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At its meeting on 19 May, the Petitions Committee gave further consideration to Guide Dogs Shared Space Petition, P-03-144.

The following briefing is intended to clarify issues which arose from that discussion:

1. By defining what is meant by a “shared surface street” and explain why we are seeking a moratorium.
2. To eliminate any possible confusion which may exist between that Petition, and the concerns that Guide Dogs has raised with regard to SUSTRANS proposed draft Legislative Competence (Traffic Free Routes) Order 2009.

### **Shared surface streets**

Guide Dogs Petition relates to shared surface streets which are one means of implementing the shared space approach to street design. In shared surface streets, the traditional kerb that segregates the footway from the carriageway is removed. As a result there is no effective delineation between pedestrians and traffic and so blind and partially sighted people, as well as other disabled people, elderly people and young children are placed at serious risk. Priority in these shared surface schemes has to be negotiated between pedestrians, motorists and cyclists by making eye contact. That is clearly impossible for blind and partially sighted people. The effect is to undermine their safety, confidence and independence. This is why our Petition has such a wide range of supporters, and why we believe there should be a moratorium on the creation of shared surface streets in Wales. We have examples of shared surface streets in Caernarfon, Newport, and Brecon, and schemes are also under discussion in Cardiff, Monmouth and Caerphilly. In all of those schemes Guide Dogs is in touch with local groups who are also opposing them.

We are disappointed that the Deputy First Minister does not believe that a moratorium on shared surface schemes is appropriate at present. The approach to the National Transport Plan may be holistic, but the shared

surface schemes we currently have in Wales have, we believe, been developed by local authorities without due regard to their Disability Equality Duty. This requires them to consult with local disabled people, and to conduct an equality impact assessment. Unless they are given clear guidance about the impact of shared surface streets now, we have no confidence that “issues around safety and accessibility” will ever be fully taken into account.

We note that paragraph 7 of the Department for Transport briefing states that “There is no conclusive evidence to suggest that shared surfaces are inherently any less safe than conventionally kerbed surfaces.” Guide Dogs’ research, and the lived experiences of blind and partially sighted people, and other disabled and elderly people, tells us that this is not the case.

If you can’t tell where the pavement ends and the road begins how can you possibly feel safe?

Our position is therefore: unless an alternative delineator is demonstrated through research to be effective, footways with kerbs, along with pedestrian crossing points with dropped kerbs and tactile paving, must be retained.

We welcome the fact that the Department for Transport intends to make evidence based policy in this area, and that the Department is undertaking a comprehensive two-year research project on shared space aimed at informing future policy and guidance.

On 22 April 2009 the Department for Transport issued a letter, via email, to ‘all local highway authorities’ that informed them of the research project and asked in the meantime that they ensure that they take particular care to consider the needs of visually impaired people. It is not clear from that letter whether this was issued to local authorities in Wales as well as those in England.

### **Call for a Moratorium**

Whilst the Department for Transport research is carried out, and until guidance is produced that sets out how the shared space concept can be applied without restricting the safe independent mobility of disabled people, Guide Dogs and our supporters across the disability sector in Wales will continue to call for a moratorium on new shared surface schemes.

This is supported by the statement DPTAC (the Disabled Persons Transport Advisory Committee, statutory advisors on transport for disabled people) has recently released which calls on local authorities not to proceed with shared surface schemes pending the Department for Transport’s research and the issuing of guidance.

Given the concerns of Guide Dogs - supported by organisations across the disability sector and the Government’s statutory advisors the Disabled Person’s Transport Advisory Committee (DPTAC) - which are acknowledged in the Department for Transport letter of April; the fact that the Department for

Transport are not yet certain that they can produce evidence based policy on how to make shared surface streets safe for disabled people; and the potential high costs of correcting mistakes in the current economic difficulties; would it not be unwise for local authorities to commission new shared surface schemes until the conclusion of the Department for Transport's research?

### **Shared walking and cycling paths**

Although there may be similarities in the terminology used and in the concerns that they give rise to, the shared surface street issue is a separate one to that of shared walking and cycling paths, where the conflict arises only between pedestrians and cyclists rather than with a wider range of road users. Additionally the issue of shared surface streets is not one that is directly addressed in the Walking and Cycling Strategy.

Guide Dogs and Disability Wales are represented on the Walking and Cycling Strategy's Steering Group, and we are pleased to note that it does not condone the use of shared walking and cycling paths, which are an unsatisfactory solution for pedestrians, people with physical disabilities, sensory impairments and learning difficulties, as well as cyclists.

### **Conclusion**

We would ask that the Committee maintains its focus on our Petition, demonstrates its commitment to social inclusion and takes action to stop the negative impact of shared surface streets on the many people in Wales who wish to move around independently and safely in our communities.

To all local highway authorities

22 April 2009

Via email

Dear Sir/Madam

### **DfT research into shared space**

The Department of Transport recently started a wide-ranging research project looking into the design and provision of shared space. Shared space is a concept predominantly aimed at reducing the impact of motor traffic in places used by pedestrians. It has proved popular on the continent and is becoming increasingly so in the UK as a means of improving public spaces, such as high streets or town squares.

Many shared space schemes feature a shared surface, where conventional kerbs are omitted and pedestrians share a common surface with vehicular traffic. The aim of dispensing with clearly defined areas for pedestrians and vehicles is to allow the full width of the street to be shared more equitably by all users of the highway.

There is a considerable amount of anecdotal evidence that shared space (which includes shared surfaces) can be a valuable technique for improving the public realm, and its growing popularity would appear to support this view.

