

Prepared by

Jacobs AECOM

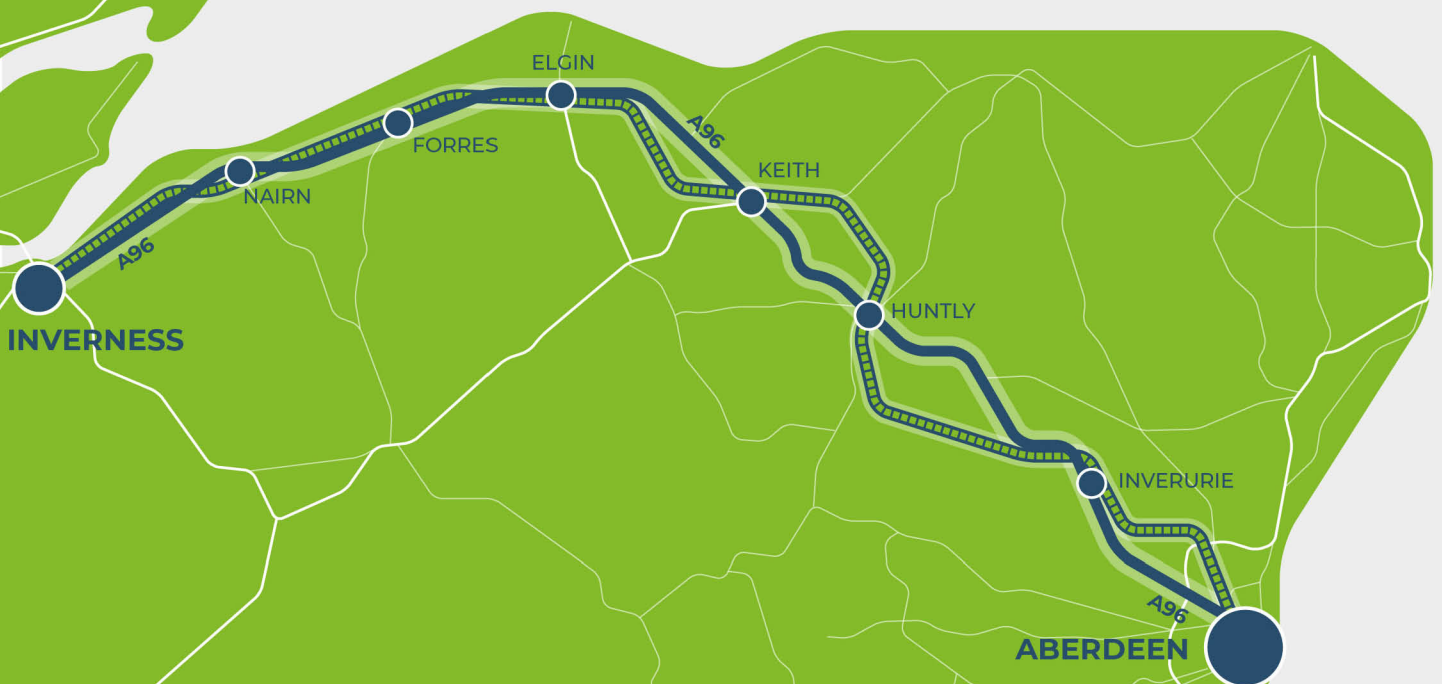
for



A96 Corridor Review

Partial Business and Regulatory
Impact Assessment (BRIA) Report
(Draft)

2024



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Acronyms

AADF	Annual Average Daily Flow
AST	Appraisal Summary Table
BRIA	Business Regulatory Impact Assessment
CT	Community Transport
DRT	Demand Responsive Transport
HGV	Heavy Goods Vehicle
ICE	Internal Combustion Engine
LGV	Light Goods Vehicle
MaaS	Mobility as a Service
NPF4	National Planning Framework 4
NSET	National Strategy for Economic Transformation
NTS2	Second National Transport Strategy
ONS	Office for National Statistics
SIC	Standard Industrial Classification
STAG	Scottish Transport Appraisal Guidance
STPR	Strategic Transport Projects Review
STPR2	Second Strategic Transport Projects Review
TPO	Transport Planning Objective

1. Introduction – A96 Corridor Review

1.1 Background

- 1.1.1 In August 2021, it was agreed by the Scottish Government to take forward a transport enhancements programme on the A96 corridor that improves connectivity between surrounding towns, tackles congestion and addresses safety and environmental issues.
- 1.1.2 Whilst the current plan is to fully dual the A96 route, it was agreed as part of this process there would be a transparent, evidence-based review of the programme, to include a climate compatibility assessment to assess direct and indirect impacts on the climate and the environment. Other statutory assessments would also be undertaken which include a Strategic Environmental Assessment (SEA) and Statutory Impact Assessments (SIAs).
- 1.1.3 As it has already received Ministerial consent following a Public Local Inquiry, dualling of the A96 from Inverness to Nairn as well as a bypass of Nairn is separate from the wider A96 review process.
- 1.1.4 The A96 Corridor Review is being carried out in accordance with the Scottish Transport Appraisal Guidance (STAG).¹ STAG is the best practice, objective-led approach to transport appraisal. The transport appraisal has considered all relevant transport modes within the A96 corridor, including active travel, public transport, rail and roads-based transport modes. Adopting STAG also brings the review in line with the same methodology as set out in the Second Strategic Transport Projects Review (STPR2).
- 1.1.5 The A96 Corridor Review is being carried out by design consultants Jacobs AECOM acting on behalf of Transport Scotland. Jacobs AECOM supported Transport Scotland undertaking STPR2. The review considers transport problems and opportunities within the A96 corridor. It also looks at the changing policy context and other key considerations, such as development and growth aims for the corridor and surrounding area. Additionally, it considers the impact of the global climate emergency and the COVID-19 pandemic on how people work and travel within the corridor.

