

Strategic Sea Crossings
in the Highlands & Islands:
Development Opportunities (2005- 2025)

Overview of Existing Ferry Networks

Final Report

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SUMMARY

Based on the data available to us, all the ferry services of the Highlands and Islands services convey the following total annual traffic levels in 2004:

- Passengers: 8,120,000.
- Cars: 2,119,000.
- CVs/Buses: 184,000, with a further 266,100 vehicle metres of freight.
- Vehicles: 280,000 on the Corran ferry service.

The total annual deficit funding for the services was £68,510,000 in 2004.

Table S.1 summarises information on the year of build for the vessels which are in public ownership and where we have been provided with their age.

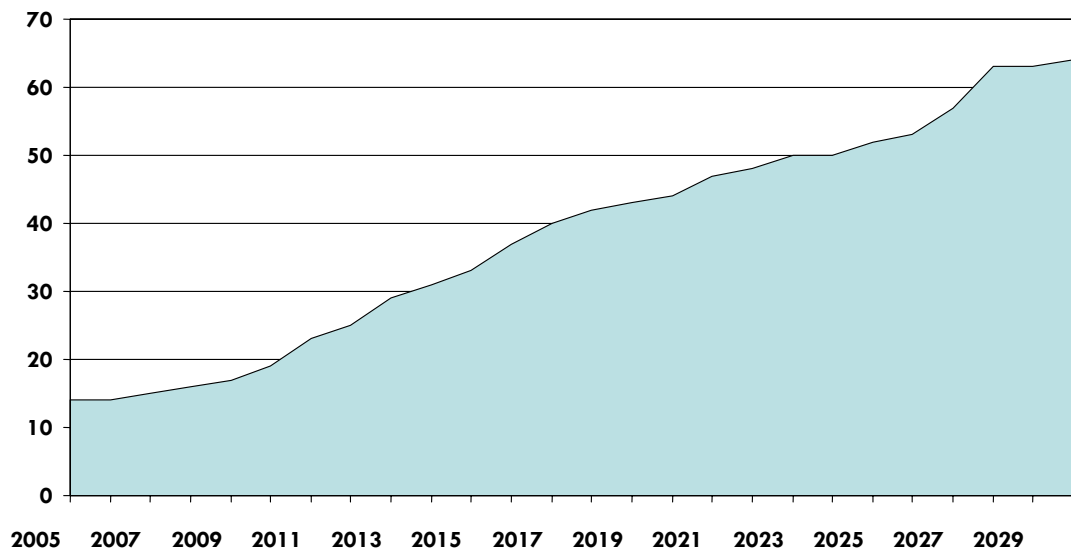
TABLE S.1: Year of build of vessels	
Built	Number of Vessels
2001-present	12
1996-2000	8
1991-1995	11
1986-1990	14
1981-1985	5
1976-1980	4
1971-1975	10
Total	64

It shows that, of the 64 ships, 20 (31%) were built in the last decade. Of the 44 that are older than this, over half (25) were constructed between 1986 and 1995. In total, just over one in two ships is at least 15 years old, with 14 (22%) of an age beyond the normal life expectancy of 25 years. The mean and median vessel ages are, at between 15 and 16 years, virtually the same.

Figure S.1 below charts the cumulative vessel replacement requirements. This is based on nominal replacement dates, assuming an operating life of 25 years. The main points to note are:

- Vessel replacement is required in almost every single year up to 2030. In most years at least two vessels are due to be replaced.
- Over half (52%, or 33 ships) of the fleet requires to be replaced between now and 2015, with over one third (36%, or 23 ships) needing replacement by 2011.

Figure S.1: Vessel Replacement Profile: Cumulative



1 INTRODUCTION

Fisher Associates has been engaged by HITRANS to undertake a study on Strategic Sea Crossings in the Highlands & Islands. The objective of the study is to prepare a strategy that will help HITRANS to realise existing and emerging development opportunities to 2025. The Strategic Sea Crossings are:

- Shetland to the Scottish Mainland
- Orkney to the Scottish Mainland
- Argyll Islands
- Hebrides CalMac Network
- Clyde crossings serving Arran, Bute and Dunoon

This report constitutes a separate but related deliverable to the strategy. It is the Overview of Existing Ferry Networks.

It addresses the whole of the ferry network in the Highlands & Islands (not just the Strategic Sea Crossings), describing these in terms of:

- Services and scheduling
- Traffic volumes
- Annual operating subsidy
- Vessels
- Shore infrastructure

The data contained in the report has been drawn from published sources, supplemented by data provided by ferry operators, Scottish Executive, local authorities and owners of shore infrastructure.

The report is structured as follows. **Section 2** presents data on services and scheduling, with the most recent available information on carryings shown at **Section 3**. In **Section 4**, the most recent data are shown for annual operating subsidy. **Section 5** describes the vessels presently deployed on the ferry networks and anticipated future replacement activities, while **Section 6** presents information on ownership of the shore infrastructure presently used by existing services and, again, anticipated future replacement requirements.

2 SERVICES AND SCHEDULING

2.1 INTERNAL SHETLAND SERVICES

Table 2.1 shows services and a summary description of their scheduling. Please note that the “Last Sailing” relates to the time of departure of the last sailing of the day to the island/peninsula served. (This is also the case with the schedules shown for other areas later in this Section). Shetland Islands Council operates all services.

Table 2.1: Internal Shetland Services					
Service	Number of Return Sailings Per Day			Last Sailing	Crossing Time
	Daily Mon-Fri	Sat	Sun		
Unst: Gutcher- Belmont	21 (Mon) 28 (Tue) 29 (Wed, Fri) 27 (Thu)	22	20	2215 (Mon, Tue, Sun) 2250 (Wed-Sat)	10"/55"
Yell: Toft- Ulsta	28	28	19	0100	20"
Bressay: Lerwick- Bressay	20 (Mon-Thu) 22 (Fri)	22	18	2300 (Mon-Thu, Sun) 0100 (Fri, Sat)	7"
Whalsay: Laxo- Symbister	18	18	14	2310	30"
Fetlar: Gutcher- Oddsta	6 (Mon) 7 (Tue,Thu) 8 (Wed, Fri)	6	5	2115 (Mon, Thu, Sun) 2250 (Tue, Wed, Fri, Sat)	25"/40"
Out Skerries: Lerwick/ Vidlin-Out Skerries	1 (Mon, Tue, Thu) 3 (Fri)	3	3½	0800 (Mon) 1445 (Tue, Thu) 1700 (Sat) 1730 (Sun) 1800 (Fri)	1' 30"/2'30"
Papa Stour: West Burrafirth- Papa Stour	1 (Mon) 2 (Wed, Fri)	2	1	0900 (Mon) 1300 (Wed) 1500 (Sun) 1800 (Fri, Sat)	40"
Foula: Walls/ Scalloway- Foula	1 (Tue, Thu)	-	-	1330	2'
Fair Isle: Grutness/ Lerwick– Fair Isle	1 (Tue, Thu)	1	-	1130/1530	2' 40"

* In winter only Grutness is served and on Tuesdays only

The main points to note are:

- The routes can be placed in two broad groups. First, short crossings that have high frequency services to islands with relatively high populations. Second, longer crossings (over 1 hour) to islands with relatively low populations, generally at a frequency of less than one sailing per day.
- Some routes (e.g. Fair Isle, Foula) are served by more than one landfall on the mainland of Shetland.
- Crossing time varies according to the particular landfall used and, in the case of Fetlar and Unst, whether the sailing is direct or via another island.
- The timetables for summer and winter are almost identical.
- On the shorter, high frequency routes, last sailings are all after 2100 and, in some cases, after 2300.
- Last sailings on the longer, lower frequency services are much earlier. In these cases, however, ferry services are supplemented by air services that allow for day trip opportunities.

2.2 INTERNAL ORKNEY SERVICES

Tables 2.2A and 2.2B, over, shows internal Orkney services and a summary description of their scheduling. All services are operated by Orkney Ferries. The main points to note are that:

- Most islands receive at least a daily service throughout the year. The exceptions are, first, North Ronaldsay and Papa Westray, which receive very limited lo-lo services, although this is compensated for by air service provision. The second group receiving less than a daily service are some of the smaller South Isles, although a daily service is maintained during the summer months.
- Higher frequencies operate in the summer months, but the differences compared with the winter service are not great. The main variations amount to around one additional sailing per weekday and, in particular, Sunday services. In addition, one service (passenger only between Westray and Papa Westray) operates on a summer only basis.
- There is considerable variation in service frequency and crossing times. Generally, higher frequencies and shorter crossing times operate on the services outside the North Isles. However, the frequencies are not extensive in those locations, with the maximum being six returns per day. In part this reflects some islands (e.g. Rousay, Tingwall and Wyre) sharing the same vessel. In the North Isles, all crossing times are in excess of 1 hour, with service frequency gravitating around 2 returns per day, with the exception of North Ronaldsay and Papa Westray.