However, it has become apparent in recent years that while shared surfaces appear to work well for most people, they present difficulties for some disabled people, particularly those with a visual impairment. Many visually impaired people use the kerb as a tactile guide and can find navigation difficult in its absence.

The Guide Dogs for the Blind Association (working name "Guide Dogs") has been instrumental in highlighting these concerns, and we will be working closely with them and other stakeholder organisations, throughout our two-year project.

The Department intends to make evidence-based policy in this area. The aim is to make shared space work for all road users including disabled people. However, whether and how this aim is pursued will depend on the conclusions and recommendations of an appraisal report - this will be an early output from the project and will be used to inform decisions on the project's methodology. I intend to write to you again at this stage to explain the findings of the appraisal report.

In the meantime, I would recommend that you continue to follow good practice when designing streetscape schemes by taking account of all road user needs and consulting with relevant user groups as necessary. If you are planning to introduce shared space or surfaces, please ensure that you take particular care to consider the needs of visually impaired people

Finally, if you have any experience of shared space (and shared surfaces in particular) we would like to hear from you. We seek to obtain any information you may have relating to the benefits (or otherwise) of shared space.

If you would like to contribute in this way, please contact our contractor's project manager directly;

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Yours faithfully,

***Gereint Killa***



## **A Business Plan for the proposed Cork/Swansea ferry service**

**October 2008**

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### **Appendix A**      Market Review Sept 2008



## **1. Introduction**

### **1.1 Background**

Between 1993 and 2006 a ferry service operated between Cork and Swansea. This was a passenger-oriented service which usually ran between March and December each year. The ferry itself was sold in autumn 2006 and the failure, so far, to secure a suitable replacement vessel has meant that the service did not operate in 2007 or 2008.

The Port of Cork has now been approached by potential operators/investors who are interested in reviving the ferry service between Cork and Swansea. As part of the assessment of the business case for this service STS International completed a market analysis for the Port of Cork. (This is shown in Appendix A.) The Port now wishes to supplement that market study with a formal business plan. The market analysis is an integral element of the Business Plan, since it explains the market mechanisms that create a specific opportunity for a Cork-Swansea ferry service.

Outline business plans were prepared in the past but these are no longer relevant because a number of the more significant input costs have changed, for example, fuel prices, target market and ships. What's now required is a business plan which takes account of current input costs and reviews the comparative financial impact of focusing on the freight or passenger market segments or both. It is also built around only those ships which are suitable and understood to be available at the time of writing – October 2008.

### **1.2 Content of Business Plan**

The business plan, combined with the market analysis, addresses a number of key questions. All assumptions are explicitly defined so that the impact of alternative inputs can be assessed easily.

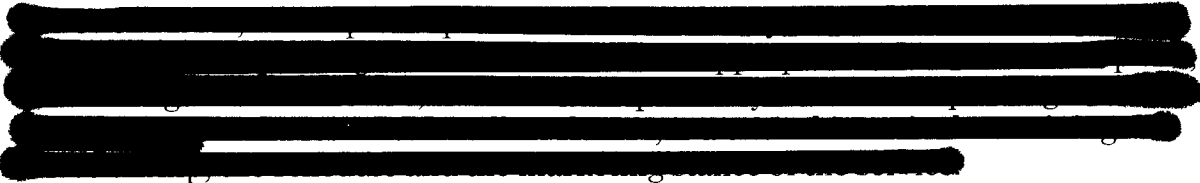
*What is the potential market opportunity?*

The market opportunity is to provide a superior link between the south-west of Ireland on the one hand and England and Wales on the other. The UK is Ireland's largest trading partner and over half of Ireland's exports to the UK originate within the potential catchment of Cork. This area is also (excluding Dublin) the leading car accompanied tourist destination in Ireland.

The proposed new service offers a superior logistical service compared to other routes, which all involve about 250 additional miles of driving on roads.

*Should the primary target market be the passenger or freight sectors or a combination of both?*

The starting point for the business plan is an assessment of the market opportunity. This defines the target market and the volume of traffic which could be attracted to the new service.



*What ships are suitable and available?*

There is a shortage of ro-ro and ro-pax capacity in the ferry sector. At the end of September there were only four ships available which could be considered to be suitable. Vessel 1 is of a similar age to the other three but has more passenger and cabin capacity. Its vehicle deck capacity is somewhat limited but it may be sufficient to meet the initial demand. It is also faster than the other three ships. Vessel 2 has reasonable freight and cabin capacity. Vessel 3 has limited passenger cabin capacity and restricted freight space. Vessel 4 has sufficient freight deck space but a passenger certificate that is only sufficient to cover freight drivers. Each of these ships can be accommodated in Swansea which has a berth restriction of 157m LOA but none is ideal in terms of the volume and type of capacity it offers for vehicles and passengers. The profiles of these four vessels are summarised in Figure 1 below.

**Figure 1 Available & suitable ships, 30 September 2008**

	Vessel 1	Vessel 2	Vessel 3	Vessel 4
Built	1978	1983	1978	1979
Passenger cert	1330	1500	1500	107
<b>Accommodation</b>				
Cabins	289		139	
Berths	1241	300	572	
<b>Vehicle Decks</b>				
Freight: Lane metres	800	1170	528	1934
Cars	416	550	320	
Operating speed (knots)	18	18	18	18
<b>Dimensions</b>				
LOA	153	155m	131.3m	150m
Beam	23.7	28.5	22.6m	23.9
Draft	6.1	6.32m		
Machinery	2* Pielstick	4* Sulzer 12ZV40	4*SWD 16180	2* Mitsui

*Pro forma Profit & Loss Accounts for 3 years*

The pro forma P&L accounts include an assessment of sensitivities in relation to critical elements such as changes in rates and bunker prices.