1.2 A96 Corridor Review Partial BRIA

- 1.2.1 A Business and Regulatory Impact Assessment (BRIA) is being undertaken as part of the A96 Corridor Review. A BRIA helps to assess the likely costs, benefits, and risks of any proposed primary or secondary legislation, voluntary regulation, codes of practice, guidance, or policy changes that may have an impact on the public, private or third sector (such as charities, community groups and other non-profit-making organisations). The Scottish Government recommends and encourages the completion of a BRIA as best practice to assess the impact of new legislation, as well as other changes such as voluntary guidance or policy changes, even where they do

not necessarily present obvious additional burdens. In such cases, it can either help confirm understanding that the impact will not change or identify and address unintended impacts which have not been identified previously.

- 1.2.2 The content of a BRIA should be proportionate to the problem involved and the size of the proposal. A Business and Regulatory Impact Assessment Toolkit and Template has been developed by Scottish Government to provide guidance and information for completing a BRIA.[#] This guidance encourages the preparation of a partial BRIA to inform consultation with stakeholders.
- 1.2.3 In line with the toolkit, an initial document was developed providing baseline information on businesses and affected parties within the area as well as an initial screening assessment of the likely impacts, costs, benefits and risks of the various transport intervention options of the A96 Corridor Review. This was used to engage with selected relevant stakeholders in early 2023.
- 1.2.4 Following feedback from stakeholders and due to the high-level nature of the A96 Corridor Review proposals at this stage, it was deemed appropriate to limit the preparation of a BRIA to a Partial BRIA for the purpose of the A96 Corridor Review. Therefore, this document presents a Partial BRIA and sets out the purpose, objective and rationale for the A96 Corridor Review. The main purpose of the Partial BRIA is to provide contextual information and identify high-level potential business and regulatory impacts. The intention is that a full BRIA would then be produced at the detailed design stage for any options taken forward as an outcome of the A96 Corridor Review. This document will form the basis for the full A96 BRIA when it is undertaken.

2. Approach to the Partial BRIA

2.1 Introduction

2.1.1 This Partial BRIA provides an initial assessment as to whether the options being considered as part of the A96 Corridor Review have the potential to impact on businesses, consumers and other organisations in the area.

2.2 Assessment Criteria

2.2.1 The guide questions used to undertake the Partial BRIA are set out below. These are taken from the Scottish Government's BRIA toolkit and template.

2.3 Sectors and Groups Affected

2.3.1 Businesses – including Scottish Firms Impact Test and Competition Assessment

- Will the review have an impact on the competitiveness of Scottish companies within the UK/Europe/globally?
- What are the relevant businesses, sectors, markets, products, or services that might be affected by the changes?
- Will the changes restrict or increase competition in these markets?
- Will it make it harder for new firms to enter a market?
- Will it impact suppliers (number/range/competitiveness)?
- Could impacts be different for different parts of an industry or different parts of a supply chain?
- Will micro and small businesses be impacted differently? (Consider regulatory burden, compliance flexibility options, distribution of benefits, cost penalties of non-compliance)

2.3.2 Local authorities

- What is the impact on local authorities?

2.3.3 Consumers – includes users of public services

- Will the quality, availability or price of goods or services in a market be affected?
- Does the review affect the essential services market, such as energy or water?
- Does the review involve storage or increased use of consumer data?
- Could there be increased opportunities for third parties to take advantage of government initiatives to target consumers whose circumstances make them more vulnerable?
- Could the review add complexity in a market, which could lead to information asymmetries or make it more difficult for consumers to understand their rights?

- Could the review affect routes for consumers to seek advice or raise complaints on consumer issues?
- Will it limit the choices and information available to consumers?

2.3.4 Organisations in the third sector

- What is the impact on organisations in the third sector?

2.4 Regulatory and EU Alignment Impacts

2.4.1 Trade – International and Intra-UK

- Is this review likely to impact on international trade?
- Does this review have the potential to affect imports or exports of a specific good or service, or groups of goods or services?
- Is this review likely to impact on intra-UK trade?

2.4.2 EU Alignment

- Is this review likely to impact on the Scottish Government's policy to maintain alignment with the EU?

2.5 Digital Impact Test

- Do the changes take account of changing digital technologies and markets?
- Will the changes be applicable in a digital/online context?
- Will the changes potentially have an adverse impact on traditional or offline businesses?

If the action can be applied in an offline and online environment, will this have any adverse impacts on incumbent operators?

2.6 Legal Aid Impact Test

- Could the review give rise to increased use of legal processes or create new rights or responsibilities, which could have an impact on the legal aid fund?

3. Purpose and Intended Effect

3.1 Background

- 3.1.1 The background of the project is discussed in Chapter 1. This report identifies potential impacts of the A96 Corridor Review detailed appraisal options on businesses, local authorities, regulators, consumers, and other relevant stakeholders. Full Dualling and the transport packages are outlined in Chapter 7 of this report.
- 3.1.2 Findings from this Partial BRIA will be used to inform the overall design and development of the A96 Corridor Review and form the basis for a full BRIA at the detailed design stage.

3.2 Objective

- 3.2.1 Transport Planning Objectives (TPOs) have been developed for the A96 Corridor Review based on the STAG process. TPOs have been aligned to those set at the national level in STPR2, supported by corridor-specific sub-objectives. An overarching set of TPOs have been established as part of STPR2, which are closely aligned with the four priorities, 12 outcomes and 24 policies contained within National Transport Strategy 2 (NTS2). To reflect the nature of the corridor, the overarching TPOs have been amended slightly from the national-level STPR2 objectives. These cover sustainability, accessibility to services, placemaking, reliability, and are detailed in the Case for Change Report.ⁱⁱⁱ

3.3 Rationale for Government Intervention

- 3.3.1 The Scottish Government's National Performance Framework's^{iv} 'Fair Work and Business' outcome emphasises the role of the thriving and innovative business sector in Scotland, with quality jobs and fair work for everyone. The vision is to fully support business and social enterprise to successfully attract and retain new talent. This also aligns with the UN Sustainable Development Goal of '8: Decent Work and Economic Growth' (UN, 2015). The Partial BRIA aims to consider these goals and the impact on businesses in the area when identifying transport intervention options to take forward for further consultation.
- 3.3.2 In addition, successful implementation of the actions set out in the route map of the Climate Change Plan 2018–2032^v is expected to transform the way of living in Scotland, where a new localism thrives in neighbourhoods; where streets become places that are safe for people of all ages to travel by walking and cycling whilst maintaining private vehicle access for those with disabilities; where longer journeys are made by convenient and affordable public or shared transport; and with greater use of online access to key services and opportunities.

