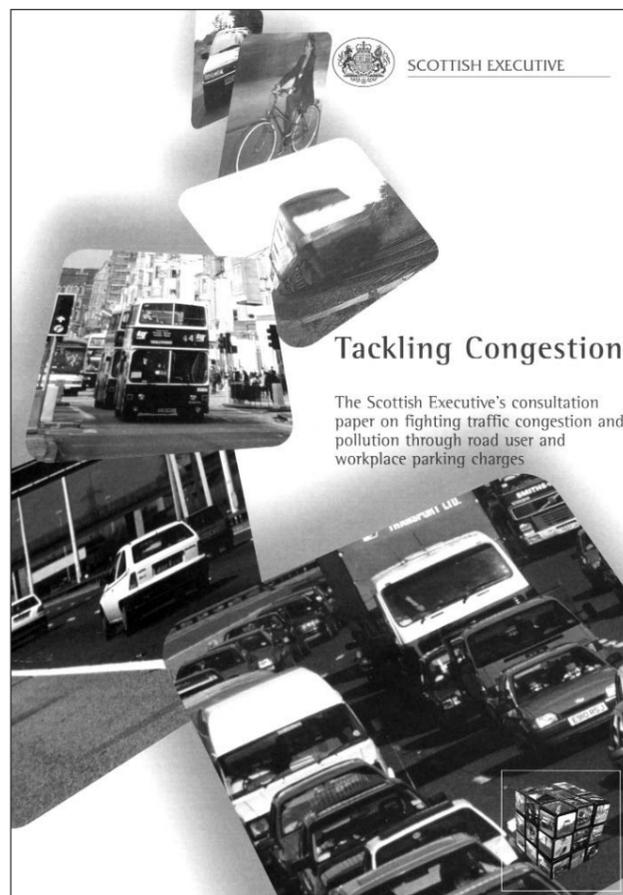
Road Pricing and Multi-modal evaluation Leeds, Edinburgh and Bristol are now seeking to share in experimental testing of road pricing. Bristol is especially keen to see early moves towards the generation of income (Herald 16 July) but present thinking is that little income will be available before 2004 (LTT 1 & 29 July). DETR has circulated a 275 page document on draft guidance for multi-modal studies and plans a finalised version by early autumn taking account of the Final Report of SACTRA on **Transport and Economic Development** (see LATE NEWS). MVA, the Institute of Transport Studies at Leeds, the David Simmonds Consultancy and ERM have been involved in preparation of draft guidance with present indications favouring a 'bottom-up' approach rather than a strong lead from central government (see also comment on M4 evaluation at p 19)

Green Transport and Speed Levels DETR policy is showing increased interest in persuading major traffic generators (large firms, hospitals, campuses, council offices) to prepare and implement **Green Transport Plans** and to expand provision of busways, lower speeds and 'home zones' with most speeds no higher than 20 mph. This contrasts with revised AA policies arguing the case for expansion in road building and the relaxation of motorway speed limits to 80 mph. A new Conservative consultation paper has also hinted at selective easing of speed limits, abolition of the road fuel tax escalator and less emphasis on traffic calming and road space reduction (Scotsman 13 July)

Competition Policy Government remains committed to the promotion of competition subject only to possible modification in the case of local transport and the need for supervision of the Railtrack monopoly. Faced with a rising trend in oil prices over the past 18 months and the proposed merger between Exxon and Mobil, the UK government has asked for EU approval to investigate the possible impact of this measure with particular reference to the retail fuel market in north-west Scotland (Herald 3 June)

Energy Taxation SNP has alleged that energy taxes could threaten Scotland with particular adverse impacts on aluminium smelting areas (Herald 5 May) but studies by Volterra have indicated that a flexible approach to energy taxation could have economic benefits (Financial Times 1 June). Consultations continue on the form of the proposed UK energy tax.

Only weeks into the life of the **Scottish Parliament** and the **Scottish Executive**, it is too early to judge whether these bodies - and related media coverage - are living up to expectations yet there have been some discouraging signs of a lack of openness and a media tendency to dwell on easy headlines and personalities rather than contributing to informed debate on key issues. Finance Minister Jack McConnell has assured MSPs that he will introduce an Accountability, Budgeting and Audit Bill to promote accountability, efficiency and transparency and to establish secondary legislation for approving and amending legislation (Herald 1 July). Full opportunities for on-line and other information on the Parliament have been promised while the arrangements for parliamentary committees and for introducing and amending draft bills will mean more open scrutiny - and are also more likely to make apparent the existence of, and the reasoning behind, differences of view between departments and within the civil service. Following the Report of the **McIntosh Commission**, similar trends are expected in local government (Herald 23 & 24 June and 1 & 3 July) However, there is some suspicion that secondary legislation - which can only be accepted or rejected - may repress debate on budget issues and the **SNP** has called for openness on issues such as explanation of the Barnett formula, the funding of PFI projects and how the Treasury channels EU structural funds to Scotland (Herald 24 June) It has been claimed that the fall in the value of the euro and the failure of government to provide full partnership funding for regional projects is damaging prospects for Highland transport schemes (Herald 6 August) The **Labour/Liberal Democrat** coalition incorporated agreement on a Skye Bridge toll freeze and increased rate relief for rural filling stations.



future role of Scottish canals and means of funding. A large rise in leisure use is anticipated (Herald 4 August). SODD Circular 13/1999 (dated 17 June) has removed the need for local authorities to gain government approval for **20 mph speed limits** and is intended to speed up the introduction of 20mph zones in residential and shopping areas. **The Road Humps and Traffic Calming(Scotland) Amendment Regulations 1999** have also facilitated action. In June, First Minister **Donald Dewar** announced that 8 bills will receive priority in the first session of the Parliament. These include a finance/accountability bill, a bill on ethical standards in local government, a national parks bill and a **transport bill** incorporating powers for road pricing and charges for workplace car parking (Herald 17 June). In preparation for this last bill, the Scottish Executive has published a consultation paper, *Tackling Congestion* (see p5) and is seeking responses by 30 September to Stuart Johnston, Scottish Executive Development Department, Transport Division 1, Area 2-D, Victoria Quay, EDINBURGH EH6 6QQ (e-mail TransDiv1@Scotland.gov.uk)

This is an encouraging start for the Parliament yet the road toll proposals, and continuing work by Glasgow and Edinburgh Councils on traffic calming and modal shift, have produced a torrent of often emotional and uninformed media comment opposing both road pricing and traffic calming while failing to indicate realistic alternatives within available funding. Perceptions of a clear and open vision by the Scottish Executive were not helped when Transport and Environment Minister Sarah Boyack was forced into a U-turn accepting that funds derived from road pricing should be fully available for transport improvement. The lack of other news in the summer season and strong public feelings about the car are possible explanations for the media space devoted to opposing car restraint yet, despite some thoughtful letters to the press, many opportunities for constructive debate were missed in the heated weeks of July (Herald 27 May, 2,7,9,11,14,15,18,19,23,26,28 & 29 July, Scotsman 14,15 & 20 July, Daily Express 14 July, Daily Record 14 & 29 July, Sun14 July, Sunday Herald 25 July, Evening News 13,14,15,16 & 26 July

CIT and **IoL** have merged on 1 June as the Institute of Logistics and Transport (**ILT**) with staffed offices at 80 Portland Place, LONDON W1N 4DP and the Supply-Chain Centre, PO Box 5787, CORBY NN17 4XQ Reg Harman, Director of Logistics and Transport Policies can be contacted at 020 7467 9416

The main Scottish rural lobby group **Rural Forum** has gone into liquidation. **Steve Sankey**, former Head of Policy with RSPB Scotland, is the new Chief Executive of the Scottish Wildlife Trust - replacing David Hughes Hallett who stood down in December.

Scottish Enterprise Chief Executive **Crawford Beveridge** is to retire next year and SE has advertised two new posts based on Glasgow dealing with transport/international connections and ICT/telecommunications

After lengthy negotiations, the threatened **Kvaerner** shipyard in Glasgow has been acquired by **GEC**, already the operators of Yarrow Yard at Scotstoun. Some job losses will arise but closure has been avoided

BAA pre-tax profits have risen 7.5% to £516m, helped by strong passenger growth and property sales (H 2June) **Vernon Murphy**, MD Scottish Airports, has been promoted to Regional Director with responsibility for all BAA regional airports including Scotland, Australia, the USA, Naples and Mauritius. He will continue as Chairman of Scottish Airports. **Donal Dowds** has moved from Edinburgh to be MD for Scottish Airports while **Lesley Bale** has moved from MD at Aberdeen to MD at Edinburgh. In contrast, **BA** is decreasing capacity in order to increase yields and maintain profitability.

First quarter profits at **KLM** have fallen by 37%, hit by Atlantic overcapacity and Asian market problems. An alliance is being developed with **Alitalia**. In a review of UK operations, **Alex Donald** has left the company and his work has been absorbed by Glasgow-based regional sales manager, **Tim Roulston**.

Stagecoach continues on an expansion path. Road King, the Chinese toll road operator in which it has a 21.5% share, is resuming heavy investment after a lull in 1998. Acquisitions include a 35% share in Italian bus group, Sogin, and a full buyout of Coach USA, the second largest US bus operator and there is speculation that part, or all, of Laidlaw, the largest North American bus operator may be acquired. Given its large existing size, there is less scope for deals capable of having a substantial effect on the Stagecoach share price. Nevertheless, annual results came in at the top end of City expectations. Pre-tax profits rose by 39% to £220m. Difficulties have arisen in securing further airports at acceptable prices but there is interest in majority shareholdings in Italian buses and moves into Italian rail operations. Stagecoach share prices are some 30% lower than a year ago but longer-term prospects are considered sound. It is now a major multinational company in a transport industry itself moving in this direction (H 4 May, 4, 9,14&15June, S 9,14&15June, 5&27July)

First Group has revealed a 31% rise in pre-tax profits to £95m. Bristol Airport is now within the Group and it has a 23% share of the British bus market. Flat growth in this market was disappointing but only slightly below the Stagecoach bus performance in Britain. The main boost to profits had come from the rail acquisitions, Great Western, North Western and Great Eastern Trains. Hong Kong bus interests are still showing losses and the government imposed fares freeze in Central Scotland as part of the price for retaining control of Midland Bluebird is likely to reduce income by £2m in a full year. Various expansions overseas are being examined and a deal has been concluded to acquire the second largest school bus operator in the USA. In Scotland, the **First Edinburgh** subsidiary has been formed by amalgamating the Midland Bluebird, Lowland and SMT divisions. **Douglas Pelling** will manage the new company. As preferred operator for the Edinburgh Western Busway, there are new opportunities to integrate this with services operating further to the west (H 19May, 6,16&22July, S 19May and 26 June)

Arriva has sold its contract hire car division for £226m and intends to increase activities in public transport. A partnership has been entered with a Dutch company to provide integrated bus and rail services in Friesland and further rail services in Groningen province. Arriva now has 4000 Dutch employees and other bus operations in Denmark and Sweden (H 12&18June)

Mayflower, owners of **Alexanders of Falkirk**, has announced a £40m order from Stagecoach for 300 buses with options for a further 150. Large sales to the USA and China are also anticipated with strong involvement in low floor, easy access buses. Alexanders have supplied the first of a new generation of low floor double deck buses to **Lothian Regional Transport** for operation in Edinburgh. LRT is investing £9m in new buses, the largest single order ever placed by the company (H 9&22June and 4Aug)

National Express, which includes ScotRail and Travel Dundee, has gained three train and tram franchises in Melbourne. **Colin Child** has quit as deputy chief executive and **Ray O'Toole** has been poached from First Group as Chief Operating Officer. Half-year results will be announced on 9 September. **Sir Philip Beck**, former head of John Mowlem, will replace **Sir Robert Horton** as Chairman of Railtrack later this year.

Prism Rail, which does not operate in Scotland, has experienced a sharp drop in profits due to inability to recoup the steep fall in annual subsidy arising as part of its franchise agreement. **ScotRail** has a lower rate of subsidy reduction and has been both cutting costs and gaining extra passengers. The value of **Jarvis**, the rail maintenance and construction group with large interests in rail renewals in Scotland, has been hit hard by contractual disputes with Railtrack Scotland (H and S 23June) **First Engineering**, the Scottish rail maintenance contractor (with Jarvis having separate contracts for major track renewals) is considering a possible sale of the business formed in a management buyout in February 1996. The firm has recently gained further contracts south of the border. Engineering Group **Motherwell Bridge** is to form a rail division following the acquisition of three rail-related companies. A five-fold rise in rail division turnover is expected.

