

BUSES FOR SCOTLAND

PROGRESS THROUGH PARTNERSHIP

A Guide for Local Authorities, Regional Transport
Partnerships and Bus Operators

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Foreword

Scotland's National Transport Strategy (NTS) provides an overarching strategy for transport. This guidance supports the delivery of some of the key bus aspects of the NTS and its sister document *Moving into the Future: An Action Plan for Buses in Scotland*. The high level forum of senior bus stakeholders held in March 2008 was strongly supportive of the Scottish Government's modal shift agenda, and in that context, recognised the vital need for a partnership approach to secure improved bus services and infrastructure.

Buses are almost unparalleled in their scope to achieve the modal shift we all want to see. But people are attached to their cars and achieving significant modal shift will require the strongest vision and leadership – not only from the bus companies, nor only from central government or the regulatory bodies, nor simply from local authorities or the regional transport partnerships: partnership working between all the key stakeholders is a fundamental requirement of the changes sought.

The Scottish Government and local government concluded a historic Concordat in November 2007 based on an outcomes-focused relationship. We strongly believe the Concordat brings benefits to the people of Scotland, empowers local government and aligns their activities with the Government's national objectives. The Concordat gives local government an active role in the delivery of the national outcomes by providing a shared set of policies and priorities we can all work towards. We firmly believe this partnership approach is the right way forward.

In keeping with the spirit of the Concordat, this guidance document aims to facilitate that process of essential partnership working. It highlights the need for co-operative working across a number of key areas, including strategic bus planning, service information, regulation and funding to help raise standards. That, and the consequent increase in passenger numbers which we believe will follow, must be our collective goal.

We hope that key practitioners within local government and the bus industry will welcome this guidance, which we commend to you.

Stewart Stevenson MSP

Minister for Transport, Infrastructure and Climate Change

Councillor Alison Hay

COSLA Regeneration and Sustainability Spokesperson

September 2008

Introduction

The aim of this guide is to provide information and advice on bus policy and its implementation. It is provided primarily for local authorities, regional transport partnerships (RTPs) and bus operating companies; however, it will also be of interest to other practitioners working within the field of transport. It is published following detailed analysis by a range of stakeholders from local authorities, regional transport partnerships, the bus industry itself, and its regulatory authorities, of the main issues impacting on the delivery of quality bus services in Scotland today.

The guidance was developed within the context of the Scottish Government's published purpose: that is to focus Government and public services on creating a more successful country, with opportunities for all of Scotland to flourish, through increasing sustainable economic growth. The Scottish Government's five Strategic Objectives are to:

- enable businesses and people to increase their wealth and more people to share fairly in that wealth;
- help people to sustain and improve their health, especially in disadvantaged communities, ensuring better, local and faster access to health care;
- help local communities to flourish, becoming stronger, safer place to live, offering improved opportunities and a better quality of life;
- expand opportunities for Scots to succeed from nurture through to life long learning ensuring higher and more widely shared achievements; and
- improve Scotland's natural and built environment and the sustainable use and enjoyment of it.

The delivery of improved bus services in Scotland, through a commitment to partnership working between local government and bus operators, will play a significant role in the achievement of these objectives. The principle of partnership between central and local government as defined by the new Concordat between the Scottish Government and COSLA is key to the New Performance Framework.

The guidance should also be viewed as one of the key outputs in implementing the actions in *Moving into the Future: An Action Plan for Buses in Scotland* published in December 2006. It should also be seen within the broader context of *Scotland's National Transport Strategy* and the three transport specific outcomes which the strategy aims to achieve:

- improve journey times and connections, to tackle congestion and the lack of integration and connections in transport;
- reduce emissions, to tackle the issues of climate change, air quality and health improvement.
- improve quality, accessibility and affordability, to give people a choice of public transport, where availability means better quality transport services and value for money or an alternative to the car; and

Mention needs to be made in this introduction of the local government definitions adopted within the guidance. Different areas of responsibility for bus policies fall to different authorities; in some cases to local authorities, in others to regional transport partnerships and, occasionally, to both. There are also different types of regional transport partnerships holding differing powers and responsibilities. For simplicity, the guidance uses the term 'public transport authority' to refer to the relevant authority with responsibility for the transport issue being discussed.

This is the first of a short series of guidance publications to be issued with the aim of improving Scotland's bus services. The content of future guidance will include important improvement measures such as Quality Partnerships and Punctuality Improvement Partnerships.

1. BUS PLANNING

1.1 This section offers specific actions for public transport authorities to consider in encouraging people out of their cars and onto more sustainable transport. These are:

- **engaging bus operators earlier in the development planning process to better integrate land-use and transport planning ;**
- **giving early consideration to the provision of Park and Ride facilities to increase bus use and relieve congestion;**
- **encouraging bus use through the development of Travel Plans for their employees;**
- **developing policies for the development of corporate Travel Plans across their areas;**
- **working in partnership with Transport Scotland and other key stakeholders to implement integrated ticketing within their areas;**
- **establishing Strategic Bus Planning Forums at local and/or regional levels to help improve key stakeholder involvement in bus planning;**
- **integrating the planning and delivery of education, health and community bus services to increase service efficiency and quality;**
- **increasing the flexibility of school transport times to achieve more efficient use of school buses and of the education budgets which support them; and**
- **setting minimum bus quality requirements and/or vehicle age specifications for the school run to raise pupils' experience and change parental perceptions of buses.**

BUS AND LAND-USE PLANNING

1.2 Good planning and transport integration is fundamental to place making in our cities, towns and rural areas. It also has a pivotal role in achieving the five Scottish Government objectives of a wealthier and fairer, healthier, safer and stronger, smarter and greener Scotland.

Transport Policy

1.3 As underlined in the *Scotland's National Transport Strategy* (NTS) published in December 2006, an efficient transport system is essential to our economy, communities, environment, health and general well being. Transport is important to us all - it gets us to our place of work and to our schools. It allows us to access shops and services, to visit friends and family, for tourists to visit us and for us to enjoy leisure activities, and provides accessibility for those who do not have access to a car.

1.4 The NTS also identified a number of key challenges facing transport in Scotland. We need to provide an efficient, integrated and reliable transport network that successfully promotes economic growth, protection of the environment, health and social inclusion. We need to reduce journey times, tackle congestion, provide attractive alternatives to the private car and improve connections and accessibility, while at the same time reducing the impact of transport on the environment. We need a public transport system which is attractive, efficient and affordable with proper integration and through ticketing.

1.5 Bus is pivotal in its potential to bring about the changes outlined in the NTS and is the focus of *Moving into the Future: An Action Plan for Buses in Scotland* – the ‘Bus Action Plan’ – its sister document. The aim of the Bus Action Plan is to develop a comprehensive bus network where sustainable services are delivered to a high quality. This guidance is a key output of the Bus Action Plan.

Planning Policy

1.6 To ensure it is planned effectively and that the bus networks of tomorrow are fit for purpose, it is essential that strategic bus planning is undertaken seamlessly as part of the long-term spatial development at local and regional levels. *Scottish Planning Policy (SPP)17: Planning for Transport* is supported by a range of Planning Advice Notes. The key policy messages they contain are that land-use planning:

- should help to reduce the need to travel and reduce dependence on the car;
- create the right conditions for greater use of sustainable travel modes;
- should avoid or mitigate adverse environmental impacts; and
- ensure that new developments should connect to local services by walking, cycling and public transport.

1.7 Achieving a significant shift to more sustainable modes of travel will be dependent on the availability of public transport services which meet the need for mobility, offer good connections and facilities for interchange, supported by integrated ticketing and good passenger information systems. Public transport should be fast, reliable and affordable. Increased use of buses can be encouraged through:

- high quality infrastructure, quality of vehicles and waiting areas;
- integration with walking and cycling networks;
- park and ride schemes;
- bus priority measures on main public transport corridors to and through development sites;
- good on-site access, stops and shelters and bus service information;
- integrated ticketing;

- demand-responsive services to fill gaps in public transport coverage; and
- discounts on travel passes and other fares initiatives.

Strategic Bus Planning

1.8 The relationship between transport and land use is central to this agenda. Early engagement by bus network providers in the preparation of development plans is more than ever beneficial as we seek to build sustainable futures for our communities. Under secondary legislation arising from the Planning etc. (Scotland) Act 2006, development plan authorities will be required to prepare a development plan scheme including a participation statement indicating when and with whom consultation will take place. There may also be potential investment benefits from the early involvement of bus operators in the development plan process; an outcome largely denied when the views of operators are only sought later on in the planning process. Co-operation is the responsibility of all groups.