4. Legislation and Policy Context

4.1 Guidance and Legislation

Business and Regulatory Impact Assessments (BRIA): Toolkit

- 4.1.1 This toolkit, published by Scottish Government in 2022, sets out guidance and information on how to complete a BRIA.
- 4.1.2 BRIAs help to assess the likely costs, benefits, and risks of any proposed primary or secondary legislation, voluntary regulation, codes of practice, guidance, or policy changes that may have an impact on the public, private or third sector (such as charities, community groups and other non-profit-making organisations).
- 4.1.3 The purpose of a BRIA is to provide an understanding to interested parties of:
- why the government is proposing to intervene
 - options the government is considering and which is preferred
 - how and to what extent new policies may impact interested parties, business and Scotland's competitiveness
 - the estimated costs and benefits of proposed measures.
- 4.1.4 The Scottish Government recommends and encourages the completion of a BRIA as best practice to assess the impact of new legislation, as well as other changes such as voluntary guidance or policy changes, even where they do not necessarily present additional obvious burdens. In such cases, it can either help confirm understanding that the impact will not change or identify and address unintended impacts which have not been identified previously.
- 4.1.5 The content of a BRIA should be proportionate to the problem involved and the size of the proposal.
- 4.1.6 A BRIA Template was published by Scottish Government in December 2022 and provides a standardised structure for completing a BRIA. This Partial BRIA has been completed in line with the guidance set out within both the BRIA Toolkit and BRIA Template.

4.2 National Policy Context

- 4.2.1 This section provides an overview of the most relevant national policies to the A96 Corridor Review.

National Planning Framework 4 (NPF4)

- 4.2.2 The NPF4 is a long-term plan providing the vision and spatial strategy for Scotland to 2045 and provides guidance to where development and infrastructure should be planned.^{vi}
- 4.2.3 NPF4 identifies six overarching principles to support the delivery of future places. These are:
- Just transition
 - Conserving and recycling assets
 - Local living
 - Compact urban growth
 - Rebalanced development
 - Rural revitalisation.
- 4.2.4 Applying these spatial principles will support the delivery of:
- Sustainable places where we reduce emissions, restore and better connect biodiversity
 - Liveable places where we can all live better, healthier lives
 - Productive places where we have a greener, fairer and more inclusive wellbeing economy.

National Strategy for Economic Transformation (NSET): Delivering Economic Prosperity

- 4.2.5 The National Strategy for Economic Transformation^{vii} is the Scottish Government's economic strategy for Scotland and outlines an ambition for a successful Scottish economy up to 2032. It encourages businesses to join the government in its pursuit of the strategy's ambition of a fairer, wealthier, and greener country.
- 4.2.6 The strategy highlights that success means a strong economy where good, secure and well-paid jobs and growing businesses have driven a significant reduction in poverty.
- 4.2.7 A key aim is to establish Scotland as a world-class entrepreneurial nation with a much stronger pipeline of scaling businesses and founded on a culture that encourages, promotes, and celebrates entrepreneurial activity in every sector of their economy.

National Transport Strategy 2 (NTS2)

- 4.2.8 NTS2^{viii} outlines Scotland's transport vision for the next 20 years through the following four priorities:
- Reduce inequalities
 - Taking climate action

- Delivering inclusive economic growth
- Improving health and wellbeing.

4.2.9 The following transport challenge relevant to the Partial BRIA is identified through NTS2:

- Productivity, labour markets, fair work and skilled workforce, and trade and connectivity: an efficient transport system, that is affordable, fair and inclusive for employers and the workforce will help address some of these challenges.

Strategic Transport Projects Review (STPR)

4.2.10 STPR outlines the Scottish Government's 29 transport investment priorities over the period to 2032.^{ix}

4.2.11 The review recognises the central role of transport; "An efficient transport system is one of the key enablers for enhancing productivity and delivering faster, more sustainable economic growth".

4.2.12 The following objectives were identified for the corridor between Inverness and Aberdeen specifically to:

- improve connectivity, particularly by public transport between Inverness city centre and the growth area to the east including Inverness Airport
- improve journey time and increase opportunities to travel, particularly by public transport, between Aberdeen and Inverness
- reduce the accident rate and severity rate to current national average.

Strategic Transport Projects Review 2 (STPR2)

4.2.13 The second Strategic Transport Projects Review^x informs transport investment in Scotland and helps to deliver the visions, priorities and outcomes set out in the NTS2.

4.2.14 STPR2 has five key objectives that it aims to address:

- Taking climate action
- Addressing inequalities and accessibility
- Improving health and wellbeing
- Supporting sustainable economic growth
- Increasing safety and resilience.

4.2.15 Over a 20-year period (2022-2042), the STPR2 aims to: enhance accessibility across Scotland for residents, visitors and businesses; create better connectivity with sustainable, smart and cleaner transport options; and highlight the vital contribution that transport investment can play in enabling and sustaining Scotland's economic growth.

5. Baseline Summary

5.1 Demography

5.1.1 The Case for Change Report provides a detailed profile of the demographic conditions within the A96 Transport Appraisal Study Area, which is the study area defined in the report. This is shown in Figure 5-1, taken from the Report. It encompasses sections of the four local authority areas of Aberdeen City Council, Aberdeenshire Council, Moray Council and The Highland Council.

