

TravelWatch-**ISLE OF MAN**

Representing and promoting the interests of Isle of Man Passengers
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Comparison of the vulnerability of ferry services to major island communities in N W Europe.

SCOPE and PURPOSE

The purpose of this paper is to compare the vulnerability of IOM ferry services, in the event of vessel non-availability, with those available to the other major island communities with a population over 20,000 and which require an open-water ferry passage of an hour or more to reach:

- ^ Channel Islands (Jersey & Guernsey)
- ^ Outer Hebrides (Harris & Lewis)
- ^ Orkney and Shetland
- ^ Bornholm
- ^ Gotland

SUMMARY

1. Isle of Man – with a population of 80,000 is served by one all year vessel
2. Jersey & Guernsey – population 156,000 are served by two year round vessels
3. Orkney & Shetland – population 42,000 are served by six year round vessels
4. Harris/Lewis (Outer Hebrides) - population 20,000 is served by three year round vessels
5. Bornholm (Denmark) – population 42,000 is served by two year round vessels
6. Gotland (Sweden) – population 57,000 is served by two year round vessels

The above services are all provided in winter by conventional (Ro-Pax and/or Ro-Ro) vessels. Fast-craft are used by all except the Scottish operators to provide additional summer capacity, although one fast craft operates year round to Bornholm. Further details of the vessels and operators follow in this paper.

CONCLUSION

The Isle of Man, although one of the larger island communities, is the only one dependent in winter on a single vessel for its freight and passenger services. It neither has its own, nor other readily available, all-weather back up vessel. The effect of the *Ben-my-Chree* going out of service for more than a few days would therefore have a far greater effect on the population of the Isle of Man, than the loss of a vessel on any other of these other routes would have on the island communities they serve.

COMMENT

Not surprisingly the number of passengers carried to/from each island dictates the number of vessels available, so that communities with a high visitor numbers relative to the population enjoy better vessel provision (and therefore potentially less vulnerability to breakdown disruption). All these communities – some of which have much smaller populations than IOM – have more ferries at their disposal and are therefore better able to deal with unexpected disruption from their own resources. With the exception of Gotland, all these communities require vessels of similar or smaller size than those used by IOMSPC but all are better able to cover contingencies from within their own resources. The decline in the availability of suitable charter tonnage has brought this problem into sharp focus in recent months.

The economics of providing these levels of service are outwith the scope of this paper, but it can be noted that, apart from the Channel Islands, the other routes and operators are all beneficiaries of some degree of subsidy – except for Pentland Ferries (Orkney).

NOTES:**STATISTICS_**

quoted are rounded and come from a variety of sources so should be regarded as indicative rather than definitive. Ship details are either taken from operator websites or sourced from **Ferries 2012 – British Isles & Northern Europe**.

SHIP TYPES

- ⤴ Ro-Pax - drive on/drive off vessels carrying both freight and passengers (e.g Ben-my-Chree).
- ⤴ Ro-Ro – freight drive on/drive off vessels, usually able to carry a maximum of 12 drivers.
- ⤴ Incat – fast wave-piercing catamarans built by Incat (e.g Manannan)
- ⤴ Austal – fast aluminium catamarans built by Austal Ships
- ⤴ Fast monohull – single hulled fast craft built by other manufacturers.

VEHICLES

figures are approximate and are maxima – the abbreviation **L** indicates the number of 15 metre long lorries which can be carried, whereas **T** refers to 13.5 metre long trailers. The maximum number of cars is based on there being no freight carried. However, due to vehicle deck configurations and height clearances, some vessels may be able to carry a full freight load plus some cars.

OTHER ISLANDS

- The **Aland Islands** in the Baltic (population 26,000) have been excluded from this study. As duty-free sales are permitted on ferries to/from Aland, the majority of ferries en route between Sweden and Finland/Estonia are scheduled to call there. It is estimated that 15 million passengers travel on duty free routes calling at the Aland Islands. This has led to a high level of ferry services from both international and local ferry companies. An official report was issued in December 2011 *[The significance of duty-free sales on board ferries to the transnational transport system in the Baltic Sea Region.](http://www.asub.ax/files/rapport_2011_8.pdf)*
- The islands of **Arran** and **Bute** each have more ferry passengers than IOM, despite populations of only 5,000 and 7,000 but these are shorter crossings with substantial commuter traffic, so have been excluded from the comparisons.
- The **Isle of Wight** (population 140,000) has also been excluded because of the short sheltered water passages, and multiplicity of services.