1.9 In planning bus services, public transport authorities might wish to have regard to the close interdependence between good bus networks and community health and well-being. The same close interdependence should be recognised by colleagues involved in planning health service provision, with good practice involving early consideration between transport interests and the health service on potential issues. For example, while sustainable transport can have a positive impact on the health of individuals and communities, bus can also play a key role in community access to healthcare facilities. In education transport planning, making bus times more flexible might lead to more cost effective and efficient use of school buses, while the setting of minimum bus quality standards for ‘school run’ buses might have the effect of raising pupils’ experience and changing parental attitudes to bus travel. Again, close and early joint working between transport and education interests is important.

1.10 Public transport authorities might also wish to consider the potential benefits of further integration of health, education and community bus services, and take into account potential integration with services which they also subsidise.

STRATEGIC BUS PLANNING FORUMS

1.11 The following guidance on the establishment of strategic bus planning forums was developed after taking account of developing best practice in Scotland and the advice of the key stakeholders involved. It outlines their aims and objectives, their management and resourcing, appropriate representation within them and, of course, the benefits they should provide. A stakeholder task group established under the auspices of the Bus Action Plan concluded that as bus services, and their client groups, often cross local authority boundaries, strategic bus planning forums might be most appropriately established at regional level.

Aims and Objectives

1.12 The aim of strategic bus planning forums is to bring together those people with a key interest in the development and efficient and integrated delivery of bus services (including Demand Responsive Transport) to discuss and inform how services and their support infrastructure might be better planned to meet the needs of individuals and communities, the

economy and the environment. By involving all key stakeholders, strategic bus planning forums encourage a partnership approach to meeting the following objectives:

- developing a good understanding of the current bus network;
- auditing bus services, whether commercial or public sector to identify scope for efficiencies and improved integration;
- identifying unmet needs;
- delivering an agreed vision of the bus network;
- improving bus planning, taking account of new land-use developments and the needs of, for example, health, education and community related services;
- raising bus service quality by acknowledging where and when bus services should operate and for this information to be made available to at least a minimum agreed standard; and
- agreeing realistic and achievable actions that provide clear social, economic and environmental benefits.

1.13 The above list is intended to be illustrative rather than comprehensive. It is for sponsoring public transport authorities to decide upon the specific objectives for any forum having regard to the priorities for action in any area. Nevertheless, strategic bus planning forums provide effective planning platforms in which to agree and deliver solutions to local priority issues.

Stakeholder Representation

1.14 To be most effective, strategic bus planning forums need to be inclusive and will likely benefit from the involvement of decision makers from among bus operators, land-use planners and education, health and community service planners. In addition, community representatives and representatives (local and/or national) of high bus dependence groups might be included. Achieving a balance between inclusion and effective group management might be addressed by establishing smaller core working groups focusing on specific objectives of the forum.

Resourcing

1.15 Public transport authorities will also wish to ensure that the work of the forum is adequately resourced through provision of a secretariat and appropriate meeting venues.

First Steps

1.16 After its establishment, a strategic bus planning forum might first wish to agree with participants:

- its terms of reference;

- the roles and responsibilities of the various stakeholders represented within it; and
- the frequency and location of meetings.

1.17 Once the priorities the strategic bus planning forum has agreed to address are identified, an action plan of deliverable outcomes might be drawn up and implemented.

Case Study: Tactran’s Strategic Bus Planning Forum

In April 2008, the Tayside and Central Scotland Transport Partnership (Tactran) established a strategic regional bus planning forum to:

- *inform and monitor the development of the regional transport and bus strategies; the Community Transport/Demand Responsive Transport Action Plan; and the regional transport strategy delivery plan;*
- *inform and monitor the development of sustainable Community Transport and Demand Responsive Transport solutions in the region;*
- *provide a regional forum for consultation on bus service and network proposals; and*
- *identify and guide implementation of joint actions, particularly in terms of developing quality bus partnerships, regional standards for publicity and marketing, agreement on minimum standards of bus stop/interchange infrastructure, integrated ticketing and timetabling, and other initiatives.*

Terms of reference for the forum, including meeting the aims listed above, were agreed at its first full meeting. Membership comprises representatives from the Regional Transport Partnership, its constituent local authorities, bus service providers – including commercial, community transport and health transport sectors - and users representative groups.

Publicity, Monitoring and Evaluation

1.18 Publicity might be considered as a means of raising the strategic bus planning forum's profile amongst stakeholders. Monitoring will help to ensure that the Forum is focused on its objectives. Evaluating outcomes will help measure the forum’s effectiveness.

PARK & RIDE

1.19 The benefits of Park & Ride facilities featured prominently at a high level bus forum held in March 2008. Chaired by Stewart Stevenson, Minister for Transport, Infrastructure and Climate Change and addressed by John Swinney, Cabinet Secretary for Finance and Sustainable Growth, the forum comprised senior leaders from the bus industry, local government and the regulatory bodies.

1.20 Industry leaders identified Park & Ride as one of the most important innovations in transportation policy and fundamental to modal shift. Communities want transport to take them where they want to go, quickly and efficiently. Park & Ride enables that. Operator experience is that they change attitudes to bus use and make a significant impact on passenger growth, in turn leading to a reduction in congestion in our towns and cities. However, industry leaders emphasised the benefits from them being involved with public transport authorities earlier in the development planning process and before major decisions are taken.

1.21 The forum concluded that public transport authorities should give early consideration to providing Park & Ride facilities and to more collaborative working with bus operators. The Scottish Government is committed to working with public transport authorities to develop a national strategy for Park & Ride, and is currently scoping the task.

Case Study: Ferrytoll Park & Ride

Operated as a partnership between Stagecoach Group and Fife Council, Ferrytoll is a Park & Ride complex situated to the south of Inverkeithing and just north of the Forth Road Bridge. Ferrytoll's main aim is to offer a more sustainable travel choice for commuters as the number of vehicles crossing the Forth Road Bridge every day tops 60,000.

Construction started in November 1999 and the site opened in November 2000 at a cost of £4.2m. The scheme's construction was funded by The Scottish Executive, Fife Council, The European Union and Scottish Enterprise Fife. After proving successful, with the original 500 space car park nearing capacity, work commenced in August 2004 to expand Ferrytoll to over 1000 spaces, including a multi-storey car park. Ferrytoll fully re-opened in May 2005.

The facilities include a staffed modern departure building with baby-changing areas, television, hot drinks and snacks dispensers, an automatic ticket machine, cash dispenser and comprehensive travel information. There are also secure cycle lockers and CCTV coverage across the complex.

Customer satisfaction with the facilities is very high. The current most attractive feature is not having to worry about parking or parking charges at travellers' destinations. 85% of customers are car drivers and their passengers.

TRAVEL PLANS

1.22 A Travel Plan is an integrated package of measures by employers to encourage sustainable travel choices for staff. It encourages walking, cycling and use of public transport. It is normally tailored to the specific needs of the organisation's staff, clients and visitors. It may cover either a single business site or a cluster.

1.23 The exact measures identified in any Travel Plan will clearly depend on existing travel patterns and facilities but may include some of the following:

- **Promoting the benefits of public transport.** Reminders to staff that, if they take the bus or the train, they could spend the time reading and relaxing or preparing for meetings.
- **Providing incentives to staff.** Subsidisation of employees' commuter travel by public transport and/or provision of 'salary sacrifice' schemes to enable staff to purchase travel season tickets. A salary sacrifice schemes is an income tax and national insurance exemption for bus travel to and from the workplace via an employer's staff benefits scheme. Within a scheme, the employee gives up the right to receive part of the cash pay due under his or her contract of employment. Sacrifice schemes enable the employee to save in the region of 20-40% on the cost of annual bus passes (providing the majority of the use is for travel to/from work).
- **Providing reliable information.** Provision of reliable timetable, route and bus stop information on local bus services to staff in a way that is easily accessible – for example, on notice boards (electronic and conventional) and computer desktops. Additionally, Traveline Scotland is able to provide batch journey planning for all employees. Use of this could also help to establish a case for extended or new services (see case study below).

Case Study: Making Use of Traveline's Journey Planner

Strathclyde Partnership for Transport (SPT) is making innovative use of Traveline Scotland's Journey Planner by grant-funding Traveline to develop an interface between it and the NHS appointment booking system. The software under development will enable personalised public transport journey plan information to be created and issued to patients along with their NHS appointment letters.

SPT has plans to develop this option further by creating an interface with its 'Dial-a-Bus' Demand Responsive Transport (DRT) system. In this way, the system will arrange a booking of a DRT service where a mainstream public transport trip cannot be achieved.

The Traveline Scotland Batch Journey Planner has also been used by SPT to offer companies and employees of Strathclyde Business Park public transport journey plans. The only information required by Traveline Scotland to enable this service to be provided were post codes and staff working pattern data.