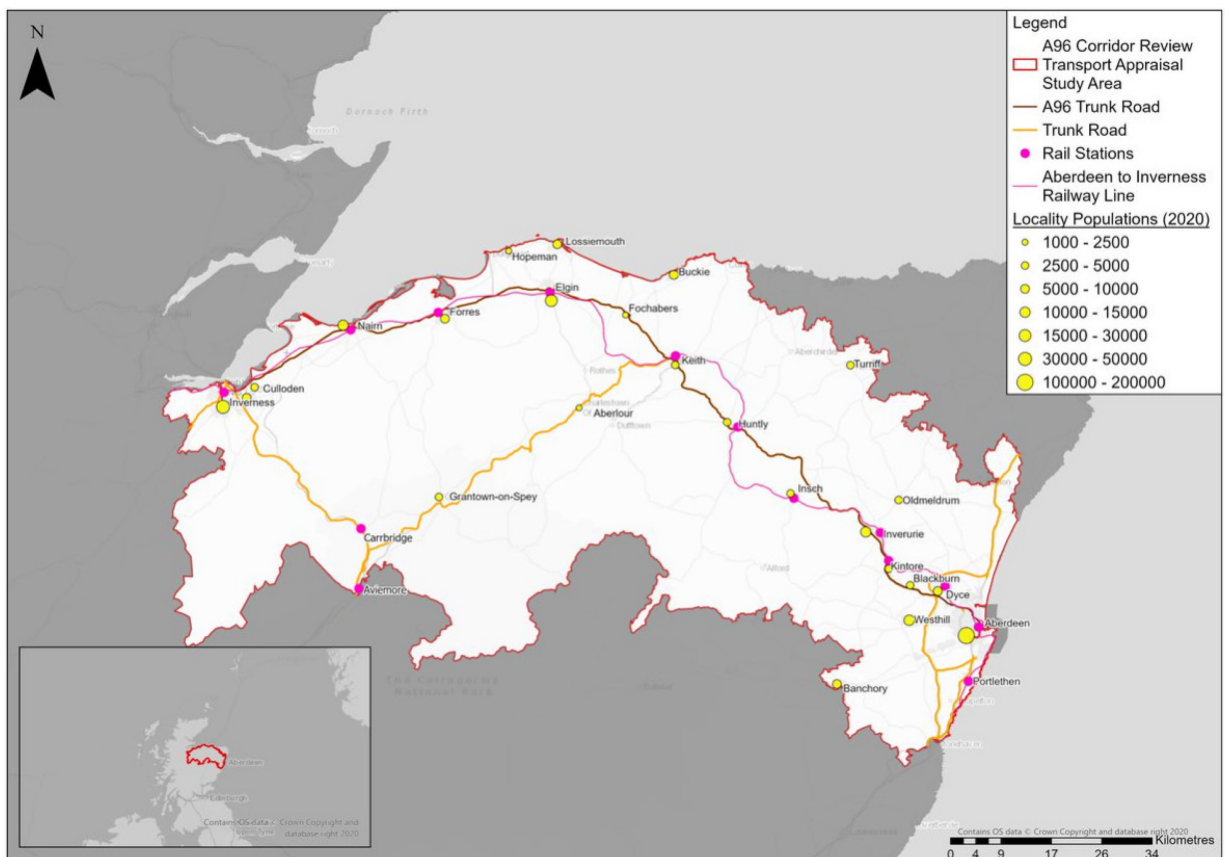


Figure 5-1: Geographic Context of the Transport Appraisal Study Area for the A96 Corridor Review

- 5.1.2 The total population within this study area, as indicated in Figure 5-2, is just under 551,000. Population density across the study area is slightly greater than Scotland as a whole, though this is only a result of the heavily dense population in Aberdeen, the third largest population area and city in Scotland, behind only Glasgow and Edinburgh. Considering the other three LA areas within the study boundary, the population density is only 47 persons per sq. km, indicating a much sparser population and greater rurality than across Scotland as a whole.
- 5.1.3 Approximately 48.4%, 47.4% and 41.6% of the populations of Aberdeenshire, Moray and Highland respectively live in areas classified by the Scottish Government as 'rural'.

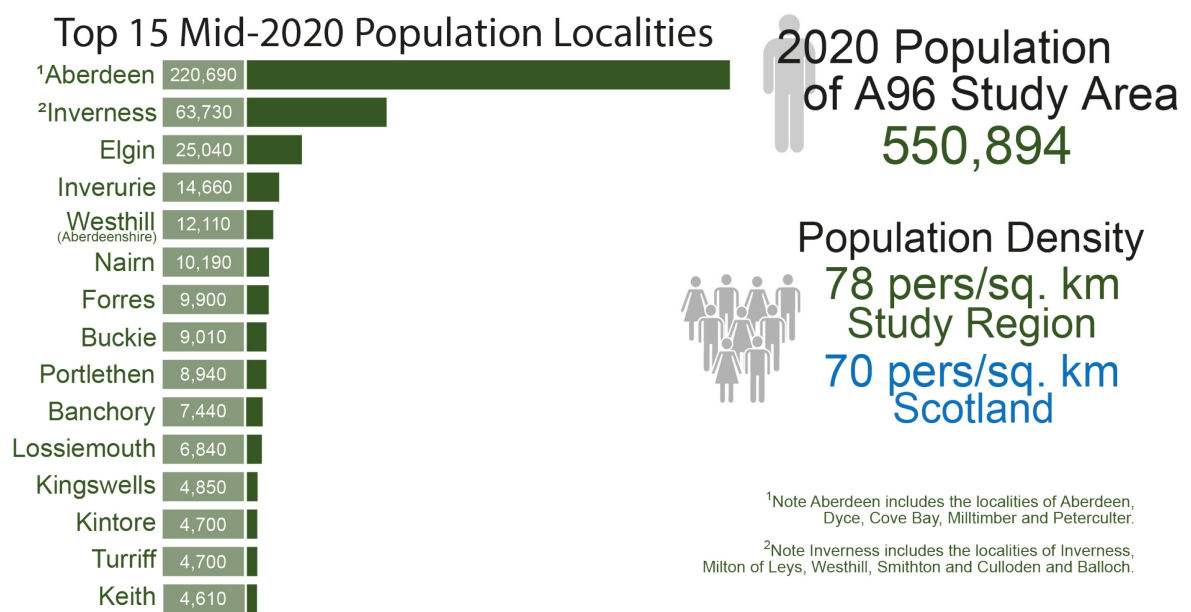


Figure 5-2: Largest Settlements by Population (2020) (Source: A96 Corridor Review Initial Appraisal: Case for Change, 2022)

5.2 Users of the A96

- 5.2.1 Data from the Department for Transport ^{xi} shows the average annual daily flow (AADF) meaning the number of vehicles that travel passed a count point on an average day of the year.