Grampian Holdings (W H Malcolm), the Glasgow-based road haulage group, has unveiled a £5m move into rail freight. A disused rail terminal at Grangemouth has been acquired and will be developed. Bulk product customers will be targeted. **Ed Burkhardt** has been forced to resign as Wisconsin Central (EWS owner) Chairman by board members seeking a higher return on investments. The implications for this for EWS are not yet apparent but there could be a contraction in growth to secure higher yields. **Chris Stokes** is to be responsible for strategic development at the **Strategic Rail Authority** (SRA) while **Nick Newton** will deal with franchise management (both are ex-OPRAF) **Julia Clarke**, former Director of the Rail Freight Group and a member of the National Transport Forum for Scotland, is to be SRA Freight Director. **Liz Parks**, formerly with Railtrack Scotland, has been appointed Commercial and Production Manager for the Glasgow Underground.

At the age of 26, **John McGlynn** has developed the £2m+ turnover **Airlink Group** based on the Scottish market for airport parking. He is now moving into other areas of parking (H 1May) Glasgow-based **Babtie**, the engineering consultancy, is aiming to double in size in the next five years, mainly through interests outside Scotland while **John Menzies**, now based on distribution services, is engaged in multinational expansion of airport-related business (H 5&25June)

Mark Naysmyth has been promoted to associate director in WSP Development's Edinburgh office

Transport 2000, the British campaigning group for sustainable transport, has moved to First Floor, The Impact Centre, 12-18 Hoxton St., LONDON N1 6NG Tel 0171 613 0743 Fax 0171 613 5280. The **RAC** has moved campaigning to a separate charitable body, the **RAC Foundation**. **Neil Greig** has been promoted to Head of Policy, AA Scotland.

Tony Ferguson is to direct the National Public Transport Information Project at CPT and **Marjory Rodger** (former MD of Rennie's buses in Dunfermline) is the new Director for Government Relations at CPT Scotland, PO Box 23229, Edinburgh EH7 4ZG Tel 0131 554 4365 Fax 0131 554 5741

Fife Council is seeking a team leader for Network Planning-Public Transport and **LRT** is seeking an assistant to help in producing bus stop information and publicity. **Aberdeenshire** is seeking a Transportation Strategy Analyst while the **Scottish Office** has advertised for a variety of posts in road engineering, landscaping, information technology and intelligent transport.



Tory toll tax poster

Herald 30 June 1999

Government has published the reports of the 12 business 'pathfinder' groups set up to give preliminary advice to the Parliament (available from the Scottish Executive, Industrial Policy Division, Meridian House, 5 Cadogan St, GLASGOW G2 6AT 0141 242 5538 or at www.scotland.gov.uk) The **transport group**, chaired by Stagecoach chairman Brian Souter urged using the Nordic model to make children and young people more aware of the environmental unfriendliness of car use when viable public transport is available. It stressed the need for a holistic view linking transport with land use and other policies and saw improvements in information and integrated ticketing (using smartcards) as essential for enlarging the role of public transport. A **Scottish Transport Bond** was suggested to raise leveraged funding from securitised revenue streams (related to road pricing) and with interest rates much cheaper than the venture capital costs of PFI funding. Transport was also identified as a key area requiring improvement in the report from the **tourism group**, chaired by Lord Gordon of STB (Sunday Herald 4 April) In announcing a review of PFI (renamed **PPP** = Public/Private Partnership), Finance Minister **Jack McConnell** stated that future assets built under private contracts will eventually revert to public ownership at no cost to the public sector (Scotsman 25 June) Following on from earlier initiatives (see p 9) Industry Minister **Henry McLeish** has announced a **major consultation on tourism**. Responses on the consultation paper, *A New Strategy for Tourism*, are sought by **31 August** and should be sent to Jim Allison, Assistant Director, Tourism Futures, STB, 23 Ravelston Terr, EDINBURGH EH4 3EU or by e-mail to Jim.Allison@stb.gov.uk (Herald 21 & 23 July, 4 Aug). **British Waterways Scotland**, with the support of the Scottish Executive, has launched a consultation paper, *Partnership with the People*, on the

The Scottish Office became the Scottish Executive from 1 July 1999

In a variant of musical chairs, **Donald Dewar** has become First Minister in the Scottish Parliament with **John Reid** (ex Transport Minister) taking the UK post of **Secretary of State for Scotland**. Helen Liddell moved to Transport for two months before moving sideways to DTI and being replaced by ex Scottish Office Industry Minister **Lord Macdonald**. Former Scottish Office Ministers **Calum MacDonald** (who dealt with transport), and **Lord Sewell** have also left the UK government, being replaced by **Brian Wilson** (ex DTI and Scottish Office) as assistant to John Reid. **John Redwood** has replaced Gillian Shephard as DETR shadow minister.

The Scottish Cabinet includes the undernoted Ministers with interests in Transport and Access

Jack McConnell	Finance
Henry McLeish	Enterprise and Lifelong Learning
Sarah Boyack	Transport and the Environment
Ross Finnie	Rural Affairs (including aspects of transport)
Wendy Alexander	Communities (local government and social inclusion)
Susan Deacon	Health
Sam Galbraith	Children and Education

Other non-Cabinet Ministers were also appointed but none with responsibilities for transport and the environment

SNP and shadow first minister Alex Salmond has appointed **Kenny MacAskill** and **Linda Fabiani** as shadows for transport and the environment. Liberal Democrat transport, environment and European Affairs spokesperson will be **Tavish Scott**, Shetland MSP - though he may find his role limited by the Labour/Liberal Democrat coalition agreement. **Murray Tosh** is the Conservative shadow on transport.

Parliamentary committees and chairs have also been elected. **The Transport and Environment Committee** comprises:-

Andy Kerr (Labour) Chair	
Helen Eadie (Labour)	Linda Fabiani (SNP)
Robin Harper (Green)	Janis Hughes (Labour)
Cathy Jamieson (Labour)	Kenny MacAskill (SNP)
Des McNulty (Labour)	Nora Radcliffe (LibDem)
Tavish Scott (LibDem)	Murray Tosh (Conservative)

David Hamilton (replacing David Begg) has been appointed transport spokesperson for COSLA with extended responsibilities for economic development and tourism

East Ayrshire councillor **Eric Ross** has replaced Charlie Gordon as SPT Chair. **Charlie Gordon** is now leader of Glasgow City Council.

John Scott (Scottish Borders Council) has replaced David Begg as Chair of the South-east Scotland Transport Partnership

Following the appointment of **David Begg** as Chair of the Commission for Integrated Transport, all 17 members have now been appointed. They include **Bill Bradshaw** (non-executive director LRT), **Stephen Joseph** (Transport 2000), **David Leeder** (National Express Urban Transit Division), **John O'Brien** (ex OPRAF), Veronica Palmer (CPT) and **Jane Wilmot** (Disabled Passengers Transport Advisory Committee) **Mark Lazarowicz** has replaced David Begg as Transport Convener of Edinburgh City Council with **Alastair Watson** replacing Walter McLelland as convener in Glasgow

The **Scottish Executive** has opened an office in Brussels, sharing space with Scotland Europa, the subsidiary of Scottish Enterprise which has been in Brussels since 1992.

Amid controversy about appointment of yet another civil servant, ex SDD head, **Harold Mills**, is to be the new part-time chairman of Caledonian MacBrayne. He is known to have had a longstanding interest in shipping and ferry issues and was appointed after open advertisement for the post (H 24, 26 & 28 July)

An advisory sub-group of the **National Transport Forum for Scotland** has been formed to give views on the *Tackling Congestion* Paper. Members include :

Moir Lockhead (First Group),
 Brian Souter (Stagecoach),
 Janette Anderson (Railtrack),
 Alastair Mc Pherson (Scot Rail),
 Bob Armstrong (FTA),
 Les Gold (Scottish Chambers of Commerce),
 Ian Mc Millan (CBI),
 Neil Greig (AA)
 Sue Nicholson (RAC Foundation)
 David Spaven (Transform Scotland)
 Peter Cockhead (Aberdeen City Council)
 Andrew Holmes (Edinburgh City Council)
 Alistair Young (Glasgow City Council)
 Tim Stone (COSLA)

Tackling Congestion, Scottish Executive Consultation Paper, July, 1999, 44 pages

This Paper fleshes out proposals in the **Scottish Transport White Paper** for road pricing and is similar to the previous DETR paper **Breaking the Logjam**. It outlines the use of pricing to tackle congestion, air pollution and other external costs arising from road traffic; it states that congestion is a serious problem in Scottish cities and larger towns and also on some interurban links, at certain times in rural areas and on the occasion of special events attracting large crowds. Direct road charging and workplace parking levies are seen as key supplements to existing local authority powers (2.3) and the paper reflects the Labour/Liberal Democrat coalition agreement that *'the proceeds of road user charging will be used to invest in transport'*. Most of the paper deals with how LAs could gain Scottish Executive approval for particular pricing schemes and workplace parking levies. Mainly paper-based pricing is favoured initially (taking the form of area licenses or simple cordon charges) with later moves to UK compatible electronic payment. Parking licenses are proposed for firms at levels related to the space provided for employee parking. Approved schemes must show clear links with Local Transport Strategies, including the ability to reduce congestion at critical points, and encouragement is given to regional collaboration though with elected LAs rather than SPT taking the lead in the west of Scotland (3.2.1). Free-standing accounts are proposed for arising income and expenditure within LAs with parallel provision for direct road charges on the trunk road network and powers to require LAs to adopt traffic control measures minimising traffic diversion when direct pricing is applied on trunk roads. An ANNEX on *Regulatory Impact Assessment* sets out the impact of the proposals on business, public bodies and individuals.

Comment : The most visible reaction to the Paper has been attacks on the government refusal to use all the income arising for transport-related improvements - on the grounds that income from pricing could tempt LAs to seek approval for major infrastructure schemes giving poor value (3.2.15). This could allow revenue to be diverted to other sectors of local government and, by adjusting grants to LAs, could cushion the Scottish Parliament from expected cuts in Westminster funding. Similar views were expressed in **Breaking the Logjam**, which - like the Scottish document - places a 10 year limit (subject to review) on funding arising from road pricing. Subsequently, the Scottish Executive has said that all funds from approved pricing schemes will be available for transport-related programmes but the 10 year rule remains, despite the longer-term financing required in the PFI/PPP projects commended in the paper. Because of the 'windfall' monopoly element in congestion charging, it is likely that government will wish to revisit this issue at some point and apply a tax regime to congestion charge income. VAT issues also arise(3.2.16).

A more practical concern has been the realisation that the slow pace of consultation and development of electronic charging may produce no appreciable income for transport before 2004. This conflicts with the strong feeling of business, social inclusion and environmental lobbies that extra income is needed now to support a sustainable transport network which will also advance Scottish competitiveness (see STR ISSUE 4, p8-10 and ISSUE 1, p9-19). Without early sources of new income, the Scottish Road Review and LA priorities could bring further cuts in the total roads budget with downward pressure on budgets for public transport, walking and cycling. This can only hamper the shift away from car use which is the priority of the Consultation Paper. The Paper makes much of the complexities of electronic pricing and there are clearly major technical and enforcement issues relating to charging for workplace parking. On the other hand, the Paper fails to explain why there have to be substantial delays in paper-based Supplementary or Area Licenses for peak-period road use. Replacing the Fuel Tax Escalator with a Central Scotland Surcharge (possibly also applying around Aberdeen) would also have low collection costs, give direct income for transport and bring a closer connection between regional road costs and related charges. Though transparency is mentioned, the opportunity is

missed to clarify the extent of 'charges' within existing road taxation. Para 2.4 says that it is 'appropriate to expect motorists to pay for road use' without reference to substantial sums already paid by road users, though often not well related to actual costs arising. It is surprising that, in the run-up to the Scottish Parliament, little attention has been given to this issue - a fault repeated in the generality of the ANNEX on Regulatory Assessment. A reasonable conclusion is that there is much Scottish support for earmarked income for transport within the next 12 months but disagreement on the split of such income between road schemes, 'social inclusion' and shifts away from car and lorry use.

Transport Priorities for the Scottish Parliament, Summary by Andrew Forster of the Conference organised by the Centre for Transport Policy, Robert Gordon University, in Edinburgh, 13 July.

