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# Islands Connectivity Plan – Strategic Approach

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## Ministerial Foreword

Our islands make an immeasurable economic and social wellbeing contribution to Scotland and Transport connectivity plays an essential role.

Our focus is on ensuring future investments address priorities identified through our work with local communities, to tackle challenges together and fully support their ambitions. Our Vision is that Scotland's ferry services, supported by other transport modes, are:



**Safe, reliable, affordable and inclusive for residents, businesses and visitors enabling transport connectivity, sustainability and growth of island and peninsula communities and populations.**

I would like to thank the individuals and ferry communities who helped shape this Vision and the wider Island Connectivity Plan through the recent consultation or one of the 23 public events held across the country.

This Strategic Approach recognises the role island connectivity has in delivering the four priorities of the First Minister: eradicating child poverty; growing the economy; tackling the climate emergency; and improving public services.

It is clear however that the most immediate issue is to ensure we have reliable and resilient ferry fleets to serve island and peninsula communities which is central to the Vessels and Ports Plan published alongside this document and our draft budget for 2025-26 clearly shows our commitment to achieving this goal.

We plan to invest over £530 million to maintain and enhance our networks serving the west coast and northern isles. This represents an increase of nearly 23% over the 2024-25 budgets and will help support our island businesses and communities as well as strengthening resilience.

However, the needed changes to deliver the transport connectivity islands communities deserve will require continued focus and effort by central and local Governments, operators, asset owners and ferry communities and I will ensure we have ongoing engagement to make our vision a reality.

Jim Fairlie

Minister for Agriculture and Connectivity

# Islands Connectivity Plan

## Scope and purpose

Islands Connectivity Plan (ICP) sets out how ferry services, supported by other transport modes, will be delivered, and strengthened, working towards a long-term vision, and supported by clear priorities and defined outcomes for people and places.

The ICP structure is set out in Figure 1 and is informed by existing Scottish Government and Transport Scotland policies, namely the:

- SG Purpose and Outcomes (National Planning Framework 4, Climate Change Plan Update and the National Strategy for Economic Transformation)
- National Transport Strategy 2 (NTS2)
- National Islands Plan (NIP)
- Second Strategic Transport Projects Review (STPR2).
- Aviation Statement

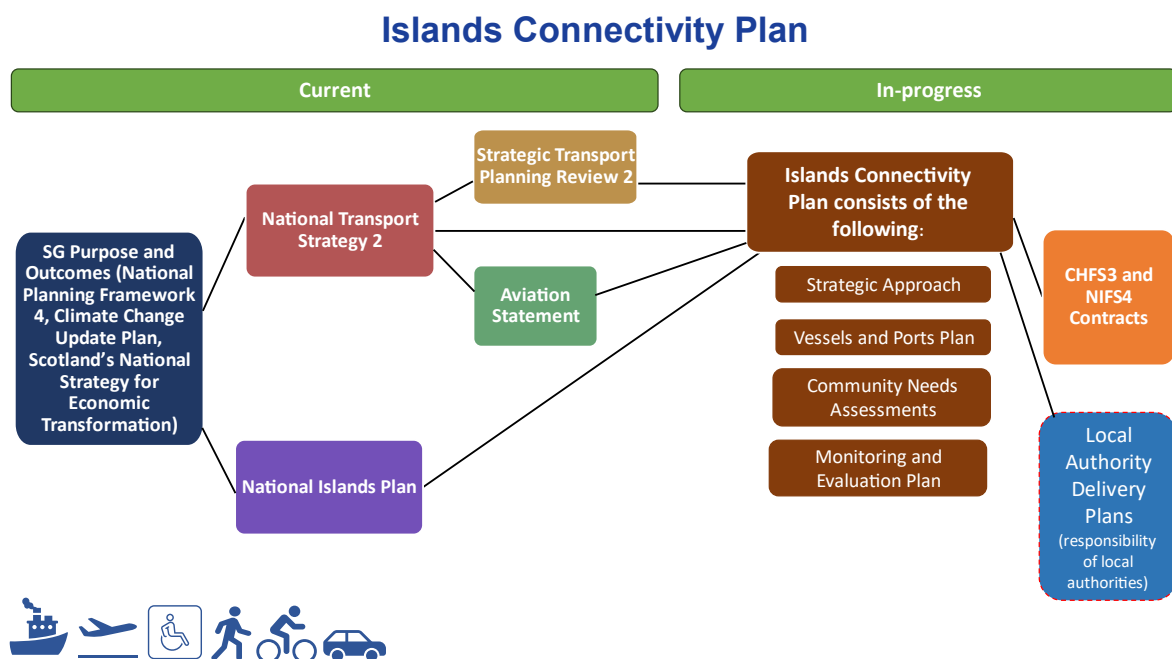


Figure 1 – the Islands Connectivity Plan structure.

This Strategic Approach paper is the core of the Plan and proposes our overall Strategic Approach to island transport connectivity including ferries, aviation, fixed links and, especially, addressing the strategic challenges facing Clyde and Hebrides Ferry Services (CHFS) and Northern Isles Ferry Services (NIFS) services. This Strategic Approach can be applied to all domestic ferry services, however, it respects the autonomy of local authorities to develop their own standards and their

accountability to local electorates for the design and delivery of ferry services for which they are responsible.

A number of delivery plans sit under this Strategic Approach: The Vessels and Ports Plan, the Community Needs Assessments and the Monitoring & Evaluation Plan.

## Future island transport connectivity

The Scotland's National Islands Plan (NIP), published in 2019, provides a framework for actions aimed to meaningfully improve outcomes for island communities. The Plan sets out 13 strategic objectives to address population decline; encourage sustainable economic development; and improve outcomes in areas such as transport, housing, health, education, environment, climate change and energy.

The [Scottish Islands Survey \(2023\)](#) highlighted that satisfaction with links to the Scottish mainland (ferries and flights) has decreased since 2020, however use and perceptions of transport vary greatly between island areas. One in five respondents to the survey find flights (to and from the mainland as well as inter-island) to be reliable and fewer find flights good value for residents. Satisfaction with ferries is slightly higher but still low: two in five respondents report that ferries are reliable and that they are good value for residents. Respondents report finding it difficult to access essential services using public transport and this has worsened since 2020.

Following a review at the end of last year, Scottish Ministers have announced that a new National Islands Plan will be published in 2025.

At its simplest, island transport connectivity should enable sustainable, inclusive, safe and accessible movement of people, goods and services to support sustainable communities and populations. The Islands Connectivity Plan seeks to address existing challenges, especially the reliability and resilience of ferry services, and will look to identify future island transport connectivity needs and opportunities while delivering value for money to residents and taxpayers.

Transport Scotland is working with the Scottish Government's Islands Team to ensure this Islands Connectivity Plan, and the emerging National Islands Plan work in tandem to address the challenges and ambitions of island communities.

The level of future island transport demand and the shape of the transport network will depend on several factors including impacts of future development planning and availability of goods and services on islands. The Scottish Government's [4th National Planning Framework](#) promotes local living and aims to encourage, promote and facilitate access to local services and create connected communities which prioritise environmental, social and economic sustainability. [Guidance](#) published to support the implementation of local living policy does recognise that flexibility is

required in rural and island areas where distances are often greater and population densities lower.

The Scottish Government remains committed to, whenever possible, reducing the need for island communities to travel long distances to access goods and services, including through better joined up health and transport planning. The future opportunities created by upgraded digital connectivity will mean that some specialist services, for example in healthcare, will be delivered remotely. The same is likely to apply to work, education and social activities. Also, better connected island groups could see a successful and more resilient island generating less need to travel long distances. When people do need to travel or require goods and services from the mainland, they will be able to count on reliable and integrated transport services. The Islands Connectivity Plan and National Islands Plan will work together to deliver this.

Future island population growth may also increase demand for the transport of goods and services to the islands. There could be opportunities for more freight ferries (or freight-only services) and passenger only ferries alongside vehicle ferries, providing alternative services which better reflect the transport needs of some people and businesses.

We can envisage a future of increasing freight demand reflecting the growth of high-quality food, drink and other exports off and on the islands. Growing islands' economies or particular sectors on islands will require adapting to changing transportation needs. Developers and planning authorities are expected to consider the impact on existing ferry services and wider transport system as part of the development planning and any additional transportation costs required should be factored in by the developers.

This Islands Connectivity Plan will aim to identify future islands transport connectivity needs including potential for better connectivity between the islands. The Plan will also recognise how people travel will change. Planning for the future of island transport connectivity should reflect those changes as well as be consistent with the Vision set out in the National Transport Strategy, which is: to have a sustainable, inclusive, safe and accessible transport system, helping deliver a healthier, fairer and more prosperous Scotland for communities, businesses and visitors.

In particular, the implementation of this ICP will aim to improve opportunities for people to travel to and from islands without their own vehicle and in line with Government's commitment to reduce car use by 20%. This is an overall national ambition and there is not a requirement for all individuals to reduce their car use at the same rate or in the same way. Our approach aims to enable everyone in Scotland to consider the role they can play, and we are already seeing innovative solutions from across Scotland's rural and island communities.