Table 2.2A: Internal Orkney Services: North Isles						
Service	Season	Number of Return Sailings Per Day			Last Sailing	Crossing Time
		Daily Mon–Fri	Sat	Sun		
Westray: Pierowall-Papa Westray (Pax only)	Summer Only	6 (Tue)			1545 (Tue)	25"
		8 (Fri)	8	6	1815 (Mon, Wed, Thu, Sat)	
		10 (Thu)			1855 (Fri)	
		12 (Mon,Wed)			2220 (Sun)	
Westray: Kirkwall-Westray	Summer	2 (Tue)			1400 (Tue)	1'25"/2' 50"
		2½ (Mon)	2	1½	1620 (Mon, Wed, Thu, Sat)	
		3 (Wed-Fri)			1700 (Fri)	
					2025 (Sun)	
	Winter	2	2	1	1300 (Thu)	1' 25"
					1330 (Tue)	
					1620 (Mon, Wed, Fri, Sat)	
					1700 (Sun)	
Stronsay: Kirkwall-Stronsay	Summer	1½ (Tue, Thu, Fri)			1500 (Mon, Wed)	1' 35"/2' 5"
		2½ (Mon, Wed)	2	1½	1600 (Thu, Fri, Sat)	
					1620 (Tue)	
					1945 (Sun)	
	Winter	1½ (Tue, Thu, Fri)			1500 (Mon, Wed)	1' 35"/2' 35"
		2 (Mon)	2	1	1520 (Sat)	
		2½ (Wed)			1600 (Tue, Thu, Fri, Sun)	
Eday: Kirkwall–Eday	Summer	1½ (Tue, Thu)			1500 (Mon, Wed)	1' 15"/2'25"
		2½ (Mon, Wed, Fri)	2	1½	1600 (Tue, Thu- Sat)	
					2005 (Sun)	
	Winter	1½ (Wed-Fri)			1500 (Mon, Wed)	1'15"/2' 55"
		2 (Mon, Tue)	2	1	1520 (Tue, Sat)	
					1600 (Thu, Fri)	
					1620 (Sun)	
Sanday: Kirkwall-Sanday	Summer	1½ (Tue)			1500 (Thu)	1' 25"/1' 45"
		2 (Thu, Fri)	2	1½	1600 (Tue)	
		2½ (Mon, Wed)			1640 (Mon, Wed, Fri, Sat)	
					2005 (Sun)	
	Winter	2	2	1	1520 (Mon-Thu, Sat)	1' 25"/2' 45"
					1620 (Sun)	
					1640 (Fri)	
Papa Westray: Kirkwall-Papa Westray	All year	1 (Tue, Fri)	-	-	1045 (Fri)	1' 50/3'20"
					1400 (Tue)	
North Ronaldsay: Kirkwall-North Ronaldsay	All year	1 (Fri)	-	-	0530-0900	2' 40"

Service	Season	Number of Return Sailings Per Day			Last Sailing	Crossing Time
		Daily Mon-Fri	Sat	Sun		
Shapinsay: Kirkwall-Shapinsay	Summer	6	5	5	1730 (Mon-Fri) 1945 (Sat, Sun)	35"
	Winter	6	4	2	1415 (Sun) 1730 (Mon-Sat)	
Rousay: Tingwall-Rousay	All year	6	6	5*	1805	25"
Hoy: Houton-Lyness	All year	5	3	5*	1615 (Sat)	35"/1'
					1730 (Mon-Fri) 1900 (Sun)	
Egilsay: Tingwall-Egilsay	All year	5	5	4*	1805	45"/1'5"
Wyre: Tingwall-Wyre	All year	4	3	3*	1805	35"/1'35"
Graemsay: Stromness-Graemsay	Summer	4	1	1	1745	15"/35"
	Winter	3	-	-		
North Hoy: Stromness-North Hoy	Summer	4 (Mon-Thu)	2	2	1630 (Mon-Thu)	20"/25"
		5 (Fri)			2130 (Fri) 1800 (Sat, Sun)	
Flotta: Houton-Flotta	All year	4	3	2*	1615 (Sat)	35"/1' 10"
					1715 (Sun) 1730 (Mon-Fri)	

* Summer only

On the North Isles services, the last sailings out of Kirkwall are, on most days of the week, between 1500 and 1700. Those to the other islands tend to be later, although few services operate after 1800.

2.3 EXTERNAL SHETLAND SERVICES

Table 2.3 shows the services and schedules for external ferry services for Shetland. Northlink operates these.

Service	Number of Return Sailings Per Day			Last Sailing	Crossing Time
	Daily Mon-Fri	Sat	Sun		
Aberdeen-Lerwick-pax and car	1	1	1	1700 (Tue, Thu, Sat, Sun) 1900 (Mon, Wed, Fri)	10'/12' 30"
Kirkwall-Lerwick-pax and car	½ (Tue, Thu-summer) (Thu-winter)	½	½	2345	5' 30'/7' 45"
Aberdeen-Lerwick-freight	½ (Mon, Tue) 1 (Wed-Fri)	-	-	1800	12'

Services operate to both Aberdeen and to Orkney. A dedicated freight vessel provides the freight service. Sailing frequency on the main (Aberdeen-Lerwick) service is 1 return sailing per day, with a crossing time that varies between 10 hours and 12½ hours. The summer and winter timetables are very similar.

2.4 EXTERNAL ORKNEY SERVICES

Table 2.4 presents information on Orkney's external ferry links.

Operator	Service	Number of Return Sailings Per Day			Last Sailing	Crossing Time
		Daily Mon-Fri	Sat	Sun		
Northlink Ferries	Aberdeen-Kirkwall-pax and car	½ (Wed-Fri only in winter)	0.5	0.5	1700	6'/7'25"
Northlink Ferries	Aberdeen-Kirkwall-freight	½ (Mon only)	-	0.5	1800	12'
Northlink Ferries	Scrabster-Stromness	3	2	2	1900	1' 30"
Northlink Ferries	Lerwick-Kirkwall	½ (Mon, Wed, Fri-summer) ½ (Wed, Fri-winter)	-	-	1730	5' 30"/ 7' 45"
John O' Groats Ferries	John O' Groats-Burwick (Summer Only)	4	4	4	1800	40"
Pentland Ferries	Gills Bay-St Margaret's Hope	3	3	3	1845	1'

It shows a range of connections, encompassing short and longer distance crossings to the mainland and a link to Shetland, provided by three different companies. Three crossings operate to different landfalls in Caithness although one is restricted to passengers and operates only during the summer. Crossing times on these services vary between 40 minutes to 1½ hours. Frequency on the shorter crossings varies between 2 and 4 returns and, for vehicle carrying ferries, is constant all year round. Frequency on the services to Aberdeen and Lerwick are relatively low. The times of last sailings to Orkney vary between 1700 (Aberdeen) and 1900 (Scrabster).

2.5 CALEDONIAN MACBRAYNE SERVICES

2.5.1 CLYDE AREA

Table 2.5 reports data for CalMac services along with those for the service operated by Western Ferries.

Table 2.5 : CalMac/ Western Ferries Services: Clyde Area						
Number of Return Sailings Per Day						
Service	Season	Daily Mon–Fri	Sat	Sun	Last Sailing	Crossing Time
CalMac						
Cumbræ: Largs- Cumbræ Slip	Summer	25 (27 Fri)	25	20	2015 (2225 Fri)	10"
	Winter	16 (18 Fri)	17	13	1845 1915 (Sat) 2015 (Fri)	
Bute: Colintraive- Rhubodach	Summer	5 (0530-0740) Frequently (0740-1830) 6 (1830-2100)	5 (0530-0740) Frequently (0740-1830) 6 (1830-2100)	1 (0900) Frequently (09:00- 2055) 1 (2100)	2055	<5"
	Winter	5 (0530-0750) Frequently (0750-1830) 6 (1830-2000)	5 (0530-0750) Frequently (0750-1830) 6 (1830-2000)	1 (0855) Frequent (0905-2000) 1 (2000)	1955	
Cowal: Gourock- Dunoon	All Year Round	18	14	13	2018	23"
Bute: Wemyss Bay- Rothesay	Summer	17 (Mon-Thu) 18 (Fri)	17	14	1945 (Mon-Thu) 2040 (Fri-Sun)	35"
	Winter	17	15	12	1945	
Arran: Ardrossan- Brodick	Summer	5 (6 Fri)	6	4	1800 (2030 Fri)	55"
	Winter	4	4	3	1800	
Western Ferries						
Cowal: McInroy's Point-Hunter's Quay	All Year Round	43 (Mon) 42 (Tue-Thu) 50 (Fri)	47	40	2230 (Mon- Thu) 0000 (Fri-Sun)	20"

It shows a network of short crossings with all crossing times less than an hour, ranging between 5 minutes (on the service to north Bute) and 55 minutes for Arran. Sailing frequencies are generally similar in the summer and winter months, although in the case of Arran the reduction is to a small absolute number of sailings. Although crossings are short and frequencies quite high, last sailing times from the mainland do not extend beyond 2100, with the exception of Cowal where Western Ferries operate up to midnight on certain days of the week. Last sailing times in the winter are generally earlier than those in the summer, with services to Cumbræ ceasing at 1845 and those to Bute by 2000.