- Reliable information could be provided to visitors too. Use could be made of Traveline Scotland's free 'Landing Wizard'. This journey planning tool can be downloaded and inserted onto the homepage (or other convenient page) of any organisation's website. Accessing this service, visitors would be able to enter the postcode of their starting point and be given detailed information on travel to the organisation's premises.
- **Choosing appropriate external venues.** When considering venues for meetings and conferences, organisers could choose those that are well served by buses and circulate clear details of nearby transport links to all participants. Start and end times for meetings could be set with bus travel in mind.
- **Improving routes and facilities.** Improved walking routes between sites and bus stops and provision of shuttle buses to key destinations could be considered for inclusion within a Travel Plan. The provision of new or redesigned bus stops would allow passengers to wait in pleasant conditions, while negotiation with operators could lead to changes in existing routes or the introduction of new ones.

Case Study: Ninewells Hospital

Ninewells, a major employer and centre for health services in Dundee and North Fife, needed urgent action to reduce congestion and the demand for car parking at its hospital site. The site hosts 17 main car parking sites. Demand on spaces was high and both staff and visitor car parks filled quickly, forcing drivers to park in nearby streets.

Initiatives to reduce reliance on the car by visitors and staff include an on-line lift-sharing scheme; dedicated parking for patients and visitors; charging for disabled parking to discourage other drivers from using disabled areas; provision of 40 upright cycle lockers, 35 spaces within a secure 'bike-cage' and showering and changing facilities; provision of good quality information on travel options from the nearby large bus interchange for staff and visitors; a business-use pool car and bike service for staff; a buy-a-bike salary sacrifice scheme; and negotiation of greater use of Dundee City Council's Park & Ride scheme.

1.24 The success of any Travel Plan will ultimately depend on its implementation rather than the plan itself. Evidence and experience show that to be effective a Travel Plan must:

- be based on a recent assessment of travel patterns;
- set out clear objectives, target and indicators;
- have a consistent monitoring programme;

- contain a commitment to future review and renewal; and
- be delivered in partnership with staff and bus operators.

1.25 Further advice and guidance on delivering a Travel Plan can be found on the www.chooseanotherway.com

INTEGRATED TICKETING

1.26 This section outlines briefly the benefits of the introduction of integrated ticking schemes within public transport authority areas. Public transport authorities and bus operators are encouraged:

- **to engage fully with policy as it develops following Transport Scotland 2008 consultative paper; and**
- **to commit to partnership working with key stakeholders to achieve the introduction of integrated ticketing across Scotland and within local and regional areas.**

1.27 The advent of smartcard technology provides significant opportunities for the introduction of new, user-friendly integrated ticketing products that make travelling by bus a more attractive proposition to a wider range of potential users. It addresses many of the themes within NTS concerning integrated travel networks and more attractive services in support of modal shift. The arrangements for the 2014 Commonwealth Games will benefit considerably from the implementation of Integrated Ticketing.

Case Study: Integrated Ticketing

A partnership between Transport Scotland, Dundee City Council, National Express Dundee and the National Entitlement Card team propose a pilot project to develop the use of smartcards across the National Express Dundee bus network. National Express Dundee is the principal operator of bus services within Dundee. Transport Scotland are funding the provision of new smartcard enabled ticketing equipment, which should be available in late 2008. The National Entitlement Card will be the card medium for Integrated Ticketing across all local bus journeys in Dundee.

In this way, Scotland can start to emulate some of the benefits of speedy, cashless, smartcard travel, akin to the Oyster Card Scheme in London or the Octopus Scheme in Hong Kong. Smartcard technology allied to strong marketing and good back office processes to apportion revenue has enabled both cities to ensure that a large share of the total public transport journeys are made on the basis of smartcard transactions.

1.28 Integrated ticketing will allow bus users to access different services – including train and ferry - without the need for additional ticket purchases or the need to carry cash for them. Transport operators, on the other hand, will benefit through revenue protection and the marketing potential of the ticketing products. Significantly, for modal shift, it will also ensure greater integration of our public transport network.

1.29 Transport Scotland is therefore developing an Integrated Ticketing Strategy for Scotland. A key aim of this strategy is to set a common operational framework for integrated ticketing schemes throughout Scotland. Responsibility for the establishment and implementation of Integrated Ticketing schemes within their areas will lie with the relevant public transport authorities.

1.30 Successful implementation of this strategy will therefore necessitate strong partnership working between Transport Scotland, transport operators and public transport authorities. The strategy was the subject of consultation with those key stakeholders. The consultation phase ended in June 2008. To complement the consultation, there have been discussions on pilot schemes in Orkney, South Lanarkshire, Dundee (see case study above), and the Glasgow to Edinburgh rail route.

2. BUS SERVICE INFORMATION

Why we need effective Bus Service Information

2.1 Good quality, accurate, up-to-date and clear bus service information is essential for regular and occasional bus users, for tourists and other visitors, and for non-users who argue that a lack of suitable information prevents them from using buses.

2.2 Bus service information may be provided in a wide variety of ways, including real-time information displays at stops, Traveline Scotland telephone and website facilities, SMS texting and via WAP enabled mobile devices. But the traditional methods of printed timetable information in leaflets, stops and stations are still the most commonly used for accessing bus service information. The quality of this information throughout Scotland, particularly at bus stops, varies widely. A more consistent approach to the provision of bus service information at bus stations and stops, and also by other printed, electronic and telephonic means, would assist greater modal shift.

2.3 A stakeholder task group established under the auspices of the Bus Action Plan took advice from Bus Users UK on what national standards of bus service information might be most beneficial in attracting and satisfying passengers, as well as what would be practical for bus companies and public transport authorities. The recommended minimum standards outlined below reflect the advice received from Bus Users UK.

2.4 Recommended Minimum Standards

2.4.1 Bus stop infrastructure

- Bus stops should be easily identified with flags carrying the words ‘Bus Stop’ and the recognised pictogram. At principal boarding points such as interchange points, a broad indication of the destination or direction of the buses serving the stop – ‘To City’, ‘From City’, ‘To Elgin’, ‘From Elgin’, etc – as already provided by some public transport authorities, is desirable.
- The flag should display the location of the stop, though if there is a space problem, this should be clearly indicated on the shelter or at the top of the bus stop information panel. The location is important both for boarding passengers and alighting passengers, who seek the reassurance of a stop location to ensure they alight at the correct place. The name shown on the stop should be the same as used in other promotional and timetable material.
- The bus stop flag should display the route numbers of services calling there, though it is accepted that the space on many flags and the number of route changes in some areas may prevent this. Inclusion of route numbers on bus stop flags is clearly essential where passengers have a choice of several stops in, typically, a town or city centre location.
- The inclusion of the Traveline Scotland (or equivalent) logo and phone number is also highly beneficial, either on the bus stop flag or prominently on the information panel.

- Where there are unique stop numbers for SMS texting, these - together with adjacent instructions on how to use the facility - should be clearly displayed.
- Public transport authority and/or operator logos displayed on bus stop flags ought not to be disproportionate in size to more important bus service information.
- Consideration should be given to providing bus stop information that is legible during the hours of darkness. Although illuminated displays are provided at some stops, these can be expensive to provide. Bus stop information should be positioned to take account of adjacent street lighting.
- Bus timetable information in shelters should be placed where passengers can consult it without disturbing other passengers, typically away from the point where passengers board their buses.
- Bus companies should encourage their drivers to report instances of damage to bus stops and shelters. A hotline phone number for the reporting of damage and faults would be a welcome facility so that passengers' needs are promptly re-established.
- Bus shelters, stops and information should be kept clean and graffiti-free.

Case Study: Lothian Buses

Lothian Buses provides bus service information for 2,150 bus stops in Edinburgh, 250 in East Lothian and 350 in Midlothian. In Edinburgh, the company supplies and updates all bus stop flags and provides the information cases within bus shelters on behalf of City of Edinburgh Council. The company has a team of four dedicated bus service information staff.

The information provided in shelters is checked by staff every two months. Any service changes are posted within eight working days of the change taking place. In addition, timetable leaflets are produced for each route along with a map of the whole network. The Lothian Buses website contains timetables for all its routes.

2.4.2 Bus stop information

Every bus stop panel should display the following information, relating to all of the services calling at that stop:

- Route numbers.
- Bus stop location/stop name (unless already displayed on the bus stop flag).

- Route details, which should list all main points and not just simply the final destination.
- Times of all departures from the stop, with Monday-Friday, Saturday and Sunday departures clearly distinguished. A note should be included to the effect that service patterns may be different on public and local holidays. Where services running on a regular frequency call at the stop, a ‘then every fifteen minutes at these times’ type of statement may be more valuable than a confusing mass of times. Times should be stop-specific.
- An indication of journey times, particularly for longer or less frequent services. In an urban situation where the number of departures is likely to be greater, the same level of information about journey times may be unnecessary. A simple line plan of the route with typical peak point-to-point timings would help passengers to plan their journey times.