Improved public transport connectivity will be available to all, including those without access to a car or those who prefer to travel without one. Interventions that focus on alternative digital and hub-based models to allow people to access goods, services, amenities, and social connections, as well as opportunities to combine and share car trips will be particularly relevant in rural areas and island communities. This means that those people who need to use a vehicle will be able to access the existing public transport services more easily, bringing economic, social and environmental benefits to islands.

We recognise that while reducing car use may be more difficult for some individuals (in many cases due to more remote locations) and that many islanders will choose to continue using their own car to access ferry services, by supporting a range of ways to reduce car use more people will have a choice to not take a car and be able to take action on climate change.

The future is also predicted to see more severe weather events and other impacts linked to climate change – this will mean an increased risk of disruption to transport networks including to and from islands.

The ICP Vessels and Ports Plan, published alongside this Strategic Approach, focuses on improving technical and weather reliability by modernising the CMAL fleet and building the resilience of the ferry network by increasing standardisation of vessels and ports. However, vessel and port design can seek to mitigate these impacts but will never remove them entirely. Therefore, resilience planning for island communities will be essential going forward as will service planning by transport operators to include the restoration of essential services and supplies, whether by air, sea or fixed links.

Future island transport connectivity will consider all options. Aviation has the potential to play an increased role, connecting islands and offering rapid and more reliable travel and good onward connectivity to the rest of Scotland, UK and also to the rest of the world. Air services are already preferred by a number of travellers over longer distances and enjoy a greater relative popularity in winter because of the lower likelihood of flights being affected by bad weather in comparison to ferries. We have also heard that air services, offering lower-cost and more frequent flights connecting islands to the Scottish mainland could be a more desirable option for those choosing to travel without a car.

The Scottish Government is committed to work to decarbonise scheduled flights within Scotland by 2040. Aviation manufacturers are developing low/zero emission hydrogen and electric aircraft, which are most likely to be used initially on shorter routes. This opens up the potential for flights to and between islands to become lower cost and to emit far fewer emissions, although it will be some time before the technology is developed enough for this to become clear. If these new aviation

technologies are introduced on scheduled services there could be a significant change in future demand for ferry services.

In the longer-term, additional fixed links could offer a more resilient transport connectivity to the islands, albeit at a substantial upfront cost.

Whilst island transport connectivity will change, the importance of putting people and place at the heart of decision-making will not. Communities will be listened to and decision-making will be clear. Decisions regarding transport services will be transparent and informed by a wide range of voices.

## Vision and Priorities

This Strategic Approach sets out a Vision supported by four Priorities for the delivery of future ferry services in Scotland. The Vision describes where we want to get to in the future and will guide long-term planning and decision-making for those with direct responsibilities and, with the Priorities, will provide high-level targets for us to monitor and review progress against.

While ferry services are the focus of this paper, we recognise that the Vision and Priorities cannot be successfully delivered in isolation from other transport modes, such as aviation and, in some cases, fixed links.

Additionally, some local authorities and private operators are responsible for their own ferry services, and we encourage them to adopt the Vision and Priorities as our shared desire for ferry services and wider transport connectivity across Scotland.

The Priorities were based on listening to ferry communities as well as the views expressed by those who have an interest in the delivery of ferry services in Scotland. This Strategic Approach paper sets out actions under 12 themes which communities identified needing improvements. Crucially we recognise that reliability and resilience of ferry services matters most to our island communities.

Ferry services, supported by other transport services, play an important part in providing transport connectivity to Scottish islands. Our Vision envisages ferry services being safe, reliable, affordable and inclusive for residents, businesses and visitors enabling connectivity, sustainability and growth of island and peninsula communities and populations.

Our Vision is underpinned by the four Priorities and together they contribute to the delivery of the National Transport Strategy and the National Islands Plan while supporting the delivery of Scotland's National Strategy for Economic Transformation and the National Planning Framework.



## Our Vision

Scotland's ferry services, supported by other transport services, will be safe, reliable, affordable and inclusive for residents, businesses and visitors enabling connectivity, sustainability and growth of island and peninsula communities and populations.

## Our Priorities

### Reliable and Resilient

- Will provide reliable and resilient service
- Will get people and goods where they need to get to
- Will be transparent

### Accessible

- Will ensure safe and fair access
- Will be easy to use
- Will be affordable

### Integrated

- Will support sustainable and active travel choices
- Will support integrated travel
- Will help making ferry dependent communities great places to live

### Environmental Impact and Low Carbon

- Will support cleaner travel choices
- Will adapt to effects of climate change
- Will help deliver our net-zero target

## Priority 1: Reliable and Resilient

Reliable and resilient ferry services that meet the needs of communities and businesses and support the transition to a well-being economy which is fair, green and growing. Our ferry services:

- **Will be reliable and resilient:** to provide certainty on how long a journey will take, and that it will be a simple and comfortable experience. The confidence we will have in our journey will enable us to plan our lives, access medical services, get to work on time, access education, enjoy leisure and recreational

opportunities, make sustainable travel choices, deliver goods efficiently and keep businesses running smoothly.

This outcome is supported by the following themes discussed later in this paper: Reliability and resilience; Timetables, unplanned and essential services; Integration and connectivity of services; Accessibility, Understanding the connectivity needs; Vessels and ports, Capacity and demand, Local authority services.

- **Will get people and goods where they need to get to:** ferry networks and services will be integrated effectively with other transport modes, supporting sustainable travel choices, economic development and adapting to changing requirements of island communities, businesses and visitors while supporting opportunities for developing and new industries.

This outcome is supported by the following themes discussed later in this paper: Understanding the connectivity needs; Vessels and ports; Community voice and transparency; Integration and connectivity of services; Freight; Local authority services; Capacity and demand; Timetables, unplanned and essential services; Fares.

- **Will be transparent:** we will feel included and listened to and we will understand the reasons for decisions being made that affect our daily lives.

This outcome is supported by the following themes discussed later in this paper: Community voice and transparency, Understanding the connectivity needs.

Scotland's National Strategy for Economic Transformation (SNSET) guides us to making our regions, communities, businesses, industries and public services more productive and innovative. International evidence shows that economies with strong productivity score highly on the indicators of a wellbeing economy.

The Islands Connectivity Plan (ICP) will deliver and sustain resilient transport connectivity that can support a high productivity economy for our islands and intends to work with local communities, island businesses and public bodies to ensure that it reflects the economic ambitions of ferry dependent communities.

## Priority 2: Accessible

Ferry services that are safe, accessible and provide easy to use and affordable transport connectivity for all users. Our ferry services:

- **Will ensure that marginalised members of our communities have safe and fair access to ferry services they need.** This will include reducing inequalities and advancing equality of opportunities, for individuals who identify as sharing protected characteristics under the Equality Act 2010, particularly through enhancement of sustainable travel options.

This outcome is supported by the following themes discussed later in this paper: Accessibility; Timetables, unplanned and essential services; Local authority ferries; Integration and connectivity of services; Community voice and transparency; Understanding the connectivity needs; Reliability and resilience.

- **Will be easy to use for all:** our ferry services will recognise that people have different needs and capabilities and will work to ensure that everyone can use the services with as few barriers as possible.

This outcome is supported by the following themes discussed later in this paper: Accessibility; Understanding the connectivity needs; Fares; Integration and connectivity of services; Community voice and transparency; Reliability and resilience; Timetables, unplanned and essential services.

- **Will be affordable:** we will consider options that affect peoples` lives in a way that is affordable and sustainable for ferry users and taxpayers.

This outcome is supported by the following themes discussed later in this paper: Understanding the connectivity needs; Integration and connectivity of services; Capacity and demand; Fares; Freight services.

In line with SNSSET we aim to support Scotland's journey towards a fairer and more equal society that is thriving across economic, social and environmental dimensions, and that delivers prosperity for island's people and places. A fair and equal society and a wealthier, greener economy are mutually reinforcing.

The ICP sets out the steps we will take to improve ferry dependent communities` access to the labour market by addressing structural barriers such as inequality and affordability when accessing ferry services and other supporting transport modes.

### Priority 3: Integrated

Ferry services that enable sustainable and active travel choices which support our health and well-being and make our island and other ferry-dependent communities great places to live, work and visit. Our ferry services:

- **Will support people making sustainable and active travel choices** which will have a significant positive effect on individual health and physical and mental wellbeing.

This outcome is supported by the following themes discussed later in this paper: Integration and connectivity of services; Understanding the connectivity needs; Reliability and resilience; Low carbon and environmental impact.

- **Will support integrated travel choices:** better integration between our ferry's networks and other modes of transport will be key when delivering the Strategy – in particular, active and sustainable modes - both on the mainland and those islands or rural communities to which they connect.

This outcome is supported by the following themes discussed later in this paper: Integration and connectivity of services; Understanding the connectivity needs; Reliability and resilience; Timetables, unplanned and essential travel; Local authority services.

- **Will help make our island and other ferry dependent communities great places to live, work and visit, supporting healthy population balances:** by promoting active travel choices we will encourage walking, cycling and public transport usage. This will deliver more social interaction, support local businesses and services and create vibrant communities.

This outcome is supported by the following themes discussed later in this paper: Understanding the connectivity needs; Reliability and resilience; Community voice and transparency; Accessibility; Timetables, unplanned and essential travel; Integration and connectivity of services; Local authority services.

Population challenges are being faced in many peninsular and island communities, and addressing those challenges is vital to ensuring these communities can realise the ambitions of SNSET.