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Isle of Man

Population: approx 80,000

Operator: Isle of Man Steam Packet Company

Traffic carried: approx: 575,000 passengers - 171,000 passenger vehicles

Routes:

Douglas to Heysham	3hrs 30min (Ro-Pax)
Douglas to Liverpool	2hrs 45min (fastcraft) 4hrs 15min (Ro-Pax)
Douglas to Belfast / Dublin	2hrs 55min (fastcraft)

FLEET	Type	Passengers	Vehicles	Length	Built
Ben-my-Chree	Ro-Pax	630	90T 275 cars	125m	1998
Manannan	Incat	830	200 cars	96m	1998

Notes:

1. Douglas – Heysham services are operated by the *Ben-my-Chree* twice daily all the year round, except that between November and March the daytime Saturday and Sunday sailings go to Birkenhead. Approx once a month there is no Saturday night/Sunday morning sailing when the vessel is scheduled for maintenance.
2. Douglas – Liverpool services are operated by the fast craft *Manannan* between late March and late October – once or twice a day.
3. Douglas – Belfast/Dublin services are mainly operated by *Manannan* up to 3 days a week during the summer and on those days the vessel only makes a single round trip to Liverpool.
4. Services are modified during the *Ben-my-Chree*'s refit period with *Manannan* usually covering both Heysham and Liverpool daytime services, and a freighter being chartered to run one round trip on the Heysham route.

Vulnerability:

1. With the *Ben-my-Chree* being the only vessel on winter service, any major breakdown would cause significant problems for both freight and passenger services.
2. The availability of freight tonnage to charter is now extremely limited due to the shortage of vessels small enough to use Douglas Harbour. In an emergency situation there is no certainty that an adequate Ro-Ro service could be maintained.
3. The *Manannan* is able to carry relatively small amounts of freight – but this would be inadequate to keep the Island's supply lines open in the event of the *Ben-my-Chree* being out of service for more than a few days. Her ability to operate at short notice in winter would be constrained by weather (wave-height) limitations and possible lack of availability of trained crew at short notice.
4. In summer neither vessel has the capacity to cover for the other, except at the times of lowest demand. The availability of short-notice cover would be just as much a problem in summer as in winter.

Channel Islands

Population: Jersey approx 94,000
Guernsey approx 62,000

Operator: Condor Ferries

Traffic carried: over 1 million passengers - 200,000 passenger vehicles
and over 100,000 freight vehicles (source Condor Ferries website)

Routes: Poole/Weymouth/Portsmouth to Jersey/Guernsey
Ro-Pax 7/9 hrs Fast craft - 2hrs40 to 4 hrs

Jersey/Guernsey to St Malo/Cherbourg
Fast craft – 2 hrs

FLEET	TYPE	Passengers	Vehicles	Length	Built
Commodore Clipper	Ro-Pax	500	92T 100 cars	129m	1999
Commodore Goodwill	Ro-Ro	12	92T	126m	1996
Condor Express	Incat	741	185 cars	86m	1996
Condor Rapide	Incat	870	200 cars	86m	1997
Condor Vitesse	Incat	741	185 cars	86m	1997

Notes:

1. Company is owned by a Macquarie fund – who also own Wightlink, but there is no vessel compatibility between the operations.
2. Operation in its current form started as two Ro-Ro vessels (freight only) and all passengers carried by fast craft – but weather reliability issues led to construction of *Commodore Clipper* (sister to *Ben-my-Chree*) to replace one of the Ro-Ro (freight only) vessels.
3. Fast craft have all experienced mechanical problems in the last two years.
4. Limited winter fast craft services operate between the Channel Islands and Weymouth / St Malo
5. Most passengers and freight for the other islands are carried by local ferries from Jersey/Guernsey but there are also seasonal passenger-only ferries from France.

Vulnerability:

1. Both *Commodore Clipper* and *Commodore Goodwill* are required to maintain a daily freight service to the Channel Islands – thus charters are required if either is out of service.
2. If one ship goes out of service unexpectedly 50% of freight capacity is maintained
3. Similar vessel length restrictions apply in Channel Islands harbours as in Douglas so Condor have the same problem as IOMSPC in obtaining replacement tonnage – particularly at short notice.
4. *Commodore Clipper* was out of service for several weeks following a fire in a vehicle on the freight deck in June 2010 and a second freighter had to be chartered in from Seatruck Ferries.