*Operation of the service*

It is two years since a service ran between Cork and Swansea. While it may be possible to draw on some resources from the previous service in terms of experience and skills, the business plan will treat the service as one starting *ab initio*. It considers the following:

- The management team – what skills are required?
- The provision of support services:
  - Stevedoring
  - Ship management
  - Information technology including reservations, customer service, documentation & statistics
  - Marketing

*Working capital*

The business plan identifies the working capital required.

*Investment exit alternatives*

The available options are identified and reviewed.

## 2. The Market Opportunity

### 2.1 Introduction

Initially the Cork Swansea service is unlikely to generate a new market of significance, so it must therefore attract trade from other routes. This can be done either by offering a better service or by price. The market review established that the new route has logistical and service benefits for both freight and passengers compared to existing routes.

[REDACTED]

An interesting opportunity exists, in the longer term, to develop a logistical network through Cork. This will help secure a solid core of traffic for the route.

The passenger market analysis underlined the prominence of the South West of Ireland as a tourism destination and the suitability of Cork as an access gateway. The model showed that, even for a resident of Manchester, the Swansea-Cork route would be attractive for someone going to the South West of Ireland.

These inherent geographical and logistical advantages suggest that traffic currently using the Southern Corridor routes constitutes the principal target market, but that for freight there is an opportunity to attract some business to the new route from the central corridor.

### 2.2 The Target Market

As mentioned above it's the traffic using the Southern Corridor that will form the obvious target market for the new Cork-Swansea service. Table 2.1 below summarises the volume of traffic carried on the services between Rosslare and Fishguard/Pembroke in the years 2003-2007 & Cork Swansea in the years 2003-06.

#### 2.2.1 Cars & passengers

[REDACTED]

Although in its last year of operation the Swansea-Cork service carried 30,500 cars, in the previous years it had usually carried more than 40,000 cars per annum. 2006 was not a representative year as the service ceased operations in October and earlier rumours about the sale of the ship had dampened demand. It is interesting to note that the growth experienced by both Stena Line and Irish Ferries in 2007 was a direct result of the absence of Swansea Cork Ferries.

For the purposes of the business plan we have assumed that the new service would attract **40,000 cars**<sup>1</sup>. This would represent a little less than 15% of the market as it stood in 2007. While this is more than SCF carried in 2006 it is about the number achieved in 2005 and significantly lower than the volumes carried in years like 2003.

**Table 2.1 Cars & Ro-ro Units on Southern Corridor services, 2003-07, 000s**

	2003	2004	2005	2006	2007	Trend 03-07
<b>Cars</b>						
<b>Northern Corridor</b>	516.9	508.4	460.6	467.8	496.8	-4%
<b>Diagonal Corridor</b>	53	62	59.4	64.5	70.8	34%
<b>Central Corridor</b>	559.5	531.9	501.8	492.3	524.9	-6%
<b>Southern Corridor</b>						
<i>Rosslare-Fishguard (SL)</i>	154.3	153.3	141.8	141.8	151.5	-2%
<i>Rosslare-Pembroke (IF)</i>	117	112	96	101.5	117.7	1%
<i>Swansea-Cork (SCF)</i>	43.8	42.4	39.6	30.5	0	-30%
<b>Total Southern Corridor</b>	<b>315.1</b>	<b>307.7</b>	<b>277.4</b>	<b>273.8</b>	<b>269.2</b>	<b>-15%</b>
<b>TOTAL All Corridors</b>	<b>1444.5</b>	<b>1410</b>	<b>1299.2</b>	<b>1298.4</b>	<b>1361.7</b>	<b>-6%</b>
<b>Ro-Ro units</b>						
<b>Northern Corridor</b>	363.1	382.8	400.7	388.4	398.1	10%
<b>Diagonal Corridor</b>	406.4	431.2	427.8	445.3	441.7	9%
<b>Central Corridor</b>	613.7	642.1	666.2	689.8	750.7	22%
<b>Southern Corridor</b>						
<i>Rosslare-Fishguard (SL)</i>	39.9	44.5	51.5	54.5	53.8	35%
<i>Rosslare-Pembroke (IF)</i>	60.1	67.8	71.9	83.5	95	58%
<i>Swansea-Cork (SCF)</i>	3.40	4.30	6.20	3.40	0.00	0%
<b>Total Southern Corridor</b>	<b>103.4</b>	<b>116.6</b>	<b>129.6</b>	<b>141.4</b>	<b>148.8</b>	<b>44%</b>
<b>TOTAL All Corridors</b>	<b>1486.6</b>	<b>1572.7</b>	<b>1624.3</b>	<b>1664.9</b>	<b>1739.3</b>	<b>17%</b>

In the case of a service involving a 10-hour crossing, we assume that most of the passengers carried would be car-accompanied passengers. The industry guideline suggests that there are 2.5 passengers travelling with every car. On that basis **100,000 passengers** would be carried in year 1.

#### 2.2.2 Ro-ro (accompanied & unaccompanied)

The focus of the former service linking Cork and Swansea was the travel market. This was shaped by the origins of the service and by the profile of the ships deployed. The initiative to re-establish the service in 1993 was taken to support incoming tourism to the South West region by providing a strategic and direct gateway through Cork.

<sup>1</sup> We have concentrated on cars as the volume of coaches carried by SCF was very small. But the new service would certainly be well positioned to attract some coach traffic.