Scottish Transport and Environment Minister **Sarah Boyack** spoke on the newly issued Scottish Executive consultation document *Tackling Congestion* and attacked the Scottish media reporting of the proposals. She said this document put transport at the very top of the political agenda in Scotland but refuted tabloid accusations that the measures were 'anti-car'. 'If some of the comments we have heard are to be believed, Scottish motorists would already be paying tolls on the M8', she told delegates. 'This is hyperbole, in search of a good headline. Surely the public deserves better than this' Even so, the consultation paper has led many differing groups to join **David Begg** in attacking the lack of ring fencing of revenues for transport. The document was also criticised as it does not guarantee that the money raised will be additional. Boyack added that proposals for **regional transport partnerships** (RTPs) might be included in next year's **Scottish Transport Bill** alongside new **charging powers and bus legislation**. A statement on RTPs would be made in the autumn and the results of the **Scottish Trunk Road Review** - started two years ago - would be announced after the summer recess. She warned, however, that the dozens of MSPs, local authorities and pressure groups who had approached her in recent weeks about pet road schemes were likely to be disappointed. 'There is no piggy bank in the Scottish Executive just waiting to be raided,' she said.

Malcolm Reed, SPT Director General, called for statutory quality contracts rather than statutory quality partnerships as the way forward for bus services. Reed said that partnerships had inherent weaknesses in relation to the 'soft features' of bus operations - information, fares, through ticketing, interchange and service stability. Statutory quality partnerships could run into 'real problems' with competition law, he predicted, whilst on-road competition undermined investment and led to LAs having to support loss making services as operators did not cross-subsidise. These problems all pointed to the need for quality contracts.

However, **Grahame Lawson**, North Lanarkshire Council's head of planning and transportation, told delegates that the future of SPT had to be reviewed. 'The deregulation and privatisation of bus and rail services calls into question the future role of SPT in the delivery of local transport strategies in the west of Scotland, certainly as far as bus services are concerned,' he said. 'The recent buses consultation paper lays increased importance on LAs in securing enhanced bus services but it seems anomalous that 12 authorities in the SPT area have no power to intervene directly in discussions with bus operators,' Lawson added. 'This puts us at a disadvantage. There has to be a case for reviewing the continued relevance of an SPT in a Scottish context and in the light of emerging transport partnerships.'

The issue of Regional Partnerships drew other varied comments. **Rodney Mortimer**, Integrated Transport Manager with Glasgow City Council, said that acceptable partnerships would have to recognise democratic accountability and the geographical diversity of Scotland. **Roy Pedersen** of HIE called for a statutory Highlands and Islands Transport Authority embracing trunk roads, ferries, piers, airports and rail freight support. Such an Authority would have an annual budget of some £70m and would be in a better position to secure improved results from this level of spending.

EXTERNAL

AIR BA is planning services cuts and a shift to premium fares to increase yields. Cuts are unlikely to affect Scottish routes (H 26 May) **GO** (the low-cost airline set up by BA) has trimmed business flights between Edinburgh and London over the summer. **Euroscot** has ceased operating the Edinburgh-Bournemouth service which it opened last year but the service is being taken over by **Gill Airways** (S 5 & 10 July) **Singapore Airlines** is to start air freight links from Prestwick Airport to the Far East in October (S 12 July) **Ryanair** is planning expansion of European routes from Stansted, including links with Scottish services from Prestwick. Direct European flights from Prestwick will also be expanded (S 29 May) Ryanair has opened a European reservations call centre in Glasgow and has introduced £20 return fares from Prestwick to London (+£10 air travel tax) (S 8 June and H 7 July) Hopes are rising for a restored direct link from **Inverness to Amsterdam** to replace the KLM flights withdrawn in March 1998 (S 25 June) After a stormy meeting, **Aberdeen City Council** has agreed to an experimental extension of the 10.30 pm curfew on night flights at Aberdeen to 11.30 pm. A motion for 24 hour opening was narrowly defeated (S 5 May) Government has confirmed plans for the part-privatisation of **air traffic control** (H 28July)

SHIPPING In discussions with Dumfries and Galloway Council, **Seacat** has agreed to restore summer services from Stranraer to Belfast to twice daily and has received permission to stay at the present Stranraer terminal until the end of May 2000 (H 17July)

RAIL GNER may lease unused regional **Eurostar** trainsets to raise capacity on the ECML and is also examining the option of sleeper car conversion for day use (Rail 2June) ScotRail **Anglo-Scottish sleepers** are being given a £7m refurbishment including the provision of seated capacity and sleeping facilities for the disabled. Family sleeper tickets are also being introduced (Railway Gazette August)

INTERNAL

AIR Loganair has reported strong growth on its Scottish air services in 1998 and a new non-stop flight from **Sumburgh** to Edinburgh is to be introduced. Yet there have also been complaints about the reliability of the **Tiree** services and high fares on island flights (S 27 April; H 10 & 30 June) Though new small capacity jets are being ordered for Islands routes, there is speculation that the planned Eriskay causeway and linking ferry to **Barra** could mean the end of direct flights to Barra's beach landing strip.

FERRIES Colonsay has reluctantly accepted Caledonian MacBrayne plans for a revised winter timetable making it more difficult for secondary school children to make week-end returns to the island (H 23 June) North Berwick Community Council is seeking support for a summer service across the Forth from **North Berwick** to **Earlsferry** (S 19May)

RAIL New electric train sets for **SPT** operation are now being delivered but delays have arisen in supplying the new Adtranz diesel units for **ScotRail**. This will not affect the quarter-hourly **Edinburgh-Glasgow** Queen St service and other improvements to **Stirling** and **Falkirk** planned for late September but will slow cascades to improve capacity on other services. More diesel rolling stock is required to ease capacity problems and overcrowding, notably in **Fife**, on the **West Highland line** and on the occasion of special events such as the Open Golf Championship at **Carnoustie**. Despite full use of available rolling stock (and a special hovercraft service from St Andrews), demand for rail use to this event exceeded capacity though 40,000 passengers were handled. MSPs are seeking a higher quality of service on the Glasgow-Edinburgh route (H 7,16,22&23July, S 31 May and 23 July, Scotland on Sunday 11 July)

BUS and **TAXI** Larger numbers of **articulated buses** have been delivered for use on Stagecoach Scottish services while special bus services (with rail) have had a useful role in easing congestion at the Tall Ships event in **Greenock**. The first low-entrance double-deck buses have been introduced on Scottish services (also see Late News)

Taxi-drivers in Edinburgh are seeking city approval for a 6% fare rise and have countered complaints at high fares by saying that Edinburgh fares are only slightly above the average of 250 UK towns (S23July) Glasgow **private hire drivers** are seeking access to city bus lanes and may receive approval for an experimental period. The city council feels that enforcement could be a problem due to most private hire vehicles being identical to private cars (H28 June & 1 July)



Taxi on Prince's Street, Edinburgh (Edinburgh City Council)

Scotsman. 2 July 1999

ROADS Roadworks on the M8 and in the Clyde Tunnel have been affecting traffic flows during summer while the temporary relocation of **Edinburgh bus station** to street stops during construction of the new terminal will increase traffic problems. Traffic has adapted to the ban on northbound movement (except for buses and taxis) on **Hope St** at Central Station in Glasgow but some resident and shopper groups in **Glasgow** and **Edinburgh** have been concerned that further plans for traffic calming could lead to added disruption. Other groups have expressed opposing views, pointing to the advantages of lower speeds and less traffic. Government policies and several recent studies by schoolchildren (responding to an RAC competition) have supported **20 mph speed limits** and **'home zones'** giving priority to pedestrians, cyclists and greener travel to school, work and shopping. Thurso High School gained first prize in the RAC competition with Portobello High School the runner up (H 25&29June,19&28 July, 2&5Aug; S 28 April, 5,27&31May, 18July; Evening News 3 June & 23 July; Royal Society of Edinburgh - Schools Discussion Forum, June) Police have expressed concern that speeding has been on the increase and have mounted a campaign to lower speeds (H 11&18 May) RAC has called for action to limit driving under the influence of drugs (H25May)

QUALITY OF SERVICE ISSUES The **Freedom of Scotland rail ticket** has been modified to include the Glasgow Underground, Caledonian MacBrayne ferries and bus links within the Highlands and to St Andrews but there have been complaints at the loss of the inclusive ScotRail timetable (H15 & 22 May) Under a voluntary scheme agreed with Scottish councils and transport operators, Scotland's 30,000 **registered blind** are to have **free bus and rail travel** from December subject to purchase of a National Card at £5 per year (H28May) Glasgow is to follow Edinburgh in introducing **moped based traffic wardens** and is expected to gain direct control over arising income (Evening Times 23 June) Tax concessions and workplace initiatives are making cycling more attractive. Glasgow has introduced a **25p per mile allowance** (of which 12p will be tax free under new Treasury rules) for council employees using **bikes on business** and Glasgow and Edinburgh have been successful in their joint bid to host the international **Velo-city** event in 2001. Glasgow plans to triple cycle trips by then (H 29May)

Air Quality and Fuel Consumption The Scottish Executive is to target £350,000 for air quality monitoring at hot spots (LTT 29July) **Andy Guy**, who invented a simple control device to reduce fuel consumption and emissions 24 years ago, has persuaded **Renfrewshire Enterprise** to provide start-up grants to exploit the invention commercially. US tests showed a 20% cut in fuel consumption with larger cuts in CO2. Separate tests at **Paisley University** showed fuel savings of 7.2% The fuel efficiency valves are now to be manufactured in Cape Town and in China under licenses. Distribution within Britain is being organised (H 17July)

Driverless Trucks Daimler Chrysler and Iveco are conducting tests on computerised lorry convoys where only a leading driver is required. Convoys would be used on motorways with a 50mph maximum speed. Initial tests have been confined to one 'ghost lorry' behind a driven truck but larger convoys are technically feasible. Separate motorway lanes are envisaged for such lorries within 10 years though accident fears have yet to be overcome. Control costs are small in relation to potential savings (S 22June)

Scottish Household Survey (see also p16) The first results of this ongoing survey have been published. 6 out of 10 households now have access to at least one car yet 30% of households contain at least one person with long-term illness or disability. About 1 in 8 households now have access to the Internet and this figure is rising rapidly (H 3Aug)

Scottish Transport Statistics 1999 edition. Launching this, Transport Minister **Sarah Boyack** stated that bus use was still falling but that the proposed Transport Bill would open up real choices for travel and help to shift modal share. However, **Malcolm Buchanan**, Chair of TRI Napier has criticised government for an 'anti-car' obsession and a failure to recognise that, even with improved public transport, most trips would continue to be made by car. Even so, he felt that it was important for government to gain legislative approval for road pricing to fund public transport (H 29July)

Transport Needs of the Elderly **Paisley** and **Essex Universities** have gained £100,000 of ESRC funding to study the transport needs of the elderly - with a particular focus on how former car owners growing older could cope without cars (LTT 15July)

Cycling and Car Traffic TRL Report 402 (£25) concludes that bikes on trains would have little impact on car use though policies easing bike travel by train did fit the philosophy of integrated and inclusive transport. Another study for DETR by **Steer Davies Gleave** and the **Centre for Transport Studies at University College, London**, has concluded that cycling - though helpful for health - has little role in reducing car trips under 5 miles. Improvements in conditions for walking and the use of public transport were found to be more likely to encourage shifts away from car use for short trips. However, the **Oscar Faber** study of **Aberdeen** found greater potential for cycling in relation to reducing short trips by car. Other factors noted as offering scope for cutting car miles were shared and linked trips, a shift to shorter trips, home delivery services and working at home (LTT 3 June) While only 2% of school pupils at Sciennes in Edinburgh cycle to school, 50% would like to do so if conditions were improved (LTT 3June)

Cycle Safety A BMA study (see page 22) has concluded that legislation introducing compulsory helmets would do more harm than good. While accident rates for British cyclists are abnormally high (well above the Netherlands), improvement can come through lower speeds and segregation. Helmets would discourage significant numbers from cycling and prevent the related health benefits of regular cycling. Enforcement would also be very difficult in present conditions. Better design and lower costs for helmets are recommended with the possibility of compulsion after a 10 year period to allow shifts in public attitudes (H 3 June)

English Heritage has commissioned JMP to develop integrated transport access to Hadrian's Wall (LTT 20 May)

Traffic Calming Research by JMP and psychology professor **Terence Lee** from the **University of St Andrews** is being used by the Scottish Executive to develop 'natural' means of traffic calming. New advice on **Traffic Calming on Through Routes** will be published. (LTT 29July)

Guided Buses and Light Rail A Task force to promote guided buses has been set up by concrete manufacturers - contact Graham Taylor at Britpave 01344 725731 DETR, CPT, First Group and Edinburgh City Council are to sponsor a **new comparison of light rail and busways** by Environmental and Transport Planning. This will consider whether light rail has been receiving too little attention compared to bus projects (LTT 17 June including feature article) Changes in fares, frequencies and marketing policies since Stagecoach acquired the Sheffield tram system has raised patronage from 7m to 12 m a year but short busways in Leeds have also raised usage by 50%

Ferry Design Researchers at **Strathclyde University** have found that small changes in RO-RO design can cut the risk of capsizing. The key is to introduce a contoured deck rather than expensive partitions. The design has enabled the university to win a Royal Institution of Naval Architects competition on ship safety. The team leader is **Prof. Dracos Vassalos**

Park+Ride Contrary to the recent report by W S Atkins for DETR, research by the **Transport Studies Unit at University College, London**, has concluded that park+ride can increase car miles. Actual results depend on particular locations and context but car miles are often 'saved' where congestion is a problem while increasing elsewhere on the approaches to park+ride points.