This Plan supports the current (2019) and upcoming National Islands Plan in addressing island population challenges by tackling transport connectivity barriers faced by some people, such as parents and carers needing to develop the skills and qualifications that will enable them to compete for jobs, reducing child poverty.

The ICP, alongside the Strategic Transport Projects Review 2 (STPR2), aims to help make Scotland's islands more accessible 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 economic growth for our islands.

## Priority 4: Low Carbon and Environmental Impact

Ferry services that take actions to reduce the negative environmental impact of their operations and help to achieve Scotland's net-zero targets. Our ferry services:

- **Will allow people to make travel choices that minimise the long-term impacts on the environment and the wellbeing of future generations:** by designing and implementing policies and actions that support protection of the natural and historic environment we will make a positive impact on our future generations when traveling on our ferry services.

This outcome is supported by the following themes discussed later in this paper: Environmental impact and low carbon, Integration and connectivity of services; Local authority services; Capacity and demand; Reliability and resilience.

- **Will adapt to the effects of climate change:** our islands are already experiencing the impacts of climate change, and we will adapt our ferry services and infrastructure to remain resilient and reduce the harmful effects on future generations.

This outcome is supported by the following themes discussed later in this paper: Understanding the connectivity needs; Vessels and ports; Environmental impact and low carbon; Integration and connectivity of services.

- **Will help deliver our net-zero target:** Scotland must transition to a net-zero economy for the benefit of our environment, our people and our future prosperity. We will support the delivery of Scottish Government's commitment to achieving net zero greenhouse gas emissions by 2045 in a fair and just way through delivery of our ferry services and infrastructure.

This outcome is supported by the following themes discussed later in this paper: Environmental impact and low carbon, Vessels and ports.

The transition to net zero is not just an environmental imperative but an economic opportunity. Scotland already occupies a position of global leadership in a range of current and future key industries including renewable energy, the hydrogen economy, space, blue economy and creative industries, and Scotland's islands are to play a major role going forward.

## Funding and financial sustainability

The costs of providing ferry services are high and rising – this is creating an affordability challenge for both the Scottish Government and local authorities. We are

in a period of sustained financial challenge, and it will be unsustainable to continue to increase funding of ferry services at the same rate as has been done in recent years. The successful implementation of this Islands Connectivity Plan can only be achieved by establishing a secure and sustainable long-term financial foundation for our island transport connectivity.

The Islands Connectivity Plan will contribute to that by providing robust and up-to-date Community Needs Assessments. These studies will enable consideration of a range of service and investment options for each community and will provide evidence to support what are expected to be difficult decisions on future spending. We are acutely conscious of the wide societal importance of transport connectivity. We will make sure these considerations are fully captured in our Value for Money analyses that will inform that decision making.

As set out in this paper, we will also be considering how different modes, such as aviation and fixed links, and different approaches, such as inter-island connectivity, freight services, passenger services and improved integration with onward and connecting travel, can help the financial sustainability of island transport connectivity. Financial sustainability will enable confident forward planning – not just by government, operators and asset-owners but by communities and island businesses.

[The evaluation of RET on CHFS report](#) estimated that the introduction of RET on the CHFS network resulted in the average fare paid per passenger and car dropping by 34% and 40% respectively. Additionally following a 20% reduction in 2018 for all passengers and car fares on the NIFS routes between Aberdeen-Kirkwall-Lerwick, islanders have also benefited from a 20% reduction in cabin fares along with the fares freeze for islander fares in place on these routes since 2020. Also, all ferry fares for CHFS and NIFS were frozen for one year in 2023.

The total annual operating cost for providing CHFS and NIFS services has increased by around 75% and 46% respectively over the last decade with the corresponding increases in farebox revenue being 18% on CHFS and 43% on NIFS. The rest of these costs are met from other revenue (e.g., from on-board retail sales) and predominately by subsidy from the Scottish Government.

Additionally, the Scottish Government has provided £220 million between 2018-19 and 2024-25, inclusive, to the four local authorities that have responsibility for ferries. The Scottish Government budget successfully maintained over £41m support for 2024-25 in the midst of a very challenging financial situation.

The annual deficit between CHFS and NIFS operational costs and income from ferry fares has increased by almost 100% over the last 10 years.

Meaning that for every £1 paid by a ferry user another £2 of public funds are required.

While it remains crucial that our ferry services are affordable for ferry dependent communities it also needs to be affordable for the Government and the Scottish taxpayer. With public spending remaining constrained, decision-makers in both national and local government have to make transparent and objective spending and investment decisions. These decisions will need to be based on agreed priorities and affordability.

As part of these difficult decisions, this Government has raised ferry fares by 10% in 2025-26, bringing fare levels back to around what they would have been before they were frozen in 2023-24. Freezing the ferry fares has supported island communities during the cost of living crisis but meant that Government effectively bore the loss of £10 million a year and while it remains important to support island communities, ongoing pressures on public budgets mean that continuing to freeze fares is not sustainable.

The approach to the prioritisation of future investment in the infrastructure to support these ferry services is also set out in the Vessels and Ports Plan.

## Themes

Following the public consultation on the draft Islands Connectivity Plan Strategic Approach and Vessels and Ports Plan which was live between 1 February and 6 May 2024 as well as reviewing existing feedback from communities and other relevant evidence, in particular the Scottish Parliament's NZET Committee report and a consultation report on ["Project Neptune"](#) we have identified the following themes needing to be addressed through the Islands Connectivity Plan:

- Understanding connectivity needs
- Community voice and transparency
- Capacity and demand
- Reliability and resilience
- Accessibility
- Timetables, unplanned and essential travel
- Integration
- Freight
- Vessels and ports
- Low carbon and environmental impact
- Ferry fares
- Local authority services



We have structured the remainder of this paper around the 12 themes where we set out work already underway and commitments, informed by ferry stakeholders and communities, which will enable progress towards the Vision and Priorities, meaning overall improvements to our ferry services.

## Understanding connectivity needs

To work towards ICP Vision and Priorities, and to support the sustainability of Scotland's islands we need to know the transport connectivity needs of each island community, whether these needs are being met and whether they are being met in the most efficient way.

The planned Community Needs Assessments will aim to answer these questions needed to plan future island transport connectivity and will identify options to address existing problems and to deliver value for money to residents and taxpayers. They will recognise whether responsibility for these services rests with private operators or local authorities.

Island communities have told us that the transport connectivity needs and priorities will also differ between routes and between communities – and also over time. This is particularly evident when significant changes in demand are created by developments on the Scottish islands, which are attractive to successful capital businesses.

This Strategic Approach recognises the importance of the economic opportunities provided by growing and sustainable businesses on our islands and aims to inform planning of future development. The Community Needs Assessments will provide evidence to authorities and business, enabling them making informed decisions when considering future transportation needs to and from islands.

Air services and fixed links have the potential to improve the reliability and resilience of island transport connectivity to the mainland but also to strengthen and prioritise connectivity between islands to their mutual benefit, potentially bringing longer-term efficiencies to communities as well as for sustainable delivery of public services.

Air travel is the quickest and often seen as the most convenient way to travel to, from and between islands and it can also be more environmentally friendly than travelling by ferry and/or car. For many, particularly in the Northern Isles and the Hebrides, the air service provides connectivity to healthcare, education, business and other essential services. We have already renewed and increased subsidy for the Glasgow–Tiree, Barra and Campbeltown air services to support these essential connections. For some islands air travel is the only means of allowing a trip to the mainland in a single day and it can also reduce overall costs by not requiring overnight stays as ferry trips often



do. Aviation also opens up onward connections to other domestic and international destinations, which support local economies through tourism, business and trade. Air travel can also offer greater resilience in bad weather.

The needs-based options identified through the Community Need Assessments could also mean that some existing transport connections provide less value than others. For example, the Community Needs Assessments also provide the opportunity for considering future options for the number and size of ferry vessels and will form part of our consideration of the Value for Money of options for ferry services and, in the longer-term, fixed link proposals. Greater interoperability and standardisation of vessels and ports will open up possibilities for new or different routes between islands and the mainland or between islands. The option of considering alternative routes or port locations in the future should not be discounted.

Transport Scotland's second Strategic Transport Projects Review (STPR2) concluded that replacing ferry services with fixed links can improve reliability, connectivity, capacity and travel times, and allow for the wider reconfiguration of ferry services. However further analysis is required to understand the potential associated long-term savings.

STPR2 considered a large number of proposals for new fixed links to communities served by existing CHFS and NIFS services and recommended further work to look at three potential links to replace and allow for the reconfiguration of current CHFS services:

- Sound of Harris - linking the Uists and Harris/Lewis
- Sound of Barra - linking Barra and the Uists
- Mull and the Scottish mainland

Directly affected island communities expressed mixed views about the above fixed links that are noted in the STPR2. We will undertake a more detailed appraisal to study the benefits, costs, and challenges of these proposals and will engage with these communities to understand if the fixed link proposals are supported by the communities themselves. The Community Needs Assessment work will support these studies by identifying community travel needs.

While other fixed links remain the responsibility of local authorities, the Community Needs Assessment methodology is available to support development of robust business cases that are in line with the aims of Scottish Ministers and this Strategic Approach. For example, Shetland Islands Council, through their Connectivity Study are exploring the appropriate solutions for communities, which could include a number of fixed links to their islands and the Highland Council is exploring a fixed link across the Corran Narrows through a feasibility study commissioned with HITRANS and Highlands and Islands Enterprise.

