

## **ATCO Scotland Information Paper 2016/1: Concessionary Travel by Rail for Scottish Residents**

### **Introduction**

- 1 At its meeting on 12 February 2016 the COSLA Development, Economic and Sustainability (DES) Executive Group considered the status of the ‘Scottish Blind Rail Travel Scheme’. This interest was prompted by uncertainties about the scope of the scheme and what rights, if any, there are for travelling companions. It was agreed that the DES Spokesperson should seek a meeting with Scottish Ministers.
- 2 COSLA officials have asked ATCO Scotland to prepare a background report detailing the current arrangements for concessionary travel by rail within Scotland and further afield.
- 3 These arrangements comprise:
  - \* The Scottish Blind Rail Travel Scheme;
  - \* Enhancements for local residents in some Council areas;
  - \* Discounts for visually impaired travellers and their companions throughout Great Britain, and
  - \* Railcards sold by train operators.

### **The Scottish Blind Rail Travel Scheme**

- 4 The Scottish Blind Rail Travel Scheme (SBRTS) was initiated in 1999 following discussions between COSLA and ATCO Scotland. ATCO (Association of Transport Co-ordinating Officers) is the professional body representing officers working in local authorities and related organisations to organise public transport services to supplement commercial provision, and to publicise and promote public transport opportunities within their areas.
- 5 In the late 1990s there was recognition that some people with visual impairments, who were not able to take advantage of Council managed concessionary fares schemes offering discounted or free bus travel, might be able to take advantage of travel by rail if the fares barrier was removed. The key features of the scheme introduced in 1999 have not changed since then:
  - \* Scottish holders of National Entitlement Cards (NECs) issued by virtue of Visual Impairment (identified by the incorporation of an ‘eye’ symbol) may travel by rail without payment of fare anywhere in Scotland and Berwick-on-Tweed and Carlisle. No tickets are issued.
  - \* All train operators providing rail passenger services in Scotland (except for heritage railways) participate in the scheme, including the operators of the Glasgow Subway and the Edinburgh Tram.

- \* NECs issued to holders who are Registered Blind display a '+1' symbol which allows a companion to travel also without payment on *buses*, but there is no entitlement for a companion to travel without payment on rail services under the terms of SBRTS. There is however a right for companions of all blind and partially-sighted travellers (not just those with '+1' entitlement) to travel at discounted fares throughout Great Britain - under a scheme run by ATOC (the Association of Train Operating Companies) - see #21 below.
  - \* SBRTS also includes a right for island residents to make two return ferry trips to the mainland each year.
  - \* SBRTS is funded by the individual Councils (with SPT acting on behalf of its constituent authorities).
  - \* Payments are made on the basis of a standard annual cost for each visually impaired NEC holder in each Council area. The annual cost in 1999 was agreed with ScotRail at £5.40 for each such cardholder, on the basis of a calculation designed to provide a fair return for the rail operators on assumptions about likely take-up. It has risen broadly in line with inflation since then. The current figure for 2015-16 is £8.50, unchanged from 2014-2015.
  - \* ScotRail acts as a single point of contact with SPT and individual Councils in the rest of Scotland. ScotRail sends out the bills, receives the payments, and passes on appropriate proportions to the other rail operators and to ferry operators, with whom they have their own agreements.
- 6 There are currently (as at December 2015, which was the relevant date for determining 2015-2016 payments) 14,123 NECs in circulation by reason of Visual Impairment (Appendix 1). The total payment made by Councils for 2015-2016 is accordingly around £120,000.
  - 7 In order to obtain an NEC by virtue of visual impairment it is necessary that the applicant be registered with a recognised blind society or their local authority. The Royal National Institute for the Blind estimates that there are many more people with such impairments than choose to register.
  - 8 In 1999, concessionary schemes for travel by bus in Scotland were organised and paid for by SPT and Councils, dealing directly with the bus operators. It was therefore natural that local authorities should at that time take on the same functions for the new SBRTS.
  - 9 In 2006 full responsibility for concessionary travel by bus was taken over by Transport Scotland in a new Scotland-wide national free scheme. The SBRTS therefore pre-dates the national bus scheme by 7 years. The budget for national free bus travel in FY 2016-17 by those over the age of 60, or with disabilities at a younger age, is £212m. In 2006, COSLA and the Scottish Executive negotiated an equivalent agreed reduction to each Council's GAE to reflect the transfer of funding responsibility for *bus* concessions.
  - 10 It was then, and remains, the view of ATCO Scotland that responsibility for organising and funding SBRTS and ferry concessions should have transferred to Transport Scotland at the same time, but that view was not shared by Transport Scotland and SBRTS remains a discrete scheme, administered separately from the national bus scheme.