Office Relocation Bristol City Council studies have concluded that relocation away from central city offices could reduce car travel by bringing offices closer to the main residential area (LTT 6 May)

Corridor Studies In response to current fashions for multi-modal corridor studies and the development of quality corridors for public transport, the corridor concept is being modified by the view that it could lead to greater increases in car use than in public transport e.g. development along longish corridors, while increasing public transport use, can also stimulate car use for longer trips especially off-peak. Within a sustainable strategy, the best results may come from concentrated extensions on the fringe of towns and/or large new towns (though quality corridors are still needed to promote public transport use, walking and cycling in such areas) **Ove Arup** has completed the first corridor appraisal study for the Welsh Office under the new common appraisal framework. Study advisors include Phil Goodwin, University College, London and Austin Smyth, formerly of Ulster University and now at TRI Napier. The study is concerned with the **M4 corridor** through Newport and concludes that there could be effective alternatives to the proposed £350m Newport Relief Road to ease strains on the M4. A successful alternative would depend on the combination of improved public transport with traffic restraint and road pricing (LTT 3 June) This study has implications for the **M74 corridor** in Glasgow. An **MVA** study of the **trans-Pennine corridor** for DETR and EU has concluded that, in a 'do nothing' approach, road traffic would rise by 20% over 20 years but could also be cut by 20% under alternative policies including general fuel price increases, £3 to £6 access charges to urban areas and major up-grading of public transport. The final report on this project is expected later this year (LTT 29July)

Public Transport Fares and Service Levels. Analysing the DETR Focus on Public Transport Report for 1999, **Peter White, University of Westminster** concludes that fare increases in rural areas are more likely to cut public transport use than in urban areas. Higher rates of bus fare increase in Scotland, plus growing car ownership, had produced a 6% fall in bus use when usage outside London had fallen by only 2% with London raising total British trips by bus in 1998 by 1%. He also concludes that improved frequencies are especially effective in increasing patronage (LTT 6May) - see also DETR paper on **Bus Fare Elasticity** - from TAS 01772 204988

For TRI Research, see inside rear cover.

ROAD TRAFFIC and VEHICLES

Vehicle numbers(thousands)	1993	1996	1997	1998	%change 97/98
TOTAL	1874	1966	2023	2073	2.5%
of which cars & LGVs	1661	1734	1779	1825	2.6%
Motor cycles	26	25	27	31	15%
Public Transport	12	9	9	9	nil
Goods (over 3.5 kg)	35	32	31	30	-3.2%

Toll Bridges (total annual vehicle numbers and -in brackets - average daily flows)

	1988	1996	1998	Toll Receipts1998	Average tolls, 1998
Forth Bridge	14.7m	20.4	22.6 (62th)	£8.7m	76.4p *
Erskine Bridge	5.8m	6.6**	8.0 (21.8th)	£4.5m	56.6p
Tay Bridge	5.9m	7.5	7.8 (21.3th)	£3.2m	81.6p *
Skye Bridge		612th	656 (1.8th)	£3.6m	545.7p

** Figures depressed by bridge closure and restrictions after oil-rig collision * tolls levied in only one direction
Source: Scottish Transport Statistics, No 18, 1999 p 26 and p 54-55

COMPARISON OF MONTHLY DAILY AVERAGE VEHICLE FLOWS (thousands)

	JANUARY			AUGUST		
	1996	1998	%change	1996	1998	%change
Scottish Core Area						
A720 Dregghorn	54.2	53.3	1.7%	67.0	70.4	5.1%
M8 Harthill	40.2	NA		43.0	49.4	15%
M80 Bankhead	24.7	NA		33.1	30.0	-10%
M90 Kelty	21.2	19.0	-10.5%	28.1	29.3	4.3%
Forth Road Bridge	<i>no equivalent data but yearly traffic fell by 1.4% in 1998 - see STR ISSUE 5 p 18</i>					
M9 Linlithgow	17.1	19.6	14.7%	23.0	25.1	9.1%
A77 Kilmarnock	16.0	18.7	16.9%	20.6	24.3	18%
A737 Lochside	17.1	NA		19.8	20.1	1.5%
North-east Scotland						
A92 Bridge of Don	17.5	19.9	13.8%	19.8	20.0	1%
A96 Forres	6.6	7.0	6.0%	10.7	10.6	-1%
Rural Trunk(North)						
A9 Tomatin	4.7	5.8	23.4%	10.4	10.3	-1%
A9 Berriedale	.9	9	nil	2.4	2.3	-4%
A82 Ballachulish	2.1	2.4	14.3%	5.5	6.8	26%
A87 Kyle of Lochalsh	1.7	1.8	5.9%	4.9	4.8	-2%
Rural Trunk(South)						
A1 Grantshouse	4.3	5.1	19%	8.0	8.3	4%
A68 Pathhead	6.5	6.4	-1.5%	11.1	10.0	-10%
A7 Langholm	2.8	2.9	3.6%	4.0	3.3	-18%
A75 Carsluith	3.2	3.7	16%	6.2	5.3	-14.5%

Source: Scottish Transport Statistics, No 18, 1999, p 73 and No 17, 1998, p 63

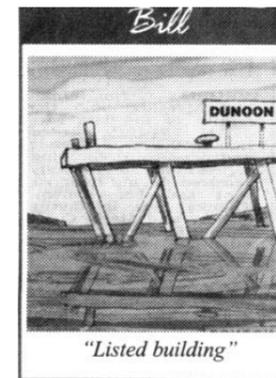
Comment: Overall, these figures - especially the falls in summer traffic - confirm the difficulties in tourism away from the major cities but they also reflect other economic problems in rural southern Scotland and in the north. There has been strong growth in winter traffic to Inverness and a significant shift from the A68 to the A1 route south from Edinburgh. Strong A77 growth reflects completion of the M77 extension to Malletsheugh and some shift away from the A736 and the congested single carriageway A737 corridor. Other routes where congestion and policy changes appear to be affecting traffic growth include the Forth Bridge, Edinburgh Bypass (A720) and the A92 at Bridge of Don in Aberdeen. The high growth shown on the central M8, influenced by related land developments, will not be sustainable within the capacity of the present motorway while peak-period M8 congestion also arises within Glasgow.

It would be useful to have comparable figures for trends in rail and bus/coach use for the corridors shown.

Note: The normal update on monthly road traffic in 1999 will be resumed in ISSUE 7.

AIRPORTS A new departure terminal at **Edinburgh Airport** has opened as Phase 1 of a £54m programme improvement. As part of this, the original short runway at Turnhouse has been closed permanently (H 29May and S 16July)

PORTS and FERRY TERMINALS With new vessels soon to be available, urgent decisions are required on a Skye terminal for services to Harris and Lochmaddy. **Uig** residents are concerned at the local effects of a shift to **Dunvegan** (H 7June). A similar situation is arising on the Clyde where the need for vessel replacements, new fast ferries and high potential costs for harbour repairs are opening up prospects for substantial change in ferry patterns. **Ardrossan** is likely to survive the threat of possible fast ferries from other ports and remain a main base for Arran and for Irish freight services. Development plans for the port are expected soon (H 9Aug) On the upper Clyde, major repairs are required at the **Gourock** and **Dunoon** ferry terminals (H 6Aug) A Scottish Executive Report on possible options is expected soon. Potential changes may include concentration of all services on a **Gourock-Hunters Quay** route (replacing the four terminals of the



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present competing services) or a move to faster ferries and a terminal in the **Port Glasgow** area. Cruise passengers using **Greenock** are on a strong upward trend (H 26June) A new 42 seat aluminium passenger ferry has been launched in Argyll. It will provide services from near **Oban** via Port Appin, Port Ramsay and Lismore to the Foster Yeoman quarry at **Glensanda** (H 17July)

RAIL

Railtrack has cleared the 320 miles of WCML from **Glasgow to Daventry** for 9 foot 6 inch containers and work is in progress on extending this clearance to **London** (Rail 5 May) There is concern a slippage in the wider programme of WCML track improvement for higher speeds (H 4June) though Sunday closures for improvement have already started north of Carlisle. In response to government pressures, **Railtrack** has promised further increase in investment provided that profitability is sustained (S 1July) An £870,000 Scottish Executive freight grant will allow relaying of track to **opencast workings** in south Lanarkshire and improve coal transits to Longannet. Railtrack and contractor First Engineering have been blamed by HSE for failures of track maintenance at Burntisland (where a coal train was derailed) and have since announced a two-week closure of the inland section of the **Fife Circle** to allow a £3m upgrade including welded track (H 7 & 21July) The new station at **Dunfermline Queen Margaret** will not now open until early 2000 but SPT has announced a £1.8m up-grade of **Kilmarnock** station (including extra car parking) as a prelude to increasing the service frequency from Glasgow to half-hourly (H 6July) Railtrack has reached agreement on a partnership deal for a £700,000 restoration of the historic station at **Broughty Ferry** (H 23 June) TRI Napier lecturer Dr David Low has urged that relaying on only 4 miles of track in north **Edinburgh** and opening of the South Suburban Line for passengers could give Edinburgh a flexible 'figure of eight' rail network (Evening News 14 May) Permission has been granted for a £35m wood-burning power station in north Carlisle which could lead to 100 lorries a day from the Kielder forest. Affected villages are pressing the case for this traffic

(and longer-distance timber haulage) to be handled by **reopening the railway from Longtown via Newcastleton to Kielder Forest** (H 26June) Though most other obstacles have been overcome, uncertainties about bank funding may delay the proposed **Cairngorm** funicular railway which is strongly opposed by walking and conservation bodies (Sunday Herald 27June and S 16July)

ROADS and BUSWAYS

First Group has won the contest for building the 9km £50m **Edinburgh Western Busway** (CERT). The project has been given the title ConCERT and should be open by 2001. **First Group** will be awarded a 25 year concession by ConCERT and construction will be by **Balfour Beatty**. Talks are being held with **Murrayfield Stadium** on a possible route diversion to provide a stadium station and direct access to **Haymarket** (H3 June and 4 Aug) The project is still attracting adverse comment from groups preferring light rail developments or a more extensive but less expensive range of bus priorities and pavement, cycling improvements on existing streets (S 7&16 June) **SPT** is expected to have to repay £1.3m to the EU due to technical faults in the funding of Glasgow Buchanan St and Hamilton bus stations (H 26 June) **Aberdeenshire** has invited tenders for a 250 car park+ride facility on Ellon Bypass for interchange with buses to Aberdeen. Completion is expected by June 2000 (S 20July)



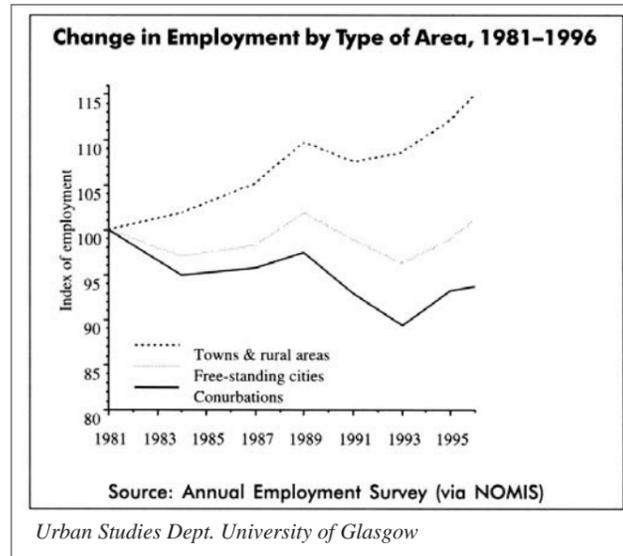
Herald 28 June 1999

The £4m **Creagan Bridge** has been opened by Transport Minister Sarah Boyack, shortening Oban-Fort William trips by 6 miles. (H 22June) She also confirmed that the £85m Aberdeen Peripheral Road could not be financed from present sources of government funding (LTT 1 July) **Glasgow City Council** is nearing completion of major traffic calming, pedestrianisation and pavement widening schemes for the city centre (H 17&19June) Studies are continuing for

a £6m 4 lane **Clyde Bridge** at **Finnieston** with 2 lanes dedicated to public transport (Evening Times 31May) EU cash and Scottish Office borrowing consents have assured a start of work on the £13.7m Eriskay and Sound of Barra Integrated Transport Project. £9.4m of funding will go to an **Eriskay causeway** (H 28 May) Accidents have led to repeated demands for a full upgrade of the **A77** from Malletsheugh to Ayrshire (S 19June and H 6Aug) but JAM74 has called for replacement of the **M74** across south Glasgow with less expensive and more effective alternatives (see p 22). **CBI Scotland** has rejected workplace parking charges but may accept road pricing if the proceeds are linked with completion of the **M74, M80, M8** and the **M6** in Cumbria i.e. the gap between Gretna and Carlisle (S 26June)