The information should be presented in a simple, passenger-friendly way, with the minimum of complicated codes and footnotes and be free of bus industry jargon. The benefit of using colours to indicate route variations is questionable; colours fade, are difficult to read under street lighting, and are of no use to people who are colour-blind. Simple instructions describing how to use the bus stop code to obtain bus times by SMS texting and via WAP devices should be provided. A nationally accepted standardised form of wording could be provided by Traveline Scotland.

The display should carry an indication of the date when the timetable went into operation. It may be difficult to include a date when the timetable expires, but a starting (or ‘updated from’) date provides reassurance to passengers on the currency of the information provided. New timetables should be in place prior to (and as close as possible to) the introduction of any service changes, with a clear starting date to avoid confusion for passengers. The name of the bus operator should be visible where different operators use the same route numbers, or compete on services to the same destination.

The provision of fares information at bus stops benefits customers, but it may be difficult to show these when the fares structure is a complex one, and out-of-date fares information is potentially worse than none at all. Urban operators can, and often do, provide fare information, as this is usually much simpler, but an indication, perhaps of fares to main points, or maximum fares, would help passengers. There are still places where companies operate an exact fare/no change policy, and passengers should be warned of this at the bus stop, and ideally given fares information that will allow them to have the correct change ready and help speed the bus journey. Where operators offer day or similar tickets, details at the bus stop would clearly benefit passengers. In the absence of fares information, passengers should be referred to other sources, possibly a telephone number for Traveline Scotland.

Operators and public transport authorities are encouraged to restrict the number of timetable changes that are made to minimise the number of times displays require to be changed. Ideally, timetable changes should be undertaken in close consultation with public transport authorities.

Bus operators might use timetable information panels to publicise their websites, particularly where they provide timetable downloads.

Details of an appropriate contact telephone number should be provided for passengers wishing to make a complaint (e.g. for a bus operator or public transport authority who can re-route the complaint if it is not for them).

2.4.3 Real-time information

Real-time information (RTI) is best regarded as augmenting rather than replacing printed information at bus stops, particularly as RTI normally only displays the ultimate destination of bus routes. The increasing provision of real-time information at urban bus stops with high-frequency services is welcome, but RTI is equally important at stops in smaller towns and more remote points where late or non-running could cause significant inconvenience.

Case Study: Aberdeenshire Council

Aberdeenshire Council maintains 1,320 bus stops of which 920 have information panels. The information displays include departure times, route details and average journey times. Location names and Traveline Scotland phone and SMS contact details are also included in the flags at over 80% of stops. The panels are maintained and updated through a longstanding partnership agreement with Stagecoach Bluebird, with every panel checked on a 20 day cycle.

In addition to supported service timetable leaflets, and other conventional publicity material, corridor guides are produced including interchange information, and a bus map is produced in partnership between Aberdeenshire Council, Stagecoach Bluebird and Moray Council. A suite of public transport information including timetables and service change information is available on the Council's website. Currently, interactive journey planners are also being introduced at key interchange points across the authority.

In response to increasing internet access via mobile devices, Traveline Scotland has agreed to extend stop specific bus departure information to WAP users. The cost of accessing bus service information via WAP is a cheaper option than SMS text-based data. WAP devices should give passengers access to real-time information for every bus stop in Scotland. This development, and more widespread use of real-time information display screens, will allow bus users, particularly in those areas where services are less frequent and where delays or cancellations could cause real inconvenience, more certainty over bus arrival and departure times. For many passengers, the ability to receive real-time information by mobile phone or similar device will be an attractive option.

In partnership with public transport authorities, some operators are developing systems linked to Automatic Vehicle Location (AVL) equipment installed to improve fleet usage and

reliability. These allow passengers to input postcode or address details to a computer and receive RTI about departures from the nearest, or a designated, bus stop. This may be for the entire range of services using that stop or for one specific service. Funding may be required if all operators are to have AVL software allowing them access to this level of information.

Although it is sometimes suggested that passengers might reasonably pay for this information, it should be recalled that AVL has wider implications than the provision of passenger information; it allows operators to respond to delays caused by roadworks or diversions and ensures that passengers are kept informed and can enjoy a regular service with delays minimised.

2.4.4 Passengers with special needs

The Mobility and Access Committee for Scotland (MACS) produced a report 'Valuable for anyone, valuable for everyone', which is concerned with providing accessible information about travel. There are a little over a million disabled people in Scotland, around one in five of the population; this includes people with learning difficulties, hearing-impaired people, visually-impaired people and mobility-impaired people. Within an ageing population, MACS suggests it will become increasingly important to take account of the needs of disabled groups if they are to be able to travel independently.

The Department for Transport's 2005 report, 'Inclusive Mobility', includes a useful guide to best practice for the provision of bus stops, shelters and bus stop information for all passengers. It provides precise positioning details and should be read in conjunction with this guide.

MACS quotes from the Royal National Institute for the Blind's guidelines on printed information, which require a typeface that is at least 12 point (and preferably 14 point), a clear preferably sans-serif font, text that contrasts clearly with its background, a clear and unfussy page layout. This same clarity must be reflected in bus company timetables and leaflets. Bus companies and public transport authorities should consider the production of large-print timetables for visually-impaired passengers.

While it would be difficult to cater for all passengers with special needs at every bus stop, public transport authorities and operators may wish to consider such matters as the positioning of bus stop information panels for wheelchair passengers, and the provision at significant stops and in bus stations of an audio facility, perhaps in the form of a link to Traveline Scotland. Some authorities have developed their own no-cost solutions.

2.4.5 Additional information at specific stops

Where clusters of stops exist, typically in town and city centres, it is important that passengers easily find the stop they require, so 'where to catch your bus' maps are useful. At designated interchange points, simple maps indicating the range of options are equally beneficial to passengers.

2.5 Responsibility for Provision

Bus information is best provided through effective partnership working between public transport authorities and operators. The following guidance on responsibility for the provision of bus stop information should be read in that context.

2.5.1 Bus stop infrastructure

Bus stops, bus stop flags, bus shelters and bus stop information panels are generally the responsibility of the relevant public transport authority, though this can be sub-contracted to another party. The public transport authority should also be responsible for the maintenance of all at-stop infrastructure.

2.5.2 Bus stop information

The provision of bus stop information is generally the responsibility of the public transport authority, although local arrangements may be made by agreement with operators who prefer to supply and affix their own timetable details. In practice, some public transport authorities provide timetables for their supported services, leaving operators to supply their own information. This can mean that some operators will provide timetables and others will not. If the public transport authority is providing all of the information, this may not be a problem. But if operators are to supply information, and some choose not to, public transport authorities are empowered to provide this information in accordance with the authorities' bus information standards and pass this cost on to operators, and in keeping with best value.

In circumstances where public transport authorities are not managing the information there can be conflict where one operator is dominant and other operators feel they are not achieving equal prominence. Bus stop information displays should reflect an even-handed approach. It is also important that operator identities and brands should be clearly visible and not abandoned in a standardised format. Passengers regularly equate brands with a quality of service and may be confused where several operators compete over common corridors, often using identical or similar route numbers.

2.5.3 On-bus information

Destination displays on buses should clearly show the route number and ultimate destination as an absolute minimum. The inclusion of intermediate points is to be encouraged, either using additional blind displays or additional place-names on electronic versions. Side-mounted destinations, visible to boarding passengers, should display the route number and ultimate destination, and a route number, at least, should be displayed on the rear, subject to relevant disability discrimination requirements.

2.5.4 In-bus information

GPS technology allows visual and audible information to be provided in buses and these are increasingly found in light and heavy rail vehicles. Information showing the next stop and repeating the ultimate destination can be reassuring for occasional passengers but irritating to regular passengers, particularly on services that stop frequently.

2.6 Timetables

Printed timetables should be easy to use in terms of the clarity and presentation of information and the ease with which passengers with impaired vision can read them. They should be available in libraries, tourist information centres and similar public buildings, and in places that people regularly travel to and from by bus, such as hospitals and shopping centres. Additionally, maps and fare information are very important to customers.

In some cases, public transport authorities have assumed responsibility for the production and distribution of timetables while in others the onus rests with the bus operators. This is acceptable provided responsibilities for the provision of information, publication and distribution of timetables and the financial arrangements are clear. These responsibilities might be clearly set out in public transport authorities' information strategies and might include provisions to pass costs on to operators, in keeping with best value.

There are various views about the style and format of timetables. Some authorities favour comprehensive booklets covering discrete areas and these are particularly valuable in rural areas. The preferred format of timetable leaflets works well in urban areas and allows for changes to individuals services without the need to reprint entire timetable books.