An exercise gathering key baseline data on island connectivity including reliability, capacity and integration has been already completed for each existing CHFS and NIFS route and includes data from both ferry operators and other sources.

We will use this information as the starting point for transport needs assessments for each community. This work will identify options to address issues and opportunities for changes to current services by engaging with communities and other stakeholders. Below is an indicative programme for commencement of the planned Community Needs Assessment for CHFS and NIFS routes and remains subject to budgetary approvals:

- Q2 2025 – Northern Isles
- Q2 2025 – Oban based services
- Q3 2025 – Clyde and Kintyre services (excluding Cowal/Rosneath)
- Q3 2025 – Outer Hebrides (may be combined with Mallaig bundle)
- Q4 2025 – Mallaig-based services and Raasay
- Q4 2025 – Islay, Jura and Gigha

Until the shape of future island transport connectivity is clearly understood we will plan for the introduction of replacement vessels when these are due, as set out in ICP Vessels and Ports Plan.

We have:

- Published the first [Community Needs Assessments for Cowal and Rosneath](#).
- In 2021, commissioned a comparative study of air and ferry services on the CHFS and NIFS networks. This found that:
  - For those travelling alone, using the ferry and public transport is generally slower but cheaper than using ferry and car or air and public transport.
  - For those travelling as a group, using the ferry and a car becomes more competitive.
  - Flying tends to be a more popular choice for longer journeys.
  - Ferry travel is more seasonal than air travel probably reflecting the choices of tourist visitors for car and ferry travel.

We will:

- Publish the updated methodology for the Community Needs Assessments and the key baseline data on island connectivity including reliability, capacity and integration.

- **Carry out remaining Community Needs Assessments for island and peninsula communities served by CHFS and NIFS ferries.**

- Ensure this Islands Connectivity Plan is responsive to change. This will include refreshing this Strategic Approach and associated delivery plans: the Community Needs Assessments and the Vessels and Ports Plan, every five years, to ensure that island transport connectivity needs and challenges are clearly understood and related policies are developed based on up-to-date needs.
- Carry out detailed appraisals for the fixed link proposals for Sound of Harris, Sound of Barra and Mull and as a first step work with the Comhairle nan Eilean Siar on their community survey to understand the views of islanders about potential fixed links.
- As part of the recently published Aviation Statement, work with stakeholders to consider opportunities to improve passenger and cargo services and our tourism offer. This will include examining how low and zero emission aircraft could improve connectivity for island and rural communities.

## Community voice and transparency

We have heard from communities that although there have already been many surveys and consultation on islands, requests and suggestions made by communities and stakeholders have not always been acted upon and there is a lack of clarity on how said decisions were made. We have also heard that there should be more meaningful community engagement, and greater community involvement in decision making.

We fully agree that it is vital to hear from a wide range of voices, and Ministers and Transport Scotland officials already regularly engage with a range of users and stakeholders. There are a range of opinions on ferry issues and not a consensus. We are keen to hear from everyone who wants to provide us with their insights and contributions on local challenges and opportunities and those making decisions must consider these opinions.

Views of local communities and other key partners are essential to understanding the community transport needs and to assist in identifying ways to support local and strategic priorities. This could be done, for example, through timely access to local development plans, prepared by local authorities, which should have earlier and fuller consideration of land use planning decisions and any impact on transport infrastructure including ferries.

We have:

- Already spoken to local communities in 34 locations across Scotland's islands as part of the public consultations on this Strategic Approach and Vessels and Ports Plan as well as on the next CHFS contract.

- Established standard approaches with CMAL for community engagement on vessel and port projects – see the Vessels and Ports Plan for details.
- Engaged positively with the Ferries Community Board since its creation in 2017 and with the Orkney and Shetland External Transport fora.
- Included a commitment to increasing the level of engagement with community members including early face to face engagement to discuss timetables and reviewing the consultation process for major service changes as part of CalMac's recently published Enhancement and Change Plan, including the expansion of the locally based Area Operations Managers.
- Reestablished the Islands Transport Forum bringing together leaders of island local authorities and Scottish Ministers to discuss how we can work together to improve transport services to communities.
- Had initial discussions with Shetland Islands Council and engaged with the Comhairle nan Eilean Siar and Orkney Islands Council on the preparation of their Local Development Plans.
- Improved processes for Board appointment campaigns resulting in recent appointments to the Boards of David MacBrayne Ltd and CMAL where individuals have demonstrated that they either have a lived experience or have a knowledge and understanding of how ferry services affect island communities.

We will:

- **Establish and publish agreed protocols for engagement and communication for Transport Scotland, CMAL and the operators, including the role of communities, their representatives and key stakeholders.**

- This should include how and when engagement or consultation with communities and their representatives should take part when formulating decisions affecting people's lives and have the right balance between digital and traditional channels, for example include more face-to-face communication, utilising digital opportunities, reaching out those who are more difficult to reach and not excluding smaller or less populated islands. This work should be followed by a post engagement/consultation statement on how gathered proposals were considered.
- Work to ensure that ferry committees, or equivalent bodies, are in place to speak on behalf of all communities served by CHFS and NIFS ferries.
- Through the next CHFS contract, enhance the role of the Ferries Community Board and improve awareness of it across communities and its primary purpose to be the voice of the communities served by CHFS.
- Work to ensure that this Strategic Approach and the Vessels and Ports Plan provide shared direction to operators and vessel owners responsible for delivery

of CHFS and NIFS services. We will establish meaningful and transparent way of measuring the delivery against desirable outcomes across all organisations.

- Maintain the focus during future Board appointments for DML, CMAL and HIAL on attracting applications from island residents who can demonstrate they have the skills, knowledge, and experience necessary to ensure that the Boards can effectively carry out their functions.
- Develop and publish an Islands Communities Impact Assessment of the overall Islands Connectivity Plan. This process aims to ensure that the impacts on island communities are captured and considered in the development of policies and plans detailed in the Islands Connectivity Plan.

## Capacity and demand

While overall more people are travelling across both CHFS and NIFS networks (12.44% since 2013, including the Gallanach – Kerrera, Gourock – Dunoon and Gourock – Kilcreggan routes) also more people take their cars on ferries. Car carryings on CHFS and NIFS increased by 36% and 68% respectively between 2013 and 2023. Some of the change on CHFS may be due to the reclassification of some commercial vehicles to cars with the introduction of RET (the “6m rule”).

This has resulted in shortages of vehicle space on some key routes, meaning people cannot travel by ferry with their car at short notice. Routes such as Ardrossan-Brodick, Kennacraig-Islay, Oban-Craignure, Mallaig-Armadale and Ullapool-Stornoway are often highlighted by ferry-dependent communities and key stakeholders as experiencing under-provision of vehicle deck capacity at peak times. Other popular day-trip routes such as Largs-Cumbrae experience demand spikes. Similar constraints on cabin spaces and vehicle deck space availability are noted by NIFS stakeholders, particularly when travelling to and from Shetland.

Increasing vehicle-deck capacity is seen by some islanders and stakeholders as important as, or more important than, the reliability and resilience of ferry services. People have also told us that there are opportunities to use existing and planned capacity better, such as having meaningful engagement with islanders and communities, incentivising hauliers to travel on off-peak sailings and running freight only services (more about freight services in the Freight section of this report).

At other times, and on other routes, there is space available for more vehicles to be carried and there is almost always space for people on any sailing at any time. These empty spaces are an opportunity for more people and freight to be carried, making better use of the ships, and bringing more people and trade to the islands.

Delivering more reliable and resilient ferry services will also automatically increase available capacity on some key routes. With the introduction of larger vessels and

increased services, vehicle deck capacity has already increased and planned vessel deployment and service enhancements will bring further increases during the current decade. Community Needs Assessments and ongoing collaboration with partners and communities will improve understanding of local community priorities and allow a more targeted appraisal of options to meet those.

As set out in the National Transport Strategy, decisions will reflect the [Sustainable Transport Hierarchy](#). This means that priority will be given in decision-making to more sustainable modes such as public transport and active travel.

We have:

- Over the last decade introduced two new routes, Ardrossan – Campbeltown and Mallaig – Lochboisdale, as well as bringing two routes Kerrera – Gallanach and Gourock – Kilcreggan under the responsibility of Scottish Government.
- Increased service frequencies, particularly in summer, to a number of islands including Arran, Islay, Mull, Skye (Mallaig-Armadale), Coll, Tiree, Colonsay and the Uists.
- As set out in the Timetables section in this Paper, worked with operators and communities to explore new ways to manage capacity when this is scarce.
- Utilised the inbuilt flexibility of the NIFS contract to provide additional freight sailings freeing up space on the passenger vessels.
- Timetabled additional sailings across the Pentland Firth at short notice.