CYCLEWAYS Local residents and community councils have been in conflict over road narrowing in Crow Road in Glasgow caused by the introduction of cycle lanes but Glasgow City Council has confirmed that it plans to have 120 kms of cycle lane in operation by 2001 (Glasgow West Courier 11 June and H 29May)

Future Patterns of Settlement The first systematic analysis of British employment trends since 1981 has shown a 500,000 job loss by the 20 largest cities while the rest of the country has gained 1.7 million. Conurbations (defined on a narrow basis) have been losing jobs to more dispersed developments and chronic unemployment has arisen among city residents due to higher proportions of reducing city jobs being taken by longer distance commuters. These trends have reinforced road traffic growth and are not sustainable. On the other hand, Glasgow and Edinburgh have been ranked joint second after Cardiff in a survey of the quality of the working and living environment in British cities (Manchester came 8th and London 9th)



Newly published research on sustainable, inclusive and competitive cities has urged the importance of stronger policies for urban regeneration and containment of the sprawl of the 1980s and 1990s (Dept of Urban Studies, Newsletter 2, University of Glasgow, July; Final Report of Lord Rogers and the Deputy Prime Minister's Urban Task Force on 'Towards and Urban Renaissance', see also p 22; H 28 May and 8&12July; S 12 July) Such changes are reinforced in the new *Scottish Guidelines for Transport and Planning* (see STR ISSUE 5, p8) yet, in purchasing **Asda**, the US supermarket giant **Wal-Mart**, has either anticipated a continuation of sprawl or bought into the supermarket group with the largest stores and possible sites for further expansion (H 15 June) The rapid expansion of e-commerce is also likely to bring a growing division between distribution depots and conventional shopping with a greater mix of catering and entertainment. e-commerce may also have adverse impacts on present demand for call centres.

Town Centre Developments

The city centre in Edinburgh has become the focus of major plans for redevelopment, shopping and leisure. Alistair Darling MP has expressed concern at the traffic impact and 'ad hoc' nature of these developments and is seeking action from First Minister Donald Dewar on a more integrated approach (H 23July). Separate inquiries are being held on Railtrack proposals to redevelop **Waverley** station and on the City Council proposals for a shopping mall under **Princes St.** while work is already proceeding to fill gap sites at the top on **Leith Walk** and to redevelop the bus station to the east of **St Andrews Square** for shopping and offices. There is alarm that Edinburgh is falling further behind Glasgow in the level of city centre shopping provision. The £100m Greenside Projects Ltd development at the top of Leith Walk includes offices and a 12 screen Warner Village cinema. The former GPO opposite the Balmoral Hotel is expected to have a £40m makeover as a five-star hotel (H 20&28May, 10 June, 17 July and 6 Aug; S 28May, 22June and 20July) The **Dynamic Earth** permanent exhibition and mini-dome opened on a major site adjacent to the Holyrood Parliament site on 3 July. Office building has been stronger

in Glasgow than in Edinburgh with some sites (as at Pacific Quay) spilling beyond the city centre (H 17June). Europe's tallest cinema, an 18 screen Virgin Megaplex is to be built on a central site adjacent to the Glasgow Concert Hall and the former GPO in George Square is to become a mix of shopping, leisure and hotel development (H 6,20&27May) The city centre Overgate shopping area in **Dundee** is having a £150m redevelopment due for completion in March 2000 and already 70% let, helping to make Dundee the prime shopping centre on Tayside (H 17June) Highland Council has approved a £40m shopping development at Eastgate, **Inverness**, adjacent to the town centre (S24 June and H 8July)

Suburban and fringe-of-town development

The pace of greenfield development is slackening with more emphasis on brownfield and waterfront schemes. The **Braehead** shopping/leisure complex on the south side of the Clyde will open in September while **Ikea** has applied for planning permission for an adjacent development giving a store in the west of Scotland as well as the store being opened at Straiton beside the Edinburgh bypass (H 19June and 5Aug) **Clydeport** and the **Bank of Scotland**, with indications of support from Glasgow City Council, have announced more details of a £500m development along the Clyde from **Broomielaw to Meadowside**. This project also has GDA and SE backing and will link with the £71m Science Park at Pacific Quay south of the Clyde. Plans include waterfront leisure, multi-screen cinema, hotels, offices and specialist retail space. Discussions are continuing with Grampian Holdings (W H Malcolm haulage) and the Arnold Clark car dealership who own part of the land along the riverfront. Planning consent is expected early in 2000 (H 25June, 15July and 2Aug) **BBC** now expects to move its Scottish headquarters from Queen Margaret Drive in Glasgow to Pacific Quay with construction starting in January 2001 (H 23July) Further down the Clyde, **Dunbartonshire Enterprise** is promoting plans to develop 4 kms of riverfront between Clydebank and Old Kilpatrick for a mix of business, recreation and housing. Neil Parkyn of planning consultants Llewelyn-Davies is being used as an advisor (H10 Aug) A Chief Executive is being sought for the £500m Edinburgh waterfront development between Granton and Leith (H 14May) **North Ayrshire's** first call centre has been established in Saltcoats close to the rail station (H 3Aug) Further expansion is taking place at the Castle Business Park in **Stirling** and the US bank Morgan Stanley is locating 1000 jobs at the mixed Orchardton Woods business and industrial site in **Cumbernauld** (H 1 July) **Inverclyde Council** has declined to support relocation of the Greenock Morton football stadium unless the retail element in the proposal is reduced (H 17June) BAA McArthur Glen's £70m development beside the Almondvale Centre in **Livingston** is likely to be the fifth and last of Scotland's low-cost designer outlets or factory shops but differs in being close to a town centre. The scheme includes the largest indoor Ferris wheel in Europe as a visitor attraction and should open in August 2000 (H 13&28May, 3 1June)

Rural Issues

The long delayed report on the proposed **Harris superquarry** has been completed and awaits a Scottish Executive decision (H 12May) Anticipating closure of the aluminium smelter next year, **Kinlochleven** is developing tourism and small business alternatives while **Grantown-on-Spey** is studying an all weather toboggan run as an added visitor attraction (H7July and 6Aug) Enterprise and Tourism Minister Henry McLeish has launched construction work on the £60m **Loch Lomond Visitor Centre** development to be complete by April 2001 (H19&20July) while planning permission is being sought for another **new golf course with hotel and holiday lodges** on this section of Loch Lomond (H 22May) Morrison Developments has moved into designer outlets by acquiring and expanding the Sterling Mills outlet in **Tillicoultry**. Market research indicates that this development, beside the Sterling furniture store, could have 1.5m visitors a year, drawn from the whole of the Scottish Central Belt (H 1July) The government decision to abandon payment of benefits at local post offices (some 30% of their business) has posed a new threat to **rural post offices** (S 22June)

Scottish Economy and Tourism There is fragile recovery in the economy. **Scottish Enterprise** has set a target of 32,000 net additional jobs in 1999/2000 and, helped by revival in electronics, the **Fraser of Allander Institute** now expects the manufacturing sector to recover more quickly than in the rest of the UK. There was an upturn in retail sales in May and this is expected to lead to a reversal of recent interest rate falls later in the year (H 18,24&26June, 22July) Revised **STB** data shows a 6% fall in tourist spending in Scotland in 1998, with a 6% rise in overseas and English tourist spending (totalling £940m and £133m respectively) cancelled out by a 38% fall (to £353m) in spending by residents on tourism in Scotland (H 30June) Tourism in parts of the Highlands and Islands may have fallen by as much as 20% in 1998 and the **Scottish Tourism Index**, produced by the Royal Bank of Scotland and STB, has indicated weak outlooks for 1999. The fall in interest rates and the growth in world tourism is working against deep recession and preliminary figures suggest that tourist numbers in Scotland in 1999 may be above 1998 (H 3,22&24June)

Population The annual estimates of population indicate a fall of 2500 to 5.120m in the Scottish population with the steepest area falls in **Inverclyde, Dundee, Aberdeen and Orkney**. The surprising **Glasgow** rise of 8020 (to 620th), against a 40 year trend fall, is thought to be mainly a correction for under-recording but also suggests that Glasgow, on the verge of further programmes for regeneration, may already be seen as a more attractive place in which to live and work (see p 8 and H 1May).

Transport, Rail and Bus Statistics Detailed information on 1998 and earlier years is contained in the 1999 edition of **Scottish Transport Statistics**, No 18, Scottish Executive, HMSO Price £10. **Road freight** moved by **UK vehicles** within Scotland fell from 140.5 n tonnes in 1997 to 138.8 in 1998 and there were also falls in freight to England (from 15.7 to 15.1 m tonnes) and from England (from 20.2 m tonnes to 18.3m) For the UK, road tonne kms rose by 1.6% in 1998 but tonnes lifted were down 1% (showing an increasing length of haul) The number of UK goods vehicles over 3.5 tonnes gross weight fell by 3200 to 419,200 in 1998 though the number of tractive units plated at 38 tonnes or over rose by 400 to 83,500 (Vehicle Licensing Statistics, 1998, DETR)

Rail freight within Scotland fell from 265 to 241 million tonne kms but volumes to other UK destinations (heavily influenced by coal movement) rose from 571 to 1324 million tonne kms (measured by tonne kms) and to outside the UK from 1500 to 2215 million tonne kms. 1999 figures indicate a 3% cut in rail freight lifted. **Local bus trips** in Scotland fell by 6.2% from 467m to 438m between 96/97 and 97/98 (see also p 19) and final figures for 1999 are likely to show a continuing, but slower, fall despite improvements leading to increased usage on some routes. Both Stagecoach and First Group have noted flat figures for patronage with Stagecoach having a slight edge towards growth. **Rail passenger trips** Trips on the Glasgow Underground rose from 13.7m in 96/97 to 14.1m in 97/98 while other rail passenger trips originating in Scotland rose from 54.4m to 57.8m (of which 38.8m and 40.9m were trips supported by SPT) ScotRail reports a 5.5m rise in passengers since National Express acquired the franchise two years ago and adds that its Edinburgh-Glasgow passenger services have gained an extra 250,000 passengers in the past 15 months (H 28May) For Britain, rail passenger trips rose 7% in the 4th quarter of 98/99 (Bulletin of Rail Statistics, Qtr4, DETR 0171 890 4448) but OPRAF had earlier reported lower (5.4%) growth for 98/99 on 97/98 due to recession and growing rolling stock and track capacity problems. GNER growth over this period slowed sharply to 1.4% with ScotRail showing 4.1% growth, Virgin West Coast 6.1% and Virgin Cross Country 10.4% (Rail 28July).

Caledonian MacBrayne Ferries

(Source: Caledonian MacBrayne)

	April/June 1999	April/June 1998	%change
Passengers(thousands)	1428	1454	-1.8%
Cars	258	266	-3.0%
Commercial vehicles	21,120	21,633	-2.4%
Buses and coaches	4,507	4,328	+4.2%

Air Passengers (thousands) April-June 1999 (with % change on 1998)

	ABERDEEN		EDINBURGH		GLASGOW	
Domestic	422	-4.1%	953	5.4%	904	-0.2%
Internat. Scheduled	91	2.6%	258	46.3%	270	25.9%
Internat. Charter	26	-0.2%	95	25.8%	648	5.8%
Helicopter	103	-20.5%	-	-	-	-
TOTAL	540	-2.8%	1,306	13.0%	1,822	5.2%
	PRESTWICK		INVERNESS		OTHER H&I	
TOTAL	158	11.3%	91	6.4%	144.4	-10%

Sources: Scottish Airports, Glasgow Prestwick International and Highlands and Islands Airports

Comment: Growth from Glasgow, and especially from Edinburgh, has been helped by buoyant outwards tourism and domestic flights aided by the high value of the £ and introduction of the extra capacity and services outlined in STR ISSUE 5 (see also comments by Ian McMahon on p 10 of the current issue). Prestwick has been helped by low fares and of extra services while Aberdeen remains affected by oil recession. Inverness data shows some recovery from the steep fall in traffic prior to April, 1998. However, traffic falls have been substantial at other H&I airports excepting Tiree. Barra, Wick, Benbecula and Kirkwall have had the highest traffic falls -between 30% and 12.6% -reflecting problems in the oil industry and other island economic difficulties. Indifferent reliability and high fares have also affected island traffic.