2.6.1 Digital Timetables

Availability of timetables by electronic means is increasingly popular and bus companies should be encouraged to offer access to timetables on screen and in downloadable PDF format. For many passengers this is an acceptable alternative to seeking out a printed timetable, with the added security that such a timetable should be completely up-to-date. Some public transport authority websites provide links to bus company websites, and vice-versa.

Traveline Scotland and Transport Direct telephone helplines and websites provide a high level of accurate and up-to-the-minute information, including multi-modal journeys and are invaluable when journeys cross boundaries or involve several different transport modes. The publicising of the Traveline Scotland telephone number at all stops offers passengers a back-up to printed information.

2.6.2 Network Maps

For many passengers, simple maps showing local transport networks provide useful information and encourage bus use. These can quickly become out-of-date when service changes are made. Ideally, changes should be undertaken in close consultation between bus operators and public transport authorities. Increased use of technology will help public transport authorities to update maps quickly. Network maps can be provided in printed form as a leaflet and at bus stops and stations where space permits, and should be downloadable from public transport authority or operator websites.

2.7 Tourist Information

Tourism is an essential ingredient in the economy of Scotland. It is also environmentally responsible to encourage greater use by visitors of public transport. Bus operators and public transport authorities should work with tourism authorities to ensure that good and regularly

restocked and updated bus information is easily accessible in places where tourists would expect to find it. Not all tourist information centres have bus leaflets or timetables available, and the knowledge of staff about public transport facilities can be patchy and even misleading. Tourist offices that close early or remain closed on Sundays do little to help the situation, and there is often little or no 'out of hours' information available. Where bus and coach operators have developed services, tickets and other facilities aimed at the tourist market, these should be made available to the widest possible audience.

Other transport gateways, such as seaports, airports and railway stations, should have prominent displays indicating where arriving passengers can find bus services and what bus services are available. Even in major railway stations it can be difficult to find any reference to forms of transport other than taxis.

2.8 Phased Introduction

A phased approach for meeting the minimum standards is recommended. Annex A provides an indication of the potential stages of their introduction. The exact timings will depend on public transport authorities having access to software and funding that will allow automatic production of bus stop information.

2.9 Monitoring

Bus service information should be regularly monitored by its providers. Minimum standards and performance indicators should be specified and reviewed regularly for their appropriateness. Regular monitoring of provided bus service information would help to ensure that passengers have access to the quality of information they seek.

3. BUS REGULATION

3.1 One of the main aims of the Scottish Government's bus policy is to improve the delivery of high quality sustainable services. In some cases, the policy is achieved through enforcement of the regulatory regime. At a strategic level, the Scottish Government is seeking to agree an over-arching protocol for the regulatory regime, and its enforcement, in partnership with the Scottish Traffic Commissioner and Vehicle and Operator Services Agency (VOSA).

3.2 However, public transport authorities are encouraged to carefully consider where they might drive up the quality of services - for example, by:

- **providing evidence of operators' non-compliance with registered standards. One role of the Traffic Commissioner is to ensure that bus companies operate their services in accordance with the details presented when the services were registered. To enforce these registration standards, the Traffic Commissioner must first gather evidence of non-compliance. Consequently, public transport authorities may wish to consider employing bus monitors to provide evidence of non-compliance within their areas;**
- **providing more effective enforcement of bus priorities. This could be achieved by decriminalising bus lane offences and allowing responsibility for enforcement to pass from the police to the public transport authorities. This could result in improved journey times, congestion relief and reduced emission levels;**
- **improving air quality through the introduction of Traffic Regulation Conditions (TRCs); and by**
- **informing the Traffic Commissioner of the termination of any subsidised services on grounds of breach of contract by the operator.**

3.3 Following deregulation of bus services in 1986, an operator may operate a service on a commercial basis provided the necessary service details (timetable, route description, start date) are registered with the Traffic Commissioner. All Public Service Vehicle Operators are required to give undertakings to the Traffic Commissioner to have proper arrangements for the operation of their licences, including vehicle maintenance. Proper vehicle maintenance serves road safety but also minimises delays due to vehicle breakdown. The Traffic Commissioner receives reports from VOSA and these are the main source of regulatory action against operators.

3.4 The Traffic Commissioner is empowered to take action against those bus operators that do not provide their services, or operate their vehicles, within the terms of their registrations or in accordance the conditions of their licenses. However, enhanced partnership working with the Traffic Commissioner and VOSA would aid this process and help address poor quality operators.

REGIONAL COMPLIANCE MONITORS

3.5 In making a decision to register a local service, the operator takes on the legal duty to operate the service according to the registered particulars. The importance of this for the bus traveller is that once registered, the bus service must operate both to route and to timetable. Any operator failing to operate compliantly may face regulatory action by the Traffic Commissioner.

3.6 Reliability, punctuality and predictability of bus services are the key performance indicators of the travelling public. They need to have confidence that buses will run to timetable. Traffic Commissioners permit operators tolerance by not penalising any running that is within the band of one minute early or five minutes late. Outwith that tolerance band, the operator has to show good reason as to why a bus did not run to its registered timetable.

Case Study: Bus Wardens

In the Strathclyde Partnership for Transport (SPT) area, 1% of public transport journeys are taken by ferry, 4% by subway and 18% by rail. The remaining 77% of public transport journeys are taken by bus.

SPT took a decision to help raise bus quality through the employment of Bus Wardens to better ensure operator compliance with standards. This on-street team engage with bus operators and members of the public to ensure that bus services operating in the Paisley area are delivered in accordance with the published timetable, that they operate safely and in compliance with any legislative requirements and that accurate and legible route, service and operator details are clearly displayed. They also seek to ensure that bus operators abide by the licence conditions introduced under any applicable Traffic Regulation Condition, particularly with regard to excessive waiting at bus stops.

SPT liaises with VOSA, Transport Scotland, the police and other agencies to maximise the effectiveness of interventions in support of the Traffic Commissioner where it is evident that there is regular non-compliance.

The original focus of the team was Paisley, where they recorded 884 instances of buses sitting at bus stops longer than permitted, 160 instances of buses parking at bus stops (or other locations) within the area covered by a traffic regulation condition, and 135 instances of operators not displaying correct destination information. The scheme has now been extended to South Lanarkshire, East Renfrewshire, North Lanarkshire and East Dunbartonshire.

3.7 For the regulatory regime to serve the bus passenger effectively, the Traffic Commissioner requires evidence that operators are not operating services according to the particulars they registered. This evidence may come direct from the public (or their representatives) but a major source is bus compliance monitoring. Currently VOSA has six bus compliance monitors covering the whole of Scotland, four of which are funded by the

Scottish Government. Evidence from public transport authorities has also allowed the Traffic Commissioner to take action against operators and is encouraged in the interests of raising the overall standards of bus services.

BUS PRIORITIES ENFORCEMENT

3.8 To be effective bus lanes and bus stops must only be used by authorised vehicles and be free of other traffic. Car parking and driving within bus lanes and bus stops are criminal offences. Effective enforcement of bus priorities in bus lanes and bus stops should increase the relative speed of bus travel and thus contribute to the three key strategic outcomes in the National Transport Strategy.

- *Improved Journey Times and Connection*
- *Reduced Emissions*
- *Improved Quality, Accessibility and Affordability*

Case Study: Bus Enhancement Measures

Strathclyde Partnership for Transport (SPT) has adopted a six-point Bus Action Plan with a number of its twelve constituent councils and is progressing discussions on its adoption with the others. The action plan includes SPT taking the lead role in:

- *regulation of bus compliance requirements;*
- *a survey of existing bus provision and identifying gaps in the market;*
- *optimum integrated bus provision;*
- *quality and punctuality improvement plans;*
- *bus service information enhancement; and*
- *dedicated transit police services on buses in order to protect revenue, monitor and intervene in locations and routes where vandalism and disorder is observed. SPT is to develop an Outcome Agreement with the Chief Constable of Strathclyde Police in this regard.*

3.9 Therefore, public transport authorities and bus operators ought to consider the benefits of liaison with the police to improve enforcement of bus priorities. Where discussions with the police indicate that their wider enforcement and crime prevention roles preclude them from allocating the necessary resources to bus priority offences, and the scale of the problem suggests it, public transport authorities should consider the benefits of decriminalising bus lane and bus stop traffic offences. Under the Transport (Scotland) Act 2001,

decriminalisation allows responsibility for enforcement of the regulations to pass from the police to local authorities.

TRAFFIC REGULATION CONDITIONS ON AIR POLLUTION

3.10 Although buses are by no means the only source of traffic pollution, a Traffic Regulation Condition (TRC) does allow some regulation of the operation of local bus services under certain defined circumstances. The Traffic Commissioner licences public service vehicle operators and can attach conditions to these licences to prevent danger to road users, reduce traffic congestion and to reduce or limit noise or air pollution. To allow the Traffic Commissioner to consider a public transport authority proposal for use of a TRC in any specific area, supporting evidence for the measure may also need to be provided.