- 11 The Scottish Government conducted a major review of the free bus travel scheme in 2009, including examination of the merits and costs of extending concessions to additional categories of eligibility and modes of travel. This was undertaken by a Steering Group comprising representatives of the Scottish Government's Transport Directorate, Transport Scotland and the Confederation of Public Transport (the trade organisation representing bus operators).
- 12 The Steering Group report noted that *"Since the introduction of the concessionary travel scheme, communications from members of the public and others have been strongly in favour of the scope of the scheme to be extended to include rail travel"* (sic). The possibility that more categories of disabled and elderly NEC holders might be granted free travel by rail was considered but discounted on cost and capacity grounds. No mention was made of the case for absorbing the existing free rail travel arrangements for blind NEC holders.
- 13 There was a further opportunity to rationalise the present arrangement when the ScotRail franchise came for renewal with effect from April 2016, by including the scheme within the specification in the Invitation to Tender. But despite representations by ATCO to Transport Scotland, and later to each of the short-listed bidders, this was not included and thus SBRTS remains as a stand-alone scheme.
- 14 SBRTS does not give benefits for travel within England and Wales. However the overall cost of cross-Border journeys can be reduced by using SBRTS to travel without charge from a Scottish station to Carlisle or Berwick-on-Tweed, before buying a ticket from there to or from the final destination.

### **Local Enhancements**

- 15 Some local Councils have chosen to enter into individual agreements with rail operators to secure and pay for local enhancements for their own residents. These Councils, and summaries of the benefits provided, are listed in Appendix 2. Only within the SPT, East Lothian, Fife, Highland and West Lothian areas are these agreements relevant for the companions of visually impaired rail travellers.
- 16 Within the SPT area companions of holders of NECs showing the "eye symbol" may travel at specified reduced fares within the designated area at any time. There is also no peak-time restriction for other disabled NEC holders and their companions. Other SPT (over 60) NEC holders are entitled to travel at reduced fares but not on rail services between 06:00 and 09:00 or between 16:30 and 18:00 on weekdays. There are no peak-time restrictions on weekends or on national public holiday. On Glasgow Subway elderly and disabled NEC holders may not travel before 09:00, but there is no evening restriction.
- 17 Companions of East Lothian '+1' Blind cardholders may travel within the former 'Lothian Region' area for 5p single or 10p return if the start or finish of the journey is a station within East Lothian.
- 18 All Fife elderly and disabled NEC holders and companions of '+1' Fife cardholders may travel off-peak (ie at all times except before 09:15 on weekdays) on rail services wholly within Fife for £1.00 per single journey and £2.00 return.

- 19 Elderly or disabled Highland NEC holders may travel at half fare within the Highlands. Companions of Blind '+1' NEC holders may travel for £0.50 single or £1.00 return on journeys which are entirely within the Highlands or are on through services which terminate in Aberdeen, Edinburgh or Glasgow.
- 20 West Lothian disabled and elderly NEC holders, and companions of all '+1' cardholders, can travel off-peak for £2 single / £4 return within West Lothian and to / from adjoining Council areas (see Appendix 2), and at half-fare to stations in Glasgow on the Bathgate and Shotts routes, and to East Lothian.

### Discounts for Companions of Visually Impaired Travellers throughout Great Britain

- 21 SBRTS does not give any benefits for travelling companions. However a scheme run by ATOC (the Association of Train Operating Companies) does offer discounts for companions throughout Great Britain, including Scotland. The companion of a blind or visually impaired adult may do so at the discounted rates below:

Ticket Type	Discount on Adult Fare
First Class / Standard Anytime Day Return	50%
First Class / Standard Anytime Singles and Returns	34%

- 22 Within England and Wales, whilst visually impaired travellers without Railcards are not generally eligible for discounted tickets, they are entitled to the above discounts when accompanied, though not when travelling alone. Because Scottish NECs might not be recognised south of the Border, travellers are advised to carry:

*'a document from a recognized institution such as Social Services, their local Authority or Blind Veterans UK. Acceptable documentary evidence includes: CVI (Certificate of Visual Impairment); BPI (Scotland) BD8 certificate, Local Authority registration card or letter for being blind or partially-sighted'.*

### Railcards and ScotRail 'Club 50' Scheme

- 23 The railway operators sell a 'Disabled Persons Railcard', at a charge of £20 for one year or £54 for three years, which allows discounts of 1/3 on all types of rail ticket, and the same discount for any adult companion.
- 24 'Senior Railcards', costing £30 for one year and £70 for three years, offer the same 1/3 discount but without the right for a companion to receive the same benefit.
- 25 'Highland Railcard' is a commercial product costing £9 a year and available to all permanent residents aged 16 or over living in Postcode areas:  
all IV except IV12, IV30, IV31, IV32, IV36; all KW; all HS; PA20 to PA38, PA41 to PA49, PA60 to PA78; PH16, PH17, PH30 to PH44, PH49, PH50; FK20, FK21; G83.  
Highland Railcard holders are entitled to travel at half fare on the Mallaig / Fort William / Oban - Glasgow; Wick / Thurso - Inverness: and Kyle of Lochalsh - Inverness routes, and two accompanying children can travel for a flat fare of £2 each.
- 26 'Club 50' is administered by ScotRail, but the benefits apply to the services of all operators in Scotland. Anyone aged 50 or over may pay an annual membership fee of £15 which allows discounts of 20% for online purchases (10% for station sales and tele-sales) on Off-peak and Advance fares anywhere in Scotland.