2.5.2 ARGYLL ISLANDS & KINTYRE

CalMac services to the Argyll islands and the peninsula of Kintyre are described at **Tables 2.6A** and **2.6B**.

Table 2.6A : CalMac Services: Argyll Islands & Kintyre: South						
Service	Season	Number of Return Sailings Per Day			Last Sailing	Crossing Time
		Daily Mon-Fri	Sat	Sun		
Kintyre: Portavadie- Tarbert	Summer	11	11	10	1845	25"
	Winter	7	7	6	1745	
Gigha: Tayinloan- Gigha	Summer	10	10	6	1800 (Mon-Sat) 1700 (Sun)	20"
	Winter	8	8	3	1700 (Mon-Sat) 1300 (Sun)	
Arran: Claonaig- Lochranza	Summer Only	9	9	8	1900	30"
Islay: Kennacraig- Port Askaig/ Port Ellen	Summer	4 (Mon, Tue, Thu, Fri) 3 (Wed)	4	3	1800	2' 5" (PA)/ 2' 20" (PE)
	Winter	2 (Mon, Tue) 2½ (Wed-Fri)	2½	1	1250 (Mon, Tue, Thu, Sat, Sun) 1800 (Wed, Fri)	
Colonsay: Oban- Colonsay	Summer	1 (Mon, Wed, Thu, Fri)	1	1	1730	2' 20"
	Winter	1 (Mon, Wed, Fri)	-	-	1200 (1000 Fri)	
Arran: Tarbert- Lochranza	Winter Only	1	1	1	1215	1' 25"
Islay: Port- Askaig-Oban	Summer Only	1 (Wed)	-	-	1530	3'45"
Colonsay: Port Askaig/ Kennacraig	Summer Only	1 (Wed)	-	-	0745	Col-PA: 1' 10" Col-Kennacraig 3'45"

Table 2.6B : CalMac Services: Argyll Islands & Kintyre: North						
Number of Return Sailings Per Day						
Service	Season	Daily Mon-Fri	Sat	Sun	Last Sailing	Crossing Time
Iona: Fionnphort-Iona	Summer	6 (0610-1200) Frequently (1200-1600) 5 (1600-1835)	6 (0610-1200) Frequently (1200-1600) 5 (1600-1835)	10	1815 (Mon-Sat) 1800 (Sun)	5"
	Winter	9	9	3	1800 (Mon-Sat) 1745 (Sun)	
Mull: Lochaline-Fishnish	Summer	14	14	9	1835 (Mon-Sat) 1800 (Sun)	15"
	Winter	11	10	10	1745	
Mull: Kilchoan-Tobermory	Summer	7	7	-	1845	45"
	Winter	3	2	-	1630 1545 (Sat)	
Mull: Oban-Craignure	Summer	6 (Mon-Tue) 6½ (Wed-Fri)	7	5½	1800 (Mon, Tue, Thu, Sun) 2000 (Wed, Sat) 2230 (Fri)	45"
	Winter	3 (Mon, Wed) 5 (Tue) 4 (Thu) 2½ (Fri)	3½	2	1600 (2130 Fri)	
Lismore: Oban-Lismore	Summer	3 (Mon, Thu-Fri) 4 (Tue) 2 (Wed)	3	-	1445 (Mon, Wed, Thu, Sat) 1645 (Tue, Fri)	50"
	Winter	3 (Mon, Tue, Fri) 2 (Wed, Thu)	2	-	1445 (1645 Fri)	
Coll: Oban-Coll	Summer	1 (Mon, Tue, Wed, Fri)	1	1	1500	2'40"/4' 35"
	Winter	1 (Tue, Thu)	1	-	0645	
Tiree: Oban-Tiree	Summer	1	1	1	1500	3' 20"/4'
	Winter	1 (Tue, Thu)	1	-	0645	
Coll-Tiree	Summer	1 (Mon) ½ (Tue, Wed, Fri)	1	1	n/a	1'
	Winter	1 (Tue, Thu)	1	-	n/a	

Note: n/a denotes "not applicable"

The main points to note are:

- The routes vary between short crossings of less than half an hour sailing time to crossing times of over 4 hours.
- Almost all services operate all year round. On the shorter routes service frequency is lower in the winter but most still have a daily service. Frequency is poor on the longer routes, with some islands (Coll and Colonsay) having less than a daily frequency all year round. Coll, Colonsay and Tiree having three sailings per week in the winter, with only Tiree having air as well as ferry services.
- On the shorter routes, last sailing times tend to be around 1800 in summer and slightly earlier in the winter.
- On the longer crossings, last sailing times in the winter can be as early as lunchtime. For example, the last sailing to Islay is before 1300 on most days. Some routes also face unsocial hours of departure, such as the 0645 sailing from Oban to Coll and Tiree.

2.5.3 HIGHLAND COUNCIL AND WESTERN ISLES AREAS

Table 2.7, over, provides details of the CalMac services in the Highland Council and Western Isles areas. The main points to note are:

- Longer routes predominate, with few crossing times less than one hour. On the longer routes frequency is generally very limited, only up to two return sailings per day.
- A significant number of islands do not have Sunday services under either the summer or winter timetables.
- Only on some routes (notably Mallaig-Armadale) is winter frequency significantly below that of the summer schedule. However, it still remains that many islands have less than a daily service, even after excluding Sundays.
- In most cases, the times of last sailings from the mainland are mid to late afternoon.
- Lewis is exceptional within the CalMac network in being served by a dedicated freight vessel in addition to the daytime sailings.

Table 2.7: CalMac Services: Highland Council & Western Isles Areas						
Number of Return Sailings / Day						
Service	Season	Daily Mon- Fri	Sat	Sun	Last Sailing	Crossing Time
Skye: Sconser-Raasay	Summer	9	9	2	1845 (Mon-Sat) 1630 (Sun)	15"
	Winter	6	6	2	1800 (Mon-Sat) 1630 (Sun)	
Skye: Mallaig-Armadale	Summer	8	8	8	1745	26"
	Winter	2	-	-	1600	
Sound of Barra: Barra-Eriskay	Summer	5	5	5	1855	40"
	Winter	4	4	2	1815 (Mon-Sat) 1600 (Sun)	
North Uist & Harris: Bernera-Leverburgh	Summer	4	4	-	1840	1'
	Winter	2	2	-	1440	
Lewis: Stornoway-Ullapool	Summer	2	2	-	1715	2' 45"
	Winter	2	2	-	1715	
Lewis overnight freight service: Ullapool-Stornoway	All Year Round	1	1	-	0430	3' 30"
North Uist: Uig-Lochmaddy	Summer	1½ (1 on Tue)	1½	2	1400 (Tue, Thu, Sat, Sun) 1800 (Mon, Wed, Fri)	1' 45"/3' 40"
	Winter	1½	1½	1	0940 (Tue, Thu, Sat) 1400 (Sun) 1500 (Mon, Wed, Fri)	
Harris: Uig-Tarbert	Summer	1½ (2 Mon)	2	-	1400 (Mon, Wed, Fri) 1800 (Tue, Thu, Sat)	1' 40"
	Winter	½ (1½ Tue)	1½	-	1500 (Thu) 1530 (Tue, Sat)	
Barra: Oban-Castlebay	Summer	1	1	1	1540	4' 50"/7' 20"
	Winter	3 returns per week			1530	
South Uist: Oban-Lochboisdale	Summer	½	1	½	1530	5' 20"/6' 40"
	Winter	3 returns per week				
Eigg: Mallaig-Eigg	Summer	1 (Mon, Tue, Thu, Fri)	2	-	1425	1' 15"/5' 5"
	Winter	1 (Mon, Wed, Fri)	1	-	1020	
Muck: Mallaig-Muck	Summer	1 (Tue, Thu, Fri)	2	-	1425	1' 15"/4' 20"
	Winter	1 (Mon, Wed, Fri)	-	-	1020	
Rum: Mallaig-Rum	Summer	1 (Mon, Wed, Fri)	2	-	1425	1' 20"/5'
	Winter	1 (Mon, Tue, Thu)	1	-	1020	
Canna: Mallaig-Canna	Summer	1 (Mon, Wed, Fri)	2	-	1425	2' 30"/3' 50"
	Winter	1 (Tue, Thu)	1	-	1020	

2.6 ARGYLL & BUTE COUNCIL SERVICES

Table 2.8 describes services operated on behalf of Argyll & Bute Council. These are provided directly by the local authority with the exception of Jura, which is a tendered service.