We will:

- **Work with operators and other stakeholders to develop updated forecasts that are informed by known future developments and the ambitions and policies set out in the various elements of the Islands Connectivity Plan as well as the refreshed National Islands Plan and the National Transport Strategy.**

- Use refreshed Community Needs Assessments to identify different options for service frequencies and vessel size and number.
- In collaboration with operators and communities identify ways of using existing and planned capacity better – see separate sections on Integration, Freight, Reliability and Resilience, and Fares in this paper.
- Through Community Needs Assessments, identify the key “pinch points” on the CHFS and NIFS networks and consider options for additional vehicle capacity where this is practical, beneficial and affordable. The best time to do this is when plans are being made for replacement vessels – noting that in some locations vessel size and vehicle carrying capacities will be constrained by the capacity of ports and roads.

## Reliability and resilience

Ferry users and island communities have told us that the most important thing about ferries is that they are reliable. Given the high support from consultation respondents, Reliability and Resilience - reducing breakdowns, improving weather reliability, and increasing network resilience - is confirmed as the first priority of ICP.

Figure 2 shows that over the last decade reliability of services has been decreasing, which is particularly seen on the CHFS network. There has been an increasing number of cancellations and delays caused by weather and breakdowns. This has been linked to worsening weather and an overstretched fleet. On CHFS actual reliability (rather than contractual reliability which excludes factors outside operator control, such as weather) has fallen from 97% in 2012/13 to 93% in 2023/24. NIFS actual reliability was 93% in 2012/13 and remained above 96% until 2023-24 when it fell to 93%, mostly due to weather related reasons.

Weather accounts for the majority of cancellations reported by both operators.

A recent [Met Office report](#) quoted in Parliament's Net Zero, Energy and Transport Committee provided evidence on whether the climate of Scotland has been getting stormier and noted that "a perception that it has become stormier in recent years (2011-2020) is a valid belief, and the period 1981-2020 is stormier than the mid-20th century."

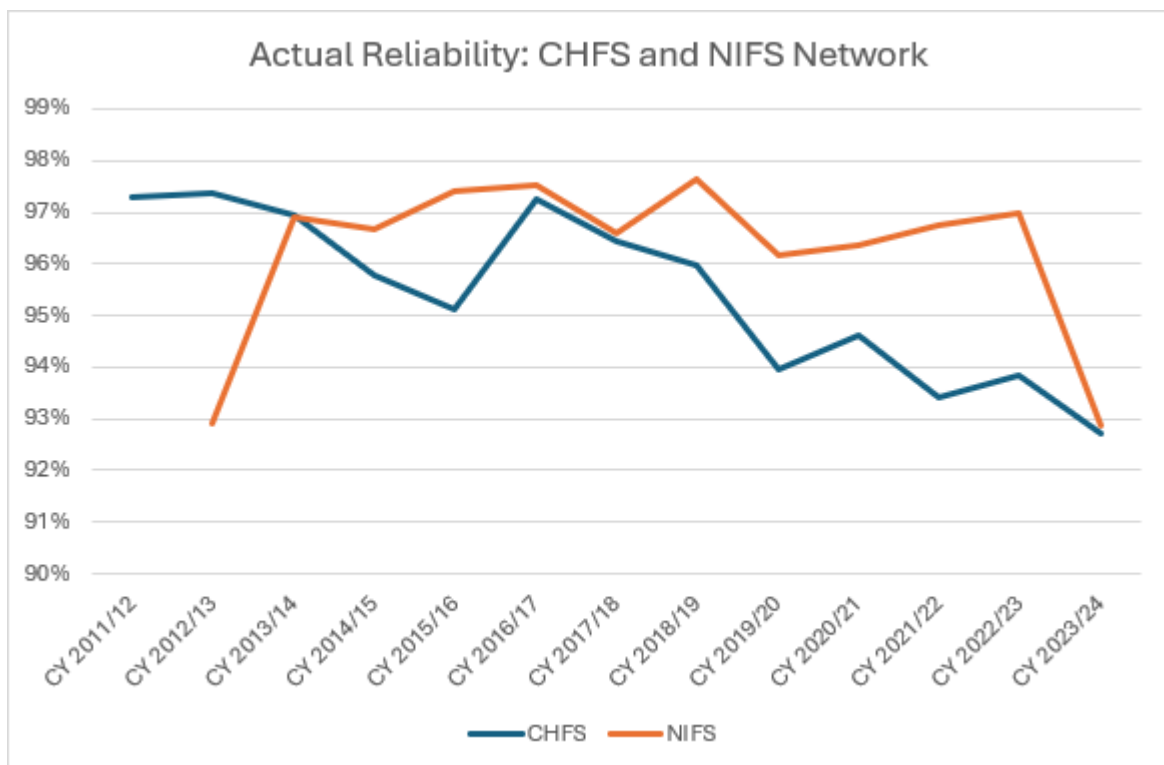


Figure 2 - actual reliability on CHFS and NIFS Networks.



Reliability can be improved through changes to vessels and ports. When buying replacement vessels, designs that will reduce the risk of disruption, in particular from weather, will be the first priority.

Resilience of services can be improved by having spare ferries available in case of breakdowns and by increasing the number of vessels that can work from different ports (“interoperability”) including by having the same, or similar, designs (“standardisation”).

Our detailed plans for the CHFS and NIFS services are set out in the Vessels and Ports Plan.

In addition, we have:

- Supported maintenance of CHFS and NIFS fleets through the Resilience Fund.
- Worked on a Weather Monitoring Systems project to assist ferry operations. CMAL is advising on the installation and servicing of tide and weather monitoring systems. Under this scheme, port owners will install the system and meet the low annual electricity costs with technical support from CMAL.
- Researched and reviewed changing climate and wave climate when undertaking both vessel and infrastructure projects. This is undertaken by CMAL as part of each of the individual project working groups during the design and planning stage.
- Committed to awarding the next CHFS contract as a single bundle: this will provide resilience through the operator’s ability to move vessels and crew around the network.

We will:

**• Improve technical and weather reliability by investing in new vessels and port upgrades.**

- Improve resilience through an expansion in the major vessel fleet and through increased standardisation and interoperability of vessels and ports across both NIFS and CHFS within both the major and small vessel fleets
- Work with ferry operators and communities to develop performance measures for reliability that reflect lived experience. These would be in addition to contractual measures which reflect the impact of weather, the responsibilities of operators and the overriding priority of safety.
- Recognise the importance of reliability of ferry services in our Vision and set Reliability and Resilience as first priority of the Islands Connectivity Plan. This will also help ensure Transport Scotland, CMAL and operators have good information



on disruption and long-term reliability issues and trends so that public money can be spent where it is most needed, and where it will have the greatest impact.

The above actions, and the commitments which are set out in more detail in the Vessels and Ports Plan, will ensure our ferry services become more reliable and resilient.

## Accessibility

We heard that although at this time it should be a given that ferry services are accessible for those with particular needs a number of users still encounter challenges, including, in some instances, wheelchair users being unable to access waiting rooms or toilets, or move around the car deck.

This Islands Connectivity Plan (ICP) will aim to deliver improved travel by ferry for all people in Scotland, unlock long term sustainable economic development for island communities and delivery towards wider Scotland's policies. But in particular it will aim to improve the experience for local communities by improving access to essential services, leisure activities and reducing social distancing.

This ICP builds on the Scottish Government commitment, as part of the Transport to Health Delivery Plan published in October 2024, to bring health planning and transport planning together, building opportunities for improved joint working. The Scottish Government will seek to build better data and evidence around the needs of patient travel and share this appropriately.

We have:

- Improved accessibility through vessel and port design: improving accessibility is a feature of CMAL vessel and port projects based on statutory requirements, industry guidelines and best practice.
- Supported improvements through the Ferries Accessibility Fund – set up as an outcome of the Ferries Plan, has delivered approaching £1 million in targeted improvements.
- During the current NIFS contract, accessible changing places stations have been added to all passenger vessels and improvements such as the Sign Language Interpreter Service and Recite Me have been introduced to the operator's website.

We will:

- **Develop an Accessibility Standard for ferry services.**

- The Standard will be in addition to legal requirements for physical and mental accessibility and will act as guidance for island ferry services, including vessel and port design.
- Work to develop an Accessibility Standard will be in partnership with the Mobility and Access Committee Scotland (MACS), ferry and port operators and councils and other user group representatives such as Scottish Tourism Alliance. A Standard could consider accessibility for those with mobility, sensory, cognitive and neurodiverse characteristics as well as broader equalities issues.
- Use this Standard as the basis for measuring current levels of accessibility at locations on the ferry networks and measuring improvements over time.

- **Reopen and explore expanding the Ferries Accessibility Fund to include aviation to, from and between the islands.**

- This new Island Transport Accessibility Fund will target future spending where improvements are most needed and can deliver real benefits to the communities.
- Through this work we will explore alternative and sustainable funding options to make improvements to accessibility over and above legal requirements.
- Undertake regular Accessibility Audits through the next CHFS contract.
- Support activities to encourage use of the public transport network as part of the integration work part of this ICP. This was raised by ferry stakeholders as being of particular importance for people with disabilities to enable them to make the journey in the first place.
- Continue to promote and increase accessibility of the concessionary travel scheme for island residents. This will include the plan to roll out digital vouchers across all eligible island users throughout Scotland.
- Support the commitments arising from the Scottish Government's recently published Transport to Health Plan - published October 2024.
- Improve accessibility for passengers across the network through fleet and port modernisation and increased standardisation.

Affordability, timetables, urgent and essential travel, integrated and connecting services and available capacity are all essential factors for accessible services and are discussed wider in the appropriate sections in this report.