Orkney & Shetland

Population: Orkney approx 20,000
Shetland approx 22,000

Traffic carried: Passengers 305,000 – Cars 68,000 (2010 - source www.transportscotland.gov.uk)

Operator: **Northlink Ferries**

Routes: Aberdeen to Lerwick (Shetland) direct 12hrs - (via Orkney14hrs)
Scrabster to Stromness (Orkney) 1hr 30 min

NORTHLINK FLEET	TYPE	PASSENGERS	Vehicles	LENGTH	BUILT
Hamnavoe	Ro-Pax	600	95 cars 20L	112m	2002
Hrossey	Ro-Pax	600	150 cars 30L	125m	2002
Hjaltland	Ro-Pax	600	150 cars 30L	125m	2002
Hildasay	Ro-Ro	12	84T	122m	1999
Helliar	Ro-Ro	12	86T	122m	1998

Operator: **Pentland Ferries**

Route: Gill's Bay (Caithness) to St Margaret's Hope (Orkney) 1 hour

PENTLAND FERRIES	TYPE	PASSENGERS	Vehicles	LENGTH	BUILT
Pentalina	Ro-Pax	345	70 cars 9L	59m	2008

Notes:

1. Northlink ferry contract is due for renewal July 2012 – slight possibility of Orkney/Shetland services being split between different operators. Northlink will be bidding against P&O Ferries (who previously operated these services until 2002)
2. *Hamnavoe* is day ship operating on Scrabster-Stromness (Orkney) day route. Other Northlink Ro-Pax vessels are deployed on overnight Aberdeen – Shetland route.
3. Pentland Ferries compete with Northlink's Scrabster-Stromness service.
4. Northlink Ro-Ro freighters (on charter from Seatruck Ferries) operate mainly Shetland – Aberdeen (but are Douglas/Heysham compatible – and one will provide cover during *Ben-my-Chree* 2012 refit)
5. Main harbour restriction is Aberdeen, particularly at low tides and in bad weather. Works are currently proposed to ease these limitations.

Vulnerability:

1. Aberdeen-Shetland ships can be switched to Pentland Firth route to cover re-fits – but this reduces Shetland passenger service to alternate nights. This is not popular but gives flexibility. Freight schedule is usually adjusted to ensure daily freight sailing availability.
2. Some Aberdeen-Shetland sailings call at Kirkwall (Orkney)
3. In the event of Aberdeen being closed for a prolonged period Shetland ships are occasionally diverted to Rosyth (95 nautical miles further south).
4. Political pressure to charter in a CalMac ship to cover Pentland Firth refits - thereby enabling the full Shetland service to be maintained - has been resisted on cost grounds.
5. There is also a competitive one ship Ro-Pax service operated by Pentland Ferries from Gill's Bay (Caithness) to St Margaret's Hope (Orkney)
6. In the case of breakdown there are many options available.

Outer Hebrides

Population: Harris & Lewis approx 20,000
other islands approx 6,000 (no island more than 2,000)

Operator: Caledonian MacBrayne

Traffic carried: Passengers 320,000 – Cars 100,000

Commercial Vehicles 19,500

(2011 - source www.calmac.co.uk/ - see Note 3

Routes: Ullapool to Stornoway (Lewis) 2hrs 45 min
Uig (Skye) to Tarbert (Harris) 1hr 40min

FLEET	TYPE	PASSENGERS	VEHICLES	LENGTH	BUILT
Isle of Lewis	Ro-Pax	680	123 cars 10L	101m	1995
Muirneag	Ro-Ro	12	54T	106m	1979
Hebrides	Ro-Pax	612	110 cars 6L	99m	2000

Notes:

1. Lewis and Harris may be considered as a single island for transport purposes as they are linked by road. Some of the tourist traffic will arrive via one route and leave by the other.
2. The Stornoway (day) passenger service is provided by the *Isle of Lewis* and a night freight only service by the *Muirneag* (ex IOMSPC *Belard*). There are plans to replace both ships with one larger Ro-Pax – although local consultation had indicated a preference for two smaller-capacity Ro-Pax replacement vessels.
3. The *Hebrides* serves both Tarbert (Harris) and Lochmaddy (North Uist) but traffic figures are not split between the two. In the above figures it has been assumed that half the traffic she carries goes to Tarbert (Harris).
4. Ship sizes throughout the CalMac network are constrained by harbour facilities, but less so on the Stornoway route than elsewhere

Vulnerability:

1. The majority of traffic is carried on the Ullapool – Stornoway route so even during re-fits it is normal to provide an alternative (but smaller) vessel from within the CalMac fleet, and there are 3 or 4 other suitable units which could be deployed. In times of operational difficulty CalMac will normally cascade vessels between routes to provide cover within 24/36 hours – but delay problems are not unknown.
2. The existence of the secondary route from Uig to Tarbert enables emergency services to be maintained, albeit capacity could be a problem.