Number of Return Sailings Per Day						
Service	Season	Daily Mon- Fri	Sat	Sun	Last Sailing	Crossing Time
Luinig	Summer	28 (Mon-Thu)	35	12	2200 (Mon-Thu)	<5"
		35 (Fri)			2330 (Fri, Sat)	
	Winter	26 (Mon-Thu)	30		1800 (Sun)	
		30 (Fri)				
Port Askaig- Jura	Summer	17 (except Mon, 16)	17	6	2300 (Mon-Sat)	5"
					1800 (Sun)	
	Winter	14 (except Wed, 15)	15	2	1830 (Mon, Tue, Thu, Fri)	
					1930 (Wed)	
Port Appin- Lismore (Pax Only)	Summer	13 (Mon-Thu)	14	5	2000 (Mon-Thu)	10"
		14 (Fri)			2130 (Fri,Sat)	
	Winter	12 (Mon-Thu)	13	5	2000 (Sun)	
		13 Fri			1800 (Mon-Thu)	
		12 (Mon-Thu)	13	5	2130 (Fri,Sat)	
		13 Fri			1820 (Sun)	
	Summer	2 (Mon-Thu)	3	On demand between 0930-1250	2050 (Mon, Thu)	3"
		3 (Fri)			And on demand between 0900-1050	
		And on demand between 0900-1050	And on demand between 0900-1050	On demand between 1400-1550	1750 (Sun)	
		1120-1250			1400-1550	
		1400-1550	1620-1810	1620-1750		
		1620-1810			1920-2050	
Ellenabeich- Easdale: (Pax only)	Summer	2 (Mon-Thu)	3	On demand between 1400-1650	1900 (Mon, Thu)	3"
		3 (Fri)			And on demand between 0900-1050	
	Winter	And on demand between 0900-1050	And on demand between 0900-1050	On demand between 1400-1650	1750 (Sun)	
		1120-1250			1120-1250	
		1400-1550	1620-1750	1810-1900		
		1620-1750				
		1810-1900				

All of the crossings are short ones, the longest crossing time being ten minutes. Two of the ferries are vehicular services while two are passenger only. Services are generally frequent, with no significant variations between summer and winter timetables, although it is noticeable that sailing frequency is greatly reduced on Sundays.

The times of last sailings to the islands vary considerably by day of the week. Generally, sailings are available after 2100 on Friday and Saturday, with the last sailings on some routes being 1800-1900 on other days of the week.

2.7 HIGHLAND COUNCIL SERVICES

Table 2.9 describes the non-CalMac services operating in the Highland Council area.

Operator	Service	Season	Number of Return Sailings Per Day			Last Sailing	Crossing Time
			Daily Mon-Fri	Sat	Sun		
Highland Council	Corran Ferry: Ardgour-Nether Lochaber	Summer	31 (Mon-Thu) 33 Fri	33	29	2100 (Mon-Thu, Sun) 2130 (Fri, Sat)	<5"
		Winter	29 (Mon-Thu) 33 Fri	33	27	2000 (Mon-Thu, Sun) 2130 (Fri, Sat)	
Highland Council	Camusnagaul- Fort William (Pax only)	All year round	7	5	-	1740	10"
Highland Council (Tendered)	Knoydart: Mallaig-Inverie/Tarbet (Pax only)	Summer	2	-	-	1415	45"/ 2' 45"
		Winter	2½ (Mon) 2 (Wed) 2½ (Fri)	-	-	1415 (Mon, Wed) 1600 (Fri)	50"/ 2' 45"
Cromarty Ferry Company	Cromarty-Nigg	Summer Only	21	21	21	1815	10"

2.8 SPTE SERVICES

Table 2.10 describes the SPTE funded services that operate within the HITRANS area. The services are operated using the same vessel by a private contractor.

Service	Season	Number of Return Sailings Per Day			Last Sailing	Crossing Time
		Daily Mon-Fri	Sat	Sun		
Gourock-Kilcreggan	Summer	12	10	3	1810 (Mon-Sat)	12"/1'
	Winter	13	11	3		12"/1'
Gourock-Helensburgh	Summer	4	4	3	1615 (Sun)	30"/45"
	Winter	4	4	3		

3 TRAFFIC VOLUMES

3.1 INTERNAL SHETLAND SERVICES

Table 3.1 presents carryings data for internal Shetland services for calendar year 2004.

TABLE 3.1: INTERNAL SHETLAND SERVICES: 2004			
Route	Pax	Cars	Commercial Vehicles/Buses
Yell	231,249	110,264	13,340
Bressay	212,957	65,831	5,399
Whalsay	154,350	68,487	4,398
Unst	123,039	61,729	5,375
Fetlar	22,311	11,314	1,390
Skerries	5,784	2,377	211
Papa Stour	2,626	9	48
Fair Isle	790	4	1
Foula	17	0	0

3.2 INTERNAL ORKNEY SERVICES

Table 3.2 presents data for internal Orkney services.

TABLE 3.2: INTERNAL ORKNEY SERVICES: 2004			
Route	Pax	Cars	Commercial Vehicles/Buses
North Isles			
Westray	41,630	9,227	3,816
Sanday	26,067	5,542	3,507
Stronsay	17,013	3,734	2,167
Eday	8,446	2,041	815
Inter-Island/Round Trip	3,501	428	247
North Ronaldsay	724	305	0
Papa Westray	576	194	0
Shapinsay	65,845	7,592	3,277
Rousay/Egilsay/Wyre			
Rousay	50,339	9,289	5,531
Egilsay	3,186		
Wyre	2,291		
Inter-Island/Round Trip	4,710	767	0
Hoy/Flotta			
Lyness	64,449	20,984	3,203
Flotta	10,402		
Inter-Island Round Trip	1,188	168	0
Graemsay/North Hoy			
Graemsay	5,103	46	0
North Hoy	14,974	1	0
Inter-Island/Round Trip	168	0	0

3.3 EXTERNAL SHETLAND SERVICES

Table 3.3 presents traffic carryings for external Shetland services for calendar year 2004.

TABLE 3.3: EXTERNAL SHETLAND SERVICES: 2004					
	Pax	Cars	Freight (metres)	Cattle	Sheep
Lerwick-Aberdeen	97,920	16,510	158,899	1,617	125,590
Lerwick-Kirkwall	17,280	2,660	5,483	319	2,139

Note: Data include carryings on NorthLink's dedicated freight vessels

3.4 EXTERNAL ORKNEY SERVICES

Table 3.4 presents traffic data for those external Orkney services for which information is available. For completeness volumes on the Northlink Kirkwall-Lerwick service are shown but these are the same carryings as, rather than being in addition to, those shown for "Lerwick-Kirkwall" at **Table 3.3**.

TABLE 3.4: EXTERNAL ORKNEY SERVICES: 2004					
	Pax	Cars	Freight (metres)	Cattle	Sheep
Scrabster-Stromness	142,884	40,205	76,026	837	3,890
Kirkwall-Aberdeen	34,086	4,828	25,705	15,427	9,536
Kirkwall-Lerwick	17,280	2,660	5,483	319	2,139

Note: Note: Data include carryings on NorthLink's dedicated freight vessels

3.5 CALEDONIAN MACBRAYNE SERVICES

3.5.1 CLYDE AREA

Table 3.5 shows carryings for calendar year 2004 on CalMac services in the Clyde area, and those for the Western Ferries service.

TABLE 3.5: CALMAC/WESTERN FERRIES SERVICES: CLYDE AREA: 2004				
	Pax	Cars	Coaches	CVs
CalMac				
Wemyss Bay-Rothesay	764,159	152,099	1,214	11,972
Ardrossan-Brodick	716,631	125,819	1,149	9,720
Largs-Cumbræ Slip	682,936	132,378	702	4,501
Gourock-Dunoon	619,776	90,219	875	5,261
Colintraive-Rhubodach	268,377	92,693	3,497	9,250
Western Ferries				
Mclnroy's Point-Hunter's Quay	1,259,600	549,200	29,100	

3.5.2 ARGYLL ISLANDS & KINTYRE

Table 3.6 shows carryings for CalMac routes serving the Argyll islands and the Kintyre peninsula for calendar year 2004.