This, combined with the fact that the service generally operated for only 9 or 10 months each year, meant that its appeal to the freight market was, by definition, limited. The ability of the service to accommodate freight traffic was also severely constrained by the lack of sufficient vehicle deck space.

The provision of a regular, all year round service using a ship that has the necessary capacity equips a ferry operator to attract freight traffic. To secure the support of freight operators it is essential if the allocation of freight space can be largely maintained during the summer tourism peak. In the last decade, as low cost airlines gained market share, it was freight that sustained ferry services. Freight volumes increased steadily as the Irish economy enjoyed unprecedented growth. This can clearly be seen in Table 2. 1 above: freight traffic on the Irish Sea grew by 17% in the five years from 2003 to 2007 while car traffic fell by 6% over the same period.

[REDACTED]

This assessment of the potential freight market refers only to large accompanied and unaccompanied trucks; it does not include any commercial vans which ferry operators treat variously as freight or passenger traffic.

[REDACTED]

## 2.3 The Service Profile: Route & Schedule

### 2.3.1 Introduction

Successful ferry services are generally built around the provision of a combination of features which meet the needs of the market; these features include route, schedule, price and quality of service.

### 2.3.2 Route

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<sup>2</sup> The logistical advantage for traffic from the South West of Ireland of the Cork-Swansea route compared to the Rosslare routes is considered in the accompanying market study. See Appendix A.

As gateways to hinterland and markets further afield both Cork and Swansea are well positioned. They have the advantage of a more central geographical location when compared to the more peripheral ports of Rosslare and Pembroke but they carry the disadvantage of a longer sea distance.

The route gives the most direct routing along the axis London – Cork. Swansea is located at the western end of the M4 motorway in the UK. The ferry serves as a substitute for single lane roadway in both Ireland and Wales.

### 2.3.3 Schedule

Operators of multi-purpose of ro-pax services always have to balance the needs of the travel and freight markets when deciding on schedule. Freight traffic, particularly accompanied traffic, traditionally prefers to travel at night in order to fit in with production and distribution patterns while passengers prefer to travel by day. But this is not quite so clear cut in the case of longer routes where passengers are generally happy to sleep through a night sailing in order to arrive at their destination early the following day; the same is true of freight drivers.

In trying to identify the most appropriate schedule for the Cork-Swansea service we have considered a number of permutations including a single ship operation and a two-ship service.

#### *Schedule options for a single ship operation*

Defining the optimum schedule for a service between Cork and Swansea operated by one ship requires a judgement to be made about a number of interlinked factors. Should the ship operate only at night? In which port should the weekly cycle begin? If the service runs during the day, should it do so every day of the week or on specific days all year around or only in high summer? At what time should the ship sail? While schedules can obviously be altered if they are found to be less than suitable, it is important to initiate the service with a schedule that is as close to the optimum as possible.

The schedule, in terms of the frequency of service, is also the means whereby capacity is provided and indeed managed. Traffic patterns are marked by peaks and troughs which vary by market sector and by time period. For example the annual pattern of the travel market is much more “peaked” than that of the freight market while the pattern of freight by the day of the week follows a different pattern to that of the travel market.

It’s clear that, with one ship, it is not possible to satisfy fully the varying needs of the freight and passenger sectors simultaneously. The best that can be done is to try to meet the core needs of both markets.

Options 1 and 2 in Table 2.2 below illustrate the critical differences between services which begin their cycle in Swansea as opposed to Cork.

There are a number of assumptions about traffic patterns underlying both options:

- The peak demand from the car-accompanied sector comes during the summer months and specifically at week-ends. Both options assume that some additional daytime sailings would be offered at summer week-ends.
- The dominant car-accompanied flow is westbound into Ireland and in the case of a sea crossing of 10 hours this traffic wants to move at night.

**Table 2.2 Possible summer schedules for a single ship service between Cork & Swansea**

**Option 1**

**Monday Tuesday Wednesday Thursday Friday Saturday Sunday**

Ex Swansea	Night						
Ex Cork		Night					
Ex Swansea			Night				
Ex Cork				Night			
Ex Swansea					Night		
Ex Cork						Day	
Ex Swansea						Night	
Ex Cork							Day

**Option 2**

**Monday Tuesday Wednesday Thursday Friday Saturday Sunday**

Ex Cork	Night						
Ex Swansea		Night					
Ex Cork			Night				
Ex Swansea				Night			
Ex Cork					Day		
Ex Swansea					Night		
Ex Cork						Day	
Ex Swansea						Night	
Ex Cork							Day
Ex Swansea							Night

The two options illustrate the impact of simply varying the port from which the weekly cycle begins.

- A Monday night departure from Cork (Option 2) will better meet the needs of the freight market than a Monday night sailing from Swansea (Option 1) because Cork is closer to the source of the freight traffic being moved.
- A Friday night sailing from Swansea (Option 2) will appeal to the incoming passenger market as it fits in with the Saturday changeover day in most self-catering accommodation.



- Eastbound day-time sailings are more useful than westbound ones for the passenger market. (Option 2)

In summary Option 2 seems to offer a schedule that has considerable appeal both to the passenger and the freight market.

*Frequency of service for a two-ship operation*

If two ships were deployed on the route then it would be possible to operate a core frequency of a night sailing in each direction daily augmented by a day sailing in each direction on Saturdays in summer. The frequency is illustrated below in Table 2.3.