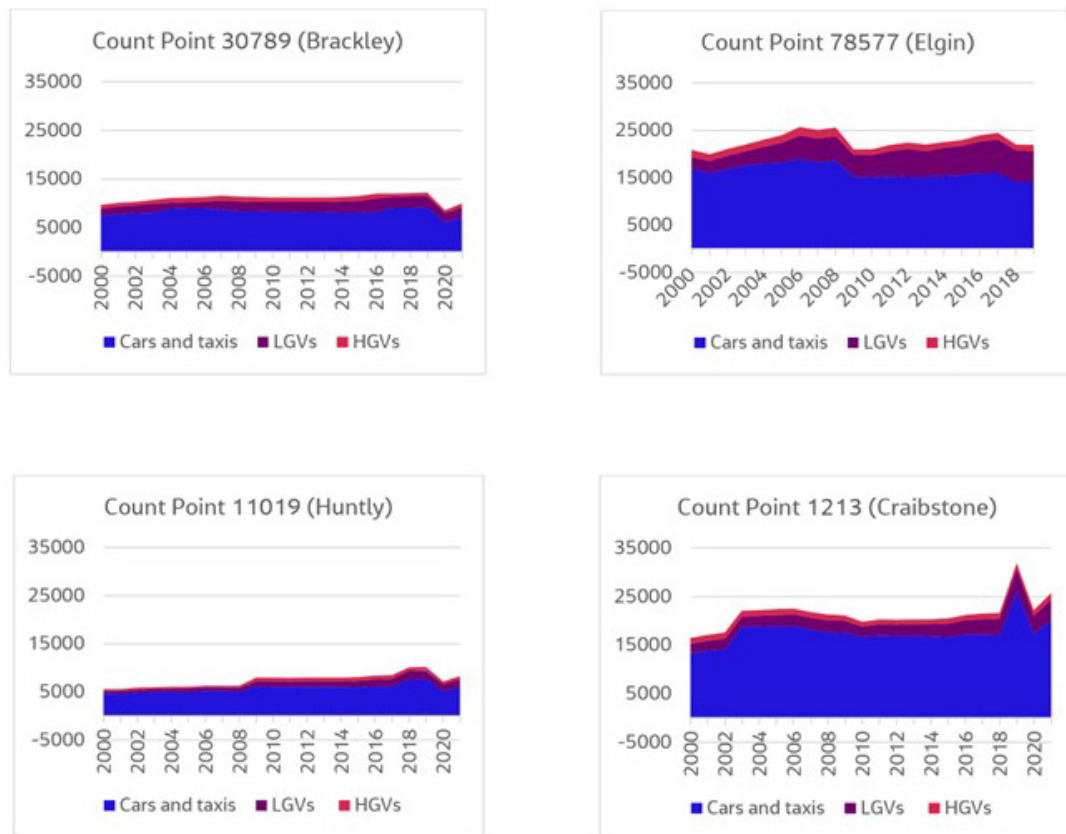


Figure 5-3: Traffic Counters at Various Count Points Along A96 (Source: Department for Transport)

- 5.2.2 Figure 5-3 illustrates the proportion of road users along the A96 at different count points in a variety of locations, both rural and urban. The majority of users of the road mainly travel by car, with up to 20,000 trips per day at count point 78577 (Elgin). HGVs and LGVs account for a much smaller proportion of trips at each count point, with a relatively higher proportion at Elgin in comparison to other count points. The road is particularly busy at more urban locations, such as count point 1213 (Craibstone), with AADF up to 32,000 in 2019.
- 5.2.3 HGV presence can be a good indicator of business travel on roads. In Scotland overall, HGVs account for around 6% of the total traffic volume on roads.^{xii} The Case for Change Report notes that across all traffic counters along the A96, up to 16% of vehicles in 2019 were HGVs and in general the proportion of these vehicles is above 8% for the whole route; a higher rate than average for Scotland. It is clear that the road is important for the movement of goods and freight, and therefore for business.
- 5.2.4 Data from the Scottish Household Survey^{xiii} shows that the main mode of transport for households is car. The Survey reports that less than 3% of trips are for business purposes and 23% are for commuting. However, most trips are for non-work purposes such as shopping (24%), visiting friends and relatives (10%), entertainment (6%), and education (6%).

- 5.2.5 Freight statistics from the Department for Transport^{xiv}, as shown in Table 5-1, provide an overview of goods moved by commodity across Great Britain. Data shows that road freight volume is high in the food and beverage, mining and quarrying, and agricultural industries and so it is likely that the majority of road freight is found in these sectors.
- 5.2.6 The Case for Change Report shows that freight traffic is heavily dependent on the A96 to provide access to key markets and destinations, including ports and harbours near to the A96 and beyond.

Table 5-1: Goods Moved by Commodity (July 2021 to June 2022 in Great Britain)

Commodity	Goods moved (million tonne km)
Food products, including beverages and tobacco	31,690
Metal ore and other mining and quarrying	16,961
Waste related products	13,529
Agricultural products	11,987
Empty containers, pallets, and other packaging	10,967
Glass, cement, and other non-metallic mineral products	8,218
Wood products	6,807
Chemical products	6,782
Coke and refined petroleum products	4,896
Mail and parcels	4,498
Metal products	4,014
Transport equipment	3,666
Household and office removals and other non-market goods	2,504
Machinery and equipment	2,148
Textiles and textiles products, leather, and leather products	1,038
Furniture and other manufactured goods	1,026
Coal and lignite	198

Source: Department for Transport (2022).

5.3 Businesses along the A96

- 5.3.1 It is likely that LGV and HGV journeys are most commonly used by businesses in industries such as agriculture, timber, energy, and logistics, where transportation of large material is necessary.
- 5.3.2 Business count data for Scottish Intermediate Zones (outlined in Figure 5-4) within the A96 Corridor Review study area is set out in **Table 5-2**.^{xv} This shows that there is a high presence of construction, agriculture, forestry, and fishing businesses located along the A96, but fewer in industries such as mining, quarrying, and utilities. When broken down further (by two-digit Standard Industrial Classification (SIC) code), data shows that a large number of businesses along the A96 are related to crop and animal production services.