TABLE 3.6: CALMAC SERVICES: ARGYLL ISLANDS AND KINTYRE: 2004				
	Pax	Cars	Coaches	CVs
Oban-Craignure	653,313	115,916	2,437	6,572
Fionnphort-Iona	257,393	5,025	0	902
Kennacraig-Islay	148,047	47,438	192	7,425
Lochaline-Fishnish	122,943	45,451	370	2,675
Tayinloan-Gigha	54,546	12,496	40	1,920
Claonaig/Tarbert-Lochranza	53,964	16,834	125	238
Portavadie-Tarbert	52,868	18,642	14	315
Oban-Coll-Tiree	44,583	12,379	30	1,504
Kilchoan-Tobermory	43,483	5,968	11	41
Oban-Colonsay	15,313	4,076	9	300
Oban-Lismore	12,530	1,929	0	500
Kennacraig-Port Askaig- Colonsay-Oban (Summer Only)	10,586	2,658	23	437

3.5.3 HIGHLAND COUNCIL AND WESTERN ISLES AREAS

Table 3.7 shows carryings for CalMac routes serving the Highland Council and Western Isles areas for calendar year 2004.

TABLE 3.7: CALMAC SERVICES: HIGHLAND COUNCIL AND WESTERN ISLES AREAS: 2004				
	Pax	Cars	Coaches	CVs
Stornoway-Ullapool	188,945	48,524	430	11,951
Mallaig-Armadale	188,320	44,452	1,326	174
Uig-Lochmaddy	73,119	24,277	197	4,492
Uig-Tarbert	69,911	21,725	243	847
Berneray-Leverburgh	51,750	18,926	143	1,382
Sconser-Raasay	51,630	16,120	19	522
Oban-Castlebay-Lochboisdale	45,939	13,099	91	1,057
Barra-Eriskay	38,707	13,848	138	826
Mallaig-Canna-Rum-Eigg-Muck	19,441	335	2	87
Uig-Tarbert-Lochmaddy	9,017	3,511	24	458
Oban-Inner & Outer Isles	7,227	1,864	4	204

Note: Stornoway-Ullapool data include carryings on the dedicated freight service

3.6 ARGYLL & BUTE COUNCIL SERVICES

Table 3.8 shows carryings for Argyll & Bute Council services. Please note that, in most cases, the data are for calendar year 2003.

TABLE 3.8: ARGYLL & BUTE COUNCIL SERVICES: 2003			
	Pax	Cars	HGVs
Jura*	66,240	21,938	2,976
Lismore	43,480	0	0
Luing	20,170	14,337	0
Easdale	18,172	0	0

* Data are for calendar year 2004

3.7 HIGHLAND COUNCIL SERVICES

Available data for the Highland Council area services are shown at **Table 3.9**.

TABLE 3.9: HIGHLAND COUNCIL AREA SERVICES: 2004		
	Pax	Vehicles
Corran Ferry	*	280,000
Knoydart	2,536	0

* Although passengers are conveyed, their numbers are not recorded because passenger travel is free

3.8 SPTE SERVICES

Passenger numbers on SPTE supported services are shown at **Table 3.10**. Please note that these are for financial year 2003-04 which is the latest available to us.

TABLE 3.10: SPTE AREA SERVICES: 2003-04	
	Pax
Gourock-Kilcreggan-Helensburgh	78,900

Note: Services convey only passengers

4 OPERATING SUBSIDIES

4.1 INTERNAL SHETLAND SERVICES

Data for operating subsidy, by route, for financial year 2004-05 are shown at **Table 4.1**. Please note that these are budget figures that are the latest available and include an allocation of central costs.

TABLE 4.1: INTERNAL SHETLAND SERVICES: OPERATING SUBSIDIES 2004-05 (BUDGET)	
Service	Operating Subsidy (£)
Yell	4,241,659
Whalsay	2,453,211
Skerries	1,242,220
Unst	1,201,786
Bressay	1,195,912
Fetlar	1,031,895
Papa Stour	640,676
Foula	544,513
Fair Isle	498,045
Total	13,049,917

4.2 INTERNAL ORKNEY SERVICES

Data for operating subsidy, for all services, are shown at **Table 4.2**. These are for financial year 2003-04 which is the last year for which these data are presently available.

TABLE 4.2: INTERNAL ORKNEY SERVICES: TOTAL SUBSIDY: 2003-04	
Category	Subsidy (£)
Route operation	4,071,000
Management and administration	609,000
Total Subsidy	4,680,000

Table 4.3 shows subsidy on a route-specific basis. This is for financial year 2002-03, the latest year for which such a breakdown is available.

TABLE 4.3: INTERNAL ORKNEY SERVICES: ROUTE-SPECIFIC SUBSIDY: 2002-03	
Service	Operating Subsidy (£)
Outer North Isles	2,610,000
Hoy/Flotta	218,000
Shapinsay	215,000
Rousay/Egilsay/Wyre	198,000
Graemsay/North Hoy	64,000
Westray/Papa Westray	52,000
Total: Route-Specific Subsidy	3,357,000

4.3 NORTHLINK SERVICES

Scottish Executive has informed us that the subsidy paid to Northlink in financial year 2004-05 was **£24,400,000**. However, they have also stated that this figure is unlikely to be typical of future years' provision, as Scottish Executive "has been funding Northlink on a deficit basis for some considerable time". The future annual subsidy will be apparent when the tendering of Northlink services is completed.

4.4 CALEDONIAN MACBRAYNE SERVICES

Table 4.4 shows operating losses, by route group, for CalMac services in financial year 2003-04. The data are the latest available to us at this time. The figures shown include both route-specific costs and the allocation of general costs (e.g. central management and admin) on a "route activity" basis.

Route Group	Operating Loss (£)
Outer Isles	11,225,000
Upper Clyde	5,307,000
Islay/Gigha	3,596,000
Mull/Colonsay	2,547,000
Skye and Small Isles	2,198,000
Arran/Kintyre	838,000
Total	25,711,000

The actual deficit grant paid by Scottish Executive was £25,919,000. Taking this into account, CalMac made a profit before tax of £777,000, which partly reflects their generation of income from activities outside the company's operation of "approved" services on behalf of Scottish Executive.

4.5 ARGYLL & BUTE COUNCIL SERVICES

Table 4.5 shows subsidies for the ferry services operated by, or on behalf of, Argyll & Bute Council for financial year 2004-05. The figures shown include allocations of central costs.

Service	Subsidy (£)
Jura	111,556
Lismore	74,636
Easdale	48,135
Luig	26,499
Total	260,826

4.6 HIGHLAND COUNCIL SERVICES

Table 4.6 presents data for annual operating subsidies on Highland Council supported services.

TABLE 4.6: HIGHLAND COUNCIL SERVICES: OPERATING SUBSIDIES: 2004/05	
Service	Subsidy (£)
Knoydart	97,644
Camusnagaul	72,635
Total	170,279

It should be noted that:

- No operating subsidy is paid in the case of the Corran ferry.
- The Camusnagaul service is tendered but was most recently awarded to an in-house bid from Highland Council.
- The Knoydart service is tendered and is presently operated by a third party, with the contract running until 2007.

4.7 SPT E SERVICES

The annual subsidy for operating the Gourock-Kilcreggan-Helensburgh service was **£30,218** in financial year 2004/05.

5 VESSELS

5.1 INTRODUCTION

This Section reviews the fleets used to operate the services described earlier in this report. It is based on available information and we have focused on those vessels that are in public ownership. These represent the vast majority of the vessels providing ferry services in the region.

Some vessels are owned by private operators who provide unsubsidised services (e.g. Pentland Ferries services to Orkney). Further, there are private operators who provide publicly funded services but using their own vessels (for example, the passenger service to Inverie). Given the uncertainty of how such vessels will change in the future, and the limited (if any) public sector influence on their replacement, these vessels are not included within the Section's analysis.

It is important to appreciate that the replacement of vessels on a particular route is not simply driven by age. It is commonplace to consider replacing vessels after 20-25 years operation, due to increasingly costly overhauls and maintenance and other operating costs, as well as possible unsuitability for meeting customers' needs, including changing maritime legislation. However, many vessels on particular routes are replaced before their life is expired but retained in the fleet and used on other routes (normally termed "cascading") or used as back-up/relief vessels. In addition, some vessels may be operated beyond a 25 year life if this continues to be cost-effective in terms of service provision.