**Table 2.3 Possible summer schedule for a two ship operation between Cork & Swansea**

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Ex Swansea	Night Ship 1						
Ex Cork	Night Ship 2	Night Ship 1					
Ex Swansea		Night Ship 2	Night Ship 1				
Ex Cork			Night Ship 2	Night Ship 1			
Ex Swansea				Night Ship 2	Night Ship 1		
Ex Cork					Night Ship 2	Day Ship 1	
Ex Swansea						Night Ship 1	
Ex Cork						Night Ship 2	
Ex Swansea						Day Ship 2	
Ex Cork							Night Ship 1
Ex Swansea							Night Ship 2

On a sea crossing of 10 hours a night time sailing in each direction would suit the needs of both the passenger and freight markets. The deployment of two ships makes it easy to augment that pattern with additional day-time sailings as required. During the day, when the ships are in port, there is ample time to permit extensive maintenance to be undertaken. This in turn will assist in reducing the time required for the annual dry-docking.

*Departure times*

The crossing time, berth to berth, from Cork to Swansea is 10 hours at 18 knots. This permits a turnaround time of 2 hours in each port. It is appropriate to schedule night-time sailings to arrive early in the morning. These factors suggest the following schedule for one round trip daily:

Dep. Cork	21.00 hours
Arr. Swansea	07.00 hours
Dep. Swansea	09.00 hours
Arr. Cork	19.00 hours

*Matching capacity to demand*

Operating a multi-purpose service on a long route like this one and with one ship poses some challenges when it comes to the providing sufficient vehicle deck capacity because both freight and passenger traffic will favour the night-time crossings. In these circumstances it is possible to run out of vehicle deck space on the popular sailings.

The P&L models explore this issue in relation to each ship.

3. *Pro forma Profit & Loss Accounts*

**3.1 Introduction**











8

10.10.20





[REDACTED]

[REDACTED]

## 4. Operation of the service

### 4.1 Introduction

Once a suitable ship has been chartered or purchased a starting date for the new service can be decided. That is the single biggest challenge in a market where 10-16 and 10-16 tonnage are both in such short supply. With a suitable ship secured, work can begin on setting up all the other functions – reservations, marketing, stevedoring contracts, etc.

### 4.2 Skills and resources required

To re-establish, manage, promote and develop this ferry service needs is a small team of people, at least some of whom have experience of the ferry sector. The ability of this team will be crucial, since funders will be looking to back a management team.

This team would comprise the following skills:

- General management
- Marketing & sales: travel & freight
- Financial management
- Operations management

#### *Marketing & sales*

Marketing and selling a ferry service to the freight sector centres on building relationships with individual customers and meeting their specific needs in order to secure a long-term commitment. This requires the employment of a small, focused freight sales team.

A computerised freight booking system will also be required. This will link in with the general booking system so that space can be appropriately allocated.

In the case of passenger sales, what's required is a user-friendly booking system as consumers are now happy to book their travel on the internet rather than through a travel agent.

The essential ingredient of successful revenue management of a ferry service is good yield management. In addition to the appropriate yield management skills it also requires an effective IT system. The management of this function requires someone who is very familiar with travel patterns, booking patterns and price elasticity.

It is worth noting that car ferry prices on the Irish Sea are generally perceived to be high and ferry companies have not yet adopted the "guerrilla" tactics of low cost airlines which exhibit considerably more flexibility in responding to changes in the

market. [REDACTED]

As a provider of access transport to the important car-accompanied market the new company will also have access to extensive marketing support and expertise from organisations like Tourism Ireland and Visit Britain/ Visit Wales in relation to promoting the service. A small company would lack the resources to make an impression on a large market like the UK. [REDACTED]

The fact that individual customers are generally happy to use the internet means that maintaining strong relationships with travel agents is no longer necessary. The need for large call centres has also eased. But there is still a market segment which requires specific attention from a passenger sales manager if business is to be secured- that is group travel.

[REDACTED]

*Financial management*

The business will also require the skills of an astute financial manager.

*Operations management*

The ports of Cork and Swansea have offered an attractive integrated rate covering ship's dues, traffic dues and stevedoring. On this basis stevedoring services would be provided by the ports, obviating the need to employ a full team of dock workers. It will however be necessary for the company to have some staff on duty in the port to oversee the overall operation, to check-in all traffic and to manage liaison between ship and shore.

Another function that is best covered internally is the management of health and safety. The very nature of the ferry business means that this is a key function which demands the employment of appropriately qualified staff

*Ship management*

The task of managing the ship can be approached in a couple of ways. If the ship is on a time-charter then the owners will be responsible for the overall management of the ship and its crew. If the ship is secured on a bare-boat charter or owned, then the ferry operator is responsible for the crewing and management. [REDACTED]





## 5. Conclusions

### 5.1 Introduction

The Swansea Cork service ceased operation in autumn 2006. Since then a number of half-hearted attempts have been made to restart the service by various parties; all of these efforts attracted positive support from the tourism and business sectors in South West Ireland and Wales as well as interest from the freight sector. But a region's perceived need for a service is not sufficient to make it happen and sentiment will not pay the bills!

This business plan, following an earlier market study, is designed to take a hard look at the financial viability of the proposed service. The conclusions of this assessment are outlined below.

### 5.2 Summary

Cork serves as a gateway to the most popular tourism region outside Dublin and the UK constitutes the most significant source of incoming tourism. Both these facts mean that a service linking Cork and the UK has an intuitive appeal. Cork is also a major centre of population and has, within its hinterland, an extensive range of industries which generate exports and imports. The market study concluded that a Cork-Swansea service had a considerable logistical advantage when compared with the Rosslare routes for traffic moving to/from the South West of Ireland and to/from an area of the UK south of Birmingham.