3.11 This guidance describes new powers that have been transferred to Scottish Ministers enabling the Traffic Commissioner to consider the use of TRCs in relation to emission standards for buses. This provides public transport authorities with a potential tool to address issues of poor air quality in their area.

3.12 An amendment to the Transport Act 1985 by the Transport (Scotland) Act 2001 allows any public transport authority to ask the Traffic Commissioner for the Scottish Traffic Area to attach a TRC to an operator's Public Service Vehicle licence for the purposes of reducing or limiting air pollution. The Public Service Vehicles (Traffic Regulation Conditions) Amendment (Scotland) Regulations ("the regulations") 2008 came into force on 31 January 2008.

3.13 The regulations do not specify how bus emissions should be regulated, but one possible method would be to specify the minimum Euro emission standard which vehicles affected by the TRC would have to meet.

3.14 Public transport authorities considering applying for a TRC establishing emission standards for buses might wish to discuss the matter with the Traffic Commissioner. The Traffic Commissioner will wish to be satisfied that any application is justified having regard to the negative impacts of reduced bus services for passengers in any area against the potential environmental benefits of reduced emissions from the affected buses.

4. FUNDING

4.1 This section of the guidance concerns the funding of bus services and infrastructure. Following agreement between the Scottish Government and COSLA on the terms of the Local Government Concordat (see below), certain funding streams were included within the overall financial settlement from the Scottish Government. These include previously ring-fenced funding for the Bus Route Development Grant (BRDG), the Rural Transport Fund (RTF) and the Demand Responsive Transport (DRT) initiative which transferred to local government on 1 April 2008. It is for councils, in line with their Single Outcome Agreements (SOAs), to decide how they will best allocate their funding according to local priorities.

4.2 Specific guidance has been included here on the impact of the Concordat and the BRDG, the RTF and the DRT schemes. However, beyond certain ongoing commitments, local authorities have discretion on the extent to which they wish to support new funding applications. It should be noted that, in its public transport authority role, SPT generally administers these schemes on behalf of its twelve constituent councils.

LOCAL GOVERNMENT CONCORDAT

4.3 The Local Government Concordat sets out the terms of a new relationship between the Scottish Government and local government based on mutual respect and a partnership approach. The Concordat underpins the funding to be provided to local government over the period 2008-09 to 2010-11. Central to this is the creation of Single Outcome Agreements (SOAs) between the Scottish Government and individual local councils.

4.4 The National Performance Framework (NPF) introduced by the Scottish Government as part of the Scottish Budget Spending Review 2007 sets out the Government's purpose and strategic objectives for a better Scotland: Wealthier and Fairer; Smarter; Healthier; Safer and Stronger; and Greener. It also underpins delivery of the Government's objectives and is designed to provide a clear framework for demonstrating performance against the Government's stated objectives. The NPF is supported by a series of 15 National Outcomes and 45 Indicators and Targets.

4.5 In developing their SOAs in line with the National Outcomes, local councils will wish to set out the outcomes which they are seeking to achieve with their community planning partners, and which ought to reflect local needs and priorities, including those for modal shift to more sustainable travel modes.

National Outcomes

4.6 By providing a shared set of policies and priorities we can all work towards, the Concordat gives local government an active role in the delivery of the Scottish Government's National Outcomes. Bus improvement policies fit well with the NPF and it is important that public transport authorities have a good insight in how these policies can be part of SOAs. For example, the policies within the Government's Action Statement for buses produced for the High Level Forum in March 2008 (attached at Annex B) contribute to the following National Outcomes:

- “*We realise our full economic potential with more and better employment opportunities*”;
- “*We live in well-designed, sustainable places where we are able to access amenities and services we need*”;
- “*We reduce the local and global environment impact of our consumption and production*”; and
- “*Our public services are high quality, continually improving, efficient and responsive to local people’s needs*”.

4.7 The National Outcomes do not need to make specific reference to bus to be relevant: for each of those outcomes, it is possible to make links to the policies set out in the Government’s Actions Statement. Local bus improvement measures may therefore be similarly highlighted within SOAs as contributing to the National Outcomes. In a wider view, bus can readily be seen as contributing to other National Outcomes, for example in accessing health and education, and for travelling to work.

National Indicators and Targets

4.8 Bus improvement measures also support many of the 45 National Indicators and Targets. Bus improvement measures clearly impact directly on two:

- “*reduce the proportion of driver journeys delayed due to traffic congestion*”; and
- “*increase the proportion of journeys to work made by public or active transport*”.

As with the National Outcomes, there are obvious direct links, but also many indirect links, where bus can be seen as supporting and underpinning the National Indicators and Targets.

Confederation of Passenger Transport

4.9 At the High Level Bus Forum in March 2008, the Confederation of Passenger Transport (CPT) tabled a series of Cross Referencing Spreadsheets detailing the ways in which bus improvements contributed to the Scottish Government’s National Outcomes, Indicators and Targets. Copies of the Cross Referencing Spreadsheets may be obtained from CPT (see Section 6 for contact information).

4.10 The above comments are offered to public transport authorities as guidance. It will be for each authority to develop its own SOA, taking account of its own bus priorities.

BUS ROUTE DEVELOPMENT GRANT

4.11 In keeping with the terms of the Local Government Concordat, the funding stream for the former central government BRDG scheme was absorbed into the main local government settlement from 1 April 2008. From that date, public transport authorities have discretion on whether they wish to make use of the BRDG mechanism, bearing in mind the requirements of European State Aid regulations. The following guidance provides an account of how BRDG

has been administered by the Scottish Government in the past, and how public transport authorities might wish to use the mechanism in future.

4.12 BRDG is an approved State Aid market intervention measure providing financial support for a maximum period of three years, after which the BRDG supported service had to be self supporting. A public transport authority wishing to continue support to a service for a longer period would have to use other service support mechanisms, e.g. public service contracts (i.e. tendered services) to do so.

4.13 As *public services concession contracts*, BRDG proposals should not be tendered. This is because they are contracts where the operator receives only minimum aid and bears the revenue risk of providing the service; in other words, contracts where the operator receives a net subsidy and retains the revenue from the service. Contracts structured in a way that ensures that revenue risk lies with the operator – and where the grant provider has not entered into any other arrangement to protect the operator from revenue risk – are not subject to the normal public service contract rules. (Indeed, if they were to be in future, public transport authorities could potentially face legal challenge for anti-competitive practice as the normal requirements of a public service contract would not be met by a public services concession contract).

4.14 BRDG has been made available to operators which meet the terms of the specified public service obligation (i.e. the requisite route, frequency, stopping points, capacity, emissions, fares and quality of vehicles, e.g. low floor accessible, engine type, age) and which qualify for the minimum Aid in return for the assumption of the obligation and the associated risks.

4.15 In this context the minimum Aid represents all eligible operating costs (including staff costs, fuel, insurance, vehicle depreciation, marketing, monitoring etc), which may include a reasonable profit, and capital costs (bus infrastructure and priority measures) less revenues relating to the designated services which have been allocated on a reasonable and proportionate basis and taking account of the rates and fares which apply. Revenues, for example, have included passenger revenue, Bus Service Operators Grant, income from Concessionary Fares schemes, schools transport and subsidised services. In the case of enhanced services (as distinct from new services), the minimum Aid has been calculated based on the whole costs and revenues of the enhanced service, and not just the net additional costs and revenues of the service.

Application Process

4.16 As explained above, the processes by which local transport authorities take forward BRDG is a matter for individual public transport authorities to consider. This guidance should be read in that context.

4.17 The requirements of State Aid regulations for transparency and non-discrimination have been met by an open approach to the development of BRDG proposals. Public transport authorities might wish to consult bus operators about possible BRDG initiatives in their area and seek to strengthen the existing commercial bus network. Proposals might be identified in conjunction with bus operators and be set within the context of the local transport strategy for the area.

4.18 To ensure that the requirements of transparency and non-discrimination are met, it is suggested that public transport authorities clearly define the route and frequency of any new or enhanced BRDG supported service. Any element of overlap with existing services might be highlighted and the operators of any affected service within the market (a service which operates within half a mile of the proposed BRDG supported service) might be informed of the proposal. Any comments made by any affected operator might be addressed and remedial action taken where it seems appropriate.