Thus, while 20-25 years operating life provides a guide as to when vessels are replaced, it will generally be the case that new vessels are built and deployed on a route before the incumbent vessel's life has expired. This has particularly been the case in recent years on the CalMac network, where new building has been driven by a need for larger vessels to cope with demand, rather than replacing vessels because of their age. Thus vessel life should only be considered as one factor influencing future vessel replacement on specific routes.

5.2 INTERNAL SHETLAND SERVICES

5.2.1 EXISTING FLEET

Table 5.1 describes the existing fleet.

TABLE 5.1: INTERNAL SHETLAND SERVICES: PRESENT FLEET					
Vessel	Year Built	Pax Capacity	Car Capacity	Service Speed (Kts)	Route(s)
Thora	1975	12	10	9.5	Relief
Hendra	1982	50/95	14	11.5	Whalsay
Snolda	1983	12	6	10	Papa Stour
Fivla	1985	49/86	11	11	Unst/Fetlar
Good Shepherd	1986	12	Lo-lo	7	Fair Isle
Geira	1988	49/86	11	11	Unst/Fetlar
Bigga	1991	45/95	16	9.5	Relief
Leirna	1992	114/125	16	9	Bressay
New Advance	1996	12	Lo-lo	6	Foula
Linga	2002	95	16	10	Whalsay
Daggri	2003	95 /144	31	12	Yell Sound
Dagalien	2003	95/144	31	12	Yell Sound
Filla	2003	30	9	12	Out Skerries

5.2.2 REPLACEMENT PROGRAMME

If it is assumed that all vessels are replaced no later than 25 years from construction, then the implied replacement dates are as shown at **Table 5.2**.

TABLE 5.2: INTERNAL SHETLAND SERVICES: NOMINAL VESSEL REPLACEMENT DATES	
Vessel	Nominal Replacement Date
Thora	2000
Hendra	2007
Snolda	2008
Fivla	2010
Good Shepherd	2011
Geira	2013
Bigga	2016
Leirna	2017
New Advance	2021
Linga	2027
Daggri	2028
Dagalien	2028
Filla	2028

Shetland Island Ferries have provided information on the presently planned/known vessel replacements. This is shown at **Table 5.3**.

TABLE 5.3: INTERNAL SHETLAND SERVICES: EXISTING REPLACEMENT PLAN			
Date	Route	Detail	Disposals
2006-08	Whalsay	Two new vessels	Fivla and Thora
2008	Papa Stour	New Vessel	Snolda (possible)
2009	Fair Isle	New Vessel	Good Shepherd
2010	Unst	New Vessel	Hendra
2012	Bressay	New Vessel (dependent on bridge)	Leirna
2014	Fetlar	New Vessel	Geira
2016	Foula	New Vessel	New Advance

5.3 **INTERNAL ORKNEY SERVICES**

5.3.1 **EXISTING FLEET**

The existing fleet is described at **Table 5.4**.

TABLE 5.4: INTERNAL ORKNEY SERVICES: PRESENT FLEET					
Vessel	Year Built	Pax Capacity	Car Capacity	Service Speed (Kts)	Route(s)
Golden Mariana	1973	34/40	0	9.5	Westray-Papa Westray
Eynhallow	1987	50/95	11	10.5	Rousay/Egilsay/Wyre
Varagen	1988	93/144	33	12	Outer North Isles
Shapinsay	1989	91	12	9.5	Shapinsay
Earl Thorfin	1990	90/190	26/27	12	Outer North Isles
Earl Sigurd	1990	90/190	26/27	12	Outer North Isles
Thorsvoe	1991	100/122	16	10.5	Relief
Hoy Head	1994	125	18	11	Hoy/Flotta
Graemsay	1996	41/73	2	10	Graemsay/North Hoy

5.3.2 **REPLACEMENT PROGRAMME**

Table 5.5 shows the nominal replacement dates for the vessels of the present fleet.

TABLE 5.5: INTERNAL ORKNEY SERVICES: NOMINAL VESSEL REPLACEMENT DATES	
Vessel	Nominal Replacement Date
Golden Mariana	1998
Eynhallow	2012
Varagen	2013
Shapinsay	2014
Earl Thorfin	2015
Earl Sigurd	2015
Thorsvoe	2016
Hoy Head	2019
Graemsay	2021

In 2004 OIC commissioned consultants to develop a plan for replacing the fleet over a period of years, with consideration given to the optimal size and speed of various ship options. The consultants' recommendations are summarised at **Table 5.6**. It is proposed that the replacement is phased over a number of years, but actual calendar years have yet to be determined.

TABLE 5.6: INTERNAL ORKNEY SERVICES: PROPOSED REPLACEMENT PLAN		
Route	Detail	Disposals/Cascading
Outer North Isles	<ul style="list-style-type: none"> 3 new vessels 15 knots service speed 40 car capacity 	Varagen to Hoy/Flotta Earl Thorfin- relief Earl Sigurd-disposed
Westray- Papa Westray	<ul style="list-style-type: none"> New vessel As per Golden Mariana 	Golden Mariana-disposed
Shapinsay	<ul style="list-style-type: none"> New vessel 12 knots service speed 20 car capacity 	Shapinsay-disposed
Rousay/Egilsay/Wyre	<ul style="list-style-type: none"> New vessel 12 knots service speed 20 car capacity 	Eynhallow-disposed
Hoy/Flotta	Varagen	Hoy Head-disposed
Graemsay/North Hoy	Graemsay	-
Relief	Thorsvoe Earl Thorfin	

5.4 **NORTHLINK SERVICES**

The existing Northlink fleet is described at **Table 5.7**.

TABLE 5.7: NORTHLINK SERVICES: PRESENT FLEET					
Vessel	Year Built	Pax Capacity	Car Capacity	Service Speed (Kts)	Route(s)
Hjalmland	2002	600	125	24	Aberdeen-Kirkwall-Lerwick
Hrossey	2002	600	125	24	Aberdeen-Kirkwall-Lerwick
Hamnavoe	2002	630	98	19	Scrabster-Stromness
Hascosay	1971	-	c 50 (trailers)	17	Freight
Clare*	1972	-	54 (trailers)	16	Freight

*Operating on a time charter

It should be noted that bids for the new NorthLink contract will be sought on the basis of using the existing three leased passenger/vehicle vessels, with bidders invited to set out proposals for providing additional capacity (including freight) and methods. Other assets, including the existing freight vessel (Hascosay) may be available. As the Table shows, the three passenger/vehicle vessels have nominal lives beyond 2025.

5.5 CALEDONIAN MACBRAYNE SERVICES

5.5.1 INTRODUCTION

Information was sought from CalMac and Scottish Executive on vessel replacement plans. CalMac stated that they do have an investment plan but did not wish to divulge it, considering it to be commercially confidential. This is in a context where it is expected that the company's existing routes will be tendered in the near future.

Scottish Executive's response was that:

"It is difficult to be precise about CalMac vessel replacement dates. The rule of thumb is 25 years, but some are already beyond or fast approaching those dates and it is equally difficult to assume a simple like for like replacement, based on the same vessel deployment and characteristics i.e. ignoring cascading possibilities and different route configurations, traffic growth assumptions, etc. We plan to do some internal work with CalMac on this kind of issue for our own long-term planning, but even that long-term look would have to be subject to periodic Spending Review bidding and we could not assume that just because a vessel was approaching retirement, we would be replacing it. (It is doubtful that) we would want to air such a speculative internal exercise publicly. In reality, replacement would be determined on the basis of the broad range of issues set out above, and the competing demands for Transport Group funding in individual Spending Reviews."

Accordingly this section of the Section is based on a description of the existing fleet, nominal replacement dates and confirmed vessel replacements that are already in the public domain.

5.5.2 CLYDE AREA

Existing Fleet

The existing CalMac fleet serving the Clyde area is described at **Table 5.8**.

TABLE 5.8: CALMAC SERVICES: CLYDE AREA: PRESENT FLEET					
Vessel	Year Built	Pax Capacity	Car Capacity	Service Speed (Kts)	Route(s)
Jupiter*	1974	381	40	12	Gourock-Dunoon & Wemyss Bay-Rothesay
Juno*	1974	381	40	12	Gourock-Dunoon & Wemyss Bay-Rothesay
Saturn*	1978	381	40	12	Gourock-Dunoon & Wemyss Bay-Rothesay
Loch Riddon	1986	199	12	9	Largs-Cumbræ
Loch Dunvegan	1991	200	36	9	Colintraive-Rhubodach
Caledonian Isles	1993	1,000	120	15	Ardrossan-Brodick
Loch Alann	1997	150	24	10	Largs-Cumbræ
Coruisk	2003	250	40	14	Gourock-Dunoon/ Wemyss Bay-Rothesay (winter only)
Bute**	2005	450	60	14	Wemyss Bay-Rothesay

* One of these vessels will also provide additional sailings on Ardrossan-Brodick during summer 2005.