Table 5-2: Businesses Within the A96 Corridor Review Study Area

Industry	Business Count
Agriculture, forestry and fishing	1,175
Crop and animal production	1,035
Forestry and logging	100
Fishing and aquaculture	40
Manufacturing	580
Manufacture of food and beverages	30
Manufacture of wood	30
Manufacture of fabricated metal products	110
Transport and storage	420
Postal and courier services	155
Mining, quarrying and utilities	90
Electricity, gas, steam, and air conditioning supply	10

Source: ONS (2022) UK Business Counts. Note - not every two-digit SIC code industry is captured in the breakdown.



Figure 5-4: Business Count Study Area

- 5.3.3 It is also outlined in the Case for Change Report that the food and drink industry is a key sector nationally, regionally and locally, with Moray being home to world-renowned brands in food and drink such as Walker's Shortbread, Baxters and Speyside whisky. With Moray home to approximately 44% of all malt whisky distilleries in Scotland, the A96 Trunk Road is integral to the sector.^{xvi}
- 5.3.4 The timber and logging industry is another prominent industry in the region, with the individual Grampian and Highland Regional Timber Transport Group's estimating a combined production of over 20 million tonnes of timber from 2020 to 2029.
- 5.3.5 The strong reliance on trade and production in industry means a high proportion of freight travel along the A96. Industries such as food and drink production, agriculture and fishing all require the movement of goods to maintain business productivity. In particular, Aberdeen and Peterhead were noted through STPR2 as having major freight tonnage movements. Access to the ports is likely to come at least in part from the A96, which increases HGV traffic on the routes.
- 5.3.6 As discussed above, these businesses are common along the A96, and therefore the corridor contains many businesses that are freight intensive.
- 5.3.7 Renewable energy is also a key emerging sector along the A96 corridor. In Moray, wind energy is being harnessed, with the Moray East offshore wind farm having the capacity to produce enough clean energy to power 950,000 homes, saving 1.4 million tonnes of CO₂ every year.^{xvii} A second farm in Moray West is due to be

operational in 2024/25.^{xviii} Aberdeen and Aberdeenshire are also active in increasing their renewable energy output. The world's largest floating offshore windfarm is based approximately 15km from Aberdeen, producing 50MW of energy since going operational in 2021, with the capability of powering more than 50,000 households per year.^{xix}

6. Consultation

6.1 Introduction

- 6.1.1 The STAG process is firmly founded on participation and consultation. Accordingly, public engagement has been pivotal to inform the A96 Corridor Review at all key stages. A comprehensive stakeholder engagement plan was developed at an early stage in the review process and has been carefully devised to ensure general representation of key businesses and organisations.
- 6.1.2 There has been engagement throughout the Corridor Review in order to provide early opportunities within appropriate timeframes for opinions to be expressed on the transport intervention options for the A96 corridor as they have developed.

6.2 Public Consultation

- 6.2.1 During the course of the A96 Corridor Review, there has been extensive public engagement. An initial four-week public consultation was held from 12 May 2022 to 10 June 2022. During this period, the public and stakeholders were invited to share insights into travel habits, general thoughts on travel and transport along the corridor and identify problems and potential opportunities along the route.
- 6.2.2 In total, 4,687 responses were received via the online consultation survey and email responses. A detailed overview of the findings are available in the Stakeholder and Public Engagement Consultation Report (Transport Scotland, 2022).

6.3 Stakeholder Engagement Activities

- 6.3.1 As part of the ongoing engagement with stakeholders, a series of stakeholder engagement sessions were held via an online collaboration platform to understand the views of different stakeholder groupings throughout the corridor. All sessions were attended by Jacobs AECOM representatives and split by the following stakeholder groupings:
- representatives from the four local authorities and Highlands and Islands Transport Partnership (HITRANS)
 - environmental stakeholders, including local authority Environmental Planners
 - North East Scotland Transport Partnership (Nestrans) and Aberdeenshire Council
 - representatives from statutory environmental groups
 - representatives from active travel and accessibility stakeholders
 - representatives from business and business organisation stakeholders
 - representatives from Stagecoach
 - representatives from Police Scotland.

6.4 Business Workshop Engagement Activities

- 6.4.1 A consultation workshop was held for the Partial BRIA on 15 March 2023, following the issue of the initial draft Partial BRIA to 20 businesses and organisations. The workshop was attended by representatives from The Highland Council, Moray Council, HITRANS and Nestrans.

Summary of Findings

- 6.4.2 There was a clear consensus that policy and guidance should be reviewed as part of the Partial BRIA, giving particular focus to NPF4 and the National Strategy for Economic Transformation. These documents have now been considered as part of Chapter 4: Legislation and Policy Context in this document.
- 6.4.3 In addition, some stakeholders requested that more detail should be included in regard to the presence of different industries in the area, such as manufacturing and renewable energy. In response to this, Chapter 5: Baseline Summary now considers business counts data to build a clearer picture of businesses and industries present in the study area. Analysis has also been undertaken about the reliance of industries on the A96 Trunk Road.
- 6.4.4 Finally, it was suggested that although the initial draft Partial BRIA was a useful document to set out the context in relation to business in the area and high-level considerations, another Partial BRIA (this document) should be drafted to be used to consult more widely with stakeholders. A full BRIA would then be undertaken on options taken forward to the next stage of design and assessment.

7. Options

7.1 Introduction

- 7.1.1 This section provides an overview of Full Dualling and each of the options ('packages') that are being considered as part of the A96 Corridor Review.
- 7.1.2 In line with the detailed appraisal stage, the transport options have been grouped into six packages. The following sections provide an overview of the current plan to dual the A96, followed by a description of the alternative transport packages.

7.2 A96 Full Dualling

- 7.2.1 The A96 Full Dualling Hardmuir to Craibstone, hereafter referred to as the A96 Full Dualling option, is the current Scottish Government commitment and focuses on improving the trunk road network in the north-east of Scotland to address road safety concerns and provide resilience and reliability improvements for a key connection between Inverness and Aberdeen.
- 7.2.2 For communities and businesses on the corridor, the dualling will provide greater connectivity between Inverness and Aberdeen and, in combination with the dualling of the A9, improve connectivity to the Central Belt.
- 7.2.3 A full package description and summary of appraisal is available in the A96 Corridor Review, Strategic Business Case - Transport Appraisal Report (Draft)^{xx}.