Case Study: Airdirect 747

In February 2006, Stagecoach Fife launched “Airdirect 747” as a new service between Fife and Edinburgh Airport. Airdirect 747 operates every 30 minutes (hourly on Sundays) from Inverkeithing rail station to Edinburgh Airport, via Ferrytoll Park and Ride facilities at North Queensferry, Fife. The service offers a convenient and fast method of transport to the airport with journey times from 25 minutes. Weekday peak time services also serve the Royal Bank of Scotland campus at Gogarburn, Edinburgh.

An extensive marketing campaign launched the new BRDG supported service using three new route branded low floor buses. To date, over 135,000 passengers have travelled on the service and there has been passenger growth of almost 53% in the last year. In 2007, the service became available to Megabus and Citylink passengers through a joint initiative serving Edinburgh Airport and using the Park and Ride facilities at Ferrytoll. In April 2008, the service frequency was increased to every twenty minutes.

Project Proposals

4.19 Public transport authorities may wish to avoid being too prescriptive about what represents a “proposal”. However, it is suggested that in general a proposal might consist of an identifiable bus service(s) or transport corridor where an improved level of service, passenger numbers, quality of vehicles and service, and bus priority measures or other infrastructure will be delivered. BRDG supported services can play a significant role in the development and optimisation of transport infrastructure such as Park & Ride projects, e.g. at Ferrytoll, Ingliston and Sherriffhall.

4.20 Good quality proposals have been defined in the past as those which demonstrate high potential for developing new and under used registered local bus services and scheduled coach services, achieving high levels of passenger growth, greater service frequency and quality, and other significant benefits to passengers.

4.21 Projects have been identified in conjunction with the bus operator(s) who run them, and, consequently, have not needed to be tendered. Where funding is to be offered, the public transport authority might contract with the operator(s) with whom the scheme was developed to ensure Best Value. BRDG support has been operated in a non-discriminatory way.

Therefore, if during the period of an approved project, another operator wishes to seek funding for a project in relation to the same service or transport corridor, and it is similar to the approved project, the public transport authority may wish to consider approaching the Scottish Government for guidance on any State Aid issues arising.

Case Study: Aberdeen-Stonehaven-Montrose

Prior to the introduction of the BRDG scheme, the Stagecoach service between Aberdeen and Stonehaven operated every 20 minutes during the daytime with additional journeys during the peaks. The service used a small number of low-floor vehicles alongside non low-floor single and double deck vehicles. The Stonehaven to Montrose service operated independently and mainly hourly.

Following the introduction of the BRDG scheme in April 2006, the frequency of the Aberdeen to Stonehaven service increased to every 15 minutes during the daytime with additional peak journeys. Additionally, the service extends to Montrose hourly and an enhanced evening and Sunday service is provide.

In August 2007 additional low floor buses were introduced to allow over 90% of the journeys on the network to be operated by DDA compliant low floor vehicles. A network brand, "Coastrider", was also introduced and an extensive marketing campaign carried out. During 2006-07 the enhanced service carried over 740,000 passengers, i.e. a year on year increase of nearly 20%.

This was a partnership initiative between Aberdeenshire Council whereby the company's investment was complemented with new stops, boarding kerbs, shelters and at-stop information displays. At the 2007 Scottish Transport Awards, "Coastrider" won the Bus Award.

4.22 Further guidance on project proposals involving vehicle purchase, project appraisal and project presentation is provided in Annex C.

THE FORMER RURAL TRANSPORT FUND AND DEMAND RESPONSIVE TRANSPORT INITIATIVE

4.23 The funding streams for the former RTF and DRT initiatives were absorbed into the main local government settlement on 1 April 2008

4.24 Thus, from that date, local authorities have discretion on whether they wish to offer funding (and the terms which will apply) to extend existing RTF and DRT projects or to support new funding applicants. However, Scottish Ministers wish to see many more DRT services introduced in the future and have additionally requested local authorities to honour

the Scottish Government's funding commitments to Rural Community Transport Initiative (RCTI) projects over the period 2008-11.

4.25 The RTF was introduced in 1998-99. The scheme's objectives were to improve transport accessibility in rural areas; reduce social exclusion from transport services; and improve connections in remote rural areas.

Case Study: Demand Responsive Transport

Fife Council were awarded funds to pilot DRT (known locally as Go-Flexi) services in the Newburgh-Cupar and East Neuk areas. The Go-Flexi services operating in the Newburgh-Cupar area have been particularly successful. From carrying fewer than 2,000 passengers per month when first introduced in August 2004, they were carrying over 3,000 passengers per month by April 2005. The services were extended to include Leuchars railway station and St Andrews from August 2006. Latest figures show over 10,000 passengers using the services per month with over 150 accessing the buses as a result of flexible routing. As a direct result of operating these services, Go-Flexi has been awarded a Fife Council Excellence Award in the category of 'Putting the Customer First'.

4.26 DRT can be defined as any form of transport where day to day patterns of service provision can be varied through flexible routing and timetabling in line with users' needs. DRT services offer public transport in areas which would not normally benefit from a regular bus service. Most DRT services tend to occur in rural areas as their relatively low population and remoteness make them unattractive to bus operators looking to run profitable routes. The Scottish Government funded several DRT pilot projects in both rural and urban areas between 2003-06. The more successful projects were given further funding to continue until March 2008. All projects improved accessibility to public transport and social inclusion. For example, Glasgow City Council's DRT pilot project included partnership working with the Greater Glasgow and Clyde Health Board and Community Transport-Glasgow to establish new patient transport and visitor services to local hospitals.

4.27 The RCTI grant scheme was introduced in 1998-99 also as part of the Rural Transport Fund. The scheme's aim was to fund community transport measures which will be of particular help in the more remote areas of Scotland particularly where there are no scheduled bus services or where the services are very limited.

4.28 Following discussion with COSLA, the Scottish Government issued detailed background briefing material on the current funding streams to local authorities in February 2008. This included an overview of the funding streams in use until 31 March 2008 and provided individual local authorities with details of the Scottish Government's ongoing funding commitments to RCTI projects within their areas and a description of the projects by type (e.g. dial-a-bus, community minibus or car schemes). This briefing material was issued for reference purposes only and, at COSLA's request, the individual local authorities received data that was relevant to them only.

5. CONCLUSION

5.1 This guidance was prepared to assist local authorities, regional transport partnerships and bus operators in the development of improved bus services, networks and infrastructure for the benefit of the travelling public in Scotland, to encourage increasing numbers of drivers to leave their cars at home, to relieve congestion and help combat climate change, and to improve accessibility and contribute to social inclusion.

5.2 An underlying theme running through the guidance is the need for and benefits of partnership working between public transport authorities and bus operators. This is a fundamental requirement for success as neither local authorities, regional transport partnerships nor bus operators can achieve comprehensive success working in isolation from each other.

5.3 The partnership theme was powerfully endorsed at the *Progress Through Partnership* high level forum chaired by the Minister for Transport, Infrastructure and Climate Change in March 2008. The forum also noted how those bus improvement measures could and should be positioned within the individual Single Outcome Agreements between the Scottish Government and each transport authority. The bibliography to this guidance provides information on how to access the forum papers and report.

5.4 The Minister recognised that change would not happen overnight but also that momentum needs to be developed and maintained. Therefore, he undertook to issue this and other guidance in the coming months. He also made a commitment to continue to work with stakeholders in advancing the agenda for change and to follow closely the progress being made around the country. To this end, the Minister aimed to reconvene the forum around Spring 2009.

5.5. The guidance we aim to issue in the coming months is in the process of development and will address quality partnership and punctuality improvement themes and the schemes which support them. If followed, this guidance will enable our key stakeholders to make significant advances towards the modal shift everyone wants to see.

6. CONTACT INFORMATION

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Bus Industry

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Bus User Groups

Passengers' View Scotland

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Tel: 0131 244 0869 or 0849

www.scotland.gov.uk/Topics/Transport/ptuc

Bus Users UK

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Edinburgh EH8 7DR

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gavin.booth@btconnect.com

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Minimum Standards - Phased Introduction

A phased approach for meeting the minimum standards is recommended by Bus Users UK. The exact timings will depend on public transport authorities having access to software that will allow automatic production of bus stop information, and the cost and time implications are acknowledged.

Stage 1

All bus stops in Scotland to display timetable details for all bus services calling at that point.

Traveline Scotland details to be displayed on the bus stop flag, shelter or timetable display.

Bus stop information to be posted prior to revised services coming into effect.

Bus stop information panels showing, for each service calling there: route numbers; instructions describing how to use SMS texting for bus information; the date when the details for each route were valid; the name of the bus operator; a clear indication if some services run on the exact fare/no change policy; some indication of fares where there is an exact fare/no change policy, and details about obtaining fares information by phone; the use of the wheelchair symbol to indicate services that can be operated by accessible buses; a phone number for complaints.

Closer liaison between public transport authorities and bus operators to encourage the majority of bus service changes to certain agreed dates.