- 27 Railway staff are instructed to apply whichever discount scheme is most beneficial to the passenger for a particular journey, but two schemes cannot be used in conjunction with each other.

### **Conclusion**

- 28 The complexity of current arrangements for visually impaired passengers travelling with companions in Scotland is evident. It is hoped that this Information Paper will provide helpful factual background to any discussion of possible changes.

ATCO Scotland

May 2016

**Appendix 1: Numbers of National Entitlement Cards in Circulation at December 2015  
by Reason of Visual Impairment**

*Holders who are Registered Blind receive '+1' cards which entitle a companion to travel without payment on buses only*

	Visually Impaired +1	Visually Impaired	Total
Aberdeen	281	247	528
Aberdeenshire	340	190	530
Angus	158	87	245
Argyll & Bute	238	85	323
Clackmannanshire	66	25	91
Comhairle Nan Eilean Siar	23	10	33
Dumfries & Galloway	230	107	337
Dundee City	369	211	580
East Ayrshire	272	81	353
East Dunbartonshire	177	98	275
East Lothian	156	56	212
East Renfrewshire	130	64	194
Edinburgh	773	289	1062
Falkirk	260	119	379
Fife	796	264	1060
Glasgow City	1426	445	1871
Highland	412	54	466
Inverclyde	228	94	322
Midlothian	156	35	191
Moray	137	79	216
North Ayrshire	394	154	548
North Lanarkshire	646	196	842
Orkney Islands	26	5	31
Perth & Kinross	265	190	455
Renfrewshire	428	167	595
<b>Scottish Borders</b>	<b>193</b>	<b>94</b>	<b>287</b>
Shetland Islands	21	4	25
South Ayrshire	246	99	345
South Lanarkshire	652	279	931
Stirling	135	72	207
West Dunbartonshire	226	60	286
West Lothian	251	82	333
<b>Total</b>	<b>10,097</b>	<b>4,026</b>	<b>14,123</b>

## Appendix 2: Local Arrangements for Travel by Rail at Reduced Fares

Area	Benefits
Aberdeenshire	Taxicard holders may travel by rail at half fare within Aberdeen / Aberdeenshire and to/from Montrose and Nairn. No provision for companions.
Angus	Scheme allows half-fare rail travel for all Angus NEC holders (disabled and elderly) within Angus and to/from Dundee and Broughty Ferry was withdrawn in 2016. No provision for companions.
East Lothian	East Lothian NEC holders can travel off-peak for 50% fare between any stations within the former 'Lothian Region' area if the start or finish of the journey is a station within East Lothian. Companions of '+1' Blind cardholders may travel within the former 'Lothian Region' area for 5p single or 10p return if the start or finish of the journey is a station within East Lothian.
Edinburgh	Companions of Blind '+1' Entitlement Cards issued anywhere in Scotland may travel without payment on Edinburgh trams. Holders of Taxicards issued by Edinburgh Council may travel without payment on rail services within the Lothians. No provision for companions.
Fife	All elderly and disabled Fife NEC holders and their companions may travel off-peak on journeys wholly within Fife for (since 15 May 2016) £1.00 single and £2.00 return (except before 09:15 on weekdays).
Highland	Companions of Highland resident Blind '+1' NEC holders may travel for £0.50 single or £1.00 return on journeys which are entirely within the Highlands or are on through services which terminate in Aberdeen, Edinburgh or Glasgow.
Midlothian	Holders of Taxicards issued by Midlothian Council may travel without payment on rail services within the Lothians. No provision for companions.
Perth & Kinross	The Council issues Highland Railcards on request to NEC holders with PH17 postcodes (the sparsely populated Rannoch, Bridge of Gaur area) without charge.
SPT	Strathclyde NEC holders may travel by rail within the SPT area for £0.90 single / £1.30 return for journeys of 10 miles or less, and at half-fare for longer journeys. Travel is permitted on the Subway for £0.90 single / £1.30 return but not before 09:00 on weekdays. <b>Companions of '+1' NEC holders travel at half-fare, or the greater of £0.90 single / £1.30 return and the standard fare.</b> Full details in the Scheme Guidance document at: ( <a href="http://www.spt.co.uk/travelcards/concessions/">http://www.spt.co.uk/travelcards/concessions/</a> )
West Lothian	West Lothian NEC holders can travel off-peak for £2 per single journey between stations in West Lothian and stations in Edinburgh, Falkirk and North Lanarkshire Council areas (Croy, and stations on the Edinburgh to Queen Street, Glasgow via Bathgate or West Calder lines); and at half fare to stations in East Lothian and Glasgow (stations on the Edinburgh to Glasgow via Bathgate or West Calder lines). Companions of '+1' Blind cardholders may travel at the fares specified above. Holders of West Lothian Taxicards may travel free by rail within West Lothian and stations in Edinburgh, Falkirk and North Lanarkshire. Travel to and from stations in East Lothian, and Glasgow (as specified above) is at half fare.