7.3 A96 Corridor Review Transport Packages

- 7.3.1 Transport packages one to five, and the Refined Package, contain a variety of interventions which aim to deliver network, safety, journey time, and reliability improvements (see **Table 7-1**). These options have been assessed collectively under 'Transport Packages Assessment' in Section 8.3 of this Partial BRIA Assessment.
- 7.3.2 With active travel interventions, the packages aim to deliver high-quality networks of active travel and facilitate placemaking improvements within settlements through creating active communities and active connections.
- 7.3.3 The packages also include a number of public transport options targeted at delivering faster and more reliable journey times, as well as improving the overall passenger experience. This includes measures such as bus priority measures, rail improvements, bus and rail station improvements, and the use of flexible services such as Demand Responsive Transport (DRT), Community Transport (CT), and Mobility as a Service (MaaS).
- 7.3.4 The introduction of rail freight terminals and gauge enhancements to encourage freight to be transported by rail also forms a component of some of these transport packages.

- 7.3.5 Some packages aim to improve the safety, resilience, and reliability of the A96 through the provision of bypasses, which would address real and perceived severance within communities by removing through trips.
- 7.3.6 Further options within the packages encourage a shift away from internal combustion engine (ICE) vehicles, with the development of the A96 Electric Corridor and alternative refuelling infrastructure along the A96 corridor and interfacing local roads. In addition, there are improvements to road safety through improved overtaking opportunities, junction improvements and improvements to the alignment of the carriageway at targeted locations along the route.
- 7.3.7 Full package descriptions and summaries of appraisal are available in the A96 Corridor Review, Strategic Business Case - Transport Appraisal Report (Draft)^{xxi}.

Table 7-1: Options contained in each package

Option	Package 1	Package 2	Package 3	Package 4	Package 5	Refined Package
Active Communities	✓	✓		✓	✓	✓
Active Connections			✓	✓	✓	
Bus Priority Measures and Park and Ride	✓	✓	✓		✓	
Improved Public Transport Passenger Interchange Facilities	✓	✓		✓	✓	✓
Investment in DRT and MaaS	✓	✓	✓		✓	✓
Introduction of Rail Freight Terminals				✓	✓	
Linespeed, Passenger and Freight Capacity Improvements on the Aberdeen to Inverness Railway Line	✓	✓	✓	✓	✓	✓
Targeted Road Safety Improvements		✓	✓	✓	✓	✓
Elgin Bypass	✓				✓	✓
Keith Bypass	✓				✓	✓
Inverurie Bypass	✓				✓	
Forres Bypass	✓				✓	
A96 Electric Corridor	✓	✓	✓	✓	✓	✓

8. Sectors and Groups Affected

8.1 Introduction

8.1.1 This section provides a screening of the high-level potential impacts of the A96 Corridor Review interventions on various sectors and groups such as businesses, organisations, and consumers. This is based on the screening guide shown in Table 2-1 which is based on the assessment questions from the Scottish Government's BRIA template. The assessment considers appraisal work carried out on Full Dualling and the packages whilst also considering baseline data and evidence for sectors and groups affected.

8.2 A96 Full Dualling – Potential Impacts

Businesses

8.2.1 As discussed in **Chapter 5: Baseline Summary**, the A96 is currently dominated by car journeys for non-work purposes, rather than HGV or LGV trips which are more likely to be for business use. Therefore, the congestion and traffic issues discussed in the Case for Change Report may be exacerbated by these car trips, which may in turn be negatively impacting business trips.

8.2.2 Traffic modelling shows that by dualling the road, it is likely that delays would decrease, improving reliability of the trunk road network.

8.2.3 Industries such as food and drink production, and agriculture and fishing are all prominent in the area and rely on the A96 for the movement of goods to maintain business productivity. It is likely that these industries are most likely to be affected by changes to the A96. Improving the reliability of the trunk road network could be critical for those industries transporting perishable goods.

8.2.4 Dualling the road may also encourage more businesses to use the A96 than currently do, and therefore could enable an increase in competition for businesses currently using the A96.

Local Authorities

8.2.5 Transport Scotland is likely to be the asset owner on completion of construction and is readily capable of arranging the operation and maintenance of the A96 dual carriageway as part of the wider trunk road network. It is assumed that ownership of the sections of the existing A96 that would in effect be 'bypassed' as a result of the option would pass to the relevant local authority.

8.2.6 For local authorities to assume responsibility for ownership of sections of the A96, this could require additional time, resourcing, and costs. However, this may provide cost savings for the local authorities if traffic is displaced from other local roads. The effect on local authority revenues, such as Business Rates and Council Tax, from

changes in the scale of location of economic activity is unknown at this stage of appraisal.

Consumers

- 8.2.7 The increase in LGV trips along the A96 over time suggests that residents rely on goods and services provided by these trips. Consumers may experience increased access to these services if journey times and reliability are improved.
- 8.2.8 Maintenance and upgrading of the strategic road network will help ensure a reliable supply of goods along the A96 Trunk Road.

Organisations in the third sector

- 8.2.9 Impacts are expected to align with impacts to businesses discussed above.

Trade

- 8.2.10 The food and drink industry in Scotland has ambitions to grow significantly by 2030, through increasing output and exports, as well as productivity. In the north of Scotland, Aberdeenshire, Aberdeen City and Moray account for a significant amount of Scotland's food and drink output, with the industry directly and indirectly supporting a large volume of employment in the region. This option would provide additional capacity for road-based trips, which is currently the most commonly used mode of transport for industry, improving the resilience and reliability of this key route and supporting the movement of goods.

EU Alignment

- 8.2.11 No impacts identified.

Digital Impact Test

- 8.2.12 It is clear in the Digital Strategy for Scotland^{xxii} that the Scottish Government recognises the importance of changing digital technologies and markets. From a transport perspective, investment in digital technology can be more effective at managing traffic congestion than improving connectivity on roads.^{xxiii} However, this option does not reflect the importance of these digital technologies.

Legal Aid Impact Test

- 8.2.13 No impacts identified.