An Equalities Impact Assessment is also carried out on the overall Islands Connectivity Plan. This process aims to ensure that the impacts on people with the protected characteristics are captured and considered in the development of policies and plans detailed in the Islands Connectivity Plan.

## Timetables; unplanned and essential travel

The Ferries Plan set out proposals for changes to service levels based on assessments of needs. Further assessments have been carried out since the publication of the Ferries Plan: mainly by councils for their own services but also by Transport Scotland for the Northern Isles Ferry Services and the Outer Hebrides.

As part of the ICP we intend to carry out further assessments using an updated methodology as discussed above in the Understanding connectivity needs section in this Strategic Approach. These will inform future levels and timetables.

Ferry travel has become more popular and there are now, in particular, more people who want to take their car on a ferry. This means that some services cannot accommodate short notice demand for essential vehicle travel by island residents and key workers. At the same time, for some islands, travel demand in the winter is very low and transport connections are noticeably reduced as a result.

We have:

- Delivered a medical protocol on CalMac services which guarantees islanders a booking on the ferry and a taxi, should they have an urgent medical appointment, on the mainland, if the ferry sailing does not have the capacity available for their vehicle.
- Introduced a procedure for “Advanced Standby” for vehicles on CalMac services which has replaced the previous waiting list.
- Through NIFS, retained cabin availability for NHS use, such as short notice appointments
- Introduced a deck space reservation pilot for Mull, Coll and Tiree routes holding back a proportion of the deck space until close to the day of travel to allow for shorter notice bookings.

We will:

- **Ensure future CHFS and NIFS contracts are flexible and can respond to short and long-term changes, including to disruption to services.**
- Explore whether, and how, the current frequency of sailings to an island could be distributed differently between seasons or during the week – or, where applicable, between routes – in response to community requests. This work will be informed by the Community Needs Assessments.

- Through CalMac's Enhancement and Change Plan review the current deck space reservation pilot for Mull, Coll and Tiree and, if this has delivered the intended benefit, engage with other communities on potential roll-out opportunities. CalMac also plan a pilot creating dedicated vehicle-deck space for healthcare workers travelling to and from Arran and Cumbrae.

## Integration

Ferry journeys are usually part of an overall journey involving other modes such as a private vehicle, public or other shared transport, or active travel modes including cycling, walking and wheeling. Improving the links between our ferry services with these other elements of the overall journey and how well they work for users has been referred to as our "onward and connecting travel" workstream of the ICP. We will take this work forward through an ongoing Integration Programme – addressing issues, some of which are outlined below.

We heard that ferry services could sometimes be better integrated with public transport on islands and on the mainland in terms of timetables, ticketing, fares and information about services being more easily available. Physical integration at ferry terminals, such as clear routes and signage between different transport modes helps smooth journeys. Well-integrated journeys were highlighted by ferry-dependent communities as a key enabler of the choice to travel to and from islands more sustainably and was raised by ferry stakeholders as being of particular importance for people with disabilities, to enable them to make the journey in the first place.

Particular problems arise when one part of a journey is disrupted by weather or breakdown leading to missed connections. This can make travel by ferry more difficult for people who do not have access to a private vehicle, or who would prefer to travel without one. Better integration of ferries with public transport, active travel, and other more sustainable alternatives like car clubs and community transport initiatives, should offer more and better travel options creating a more efficient transport network.

Also important are issues around poor provision of information during disruptions across operators of different transport modes which provide a challenge when planning the journey. This is particularly important for those choosing to travel without a vehicle to allow them to continue their journey. Out with times of disruption, increasing links between operators around planning of timetables improves integration.

Options around longer stay car parking at ferry terminals could also be explored to allow the journey at one end to be by private vehicle but not taking that vehicle on the ferry allowing for more sustainable options at the other end.

Better provision for use of our ferries by non-vehicle passengers would bring additional patronage and thus sustainability to public transport connections, give increased travel choices for travellers, enable more sustainable “greener” travel and, potentially, ease the growing pressure on ferry vehicle deck space on some routes, as well as faster turnarounds with less vehicles to load/unload. Wider environmental benefits result from less transportation of private vehicles, including carbon reduction, cleaner air, lower noise levels and less congestion around ferry ports.

This ICP will support integrated travel choices by mandating action to deliver better integration between our ferries’ networks and other modes of transport, in particular, active and sustainable modes, both, on the mainland and those islands or rural communities to which they connect. Promotion of active travel choices, such as walking, cycling and wheeling while using ferry services can also encourage public transport usage for accessing bus and train stations. This will deliver more social interaction, support local businesses and services, and create more vibrant communities.

Work on connectivity will include a range of measures, such as better information provision, improved infrastructure, and developing more integrated products and processes across operators to assist connectivity.

We have:

- Included in the second Strategic Transport Projects Review 2 (STPR2) a recommendation on “Supporting Integrated Journeys at Ferry Terminals”.
- Supported development of the Mobility as a Service (MaaS) sector through funding for pilot schemes lead by Regional Transport Partnerships. Linking our ferries networks to MaaS systems will enable users to access integrated journey planning information and ticketing.
- Launched an improved Traveline app which allows users to plan their entire journey and get a fuller range of available modal choices.
- Migrated concession vouchers on NIFS to a smart platform.
- Undertaken a baseline study of wider connectivity for ferry-served communities as a part of the first three stages of the Community Needs Assessments.
- Facilitated a Partnership Agreement between CalMac and ScotRail which prioritises joint working to improve ease of connections and offer more integrated journeys across these operators. The Agreement may be a useful model for other agreements between ferry operators and other transport providers.

We will:

- **Work with operators and wider stakeholders to better support journeys that integrate ferries with other modes - in particular public transport, active travel and other sustainable modes.**
- This work will set out more information on the range of priority activities we will take forward to enable better integrated journeys for all users of the ferry network, especially when using public, shared and active travel modes. We will use the summary and outputs of the baseline study to inform and develop our priorities.
- The workstream will be based around activities in the following areas:
  - Provision of information before and during journey.
  - Addressing challenges and inconvenience due to service disruption.
  - Signage and mapping of connections between other modes and ferry terminals.
  - Integrated ticketing and fares options.
  - Timetables.
  - Closer coordination between different transport operators.
  - Improved travel infrastructure and processes for active travel users at ports and on vessels.
  - Long stay car parking provision.
  - Consistent provisions across ferry terminals.

## Freight

A key role of ferries is moving goods and service vehicles to and from islands and providing access to markets and essential supplies such as food, fuel and building materials. This supports local and international businesses exporting products to the Scottish mainland and beyond, such as the food and drink industry. Most freight travels in commercial vehicles which share the ferries with people and cars.

For island farms and crofts, ferry services provide both access to markets and also a route for essential deliveries for farm businesses for feeding, fuel or contractors coming on to the islands. This is particularly important during livestock sale periods when high numbers of animals need to be moved. Efficient routes to market are also essential for seafood and aquaculture businesses.

We heard that periods of disruption to ferry services have been challenging for hauliers, including goods taking longer to arrive, resulting in shorter shelf life, delays in work programmes and impacts on costs. Impacts were particularly noted by those transporting time-critical goods off islands. We also heard that if not planned for and managed, plans for major development projects that would bring substantial sea freight requirements in sectors such as energy, space, decommissioning and aquaculture could exacerbate existing capacity challenges.

Developers and planning authorities are expected to consider the impact of future major developments on existing ferry services, as part of their appraisal of impacts on the strategic transport network, and costs to mitigate any such impacts should be factored in by the developers. The refreshed Community Needs Assessments, discussed earlier in this paper, will provide evidence to planning authorities and developers to be taken into account when making and approving such development plans and planning proposals.

Although the ferry commercial vehicle fare is only one part of the overall cost of deliveries, we heard concerns that increasing freight fares, including based on the profitability of a company, could have negative impact on small island businesses and on on-island consumer prices. Our proposal, based on an NZET Committee recommendation will reflect on these concerns.

Directly subsidising freight fares is one way of reducing cost, but it means that all businesses benefit from that subsidy whether or not they need it. It also does not guarantee that the benefit of reduced ferry costs is not absorbed by the hauliers or businesses and is indeed passed to the consumer. At a time of financial constraint, we seek to consider how support to island businesses, currently provided through subsidising ferry freight fares can be offered more effectively, delivering better Value for Money and financial support to island businesses more directly.

In some cases, privately chartered vessels are used to provide more capacity or to deliver bulk or specialist cargos. Freight, including shipping, is, in principle, an open and effective market, even without direct government subsidy. For example, the distilleries on Islay arrange for delivery of grain by bulk freighter. There are also small volumes of freight moved by air and growing interest in new options such as using drones to deliver small but vital loads such as medical supplies.

We have:

- Secured two dedicated freight vessels to serve Shetland and Orkney from Aberdeen supporting high freight volume travelling to and from the Northern Isles.
- Supported CalMac operating a Stornoway-Ullapool overnight sailing for freight only using the regular Ro-Pax vessel: the MV Loch Seaforth.
- Supported additional sailings on both networks to facilitate seasonal livestock movements and access to key livestock markets.
- Invested almost £1 million to purchase five new port tractors at NorthLink terminals which will be received in 2025 and invested in fifteen new Livestock Cassettes as well as funded maintenance of existing Livestock Cassettes providing additional resilience across NIFS network.