A note by the Scottish Executive Development Department

1. Background

The **Scottish Household Survey (SHS)**, which started in February 1999, collects information to help the Scottish Parliament to develop and monitor policies. It covers many topics, particularly transport, local government and social inclusion. SHS questions on transport were listed in Issue 5 of "STR" (page 19).

MORI and **System Three**, who are carrying out the survey on behalf of the Scottish Executive, will conduct interviews in over 15,000 households each year. Councils and others may buy boosted samples in their areas. Follow-up surveys may be addressed to sub-samples. Anonymised copies of each year's data will be given to Councils and the ESRC Data Archive. Results from the survey will be available on a quarterly basis for Scotland (but not for areas within Scotland). In due course, SHS results will show seasonal variation and year-to-year changes for Scotland, and provide annual sub-Scotland analyses, which the **National Travel Survey** cannot do (see the recent "Travel by Scottish residents" statistical bulletin¹).

This note describes initial findings on the frequency of driving and on travel to work, based on the first quarterly data from the survey. The 'driving' questions were answered on behalf of each person in the household by either the highest income householder or his/her partner/spouse, and the 'travel to work' question was answered by one randomly-chosen adult per household. The results are weighted to take account of differences in selection probabilities. It must be remembered that, as with all such surveys, factors such as sampling variability and non-response bias may affect the results. Articles in later issues of the STR will cover some other transport-related SHS results.

2. Frequency of Driving and Net Household Income

The SHS collects information on the **number of people holding full driving licenses**, and how often they drive. The first row of the Table shows that, of the 4,764 people aged 17 and over in the sampled households, 43% held a full driving licence and drove every day, 8% drove at least three times per week, 4% once or twice per week, a total of about 3% drove less than once a week, 4% held a licence and never drove, and 37% did not hold a full driving licence.

The second and third rows of the Table show the **frequency of driving for each sex**: for example, 54% of men drove every day compared with 33% of women; 76% of men hold a full driving licence which contrasts with the 51% of women who do. The frequency of driving varies markedly with **age**: about 60% of people aged between 31 and 50 drove every day, compared to 32% of 17 to 30 year olds, and 22% of those over 60. Around half of those aged 17-30 do not hold a driving

licence, compared with under a quarter of those aged 31-50, 31% of those aged 51-60, and 53% of those aged 60 and over. **Net household income** is the total income of the highest income householder and any spouse/partner from employment, benefits and other sources, after taxation and other deductions, and including any contribution to the household's finances made by other household members (eg money for 'digs'). There is a clear relationship between net household income and whether a full driving licence is held by adult members of the household. Under half the people aged 17 and over who lived in households with a net income of under £10,000 held a licence, which contrasts sharply with 86% of those living in households with net incomes of over £25,000.

A similar pattern applies for the percentages driving everyday. Under a quarter of adults living in households with a net income of less than £10,000 drove every day, compared with 68% of those in households with a net income of more than £25,000.

3. Usual Method of Travel to Work

The surveys first quarterly sample included 1,057 adults selected from the household at random, who said how they usually travelled to work. Overall, 67% went by car or van (53% drove, and 14% were passengers), 11% travelled by bus, 15% walked, 3% caught a train, 1% cycled, and 3% used another means of transport (e.g. motorcycle, lorry, etc). 61% of men drove to work compared to only 45% of women; and just 11% of men walked compared with 19% of women.

The Survey also revealed 'travel to work' patterns differ with age. Almost three quarters (72%) of those aged between 31 and 40 travel to work in a car, which compares with 61% of those aged between 16 and 30. Only 8% of those aged 31 to 40 travelled to work by bus compared with 15% of those aged up to 30.

The means of travel to work varies with net household income. 83% of people living in households with a net income of more than £25,000 travelled to work by car, and only 8% walked. Of those adults living in households with net incomes of under £10,000, only 47% travelled to work in a car, with 27% walking. 28% of people in part-time employment walk to work compared to only 11% of those in full-time employment. The figures for the self-employed should be used with care given the small sample size upon which they are based.

When more quarters' results become available, it will be possible to analyse travel to work data in more detail - e.g. for sub-groups defined by age-group, sex and income together.

4. Further Information

"Scottish Household Survey Bulletin No. 1" is available (price £5) from The Stationery Office (ISSN 1467 7393), and includes three pages on transport topics. Forthcoming publications arising from the SHS include further quarterly bulletins, a detailed annual report, and a statistical bulletin on transport-related results. SHS results will also appear in "Scottish Transport Statistics 2000"².

Enquiries about the SHS should be made to Louise Finlayson, SHS Project Manager Scottish Executive Central Research Unit Victoria Quay, Edinburgh EH6 6QQ Tel: 0131 244 7557 FAX: 0131 244 7573. e-mail: shs@scotland.gov.uk

References

- ¹ 'Travel by Scottish residents: some National Travel Survey results' is a Statistical Bulletin, published in March 1999, available price £2 from The Stationery Office.
- ² 'Scottish Transport Statistics' is an annual statistical volume, available price £10 from The Stationery Office.

STSG CONFERENCE, Transport and Tourism: Scottish Prospects 2000-2020 Dewar Centre, Perth, 26 April 1999

(All photographs by Brian Weddell except Road Tourism sign)

The aims of this conference were to consider better immediate and longer-term links between transport and tourism following the elections to the Scottish Parliament and in the context of the UK agenda for competitiveness and sustainable development. The principal speakers were Lord Gordon, Chair of the Scottish Tourist Board, Ian McMahon, Head of Planning and International Marketing, Scottish Airports and Roy Pedersen, HIE.



Lord Gordon of Strathblane

Lord Gordon started by highlighting the vital role of transport in relation to tourism and leisure. Transport was essential to implement expanding aspirations. Transport had encouraged people to widen their holiday horizons and, in a very competitive world market, had a significant role both in helping to attract visitors to Scotland and in helping residents to make use themselves of Scotland's many attractions. He preferred a 10 year to a 20 year horizon and was currently involved in the **Tourism Futures Group**. The pace of change was accelerating and it was clear that there had to be a dynamic interpretation of past trends if Scottish tourism was to maintain, and enhance, its position. Leisure time and available income were increasing yet the UK share of tourism was down by one-third since 1980, a much poorer performance than France. Absolute growth had been achieved yet action was needed to slow the rate of relative decline in an economic sector which was important for the Scottish economy and especially so for some parts of Scotland.

In considering tourism and transport, there also had to be a realisation that tourism could bring worthwhile additional income to transport operators as well as other benefits for local economies. Travel operators gained income from outgoing as well as incoming tourists while Scottish ferries in particular gained from tourist travel. Without such income, ferry support for the Scottish islands might well have to be increased. Some operators had a tendency to see business income as more important yet, with increasing business pressure to cut costs and move to less expensive flights, there was growing evidence of complementarity rather than conflict in policies for the business and leisure traveller.

Sustainability was also an issue of increasing importance but Scottish tourism was well placed to respond. In many respects, there was capacity to accommodate more tourists without serious conflict with the environment and Scotland still stood to gain from the quality of its scenic and spacious environment coupled with further growth of city and short-break tourism.

Turning to the 'Futures Group' and the recent Pathfinder report, Lord Gordon picked out four key issues which would be raised at early meetings with Henry McLeish, the new minister responsible for enterprise and tourism:-

- 1) Project Ossian** seeking to make the most of IT and information provision in relation to tourism
- 2) Infrastructure** - the overall quality of the road system in Scotland was relatively good compared to the rest of the UK yet attention needed to be given to further improvements in ease of access. This matter, including surface access to airports, was being taken forward in the current DETR study of Scottish airports and air services
- 3) Quality of Service** Since 70% of visitors came by car and would remain in the majority, projecting an image and reality of easy travel by car remained important for tourism. Car curbs should be considered only in cities while public transport had only limited scope for replacing car use in rural areas. Nevertheless, there were opportunities for public transport improvement and it was encouraging that ScotRail, already one of the most reliable rail passenger companies, was moving to increase frequency on key routes within central Scotland and to Aberdeen and Inverness. Perhaps more attention could be given to tourist park+ride as well as more general park+ride.

4) Fiscal Policy and Charging Present policies could work against tourism as well as having other adverse effects on the fragile economies of rural areas. There was growing political opposition to the **Road Fuel Duty Escalator** and added concern at the regressive impact of the **Airport Passenger Duty**. As a member of the BP Advisory Board, Lord Gordon was hopeful that major oil companies might be persuaded of the benefits of uniform petrol prices across Scotland but there was a case for examining the scope for fiscal action to differentiate the costs of road use within Scotland - including lower petrol and derv prices for remoter areas.

Lord Gordon concluded with some specific suggestions for the more immediate future. It was only in respect of travel by road that Scotland was seen as peripheral. It already had the benefit of quick access by air and rail for longer and shorter breaks. The need was to build on such advantages by looking at pricing, marketing and convenience - including filling empty seats currently available and moving on to **additional direct services** with a secure future. There was a need for more determination to remove restrictive practices and cartels, especially in the air industry. The present allocation of **airport slots** was a scandal with too much reliance on 'grandfather rights'. It was possible that the EU could act in this sphere yet there was a lack of confidence in the ability of the EU to respond competently to regional needs. His personal view was that the UK government should legislate for government ownership of airport slots with subsequent allocation being based partly on price and partly on cross-subsidy to help areas such as the Highlands.

There were also immediate opportunities for developing **inwards charter flights** integrated with package deals which could disguise hotel discounts which owners might be reluctant to publish directly. With so many Atlantic flights crossing over Scotland, more could be done to capitalise on this situation with stopovers allowing connections and direct access to Scottish facilities - including golf visitors. Scottish population was low but there was potential for developing worldwide attractions within Scotland, enhancing prospects for better air services and a shift away from indirect access via London or the continent. There was a need for systematic planning of tourism/transport links to capture more international conferences and other special events.

TABLE	Every Day	Per week		Less than weekly	Holds full licence, never drives	Total with a full driving licence	Don't have a full driving licence	Sample sizes
		at least 3 times weekly	Once or twice					
<i>row percentages</i>								
All people aged 17+	43	8	4	3	4	63	37	4,764
By Sex:								
Men	54	9	5	3	5	76	24	2,205
Women	33	8	4	3	4	51	49	2,559
by age:								
17-30	32	6	4	5	3	51	49	968
31-40	61	9	3	2	3	78	22	941
41-50	60	6	4	3	3	76	24	875
51-60	49	9	4	2	5	69	31	779
Over 60	22	10	5	2	7	47	53	1,201
By net household income under £5,000 p.a.	21	10	4	4	6	46	54	232
£5,001 -£10,000	23	6	5	4	8	46	54	632
£10,001 -£15,000	41	9	3	2	6	62	38	625
£15,001 -£20,000	53	10	5	2	2	73	27	458
£20,001 -£25,000	59	10	5	3	1	78	21	321
Over £25,000	68	9	5	2	1	86	14	471

On rail, Lord Gordon looked forward to increased capacity, comfort and frequency linked with tailored pricing bringing more visitors to Scotland by the ECML and WCML. Short-break holidays by rail seemed certain to expand while Motorail could provide a valuable extra facility for those keen to retain the advantage of access to their own car and its luggage capacity. Current discussions on franchise extensions could be tied in the further improvements and more user-friendly Motorail where you were not separated from your car. Within Scotland, there were several opportunities for new stations of value to tourists plus new and improved services and interchanges. He anticipated early decisions on rail access to airports and reopenings such as that being studied from Edinburgh to the Borders. Rail was likely to cut into the air share of the London-Edinburgh market but a rail system now with good prospects - and deserving better of the press - could also be used to improve surface access to flights from major airports, including a rising proportion of overseas direct flights.

Tom Hart (standing), Ian McMahon, Lord Gordon and Roy Pedersen

Ferry tourism within Scotland was being helped by the two new orders for Caledonian MacBrayne vessels yet there was a need to study charging issues, route timings/frequency and the integration of Orkney and Shetland in plans for ferry improvement.