** Vessel due for introduction in summer 2005

Replacement Programme

Table 5.9 shows the nominal replacement dates for the vessels shown at **Table 5.8**.

TABLE 5.9: CALMAC SERVICES: CLYDE AREA: NOMINAL VESSEL REPLACEMENT DATES	
Vessel	Nominal Replacement Date
Jupiter	1999
Juno	1999
Saturn	2003
Loch Riddon	2011
Loch Dunvegan	2016
Caledonian Isles	2018
Loch Alann	2022
Coruisk	2028
Bute	2030

The following points should be noted that:

- A second new build vessel is under construction for use on the Wemyss Bay-Rothesay service and will be of similar capacity to MV Bute. It is expected that it will come into service in 2007.
- A new vessel is being constructed for the Largs-Cumbrae service and is due to come into service in 2007. One of the existing Largs vessels will be cascaded to the Oban-Lismore service.
- The futures of the vessels Jupiter, Juno and Saturn are yet to be decided, in the light of new tonnage being deployed on the Wemyss Bay-Rothesay service and the tendering of the Gourock-Dunoon service.

5.5.3 ARGYLL ISLANDS & KINTYRE

Existing Fleet

Table 5.10 describes the existing fleet operating within the Argyll Islands & Kintyre area of the CalMac network.

TABLE 5.10: CALMAC SERVICES: ARGYLL ISLANDS & KINTYRE: PRESENT FLEET					
Vessel	Year Built	Pax Capacity	Car Capacity	Service Speed (Kts)	Route(s)
Eigg	1974	75	6	8	Oban-Lismore
Isle of Cumbrae	1977	139	18	8.5	Tarbert-Portavadie & Tarbert-Lochranza
Isle of Arran	1984	446	68	15	Oban to Coll, Colonsay, Mull, Islay, & Tiree (Summer Only)
Hebridean Isles	1985	494	68	15	Kennacraig-Islay
Loch Linnhe	1986	199	12	9	Tobermory-Kilchoan
Loch Ranza	1987	199	12	9	Tayinloan-Gigha
Isle of Mull	1988	962	80	15	Oban-Colonsay & Oban-Craignure
Loch Fyne	1991	200	36	9	Lochaline-Fishnish
Loch Tarbert	1992	149	18	9	Claonaig-Lochranza
Loch Buie	1992	250	9	9	Fionnphort-Iona
Clansman	1998	638	90	16.5	Oban-Coll/Tiree

Replacement Programme

Table 5.11 shows the nominal replacement dates for the vessels shown at **Table 5.10**.

TABLE 5.11: CALMAC SERVICES: ARGYLL ISLANDS & KINTYRE: NOMINAL VESSEL REPLACEMENT DATES	
Vessel	Nominal Replacement Date
Eigg	1999
Isle of Cumbrae	2002
Isle of Arran	2009
Hebridean Isles	2010
Loch Linnhe	2011
Loch Ranza	2012
Isle of Mull	2013
Loch Fyne	2016
Loch Tarbert	2017
Loch Buie	2017
Clansman	2023

It should be noted that CalMac have conducted a STAG appraisal regarding services to Islay. Their preferred option is for a two-vessel service on the route using dedicated ships on one of which would be a new build. They are presently awaiting a ministerial decision on funding for the new vessel.

5.5.4 HIGHLAND COUNCIL AND WESTERN ISLES AREAS

Existing Fleet

Table 5.12 describes the existing CalMac fleet operating within the Highland Council and Western Isles areas.

TABLE 5.12: CALMAC SERVICES: HIGHLAND COUNCIL AND WESTERN ISLES AREAS: PRESENT FLEET					
Vessel	Year Built	Pax Capacity	Car Capacity	Service Speed (Kts)	Route(s)
Muirneag*	1979	12	418 Lane Metres	15.5	Ullapool-Stornoway freight service
Isle of Arran	1984	446	68	15	Additional summer sailings from Oban to Castlebay/Lochboisdale
Loch Striven	1986	199	12	9	Sconser-Raasay
Lord of the Isles	1989	506	56	16	Oban-Castlebay/Lochboisdale
Isle of Lewis	1995	680	123	18	Ullapool-Stornoway
Loch Bhrosda	1996	150	18	8	Barra-Eriskay
Clansman	1998	638	90	16.5	Oban-Castlebay/Lochboisdale
Hebrides	2000	612	110	16.5	Uig-Tarbert/Lochmaddy
Lochnevis	2000	190	14	13	Mallaig-Canna/Rum/Eigg/Muck, Mallaig-Armadale (winter)
Loch Portain	2003	200	32	10.5	Leverburgh-Berneray
Coruisk	2003	250	40	14	Mallaig-Armadale (summer)

* Vessel not owned by CalMac

Replacement Programme

Table 5.13 shows the nominal replacement dates for the vessels shown at **Table 5.12**, excluding the chartered freight vessel.

TABLE 5.13: CALMAC SERVICES: HIGHLAND COUNCIL AND WESTERN ISLES AREAS: NOMINAL VESSEL REPLACEMENT DATES	
Vessel	Nominal Replacement Date
Isle of Arran	2009
Loch Striven	2011
Lord of the Isles	2014
Isle of Lewis	2020
Loch Bhrusda	2021
Clansman	2023
Hebrides	2025
Lochnevis	2025
Loch Portain	2028
Coruisk	2028

CalMac have very recently completed a STAG appraisal of the possible reintroduction of a service between Mallaig and Lochboisdale. We understand that the preferred option would require a new vessel to be built for the service.

5.5.5 RELIEF/BACK-UP VESSELS

Table 5.14 describes the existing CalMac relief fleet.

TABLE 5.14: CALMAC SERVICES: RELIEF FLEET					
Vessel	Year Built	Pax Capacity	Car Capacity	Service Speed (Kts)	Route(s)
Bruernish	1973	121	6	8	Relief
Pioneer	1974	218	33	16	Relief
Raasay	1976	75	6	8	Relief

It shows that all three vessels are over 25 years old. In addition to these ships, MV Isle of Arran also acts as a relief vessel. Her scheduled summer sailings, which were shown in earlier, Tables are suspended if she is needed to cover for other vessels in the network.

5.6 ARGYLL & BUTE COUNCIL SERVICES

5.6.1 EXISTING FLEET

Table 5.15 describes the Council's existing fleet.

TABLE 5.15: ARGYLL & BUTE COUNCIL: PRESENT FLEET					
Vessel	Year Built	Pax Capacity	Car Capacity	Service Speed (Kts)	Route
Belnahua	1972	40	6	8	Luing
Lismore	1988	20	0	7	Lismore
Easdale	1993	12	0	7	Easdale
Eilean Dhiura	1998	50	8	8	Jura

5.6.2 REPLACEMENT PROGRAMME

ABC have informed us that the anticipated replacement date for the ferries, by service, are:

- Luing: 2006.
- Lismore: 2008.
- Easdale 2013.
- Jura: 2018.

Please note that this is the programme that is presently proposed and is subject to agreement by the Council and funding being available.

The present contract for operating the Jura service expires in April 2006.

5.7 HIGHLAND COUNCIL SERVICES

5.7.1 EXISTING FLEET

Table 5.16 describes Highland Council's existing fleet.

TABLE 5.16: HIGHLAND COUNCIL: PRESENT FLEET					
Vessel	Year Built	Pax Capacity	Car Capacity	Service Speed (Kts)	Route
Maid of Glencoul	1975	116	16	7	Corran (relief)
Cailin an Aiseag	1980	26	0	6	Camusnagaul
Corran	2001	150	30	8	Corran

5.7.2 REPLACEMENT PROGRAMME

Highland Council have informed us that their replacement schedule is as follows:

- Maid of Glencoul: as soon as possible
- Cailin an Aiseag: by 2010.
- Corran: 2020

5.8 SPTE SERVICES

The existing contract for the Gourock-Kilcreggan-Helensburgh passenger service is due to expire in March 2007.

6 SHORE INFRASTRUCTURE

6.1 INTRODUCTION

This Section provides information on the shore infrastructure used by the services. In Orkney and Shetland, the local authorities own this. The CalMac services use a mixture of Council-owned infrastructure, that owned by CalMac and also facilities owned by third parties-notably Harbour Trusts. In most cases, the local authority operated/supported services use facilities that are Council-owned.