- Invested in two new vessels for Islay that will, together, provide 55% more space for Heavy Goods Vehicles than the two current vessels and are expected to meet growing demand in the coming years.
- Through CMAL, started a project to replace the two Northern Isles freight vessels with an improved design, adding capacity and reducing passage time, and potentially adding some flexible passenger-carrying capacity.

We will:

- **Alongside consideration of other ferry fares (see Fares section) re-visit the Freight Fares Review to explore ferry freight issues in more detail.**

- Encourage CHFS and NIFS operators to continue to engage with hauliers and businesses for greater forward planning and management of current and future capacity and current and forecast demand.
- Consider how costs of sea freight transport could be shared differently between users, developers, and public funding.
- Discuss further with planning authorities and major developers the role that subsidised ferry services should have at the outset of major development planning.
- In considering future freight policy, recognise impacts for island residents, for islands businesses including farmers and crofters, and for other sectors such as housebuilding.
- Continue to retain up to 18 trailer spaces on NIFS passenger vessels on days with no parallel freight sailing and with priority given to time sensitive goods

A Business and Regulatory Impact Assessment is also being carried out on the overall Islands Connectivity Plan. This process aims to ensure that the impacts on business are captured and considered in the development of policies and plans detailed in the Islands Connectivity Plan.

## Vessels and ports

Many Scottish ferries – CHFS, NIFS and local authority ferries – are ageing and some are overdue for replacement. This makes them more likely to break down and it can take longer to repair them when specialist parts are needed. Many ferry ports are also in need of major renewal or replacement works; there is the same need to invest in these as in vessels though the picture is complicated by the number of port owners, other than CMAL, who are responsible for their own forward planning and investment decision-making with potentially significant implications and risks for the



CHFS and NIFS networks. Local authorities own almost all the ports which are used by their own ferry networks.

On some services there is a lack of spare vessels to cover for breakdowns. CalMac's major vessel fleet has been fully deployed since 2016 affecting resilience across the CHFS network. The NIFS fleet is also fully deployed at peak times.

However, things are improving, we have:

- Delivered and published, alongside this Strategic Approach our Vessels and Ports Plan for CHFS and NIFS.
- Purchased the second-hand vessel MV Loch Frisa.
- Chartered the MV Alfred to add resilience to the CHFS major vessel fleet.
- Ordered six new major vessels for the CalMac fleet.
- Ordered seven new small CHFS vessels as Phase 1 of the Small Vessels Replacement Programme.
- Committed to introducing a second summer vessel to the Little Minch routes, increasing route capacity and further improving the resilience of services to the Western Isles and of the network as a whole.
- Supported the Little Minch Infrastructure Programme (previously known as Skye Triangle) by over £76 million investment.

We will:

- **Reduce the average age of the combined CHFS and NIFS fleets to around 15 years by the end of this decade.**

- Retain a major CHFS vessel to provide resilience until at least 2030.
- Increase “standardisation” across CHFS and NIFS fleets and increase “interoperability” of vessels and ports across these networks. Given the wide variety of communities and routes served by these fleets, increased standardisation does not need to mean identical vessels but should allow for increased interoperability of vessels and ports.
- Continue exploring second hand tonnage to accelerate benefits to communities.

The above actions, and the commitments set out in more detail in the Vessels and Ports Plan will improve resilience, reliability, capacity and accessibility, increase standardisation and reduce emissions to meet the needs of island communities for the CHFS and NIFS networks.

## Environmental impact and low carbon

A [Strategic Environmental Assessment \(SEA\)](#), assessed components of this Strategic Approach against 9 environmental factors: air quality, population and human health, noise, material assets, water environment, biodiversity, cultural heritage, landscape and soil sediment. Alongside the responses from the public consultation, it has informed this Strategic Approach and the remainder of this section.

[Scotland's Marine Assessment 2020](#) predicts that marine tourism will continue expanding which could mean that, without appropriate policies in place, the greenhouse gas (GHG) emissions and the emissions of other air pollutants from the transport sector could increase up to 2045. Similar trend could be expected on noise generation, both airborne and underwater. This Strategic Approach proposes that ferry service levels should be based on identified community transport needs through CNAs and that ferry infrastructure should be designed to mitigate such outcomes.

Although, most of our ferries operate using low sulphur marine gas oil reducing sulphur oxide emissions, it still produces carbon emissions that contribute to climate change as well as is a local air and noise pollutant. Our long-term goal is to reduce ferry carbon emissions very substantially by 2045 and, ideally, to eliminate them, as a contribution towards reaching net zero.

We acknowledge that currently low carbon solutions can be more costly than conventional technologies – particularly in the shorter term. We intend to balance consideration of such additional costs with our first priority of maintaining reliable and resilient operations, supporting island population and human health.

How people connect to our ferry services also matters. Our integration workstream will encourage more environmentally friendly behaviours when using ferries for the whole or for a part of the journey, particularly encouraging active travel modes and utilising existing public transport infrastructure.

The successful delivery of our vessel and port electrification policies will reduce the risk of fuel spillages into marine waters which can be significant pollutants and threat to marine biodiversity as well as human health and wellbeing.

Marine litter can also damage marine wildlife and decrease public health, also have a negative impact on marine industries. It can also damage our vessels if it gets caught, which can lead to delays or cancellations. To fulfil our duty under the Environmental Protection Act 1990 and the Merchant Shipping Act 1995 and associated Statutory Instruments we must, through our ferry operations, as far as practicable, keep our land and seas clear of litter and refuse.

We have:

- **Set a target in the Scottish Government's Climate Change Plan that 30% of the Government (CMAL) owned fleet should be low or zero emission vessels by 2032.**

- Explored the use of batteries for small ferries. This has led to three hybrid ferries already operating in CalMac fleet for over 10 years and informed the design of the Small Vessel Replacement Programme vessels.
- Placed an order for 7 new small vessels under the Small Vessel Replacement programme that are able to operate on a fully electric basis.
- Delivered dual fuel (LNG and MGO) vessel MV Glen Sannox serving Arran route. LNG has a lower nitrogen content and is virtually sulphur free when compared to conventional marine fuels, it also burns more cleanly, reducing particulates.

- **Funded the NIFS implementation of the MV Hamnavoe Shore Power Project it being the first large commercial ship shore connection in the UK.**

- Allocated funding for Orkney Islands Council trial of two electric ferries.
- Optimised ferry operations to improve energy efficiency by maximising operational vessel capacity, optimising fuel consumption and upgrading vessels to improve vessel efficiency and resilience.
- Improved our new terminal and port buildings by installing air-source heat pumps and solar PV and a wastewater treatment system at Portavadie slipway and waiting room. We also considered the risk of coastal flooding in the designs of shore infrastructure.
- Supported active travel through NIFS initiative of bicycles traveling for free.
- Harvested and utilised rainwater for supporting the delivery of livestock shipping and delivered animal waste to farms for fertilising from the lairage through NIFS.
- Supported environmental initiatives through organisations such as UK Chamber of Shipping, Marine Scotland, Scottish Natural Heritage, RSPB and the Sea Watch Foundation. For example, the Predator Free Certification scheme aiming to preventing invasive non-native species from reaching our islands and the initiatives and measures tackling climate change including protecting marine life and other wildlife, alongside plastic and underwater noise reductions and eco-friendly recycling of end-of-life ships.
- Received a GOLD [Green Tourism Award](#) through NIFS evidencing operators commitment from improving biodiversity, eliminating single-use items and supporting local community, to embracing the circular economy, embedding Environmental, Social & Governance (ESG) solutions and implementing measures to reduce carbon footprint. For example installing filtered mains water machines in 2021 has saved 118,385 plastic bottles
- Provided recycling stations through both ferry operators and removed plastic water coolers,

We will:

- **Minimise the environmental impact of the next generation of vessels, harbours and ports and ensure they are resilient to the impacts of climate change.**
- Deliver the seven electric vessels as part of the Small Vessels Replacement Programme by 2029, improving local air quality and reducing greenhouse gas (GHG) emissions.
- Enable reduced emissions, vibration and noise in ports by utilising shore power connections following the arrivals of four new Islay & Little Minch vessels, removing the need for vessels to operate on MGO when laid-up at berth.
- Design new major vessels with diesel-electric propulsion systems using battery power for peak-shaving and when manoeuvring at berth. The vessels will also have the capability to use shore power when laid-up.
- **See a significant emissions reduction following the installation of shore power facilities at Port of Aberdeen through CMAL funded project in addition to those already in place in Orkney. The use of a clean electrical power source, through the port's renewable energy tariff, for NIFS vessels, is expected to mitigate more than 1,300 tonnes of CO2 equivalent per year, improve air quality, and reduce noise.**
- Seek to optimise the ferry timetables in line with demand through the Community Needs Assessments (CNAs).
- Through CHFS, continue working with Carbon Neutral Islands (CNI), a Scottish Government programme, to support four islands within the network aiming to reach carbon neutrality by 2040, such as by supporting the waste and emission reduction projects.
- Encourage drivers to turn off their engines whilst waiting to board our vessels.
- Undertake Environmental Impact Assessments (EIA), where required, for new port infrastructure projects, including modelling to predict the impact of construction activities and new infrastructure on the disturbance and transport of marine sediment. For example, as a result of an EIA at Port Ellen the preferred option was identified as it built over the existing pier and extended seawards, instead of alternative option increasing the visual impact on the village.
- Mitigate generated dust, low frequency tonal components, booming effects and underwater noise generated during port infrastructure and new vessel works.
- Contribute to biosecurity in the areas we operate, including through Predator Free Certification by the RSPB through invasive weed species controls, identifying the local habitat vulnerabilities and assigning specific and targeted conservation activities and goals at least 26 CMAL owned ports.