8.3 Transport Packages Assessment

Businesses

- 8.3.1 Evidence suggests that the majority of trips along the A96 are non-business related and short in length and therefore could be facilitated with active travel. Providing suitable active travel routes could encourage a move away from car usage along the A96 for these short journeys, and therefore free up the road for business vehicles.
- 8.3.2 If the A96 were to have fewer cars travelling on it, it is likely that journey times would reduce for HGVs and LGVs, saving businesses time and money and increasing competitiveness.
- 8.3.3 Some businesses, sectors, markets, products, or services may be affected by the infrastructure provision for public transport if, for example, it removes space for other travel modes (adverse effect) or improves access for a wider range of employees and consumers (positive effect).
- 8.3.4 If public transport is improved and made more accessible, people may begin to choose to use it over private vehicles. This could reduce the number of cars on the road and free up road space, making it easier for HGVs and LGVs to travel. Facilitating more business travel in this way could increase competitiveness in the local and national market.
- 8.3.5 The A96 Electric Corridor seeks to improve the provision of alternative refuelling infrastructure and facilities along the A96 corridor. Businesses supplying fuel, such as petrol stations, may be disproportionately impacted by this intervention, as an increase in electric vehicles would reduce the need for consumers to purchase petrol. However, with a shift to net zero expected in Scotland, it is likely that petrol-fuelled vehicles will be phased out by the government in coming years.^{xxiv}
- 8.3.6 It is possible that car use may increase with the introduction of an Electric Corridor. This is because electric cars are typically cheaper to fuel and so more people may opt to use cars to travel. This could worsen traffic and congestion and impact on vehicles using the A96 for business.
- 8.3.7 The UK Government has set the target of 2040 for all new HGVs to be zero emission, which is five years after the target of 2035 for cars and vans.^{xxv} Therefore, HGVs may not benefit from electric vehicle infrastructure as soon as other vehicles.
- 8.3.8 However, through enhancing and expanding the network of alternative refuelling infrastructure for electric and/or hydrogen vehicles, and in turn providing operating benefits, there is the potential to move existing road-based freight onto more sustainable alternative fuelled vehicles. This could aid businesses in achieving their net zero targets.

- 8.3.9 In addition, modelling shows that the A96 is a significant freight route, and many freight trips are not destined for the towns that would be bypassed with this intervention. Approximately 90% of HGVs on the A96 travel through Forres and Keith. Bypassing towns such as Forres and Keith is likely to improve journey times for these HGV trips, removing the need to travel through multiple towns.
- 8.3.10 The bypasses however may also result in an increase in the use of private vehicles due to the reduction in congestion.
- 8.3.11 Rail network improvements seek to facilitate the movement of goods via rail freight. Businesses and enterprises that currently transport goods over medium to long distances via road could benefit from a shift to rail freight as a result of the linespeed increases, additional passing loops and provision of freight terminals.
- 8.3.12 Rail freight is a key component of the rail sector's contribution to Scotland's economy. The provision of rail freight terminals is expected to enhance economic growth and private sector investment across Scotland.
- 8.3.13 The reliability of freight journeys would be improved if they transferred to rail as they would avoid congestion and potential accidents. Dedicated rail freight facilities could facilitate the integration of transport modes that move goods, particularly those that are moved via road. Benefits are more likely to be realised for longer distances where rail freight is both more competitive and advantageous.

Local Authorities

- 8.3.14 Transport Scotland is identified to be the responsible asset owner for any intervention introduced on the trunk road network, whereas local authorities would likely be responsible for assets on local roads. It is anticipated that the asset owners would take on the operation and maintenance associated with any intervention, which would have ongoing costs, though third parties or a collaborative approach between asset owners may also be utilised for ongoing operation and maintenance.

Consumers

- 8.3.15 By enabling more opportunities for business travel and increasing competitiveness, the availability of goods in the market may increase, providing benefits to consumers.
- 8.3.16 A potential benefit to consumers is an increased range of travel options. For example, options for public transport and active travel may increase the availability of transport for consumers by making services more accessible and user friendly.
- 8.3.17 If measures are in place to introduce concessionary travel, there may be potential issues associated with data storage of those eligible for concessionary fares.

Organisations in the Third Sector

- 8.3.18 To implement some interventions, it is likely that organisations such as Sustrans will be involved for some measures, particularly those that interact with the National Cycle Network. Other active travel organisations may also be involved, such as Living Streets.

Trade

- 8.3.19 With fewer cars on the roads and the potential for increased business travel, intra-UK trade may increase with the improved ability of commodities to transport goods.
- 8.3.20 Encouraging the use of electric vehicles could increase sales and trade of the vehicles, both internationally and in the UK.
- 8.3.21 The provision of bypasses along the A96 could make the road more attractive for the transportation of goods. This could boost trade within Scotland and the UK as a whole.

EU Alignment

- 8.3.22 No impacts identified.

Digital Impact Test

- 8.3.23 There is potential for online transactions to be introduced when accessing active travel schemes such as bike hire/loan schemes. This could have implications for consumers with regards to payment methods and for those responsible for implementation and maintenance of any related interventions and payment systems.
- 8.3.24 There may also be a need for online or digital transactions to facilitate public transport ticketing options. This could have potential implications on public transport operators and consumers with regards to changes to payment systems. It could also impact on local authorities with regards to concessionary fare payment methods.

Legal Aid Impact Test

- 8.3.25 No impacts identified.

9. Summary and Recommendations

9.1 Summary

9.1.1 This report has set out the approach undertaken to the initial high-level assessment of business and regulatory impacts and demonstrates Transport Scotland's consideration of these stakeholders throughout the A96 Corridor Review process. It identifies the potential high-level impacts on businesses, consumers and others associated with Full Dualling and the various transport interventions and options contained within A96 Corridor Review. The BRIA process started at early stages of transport intervention development to ensure intervention options maximise positive outcomes and, where possible, include appropriate engagement with stakeholders to understand specific requirements.

9.2 Recommendations

9.2.1 The detailed appraisal transport options and interventions are still under review. It is recommended that this Partial BRIA, and the feedback from stakeholder and public consultation, be used to inform the development of a full BRIA for any transport options to be taken forward.

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