Bornholm

[Bornholm is a Danish island in the Baltic most directly reached from Copenhagen by road/rail via Ystad in southern Sweden. It has very high visitor numbers in summer]

Population: approx 42,000

Operator: Bornholmer Faergen

Traffic carried: Passengers 1.365m - Cars 311,000 (2010 – source www.statbank.dk)

Routes:

- ⤴ Bornholm – Ystad (Sweden) fast ferry - 3/8 round trips day – 1hr 20min
- ⤴ Bornhold – Koge (Denmark) Ro-Pax – one evening/overnight round trip daily – 5hrs 30min
- ⤴ Bornholm – Sassnitz (Germany) summer only 1-3 round trips per week – Ro-Pax 3hrs 30 min

FLEET	TYPE	PASSENGERS	VEHICLES	LENGTH	BUILT
Hammerodde	Ro-Pax	400	342 cars 106T	125m	2005
Povl Anker	Ro-Pax	1500	262 cars 26T	121m	1978
Leonora Christina	Austal	1400	359 cars	113m	2011
Villum Clausen	Austal	1055	200 cars	87m	1999

Notes:

1. Services are provided by a subsidiary of Faergen, in which Clipper Group (owner of Seatruck Ferries) is the major shareholder. The group operates services to a number of disparate Danish communities but vessels are not interchangeable between subsidiaries.
2. Under the previous contract services were operated by three ro-pax vessels and one fast craft, but the 2011 contract required the enlargement of the *Hammerodde* (a near sister to *Ben-my-Chree*) – by adding another freight deck, the construction of a larger fast-craft and the disposal of one of the Ro-pax vessels. The decision was made to retain the older *Povl Anker* because of her high passenger capacity. (The displaced vessel – another near sister to the *Ben-my-Chree* has been sold to New Zealand operator Strait Shipping)

Vulnerability:

1. Winter services are provided by one fast craft and one Ro-Pax vessel. Refits and breakdowns can therefore be covered from within existing resources with minimal re-scheduling.
2. Apart from summer weekends there is considerable spare capacity in the fleet with the *Povl Anker* being lightly used. Initial problems with the *Leonora Christina* after delivery led to some capacity problems when *Villum Clausen* was substituted.
3. The breakdown of one vessel would cause inconvenience but there is flexibility within the fleet to minimise this most of the time.

Gotland

[Gotland is an island in the Baltic off the east coast of Sweden. It has very high visitor numbers in summer]

Population: approx 57,000

Operator: Destination Gotland <http://www.destinationgotland.se/>

Traffic carried: Passengers 1.583m - Cars 495,000 (2008 – source www.gotland.se/imcms/1354)

Routes:

- ▲ Nynashamn – Visby 3hrs 20 (Fast RoPax) 3hrs 10 (Fast monohull)
- ▲ Oskarshamn – Visby 3hrs (Fast Ro-Pax) 2hrs 50 (Fast monohull)

FLEET	TYPE	PASSENGERS	VEHICLES	LENGTH	BUILT
Visby	Fast Ro-pax	1500	500 cars 118T	195m	2002
Gotland	Fast Ro-pax	1500	500 cars 118T	195m	2003
Gotlandia	Fast monohull	700	140 cars	112m	1999
Gotlandia II	Fast monohull	780	160 cars	122m	2006

Notes:

1. One vessel of each type is normally deployed on each route – with the fast monohulls not used in winter.
2. The Fast Ro-Pax vessels are capable of 28.5 knots, hence the similar passage times to the smaller fast craft.
3. Approx 75% of travel to/from Gotland is by sea with visitor numbers rising by 25% between 1995 and 2005. The highest traffic levels are in June, July and August.

Vulnerability:

1. With at least two ships in service most of the year, and excess capacity on offer in all but the peak months, vulnerability to unexpected breakdown etc is low.
2. The size of ships used on the Gotland routes (unlike the other comparisons in this paper) suggest few restraints on the type of ship that could be brought in to provide alternative cover.