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

- [REDACTED]
- [REDACTED]
- [REDACTED]

### Conclusions

Strategically the reason for supporting this service is because it is "green" in that, for the Ireland – UK market it minimises for both passengers and freight the distance they need to travel by road and maximises distance travelled by sea. This meets EU and national government objectives of reducing CO2 emissions. It also meets the need of major retailers like Super Valu and Tesco to be "green". In addition the model shows that the route has cost advantage over Rosslare as a gateway into Ireland. Therefore, strategically, this proposed service ought to be successful even if it does nothing more than match current routing costs. In fact it offers significant cost savings to the freight industry. For passengers it offers access to Ireland and GB through two well-positioned gateway but at no extra cost.

[REDACTED]

[REDACTED]

The route would benefit from a larger vessel. Once the service proves its viability, Associated British Ports would be more willing to develop the berth in Swansea to accommodate larger ships or to build a new berth at Port Talbot.

[REDACTED]

Hello Gareth

Thank you for your email regarding the Petition. I have read the Minister for Rural Affairs, and I am happy with her reply and the letter was very helpful, and understand work is underway to update the Study I also welcome that the Welsh Assembly Government offering to Work with the partnership with the View to a future submission under the second Business plan period 1st march 2011 - 31st Dec 2013. under Axis 3.

Once again I thank the Committee for there Time on this petition

Kind Regards

Cllr Russell Downe



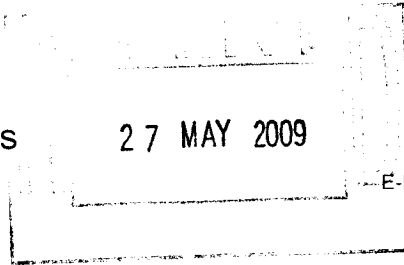
**Edwina Hart AM MBE**

Y Gweinidog dros Iechyd a Gwasanaethau Cymdeithasol  
Minister for Health and Social Services

Our ref: EH/01791/09

Your ref: PET-03-188

Val Lloyd AM  
National Assembly For Wales  
Cardiff Bay  
Cardiff  
CF99 1NA



Llywodraeth Cynulliad Cymru  
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27 May 2009

*Dear Val,*

Thank you for your letter of 15 May regarding the petition on the special care baby unit at Royal Glamorgan Hospital.

Officials from Health Commission Wales recently met with Cwm Taf NHS Trust who confirmed that, despite every effort, they have been unable to appoint middle grade doctors to staff their rotas. This has not been due to a lack of funding as they received agreement to fund their actual costs for staffing at locum rates if necessary. The Trust is continuing to seek middle grade doctors by any means available.

The unit currently operates mostly at level two due to the shortage of middle grade doctors and transfers babies that require the most intensive level of care to other units. However every effort is being made to maintain babies locally in the unit and Consultants are covering out of hours on occasion to support this.

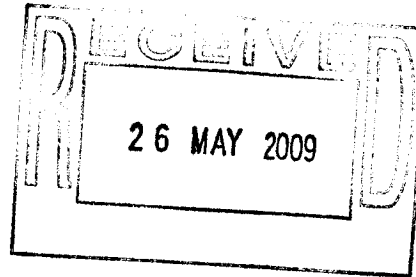
The ability to transfer babies across the South Wales units will be improved with the implementation of a Neonatal Transport Network, for which work is currently underway through the all-Wales group chaired by Dr Jean Matthes. This work is being supported by the additional funding of £2 million from 2009-2010 I announced last year for Neonatal Services. This will free capacity across the units in South Wales and ensure that the most appropriate level of care can be provided when needed at the most suitable location.

*Edwina Hart*



Eich cyf/Your ref  
Ein cyf/Our ref DFM/00711/09

Val Lloyd AM  
Chair  
Petitions Committee  
National Assembly for Wales  
Cardiff Bay  
Cardiff  
CF99 1NA



20 May 2009

*Dear Val*

Thank you for your letter of 16 April regarding the Petitions Committee on going consideration of the petition submitted by NEVAR (No Ely Valley Airport Road) group in respect of the Public Consultation Exercise (PCE) into "Improving Access to Cardiff International Airport".

With regard to the various questions you have raised, the need to ensure good road and public transport access to the airport is set out in "People, Places Futures - The Wales Spatial Plan 2008 Update" adopted by the Assembly in July 2008. The preparation of a surface access strategy for the airport is also referred to in "One Wales: Connecting the Nation - The Wales Transport Strategy" published in May 2008.

Any decision I take on which if any transport solution(s) is to be taken forward for further development will be in accordance with the Welsh Transport Appraisal Guidance (WelTAG). This appraisal methodology is centred around three Welsh impact areas of Economy, Environment and Society, which form the three pillars of sustainability which underlie policy in Wales.

Both the Metrix development at St Athan and the proposed International Business Park at Junction 33 of the M4 do not yet have planning permission and therefore their traffic impacts cannot be taken into account as part of this study. However the traffic model developed by the Assembly Government's Consultants has incorporated the flexibility to test these and other various development scenarios by way of a sensitivity analysis.

The responses received as part of the PCE require detailed consideration before any public announcement but I am hoping to be able to announce my decision in the summer. As part of the Statement of Results that will accompany my announcement, details of the reasons for taking forward any new transport proposals will be described. Results of the traffic modelling will be available at that time.