Closer working between public transport authorities and bus operators to handle the physical job of updating timetable panels.

Availability of printed timetables to be improved, with Tourist Information Centres, Libraries, etc regularly stocked as well as bus company, public transport authority offices and shopping centres.

Operators of airports, seaports and railway stations should ensure that bus facilities are clearly signposted and details of bus services are available for arriving passengers.

Stage 2

Bus stop flags to include an indication of the direction or destination of buses serving that stop, where appropriate.

Bus stop flags, shelters or timetable displays must include prominent details of the location of the stop.

Bus stop information panels providing an indication of journey times and route details that include intermediate points

Later stages

Public transport authorities and bus companies should work more closely in partnership to achieve some of the more desirable passenger information facilities listed below.

Route numbers on bus stop flags, particularly where passengers have a choice of stops.

Illuminated bus stops, or at least stops with information in a position that it can be read during hours of darkness.

Providing some level of fares information for all services.

Audio information facilities at certain stops for passengers with impaired vision.

‘Where to catch your bus’ maps at clusters of stops or interchange points.

The actions below are a distillation of the Bus Action Plan steering group's findings and set the context for the High Level Bus Forum chaired by Stewart Stevenson, Minister for Transport, Infrastructure and Climate Change on 11 March 2008.

Planning

1. Ensure bus planning considerations are integrated within the revised **National Planning Framework**. (during 2008)
2. Promote **Bus Forums**, across transport authorities (during 2008).
3. Publish **local strategic planning guidance** for transport authorities to join up commercial services, community transport and demand responsive transport (DRT), and use the potential funding from Bus Route Development Grant to develop new services (during 2008)
4. Work with local authorities and RTPs to develop a national strategy for **Park and Ride** facilities (during 2008).
5. Mainstream national standards of **bus service information** (during 2008).

Quality

6. Raise awareness among public transport authorities of the benefits of **Bus Punctuality Improvement Partnership** (during 2008).
7. Develop improved guidance to enable wider use of **Quality Partnerships** (during 2008).
8. Highlight Strathclyde Partnership for Transport's recent initiative to increase the resource going into **bus compliance monitors** (during 2008).
9. Pilot a **reformed BSOG regime**, with environmental focus, in 2008, for potential introduction in 2009.
10. Introduce **Safe and Fuel Efficient Driving** training scheme for small and medium sized operators (during 2008).
11. Engage with Transport Scotland on the development of **Integrated Ticketing** (during 2008).

Regulatory Regime

12. Set specific Public Inquiry timings for **Traffic Commissioner decisions** on operator/driver non-compliance issues via a protocol with VOSA and Traffic Commissioner (by May 2008).
13. Provide the legislation to enable **Traffic Regulation Conditions** on emissions standards for bus vehicles to improve air quality. (The regulations came into force on 31 January 2008).
14. Promote use of **de-criminalised parking** on busways using Edinburgh as an exemplar for other authorities (during 2008).
15. Look for a legislative opportunity to enable councils to deal with **traffic offences** on yellow boxed junctions (during 2008).

Project Proposals involving Vehicle Purchase

1. If a project involves the purchase of vehicles, or a contribution towards the costs of purchase, which are made over to operators for use on BRDG assisted routes the public transport authority might wish to ensure:

- it has appropriate statutory powers to enter into the arrangement;
- vehicles are purchased at a price not exceeding the market price after an open procurement exercise;
- the value to the operator of the benefit of the vehicle(s) is taken into account in the costs of the project and the benefits provided by the operator to ensure the operator is not being over-compensated;
- such benefits are also taken into account in the contract price or in the benefits otherwise provided (e.g. in quality of service, more accessible vehicles, promotion and marketing of the service) where the service is supported by the authority; and
- there is a written agreement with the operator setting out the conditions which will apply to the use of the vehicle(s) and the arrangements for its subsequent use and/or disposal. If the operator retains the vehicle without paying a market price or contributing in kind this could represent an anti-competitive advantage and be in breach of State Aid rules.

Appraisal of Proposals

2. Public transport authorities might wish to appraise their project applications in accordance with the principles set out in the Scottish Transport Appraisal Guidance (STAG), Single Outcome Agreements and local and regional transport strategies.

3. It is suggested that the level of detail in the appraisal should be commensurate with the scale of the proposal and the level of funding involved. For small schemes, the appraisal may involve less detail and might be set out in accordance with the following appendix. However, for larger and expensive schemes that are likely to have a more significant impact, a more thorough STAG analysis may be appropriate to demonstrate that the BRDG option is the most effective means of achieving the objectives.

4. The appraisal might:

- identify the problems, opportunities and issues to be addressed;
- set out the objectives of the proposal – e.g. what it is seeking to achieve, e.g. greater access to public transport by improved level of service, reduction in congestion, fare reductions, modal shift from car to bus etc.;

- explain why the BRDG option appears the most effective solution for achieving the objectives – rather than, say, other demand management solutions or other modes;
- set out how the proposal will make the service(s) more accessible to older and disabled people;
- provide sufficient evidence to support the claim that the proposal will achieve the stated objective;
- provide an assessment of potential impacts on other modes (including modal shift), other public transport authorities and operators (including details of abstraction from other routes);
- any abstraction of passengers might be considered as part of the bid appraisal, and details of other services in terms of the route, frequency, stopping places, capacity, quality of vehicles (e.g. low floor accessible, age, emissions etc) and fares might also be taken into account; and
- set out what monitoring and evaluation arrangements will be in place to ensure that the objectives are met.

Project Presentation

5. To assist in their assessment of any future bids, public transport authorities might consider how they wish them to be presented. Some options might include:

- an executive summary of what is being proposed. It is recommended that this summary makes clear all elements of the project including the various elements of capital and current costs, assumptions on the depreciation of vehicle costs, passenger and revenue growth assumptions and the longer-term funding of the services, including the assessment on which it is considered that numbers will increase based on underlying assumptions and evidence of the route's capacity to become commercially viable;
- the identification, assessment, development and delivery of the proposal which should become self supporting after the period of grant funding has ended. Proposals might include a letter from the bus operator(s) confirming their participation, agreeing to provide the service if the funding proposal is successful, and to meeting any other obligations described in the proposal;
- a clear understanding between the partners on the obligations involved (including any obligations after the period of funding). The public transport authority and operator(s) may wish to consider if a formal written or contractual agreement between them would be appropriate if the proposal is funded;
- a declining requirement for BRDG over the life of the award as progress towards viability is achieved;

- a commitment by the public transport authority and bus operator to continue the enhanced service for at least one year after the period of BRDG funding; and
- commitments by the public transport authority and bus operator to market and promote the service, provide enhanced customer care, upgrade infrastructure, provide bus priority measures etc.

BUS ROUTE DEVELOPMENT GRANT SCHEME
Project Appraisal – Small Schemes

Appendix

Public transport authority:	
Project description:	

Please state the objectives of the proposal:
Please detail the opportunities or problems that are being specifically addressed:

Financial & Appraisal Summary

Financial Item	Base	Year 1	Year 2	Year 3	Year 4
Operating costs (£s)					
Marketing expenditure (£s)					
Bus priority measures (£s)					
Monitoring & Compliance (£s)					
Other expenditure (£s)					
Total Revenue expenditure (£)					
Total Capital expenditure (£)					
Total expenditure (£)					
<i>Less Passenger Revenue (£)</i>					
<i>Other Revenue (£)</i>					
Total Revenue (£s)					
Shortfall/Surplus (£s)					
Funding Requested					
Revenue (£s)					
Capital (£s)					

Please give details of assumptions on capital depreciation of vehicles etc:

Will the proposal be commercially viable after year 3? If not, please describe how the service will be funded in year 4 and beyond:

--

		Base	Year 1	Year 2	Year 3	Year 4
Additional Passenger Journeys						
Of which	Modal Shift					
	Improved Accessibility					
Less any abstraction of passengers from public transport?						

Please give details of your proposal covering the following areas:

Accessibility/Social Inclusion	
Improved frequency of service (specify current frequency and proposed improvements)	
Community services that will be made more accessible (e.g. employment opportunities, hospitals, new housing, retail developments etc)	
Network improvements /enhancements	
Improvements to vehicle accessibility (e.g. % of accessible vehicles on route, high kerbs etc)	
Modal Shift	
How the proposal will achieve modal shift	
Bus infrastructure improvements (e.g. bus lanes, bus station/stop improvements and other bus priority measures)	
Integration with other modes	
How the proposal will reduce congestion levels	

Journey time improvements	
Environmental Benefits	
Any environmental benefits the proposal will provide	
Economic Benefits	
Any wider economic benefits the proposal will provide (e.g. new jobs)	
Monitoring and Evaluation	
Set out what monitoring and evaluation arrangements will be in place	



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