We have identified, as far as possible, infrastructure replacement dates through discussions with the relevant owners. In the case of CalMac facilities the position is similar to that for its vessel replacement programme. The information shown for these facilities is that which is in the public domain. Scottish Executive have stated, correctly, that in practice vessel replacement “would be in response to market needs rather than simple like for like and thus it follows that major harbour works may from time to time be required simply to accommodate larger vessels”. This cannot be known in advance of decisions about new vessels being deployed on the CalMac network; and, in the longer term, vessel replacement and cascading will be a key determinant of the timing and nature of shore infrastructure works.

6.2 INTERNAL SHETLAND SERVICES

Shetland Island Ferries have provided information on present plans for shore infrastructure. This is shown at **Table 6.1**.

Date	Details	Route(s) Affected
2006-08	Three new terminals	Whalsay
2006-08	Major maintenance to two terminals	Unst/Fetlar
2006-08	Mooring dolphin at Skerries	Skerries
c 2008	Major works at Grutness and Fair Isle to accommodate new vessel	Fair Isle

6.3 INTERNAL ORKNEY SERVICES

Table 6.2 reports infrastructure works that will be required to support the introduction of the vessel replacement, proposed in the OIC consultants study, shown at **Table 5.6**. Again, as the plans have still to be finalised no calendar dates are available for the timing of the works.

Details	Route(s) Affected
Disabled access improved and passenger terminals refurbished	All
North Ronaldsay for ro-ro vehicle loading/unloading	North Ronaldsay
Papa Westray for ro-ro vehicle loading/unloading	Papa Westray
Provision of hard ramp at Graemsay	Graemsay

6.4 NORTHLINK SERVICES

Scrabster Harbour Trust and Lerwick Harbour Trust have confirmed that no significant works will be required in the period up to 2025. We understand that this will also be the case for Stromness and Hatston (Kirkwall).

6.5 CALEDONIAN MACBRAYNE SERVICES

6.5.1 CLYDE AREA

Ownership

Table 6.3 shows details of ownership of facilities used by CalMac services in the Clyde area.

TABLE 6.3: CALMAC SERVICES: CLYDE AREA: SHORE FACILITIES OWNERSHIP			
Port	Ownership		
	Pier/Slip	Linkspan	Building
Wemyss Bay	CalMac	CalMac	CalMac/Network Rail
Rothesay	ABC	CalMac	ABC
Ardrossan	Clydeport	Clydeport	Clydeport
Brodick	CalMac	CalMac	CalMac
Largs	CalMac	n/a	CalMac
Cumrae	CalMac	n/a	n/a
Gourock	CalMac	CalMac	CalMac
Dunoon	ABC	ABC	ABC
Colintraive	CalMac	n/a	CalMac
Rhubodach	CalMac	n/a	n/a

Note: n/a denotes not applicable

Infrastructure Works

In terms of known works Scottish Executive have announced the following programme of works in the period to 2008:

- Upgrading works at Largs and Cumrae prior to the new build vessel being deployed on the route in 2007.
- Works at Wemyss Bay to accommodate new vessels.
- A replacement linkspan at Brodick.
- Works at Rothesay pier (anticipated 2006/07).

6.5.2 ARGYLL ISLANDS & KINTYRE

Ownership

Table 6.4 shows details of ownership of facilities used by CalMac services in the Argyll Islands & Kintyre area.

TABLE 6.4: CALMAC SERVICES: ARGYLL ISLANDS & KINTYRE: SHORE FACILITIES OWNERSHIP			
Port	Ownership		
	Pier/Slip	Linkspan	Building
Oban	CalMac	CalMac	CalMac
Craignure	ABC	ABC	ABC
Fionnphort	ABC	n/a	ABC
Iona	ABC	n/a	n/a
Kennacraig	CalMac	CalMac	CalMac
Port Ellen	CalMac	CalMac	CalMac
Port Askaig	ABC	CalMac	ABC
Lochaline	CalMac	n/a	n/a
Fishnish	CalMac	n/a	CalMac
Tayinloan	ABC	n/a	n/a
Gigha	ABC	n/a	n/a
Claonaig	CalMac	n/a	n/a
Lochranza	CalMac	n/a	CalMac
Portavadie	Not Known	n/a	Bulloch
Tarbert (Loch Fyne)	Tarbert Harbour Authority	n/a	n/a
Coll	CalMac	CalMac	CalMac
Tiree	CalMac	CalMac	CalMac
Colonsay	CalMac	CalMac	CalMac
Kilchoan	CalMac	n/a	n/a
Tobermory	CalMac	CalMac	CalMac
Lismore (Achnacroish)	ABC	n/a	n/a

Note: n/a denotes not applicable

Infrastructure Works

Information from Scottish Executive shows the following:

- Works at Lismore to accommodate the cascaded vessel from the Largs route, prior to its introduction on the route in 2007.
- A major upgrade of berthing facilities at Kennacraig prior to 2008.

ABC have informed us that they expect shore infrastructure replacement/upgrade works at their facilities as follows:

- Fionnphort: 2010.
- Iona: 2010.
- Tayinloan: 2010.
- Craignure: 2012.
- Gigha: 2020.

Please note that this is the programme that is presently proposed and is subject to agreement by the Council and funding being available.

Tarbert (Loch Fyne) Harbour Authority have stated that the as the slipway used by the CalMac service was constructed three years ago they do not foresee any need for replacement or significant upgrade.

6.5.3 HIGHLAND COUNCIL AND WESTERN ISLES AREAS

Ownership

Table 6.5 shows ownership of shore facilities used by CalMac services in the Highland Council and Western Isles areas.

TABLE 6.5: CALMAC SERVICES: HIGHLAND COUNCIL AND WESTERN ISLES AREAS: SHORE FACILITIES OWNERSHIP			
Port	Pier/Slip	Ownership	
		Linkspan	Building
Stornoway	Stornoway Pier & Harbour Commission	Stornoway Pier & Harbour Commission	Stornoway Pier & Harbour Commission
Ullapool	Ullapool Harbour Trust	Ullapool Harbour Trust	Highland Council
Mallaig	Mallaig Harbour Authority	CalMac	CalMac
Armadale	CalMac	CalMac	CalMac
Uig	Highland Council	Highland Council	CalMac
Lochmaddy	CnES	CnES	CnES
Tarbert (Harris)	CalMac	CalMac	CalMac
Otternish	CnES	n/a	CnES
Leverburgh	CnES	n/a	n/a
Sconser	Highland Council	n/a	n/a
Raasay	Highland Council	n/a	n/a
Castlebay	CalMac	CalMac	CalMac
Lochboisdale	CalMac	CalMac	CalMac
Barra (Airdmor)	CnES	n/a	n/a
Eriskay	CnES	n/a	n/a
Canna	NTS	n/a	n/a
Rum	SNH	n/a	n/a
Eigg	Highland Council	n/a	n/a
Muck	Highland Council	n/a	n/a

Note: n/a denotes not applicable

Infrastructure Works

In terms of infrastructure works:

- A new pier for Raasay is under development at a different location (Churchton Bay) from the existing facility.
- All other piers owned by Highland Council have lives beyond 2025, although ongoing repairs will be required at Uig.
- Mallaig Harbour Authority has informed us that no significant works are anticipated. This holds even if a Mallaig-Lochboisdale service is reinstigated.
- No significant works are expected at either Ullapool or Stornoway before 2025.
- CnES indicated that upgrading of Lochmaddy pier, possibly including works to the linkspan, might be required in the medium term.

- CnES have also stated that their other facilities would need to be upgraded before 2025 but there is no information on the types of works required.

6.6 ARGYLL & BUTE COUNCIL SERVICES

Information from ABC regarding shore infrastructure upgrades indicates the following dates:

- Islay-Jura: imminent (Port Askaig).
- Cuan-Luing: imminent.

6.7 HIGHLAND COUNCIL SERVICES

Highland Council have provided the following information:

- Shore structure at Inverie (Knoydart) is currently being replaced. The new structure will be owned by the Council and has a design life of 120 years.
- The slipways used by the Camusnagaul and Corran services are owned by the Council. Provision of a permanent berthing structure for the Corran service would cost £2 million but there is no identified timescale for the necessary works.

6.8 SPT SERVICES

The shore facilities at Kilcreggan and Helensburgh are both owned by ABC. They have each had significant investment in the past two years although given that they are timber structures ABC anticipate that some pile replacement would be necessary within the next ten years.