**Ieuan Wyn Jones**

**Gweinidog dros yr Economi a Thrafnidiaeth  
Minister for the Economy and Transport**

## ***Further information relating to the NEVAR Petition (P-03-190)***

The report from the Members' Research Service dated 12 March 2009 provides evidence that proposals for improved road access to Cardiff Airport have been under consideration by the Welsh Assembly Government (WAG) for some time.

### **1. Lack of evidence of need**

We have asserted "*there is no good evidence that there is a problem in getting to and from the airport by private road transport, nor that poor road access is inhibiting its growth*". The Members' Research Service report does not refute this. The few complaints about access in Cardiff Airport's passenger comments log<sup>1</sup> are almost all about poor public transport.

### **2. Outdated Airport Masterplan**

The WAG planning documents use figures taken from the Airport's 2006 'Masterplan'. This document was unrealistically optimistic at the time of its publication, being based on the findings of the 2002/3 Faber Maunsell study which anticipated a new 'Miskin Parkway Rail Station' as a major transport interchange with Park & Ride facilities at junction 34, that was quickly rejected by Network Rail.<sup>2</sup> The Masterplan's growth prediction of 7.8 million passengers a year by 2030 is unsupported.<sup>3</sup> In reality, last year's **passenger numbers were 5.5% down on those for 2007**<sup>4</sup> and the airport concedes that this downturn is likely to continue, exacerbated by the current economic crisis.

The response from SEWTA was that "*the link between economic growth and increase in traffic needs to be broken*" and that "*all statements concerning economic growth related to the airport need to be fully validated.*"<sup>5</sup>

### **3. Airport management's view**

The airport's Business Development and Commercial Director has recently said "*in terms of **people who use the airport they do not perceive road access to be a problem** but in terms of others who don't, it is perceived to be a problem*" (our emphasis).<sup>6</sup> Perhaps even more pertinently he said "*At the moment you can get to more places at airports other than Cardiff – **the [access] road is not really the issue.** If we can get more flights, more people can use the airport.*"<sup>7</sup> (our emphasis).

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<sup>1</sup> See: [http://www.airlinequality.com/Airports/Airport\\_forum/cwl.htm](http://www.airlinequality.com/Airports/Airport_forum/cwl.htm) (35 passenger reviews going back to 2003)

<sup>2</sup> Cardiff Airport Masterplan 2006 "Response to the Government White Paper on the future of Aviation"

<sup>3</sup> Ove Arup Consultants, *Cardiff International Airport and Culverhouse Cross Access Improvement Planning Stage Report for the Welsh Assembly Government* (Dec Ref 08/7352), June 2008 Page 14 [Available in the Members' Library]

<sup>4</sup> Minutes of Cardiff Airport Consultative Committee meeting of 27 January 2009

<sup>5</sup> South East Wales Transport Alliance 12th July 2006, Cardiff International Airport Masterplan consultation - SEWTA's Response, Item 12 (i) See: <http://www.sewta.gov.uk/Board%20Meetings/July06/Item12.doc>

<sup>6</sup> Minutes of Cardiff Airport Consultative Committee meeting of 9 September 2008

<sup>7</sup> Western Mail article by Tomos Livingston 16 February 2009 See: <http://www.walesonline.co.uk/news/wales-news/2009/02/16/belgian-success-gives-wings-to-cardiff-airport-s-expansion-plans-91466-22934839/>

#### 4. Inadequate traffic flow information

The WAG consultants, Ove Arup & Partners, say that “*In the absence of calculations produced by a computer traffic model, the **evidence for congestion tends to be anecdotal rather than factual.***”<sup>8</sup> (our emphasis). They also say “*There is currently localised congestion along certain parts of the signed airport route, for example Culverhouse Cross. However, based on available traffic data, **the airport does not seem to contribute significantly to this congestion.***”<sup>9</sup> (our emphasis). The consultants have identified the need to “***develop a new, robust transport model for the wider study area,***...”<sup>10</sup> (our emphasis).

We contend that such modelling should be performed before a decision is made as to whether there is a need and which corridor is preferred, not afterwards.

#### 5. Focus of the study

The publicity leaflet for the 2008 exhibitions was entitled “*Improving Access to Cardiff International Airport: Public Consultation – July 2008*”.<sup>11</sup> We are concerned that there may have been another agenda that was effectively hidden amongst a confusing conglomeration of other proposals.<sup>12</sup>

The WAG is committed to only four minor road improvements for the St Athan development to go ahead<sup>13</sup>, and Metrix has denied any requirement for further road improvements. The joint Metrix, WAG and Vale of Glamorgan ‘St Athan Development Brief’ makes no mention of a M4 junction 34 link road.<sup>14</sup>

And yet we find that “*The website for the airport industry*” states that: “*Road access to the airport is poor at the current time with only minor roads running near it after junction 33 of the M4 motorway. Improvement of the road access has been met with opposition and a public enquiry in 2006 but this is no longer a problem as the forthcoming Defence Training Academy at RAF Saint Athan, **which is to get a direct link to the M4 motorway** is near the airport and the link road will serve both.*”<sup>15</sup> (our emphasis).

It seems that the Welsh Transport Planning and Appraisal Guidance (WelTAG) – which is being used for these proposals – requires that road improvements for developments such as the St Athan college, must include a transport scheme as an integral component.<sup>16</sup> This has given rise to the suspicion that improved access to the airport is being used as a convenient excuse for improving access to St Athan.