- Install oil interceptors in our port surface water drainage systems and use water efficient fittings/equipment as standard in our new shore projects.
- On CHFS increase recycling rate to consistently exceed 70% and reduce our landfill rate by 5% by 2028.
- Through CMAL endeavour to minimise and reuse any excavated or dredged material on site if it is suitable. However, this is constrained by material properties (including presence of contaminants), timing of construction activities and whether there is sufficient space for the reusable material to be stored on site.

## Fares

We heard from communities and our stakeholders that RET fares and current RET principles - simplicity and transparency, comparability and consistency, and public sector affordability versus community sustainability - should be retained as the basis for future ferry fares structure and that there should be a flexible approach to fares. We also heard that communities favour a fares structure that both encourages passengers to travel without a private vehicle and incentivises travel at quieter periods.

We also heard that cheaper fares brought by RET, on some islands, have created higher demand for vehicle space on ferries, resulting in capacity constraints and delays to island supply chains and more pressure on island roads and tourism infrastructure. Issues were also raised regarding how the RET formula will be applied on longer routes, previously capped fares, the application of RET to vehicles over 5m in length including motorhomes and caravans.

This ICP recognises the importance of tourism to island economies and aims to encourage more people visiting to travel without cars where possible, or to travel at quieter periods. We will do so by having higher fares for non-island-residents bringing vehicles on ferries at busier times. This has the potential to reduce some of the vehicle capacity pressure on some routes at peak times and improve access for those who do not have a choice but to use a private vehicle, including islanders. It also means that tourists will be making a bigger contribution towards the increasing cost of providing ferry services, ensuring that our ferries system is sustainable and that we can continue to keep islander fares low. Our wider approach to capacity is set out in the Capacity and Demand section of this Strategic Approach.

We recognise that public transport options are currently limited in some rural and island areas and we are exploring this issue more widely in the Integration section of this document.

We heard requests for free travel for under 22 year olds to be provided on all ferry services, however this is not feasible in the current fiscal climate.

We heard that for some of the outer-islands in Orkney and Shetland, aviation is the primary mode of passenger travel and not ferries. We will continue to discuss inter-island connectivity with the Councils.

The immediate priority is to address issues around RET, non-islander fares and under 22s. This Strategic Approach also recognises the importance of freight fares and the impacts of freight movements on island communities (more detail in Freight section of this document).

We will:

- **Work towards implementing islander and non-islander fares across both CHFS and NIFS networks.**

- Retain RET as the fares structure for islanders, with non-islanders paying higher fares to contribute more to the cost of ferries and encourage visitors to travel as foot passengers or at quieter periods.
- Carry out further work to consider the application of islander and non-islander fares, including potential dynamic or seasonal pricing to encourage travel at quieter times.
- Consider changes to how the RET formula will be applied on longer routes, previously capped fares, and the application of RET to vehicles over 5m in length including motorhomes and caravans.

- **Introduce free foot passenger travel for under 22 year old islanders on inter-island ferry routes within Orkney, Shetland and the Outer Hebrides on 1 April 2025.**

- Extend the existing ferry concessionary scheme - which provides 4 journeys to or from the mainland each year for 16–18-year-old islanders - up to and including 21-year-olds in late June 2025.

## Local authority ferry services

Four local authorities: Shetland Islands Council, Orkney Islands Council, The Highland Council and Argyll & Bute Council, are responsible for operating ferry services within their areas. These and Comhairle nan Eilean Siar also enable the operation of air services and are responsible for existing fixed links. This supports the view that decisions affecting local communities should be made at the local level and local authorities are best placed to respond to their local communities' needs. Local authorities also have a responsibility in achieving a well-integrated onward and connecting travel for their local communities. Transport Scotland, though the

Integration workstream of this Strategic Approach, will support local authorities in achieving a more sustainable island transport connectivity.

These four local authorities are encouraged to adopt the agreed Vision and Priorities as an example of the desired standard for our ferry services across Scotland.

We heard from local authorities with ferry responsibilities that the current financial climate is a barrier to changes, including investment needed to help achieve national targets, or adoption of the proposed ICP Vision and Priorities. We heard concerns that with no additional funding being allocated to local authorities through ICP, it is difficult to see how this will significantly improve island transport connectivity over the lifetime of the Plan. For 2025-26 Scottish Government has met and funded in full the requested budgets from all four local authorities with ferry services responsibility.

Local authorities have also expressed their views on future delivery responsibility for ferry services. In line with the positions of Parliament's NZET Committee and the Scottish Government, we do not see a benefit for users or public finances of taking over, at this time, ferry services run by local authorities.

Local authorities face the same challenges as the Scottish Government of ageing vessels and ports with limited public money and future transport connectivity needs could include the consideration of fixed links and increased aviation schedules, in place of or as well as renewing ferry fleets. We recognise that each island's needs will be different and there is no one size fits all solution. When considering their own services, a refreshed Community Needs Assessment methodology is available to use for local authorities, and others, who are responsible for the design and operation of their own services. This will provide robust evidence for development of their own business cases that are in line with the aims of Scottish Ministers and this Strategic Approach.

We have:

- In our response to the NZET Committee report, noted agreement with the Committee's support for the principle of council-run ferries.
- Allocated £3 million to Orkney Islands Council for developing the business case for fleet replacement, design for a north isles ferry and for electric ferry activity in 2024-25/26.
- Maintained over £41 million support for 2024-25 for local authorities with ferry services delivery responsibility during a very challenging financial situation and met in full the requested budgets from all four councils for 2025-26.
- Established Orkney and Shetland Ferry Replacement Task Forces to support the Councils addressing their fleet replacement challenges.



- Committed to support free foot passenger travel for under 22 year old islanders on inter-island ferry routes within Orkney, Shetland and the Outer Hebrides.
- Approved The Highland Council's request to reallocate £28 million funding from an existing commitment in the Inverness and Highland City Region Deal towards its priority of procurement of a new vessel for the Corran route.
- As part of the Islands Forum Connectivity Task and Finish Group, announced by the UK Government in Stornoway in October 2023, discussed procurement, transport integration and fixed links with a view to sharing best practice and experience from all UK islands.

We will:

- Continue advising the Councils through the established Task Forces on their development of robust business cases that deliver practical and affordable improvements to their ferry services.
- Through CMAL, continue offering local authorities' advice and learnings from the Small Vessels Replacement Programme to help plan new vessels and infrastructure projects.
- Consider established local priorities as part of community transport needs assessments and to inform the future service requirements.
- The Community Needs Assessments will identify options to address transport connectivity problems that could include ferries, aviation, fixed links and onward and connecting travel. It will recognise whether responsibility for these services rests with private operators or local authorities.
- In the 2025-26 budget, provide Orkney and Shetland Islands Councils each with a one-off grant of £10 million funding for Inter-Island Connectivity projects.

## Monitoring and evaluation

The key to understanding and evaluating the progress of this Strategic Approach over the short, medium and long term is to set Specific, Measurable, Achievable, Relevant, and Time-Bound (SMART) targets and routinely monitor and report on progress towards its outcomes and their contribution towards successful delivery of the four Priorities set out in this paper.

To support this outcome a Monitoring and Evaluation Plan will be developed in collaboration with the ICP Key Stakeholder Group. Set and agreed criteria will be used to assess the proposals made in this Strategic Approach and to set SMART targets. It will include a series of performance measures which will go beyond the measures applied to the ferry operators through the CHFS and NIFS contracts and will capture a wider range of essential activity and better reflect the lived experience of users and communities. These could include:



- Customer and community satisfaction.
- Average fleet age.
- Service reliability – reflecting user experience.
- Progress against the Accessibility Standard and on number of passengers using ferry services who identify themselves as disabled.
- Indicator on Timetables linked to Deck Space Reservation pilot.
- Ratio of passengers to vehicles as an indicator of better “integration” and increased foot passenger usage; Measure of progress against a proposed “integration baseline”.
- Carrying, capacity, and capacity utilisation (passengers, cabins, and vehicles) by route.
- Volume of freight moved to/from islands.
- Number of zero/low emission vessels in the CMAL fleet.
- Fares indicator: e.g., ratio of fares to subsidy as an indicator of cost to Government; changes in fares vs inflation as an indicator of cost to users.
- Environmental criteria.

Although this is the “final” version of this Strategic Approach, it will be reviewed and refreshed every five years to reflect changes and progress – recognising that the service delivery environment is dynamic, not static. This process will be informed by the monitoring and evaluation as outlined in the future Monitoring and Evaluation Plan. The first refresh is therefore expected to take place during 2029 and an updated Strategic Approach and Vessels and Ports Plan will be published by the end of 2029.

The Islands Connectivity Plan supports the National Transport Strategy and overall progress will be measured through Transport Scotland’s Monitoring and Evaluation of the NTS2 Indicators.



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