Lastly, much still needed to be done on **timetable integration, ticketing, interchange and information provision**. It was vital to achieve short transfer times between modes and guaranteed fallback arrangements where services were delayed. Customer service had to have high priority. Finally, the economic value of **heritage** and heritage events had to be recognised - and could be seen in projects such as canal restoration, steam trains and this year's tall ships visit



Route and Service Prospects

The exceptional growth in seat capacity for summer 1999 was unlikely to be repeated with further growth being more incremental. This was a special difficulty for Aberdeen where enlarged seat capacity over the North Sea had coincided with a severe oil industry downturn. Elsewhere, prospects varied depending on individual circumstances. In the scheduled market, Edinburgh-Paris, Glasgow-Amsterdam and Glasgow-New York(Newark) had been performing well whereas traffic to Brussels had been less buoyant. There were commercial reasons for scheduled flights always having more empty seats than charters yet both markets could benefit from special efforts to fill seats (also tending to spread the tourist season) without prejudice to other income. In 1998/99, there were 2.6 million empty seats between Edinburgh/Glasgow and London while, proportionately, London flights from Prestwick had had the lowest load factors. 'No-frills' flights, though hit by **Airport Passenger Duty**, had stimulated the total market but there was some doubt about the net gain to Scotland i.e. the stimulus to outwards tourism appeared larger than that to in-tourism. Scotland could gain from more attention to in-tourism and the benefits of the higher spending per head by overseas tourists compared to those from elsewhere in the UK.

In Scotland, Airport Passenger Duty - brought in as a substitute for a Fuel Tax - gave UK Treasury an income of £52 million a year yet, as a fixed duty per passenger, it was regressive while imposing only a modest levy on long-distance air travel. Relating the tax to fuel used indicated that it was equivalent to a levy of 27p a gallon on the present Glasgow-New York service compared to 70p a gallon on 'no frills' flights to London. At some time in the future, it was probable that an **aviation fuel tax** would be an additional tax, rather than a replacement of the Airport Passenger Duty. Precise timing would depend on international agreements but the level of tax was not likely to be such as to have a large impact on air travel forecasts.

Assessments of travel between city pairs were being used as a basis for encouraging operator interest in additional services. These used existing data on overseas air travel plus estimates for traffic generation.

WORKSHOP (3) Transport, Tourism and Sustainable Development

(Facilitator: Sandy Dear, Scottish Tourist Board; report back by Ian Findlay, HIE)



Workshop 3

The problem of defining sustainability was noted. Nationally and internationally, there are continuing discussions on the need to maintain ecological diversity and move towards renewable resources, with particular targets for absolute cuts in fossil-fuel derived CO2 emissions. In a Scottish context, however, the main is to assist economic sustainability for remoter communities. In some areas, however, and especially in the cities and on some inter-urban corridors, problems do arise from movement - mainly on the roads - being in excess of physical and environmental capacity. In such areas, reductions in car use could help the tourist environment but, in most of Scotland, there is only overuse on a few routes at seasonal peaks. For most of the year and in most areas, there is ample capacity for additional car use as a means of encouraging, and spreading, tourism with overall strategies.

A key requirement is a national strategy for tourism dispersal (both geographical and seasonal) and city car traffic reduction relating vehicle miles to infrastructure capacity. Ownership of this strategy had to rest with the whole industry and could include development of Autumn Gold type programmes and differentiated seasonal pricing. It was noted that some areas still had considerable spare capacity at peak periods and that dispersal policies should take this into account.

Turning to service provision, steps could be taken to ease conflict between local provision and tourism provision e.g. a small adjustment in bus services could allow the **Inverness-Ardersier** bus to take tourists to **Fort George**, but such adjustment had to be backed by effective publicity both for the service and on the reasons for visiting Fort George. Operators needed to be more flexible in ticketing arrangements and it would also help if local residents had more knowledge of transport information. Tourists could be deterred from bus use because residents or hoteliers are unable to tell them about services actually operating. There is also room for improvements in car hire and in cycle hire with flexibility in uplift points and points of return. In Scotland, there is too often still a narrow minded or 'Presbyterian' attitude which fails to see the benefits of leisure and the opportunities for sustainable growth and local enterprise.

Finally, the report dealt with fiscal measures, hypothecation and sustainability. It was accepted that the global trend is towards energy taxes and targeted road pricing. This would increase travel costs, especially by air and car, but need not mean an end to tourism growth in Scotland, provided that adjustments are made in the outlook of individuals, business and government. Such adjustments could include relative reductions in rural petrol prices and in island air fares associated with tax rebate arrangements for tourists either via vouchers or by paybacks on leaving the country. Tourism taxes could also be linked to improving the tourist experience. Fiscal and pricing measures affecting transport are an inevitable part of sustainable development and higher costs need not deter tourists if they consider that they are still receiving value for

money. Hypothecation could open up opportunities for improving tourist facilities and the environment while also making funding available for improvements in public transport and in walking, cycling and information networks. These topics and fiscal structures are controversial but important. Specific suggestions made in the Workshop included an entry charge for National Parks and a tax on caravans and motor homes, both in a hypothecated context. However, there were doubts that the latter tax would, in practice, achieve the target of shifting users to bed and breakfast or guesthouses. Lastly, attention was drawn to the importance of regulatory as well as fiscal policy. This is helping to raise environmental standards and could be both extended and more fully enforced e.g. in ensuring observance of bans on overnight parking in lay-bys. Such policies could be extended to include quality assurance standards for road maintenance and the level of public transport integration.

SUMMARY

Tom Hart, Chair, STSG, thanked all the speakers and participants before summarising the proceedings. He felt that five main points had emerged, some more clearly than others:-

(1) **Data problems emerging form the mingling of 'external' tourists (who also made trips in Scotland) with expanding leisure travel by residents in Scotland** (partly in Scotland and partly beyond). Despite the huge growth of tourism, it was often forgotten that most leisure trips remained more localised and part of strategic visions needing a regional dimension within Scotland. In looking at **net income from tourism**, account had to be taken of the substantial spend by Scots abroad and of the scope for encouraging more leisure activities and short-breaks by Scots in Scotland. Policy had to examine this issue as well as looking at how best to attract tourists from elsewhere in what was admittedly a very competitive global market with many inducements for Scots to holiday abroad and many rival attractions for the millions outside Scotland considering their holiday options.

(2) **The dangers of isolating tourist policies from other policies.** Tourism and transport had traditionally been the responsibility of different Ministers. This pattern was being followed in the Scottish Parliament yet conference had recognised the mutual advantages of linking transport and marketing policies for tourists with policies offering benefits for other aspects of the Scottish economy and the social inclusion agenda. One Ministry for Enterprise, Tourism, Transport and the Environment would be unwieldy but there was a need to examine ways of using Working Groups and consultations crossing departmental boundaries if 'best value' was to be secured

(3) **The importance of differences within Scotland and the case for stronger measures to spread tourism on a seasonal and area basis** - including organisational implications for the Scottish Parliament and present structures for decision-taking affecting transport and tourism

(4) **The need to discuss organisational change and planning in the context of changes in fiscal structures, pricing and hypothecation** - including collaboration rather than conflict between the Mound and Westminster in reviewing the Road Fuel Tax Escalator and air travel taxes. The Scottish Parliament will have to consider early decisions on legislation affecting road pricing and other possible levies or tourist charges. These changes could permit increased funding for tourism-related projects.

(5) **Recognition of the need for a longer-term vision for sustainable Scottish tourism and leisure** - looking forward at least 10 years and possibly 20 years in relation to the economics of projects such as rail franchise extension and other programmes relating to infrastructure provision, financing and pricing.

In conclusion, it was indicated that there could be opportunities for more regular meetings to review programmes and practices relating to transport and tourism once initial reactions from the Scottish Parliament and Executive had been clarified.



Workshop 2

WORKSHOP (2) Access and Local Impacts within Scotland
 (Facilitator : Stuart Black, HIE; report back by Dan McGrory, Scottish Rail Developments)

Strengths of internal access and local impacts were identified as:-

- generally good infrastructure, including recent improvements in tourist signposting though with room for further advances in information, quality of service and scenic route development
- positive reasons for travel within Scotland with a widening range of attractions and travel itself being an important part of the enjoyment of longer holidays and short breaks.



Road Sign-Posting for Tourists (Tom Hart)

Weaknesses included:-

- road fuel costs (though there was scope for making tourism less car dependent)
- ferry charges, bridge tolls and high fares on public transport (including the cost and reliability of internal flights)
- difficulty in preparing touring itineraries due to lack of information and uncertainty about public transport connections (information affected car user as well as the public transport user since lack of knowledge of roads and of availability/location of overnight accommodation could keep car users on popular routes - there was probably too much emphasis on Loch Ness!)
- tendency for honeypots to draw attention away from other tourism possibilities
- conflict between tourist travel demand and demands of local residents (affecting ferry, train, bus and air timings)
- fragmentation of marketing efforts and gaps in service/fare co-ordination
- lack of integrated marketing of Scotland making more of the differences within Scotland The last two points were seen as the most serious weaknesses.

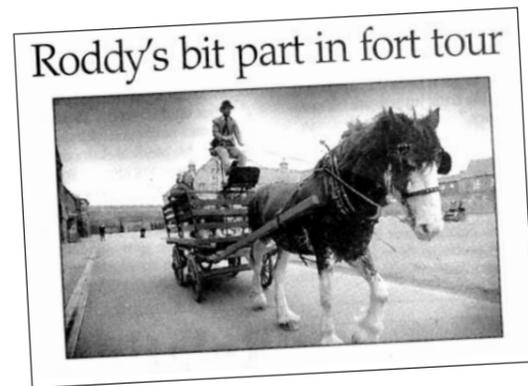
Future threats included duplication and dilution of effort, further adverse impacts from rising costs for cars and coaches and a more general growth of fiscal policies (including Airport Passenger Duty) working against tourism development in the remoter parts of Scotland. A neglected but very important point was that the effects of competition could lower travel costs to popular areas outwith Scotland and further exacerbate the task of attracting tourists to Scotland's outer parts.

The two main opportunities for improvement were seen as:-

- linkages between the information-based Project Ossian and better marketing/ route or area branding
- the actual decisions taken by the Scottish Parliament.

Within this strategic approach, it was anticipated that action would include significant developments in branding -e.g. of rail lines, roads, walking routes, cycling routes, island opportunities - assisting the growth of green tourism and positive impacts on local economies. National Parks and Study Tours offered further potential for sustainable tourism while short breaks and other holiday packages could be used to absorb spare capacity and spread the season. Echoing Workshop 1, there was a related need to develop better connections and direct services to Scotland from continental Europe and from UK cities other than London.

In discussion, comments were also made on the need to spread tourism away from Edinburgh and Glasgow - assisted by direct services into the Highlands (one possibility being a restoration of direct trains from the WCML to Inverness) and by excellent connections and integrated ticketing. In preparing and implementing strategies, options ranged from new organisational patterns set by the Scottish Parliament and Executive to reshaping the Scottish Transport Forum to give it a more powerful role. To promote transport and tourism more effectively, a plea was made for a Highlands and Islands regional authority developing work currently being done by HIE and local councils. LECS and tourism bodies. Such a body would be able to integrate plans for transport and marketing to benefit both tourism and other business aspirations.



Fort George *Herald 15 June 1999*
 (See suggestions on p.15 for an added bus link to fill the gap between Ardersier and Fort George)

Lastly, reference was made to the cessation of the present ScotRail timetable and to general timetabling difficulties. It was felt that the best way forward was through Journey Planners and a range of local booklets, some specifically tailored to tourists and others giving combined information on public transport, taxis and parking. ScotRail emphasised that a folder would still be available including all the area timetables within Scotland for those who desired to have it.

Very few existing 'city pairs' reached the level making direct, daily services viable. Assuming 100 seater aircraft, 65% load factors and 6 flights per week, only a handful of existing direct services were viable - including Glasgow-Dublin, Glasgow- Amsterdam, Edinburgh- Paris and Edinburgh- Amsterdam. However, operators were willing to provide flights if they expected high rates of traffic generation or gained other benefits e.g. from feeder traffic. There had been examples of 'failed' direct services and Scottish Airports preferred to concentrate on services with the best prospects for a secure future. The size of the Scottish market made it difficult to develop all-year, daily direct services but this still left scope for the expansion of less frequent scheduled services and charters. Scottish Airports encouraged growth by sharing risks with operators and, in real terms, airport charges had been falling since 1992. Charging packages included rebates on new services for three years and 'growth' rebates. Where frequencies were lower, it was inevitable that Scotland rely on good connections with other services at global hubs, including London. This reality was recognised in marketing and development policies. For example, despite, a direct service to New York, two-thirds of travel between Scotland and the USA in 1996 was by indirect services though this proportion was highest for business flyers.

Marketing and development policies took account of all these varied circumstances and research. Overall, prospects for air traffic growth to and from Scotland were good though with incremental development rather than the fast pace of change experienced in 1998/99. The most probable further developments in direct routes related to Europe. New aircraft types suited to marginal routes, desires to spread traffic away from London and the continuation of general economic growth offered a firm basis for air traffic expansion but marketing abroad would be vital in achieving actual development in Scottish air services and the growth of in-tourism.