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<sup>8</sup> Ove Arup Consultants, *Cardiff International Airport and Culverhouse Cross Access Improvement Planning Stage Report for the Welsh Assembly Government* (Dec Ref 08/7352), June 2008 Page 36

<sup>9</sup> *Ibid* Page 14

<sup>10</sup> Ove Arup Consultants, *Cardiff International Airport and Culverhouse Cross Access Improvement Planning Stage Report for the Welsh Assembly Government* (Dec Ref 08/7352), June 2008 Page 10

<sup>11</sup> See: <http://wales.gov.uk/consultation/det/2008/transport/improveaccess/consultation.pdf?lang=en>

<sup>12</sup> See: <http://wales.gov.uk/deet/meetings/ciapublicinfo/july08/context.pdf?lang=en>

<sup>13</sup> Reply from the Deputy First Minister and Minister for the Economy and Transport to a question from Andrew R T Davies (WAQ52439) presented on 8 September 2008 see: <http://www.assemblywales.org/waq080908-e.pdf>

<sup>14</sup> St Athan Development Brief July 2006 Page 22 § 3.6

[http://www.valeofglamorgan.gov.uk/files/Living/Planning/Policy/Development/St\\_Athan\\_Development\\_Brief.pdf](http://www.valeofglamorgan.gov.uk/files/Living/Planning/Policy/Development/St_Athan_Development_Brief.pdf)

<sup>15</sup> See: <http://www.airport-technology.com/projects/cardiffinternational/>

<sup>16</sup> See WelTAG 3.1.3 “WelTAG is not geared specifically to deal with new development or regeneration-led proposals...”

The study objectives in the Invitation to Tender included to “*Identify and investigate options available for the provision of an improved route between the M4, junction 34 and Sycamore Cross and associated upgrading of the A4226*”.<sup>17</sup> None of the other possible corridors was mentioned explicitly, which provides a potential bias in favour of this corridor.

## **6. Conduct of the Public Consultation Exercise**

It is claimed that the 2007 exhibitions “*identified a need for improved airport access*”. We would dispute this. The questions asked of those attending the 2007 public exhibitions are open to considerable criticism. Question 2 asked “*Do you consider road access to the Airport is adequate? Yes/ No*”. This is not a neutral question, as it is bound to be interpreted as ‘would you like there to be better road access to the airport?’ It should be noted that the answer from those who are happy with access by car, but not happy with the bus services, would be ‘No’. The statistical validity of a small sample (218 responses) of unknown representativeness, is highly suspect, so we do not think that much weight should be given to this piece of information.

The aerial photograph/map that was displayed at the 2008 Pendoylan exhibition was wildly over-optimistic about the extent of flooding in the Ely valley – a serious and recurring issue that is likely to be made worse by building a road through the valley. We have been told that ‘attenuation ponds’ would be provided to ameliorate this problem, but there was nothing about them on the exhibition boards.

We also contend that the supporting information provided in the public consultation leaflets was flawed, with a bias towards Corridor C. For example, in the lists of benefits and disadvantages of the three corridors, no mention was made of the fact that Corridor C would cross a Site of Special Scientific Interest (SSSI) and a golf course, whereas both of these were given as disadvantages of Corridor A.<sup>18</sup> There was also no mention that “*The deserted Medieval settlement of Caerwigan [sic] would be demolished by the Pendoylan outer western bypass option*.”<sup>19</sup> Pendoylan is designated by the local council as a Special Landscape Area, with ecologically vulnerable sites. The centre of Pendoylan is a Conservation Area, and has seventeen times been winner of the Best Kept Village in the Vale award.

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<sup>17</sup> Ove Arup Consultants, *Cardiff International Airport and Culverhouse Cross Access Improvement Planning Stage Report for the Welsh Assembly Government* (Dec Ref 08/7352), June 2008 Appendix A

<sup>18</sup> See <http://wales.gov.uk/consultation/det/2008/transport/improveaccess/consultation.pdf?lang=en>

<sup>19</sup> Welsh Assembly Government Cardiff International Airport and Culverhouse Cross Access Improvements Preliminary Stage 2 Scheme Assessment Report July 2008 p.54

**Brian Gibbons AC/AM**  
Y Gweinidog dros Gyfiawnder Cymdeithasol a Llywodraeth  
Leol  
Minister for Social Justice and Local Government



Llywodraeth Cynulliad Cymru  
Welsh Assembly Government

Eich cyf/Your ref KJ/NR/LONGJ  
Ein cyf/Our ref BG/00309/09

Nick Ramsay AM  
16 Maryport Street  
Usk  
Monmouthshire  
NP15 1AB

28 April 2009

*Dear Nick*

Thank you for your recent letter concerning Abergavenny Cattle Market.

The future of the cattle market in Abergavenny is clearly an important one for those living in and around the Abergavenny area, and as you mention in your letter, there is a legal requirement to maintain the cattle market conferred by the Abergavenny Improvement Acts 1854 – 1871.

The Welsh Ministers have the power under section 58(2) of the Local Government (Wales) Act 1994 to repeal local Acts by Order where they appear to be spent, obsolete, or unnecessary or have been substantially superseded by another enactment. That would in theory include the Abergavenny Improvement Acts. Such an Order would be made under negative resolution through the National Assembly.

I have no view on whether there should be a cattle market in Abergavenny. That is rightly a planning matter for Monmouthshire County Council and, should it be called in, the Minister for Environment, Sustainability and Housing. The Council has previously contacted Ministers with a request to repeal the local Acts, and if considered an obstacle to the redevelopment of the site, I would consider such a request subject to local consultation, and once all planning procedures have been met.

Yours sincerely

A handwritten signature in black ink, appearing to read 'Brian Gibbons'.

**Brian Gibbons AM**

Bae Caerdydd • Cardiff Bay  
Caerdydd • Cardiff  
CF99 1NA

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