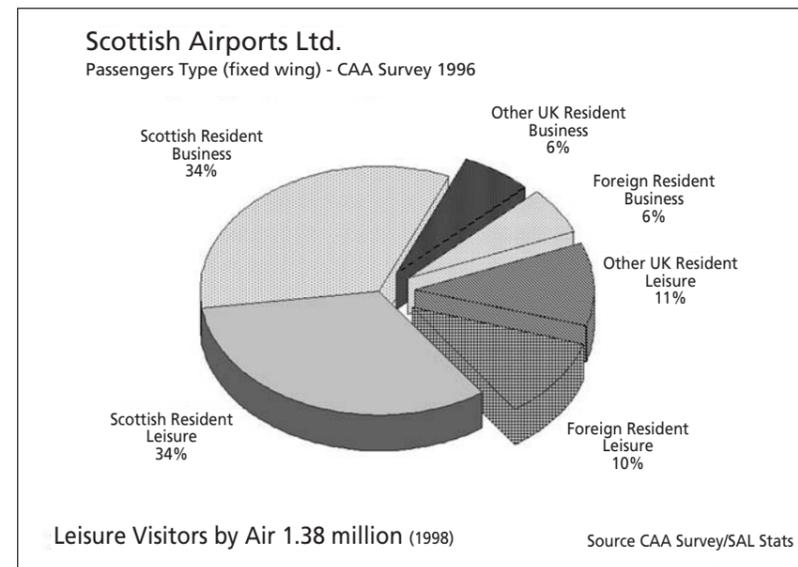
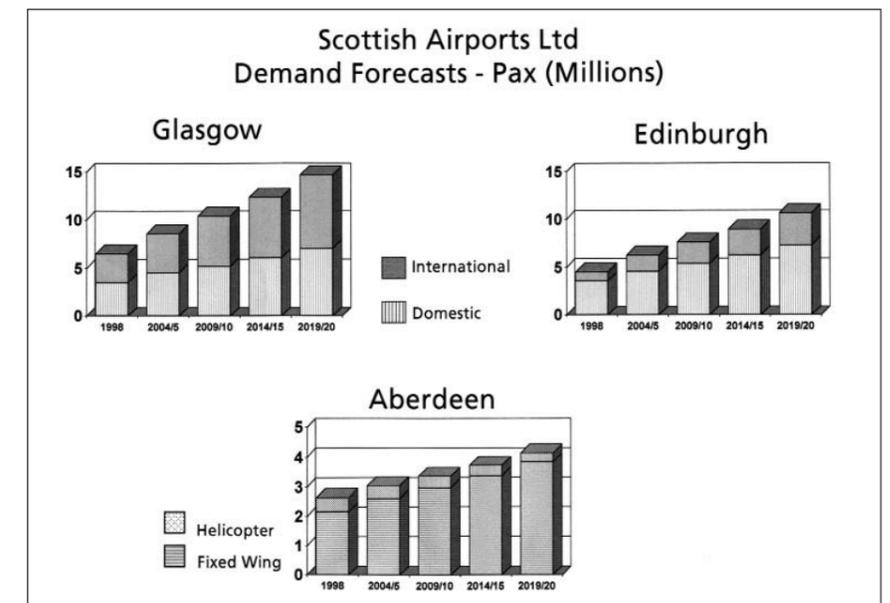


Diagram 1

Diagram 2



Prospects for Rural Transport and Tourism

Roy Pedersen began by saying that tourism was Scotland's biggest industry, employing 180,000 and contributing £2.6 billion to the economy. It was especially important in the Highlands and Islands, accounting for 20% of all tourist spending in Scotland though having only 7% of the population. In the Borders, Galloway, south Ayrshire and the rural north-east, tourism was also an important contributor to local economies. Maintaining and spreading the momentum of tourism was very important for these areas.

The main point made by Roy was the importance of 'imagineering' rather than 'engineering' in attracting tourists to the more rural parts of Scotland. 19th century railways and steamers and 20th century motor roads had helped attract tourists to the Highlands but, even in the past, the 'image' of the Highlands and Islands (and the Scottish Borders as promoted by literary figures like Sir Walter Scott) had been a factor in encouraging tourist visits. Image was now more important than ever in securing visitors. People had to want to come to an area and could also use their experience to warrant repeat visits and to tell friends and relations to join the visitor stream.

Disneyworld was quoted as an example of both the **creation of an image** and the provision of **integrated transport** linking themed areas. Scotland needed to work hard copying this concept - not in the sense of a replica Disneyworld but in making use of existing heritage and new attractions within a transport and marketing framework which facilitated access and a spread of tourism and which itself built on transport to and through scenic areas as an important part of the visitor experience. Sea travel to the islands was known to be a unique attraction for tourists yet more could be made of this tremendous asset. Detailed planning strategies could ensure that no areas were overwhelmed by tourists (as could happen when cruise ships called at small communities without provision for a variety of activities and linked trips by coach or train). For most of rural Scotland, the problem of too many tourists was insignificant compared to the problem of extending the tourist season and devising policies to encourage tourists to spread out from the major cities and other magnets such as Stirling and the traditional golfing areas.

Roy followed this introductory theme by expanding on images within transport and on the importance of integration for future development and consumer satisfaction. First of all, however, the tourist had to reach Scotland. Issues here included those of airport access and **trunk rail and air service development** together with the need to introduce **direct ferry links from continental Europe** (probably to Rosyth). Most air travellers would come in via central Scotland but there was also scope for developing **direct services and charters to Inverness** and other Highland/island destinations. There was concern that road tolls, congestion and high petrol prices could deter the large number of visitors using cars while also depressing the coach trade. On images, he urged the **branding of particular roads and railways** as marketing tools. On the whole, road signposting was now good but there was room to do more to divert traffic to underused scenic routes. Symbols or slogans could also be added to make car number plates more interesting. Despite Beeching, the Highlands had retained a substantial rail network - again perceived as a major visitor attraction which could gain from further specialist branding, additional capacity and extra services. Visits to the Borders would undoubtedly receive a boost were the rail link from Edinburgh to be reopened. On lines already open, such as those to Inverness, there was a need to reduce trip times to the central belt to under 3 hours, opening up opportunities for tourists and day visitors as well as aiding business travel. **Easy rail interchange** (e.g. cross platform facilities at Perth) and **links with bus services** also needed development and publicity **Ferries** had already been mentioned by Lord Gordon yet data showed falling usage on several routes in 1998. The recent HIE paper on *Ferry Futures* suggested that radical measures are needed to ensure that island communities can thrive and

reverse depopulation. Spreading tourism had an important role here but it was not likely to happen unless route and service reappraisals led to shorter routes, higher frequencies and lower charges without increases in total financial support. Routes worth study include to Islay overland via Jura, shorter routes to Tiree, Lismore-Port Appin, Glendale-Lochmaddy, North Skye-Scalpay and shorter crossings to Orkney.

In making these changes happen, it was likely that three to five **statutory planning and land use authorities** would be needed under a **Scottish Transport Commission**. One of the area bodies could cover the Highlands and Islands.

Finally, Roy mentioned some longer-term possibilities aiding both business, general users and tourism. These included bringing **Inverness-Edinburgh rail times** down to 2 hours 30 minutes (diverting traffic growth from the A9) and **reshaping the Scottish rail network so that all the main airports were served by through rail services**. Future routes (mainly using existing track) might include Fife to Galashiels via a tunnel under Edinburgh Airport, Aberdeen to Stranraer through central Glasgow and serving the existing airport station at Prestwick and a direct high-frequency service from Glasgow Airport via Glasgow to Edinburgh.



Roy Pedersen's impression of Scotland's transport!

GENERAL DISCUSSION

Motorail services attracted initial questions. Geoff Riddington, Glasgow Caledonian University, queried their viability and gained partial support from Don Matthew of ScotRail who noted, however, that VAT was levied on Motorail unlike normal rail services. Altering this condition could improve prospects for Motorail though there was also scope for developing packages linking trunk rail travel with car hire. Lord Gordon felt that Motorail could be justified on an assessment of total benefits for areas which might otherwise lose out on visitors by car. He preferred a situation where users travelled with their vehicle and suggested that operational economies could be made through driving yourself on to trains and by using open wagons and stock otherwise unused overnight. Motorail could be added to existing sleeper services but Frank Roach explained that this would not be possible since Anglo-Scottish sleepers were already at maximum length. Maximum likely travel by Motorail would be a small part of the total market and prospects could be better for attracting more car-based visitors from the continent through a direct ferry service to Scotland.

Moving to **air travel**, Gareth James, British Tourist Authority, stressed that the transport element in tourism costs had been falling and that there could be advantages in using London as Scotland's third major airport. Ian McMahon felt that London would still be used as a hub for certain connections - e.g. from areas such as Asia Pacific, Africa and South America - but that a maturing market was producing a shift away from London which was also bringing benefits to the Scottish economy.

Attention then turned to issues of **ticketing, packages and marketing**. The Scottish Conference Association pressed for faster progress towards all inclusive tickets and was assured by Lord Gordon, Roy Pedersen and Don Matthew that policy was moving in this direction. Sandy Dear sought price cuts or inclusive packages to fill empty seats. Ian McMahon said there was scope for such action, especially the latter, but noted the importance of avoiding damage to overall yields. Internal US air fares were now rising rather than falling and Ian Reid added that BA domestic travel was unprofitable. Business wanted a high frequency of service but this also meant empty seats which were difficult to fill without damage to yield. 'No frill' operations could avoid some of these problems. Dan McGrovy, from his experience of rail, air and ferry marketing, said that there was potential to expand attractively priced **short breaks** as a means of improving capacity and net income. Sam Milliken argued that the BA policy of 'free' add ons from London to Scotland was hampering direct service development but Ian McMahon felt that this still enlarged the total Scottish market and was a response to attractive fares to Scotland through other international hubs. Slot space at Stansted as well as Heathrow was now becoming a problem. Concluding the morning session, Gareth James made a plea for the return of **rail observation cars** but was told by ScotRail that this was not possible given changes in the rolling-stock position and doubts about the commercial return on new stock designed to give improved observation facilities (and capacity) over the tourist season.



Coffee Break

WORKSHOP (1) Access to Scotland

(Facilitator : Mary McLaughlin, *Scottish Enterprise*; report back by Ian Docherty, *University of Glasgow*)

Priorities agreed by this workshop were:-

- how best to improve utilisation of existing air services (including a close link with improvements in international marketing)
- a need to integrate tourist marketing with the marketing and development of transport services required by other Scottish sectors
- a need to address rail capacity constraints, covering both rolling stock expansion and action on infrastructure bottlenecks on Anglo-Scottish routes (linking with the need for early reappraisal of rail passenger franchising and rail regulation)
- a need to cater for the independent traveller.



Workshop 1

The report back also commented on the omission of discussion of the role of long-distance coaches, both scheduled and as part of holiday tour operations. It was felt that there was a need to extend the catchment areas of airports (and reduce parking problems and costs) through improved rail and bus services. There was also a need to examine co-operation between tourism bodies and transport operators on the implications of extending the tourist season. The success, or otherwise, of previous marketing required fuller evaluation as did proposals for quality partnerships or bus re-regulation. There was agreement on the need for new and revised transport charges but how were these to be raised or varied and who would decide on spending the proceeds? This raised the key issues of relationships between the Mound and Westminster and of possible regional dimensions in pricing, spending and planning strategy decisions within Scotland.

In discussion after the report back, questions were also raised about external ferry services and direct Eurostar rail links. On the former, it was felt that there were growing opportunities for tourist and other benefits from the early introduction of direct ferry services from a suitable port in the area from Rotterdam to Dunkirk. This was the area which tapped into the largest European market though, in the longer run, some further expansion of longer distance, high speed ferries was anticipated. The impact of the Ballycastle-Campbeltown ferry required monitoring. Workshop (1) had taken the view that restoration of a rail service to the Borders could yield significant gains through this was a matter of internal rather than external access.

On Eurostar, there was a strong feeling that through services to Scotland were not likely to be commercial while the other benefits (e.g. for tourism) of such services looked insufficient to merit subsidy costs. This situation could change if the UK entered the Schengen agreement and allowed Eurostar services to be used for movement within the UK as well as to and from the continent. In the absence of such a change, GNER and/or Virgin might find ways of making use of the expensively constructed and idle North of London Eurostar sets. GNER was studying the acquisition of sets to ease capacity problems on the ECML while improved GNER services from Scotland and other Virgin developments could offer excellent interchange at St Pancras/Kings Cross as and when Phase 2 of the Channel Tunnel rail link was completed.