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# Integrated Transport in Wales

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Submission to  
the National  
Assembly's  
Enterprise and  
Business  
Committee

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2<sup>nd</sup> November 2012

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## **Integrated Transport in Wales**

### **The Federation of Small Businesses Wales**

The Federation of Small Businesses Wales (FSB Wales) welcomes the opportunity to present its views to the National Assembly's Enterprise and Business Committee on integrated transport in Wales. FSB Wales is the authoritative voice of small businesses in Wales. With 10,000 members, a Welsh Policy Unit, two regional committees and twelve branch committees; FSB Wales is in constant contact with small businesses at a grassroots level. It undertakes a monthly online survey of its members as well as an annual membership survey on a wide range of issues and concerns facing small business.

#### **Executive Summary**

- Moves towards greater integration of public transport should recognise at the outset that the use of private transport and the road network are crucial for businesses in Wales. This means that efforts to encourage integration between private and public transport should be a starting point for integration policies.
- More work is needed to ensure that public transport becomes a viable alternative to private transport for businesses in Wales.
- Road infrastructure problems in Wales, such as traffic bottlenecks, cause significant costs to businesses in Wales. The lack of viable alternatives makes substitution to alleviate these costs unlikely.
- In order to achieve integrated transport in Wales, transport policy should have effective organisation and management of the existing network, encourage economic growth and ensure the network is reliable and flexible to business and consumer needs.
- The Welsh Government should make use of its powers under the Transport (Wales) Act 2006 to create Joint Transport Authorities where appropriate and consider stronger measures in proposed city regions. The current situation is too fragmented amongst Wales' 22 local authorities.
- The model of ownership for the Wales and Borders franchise will have little impact on transport integration. Rather, the Welsh Government should ensure that any future franchise agreement is fit for purpose and fulfils Wales' business and consumer needs by including integrated transport as part of the franchise negotiations.
- The Welsh Government should examine bus quality contracts and partnerships further and carry out research into their likely economic impact and their potential to drive integration. This should then form part of a wider debate on the future of bus services in Wales.
- While recent announcements on rail electrification have been welcome, Wales has historically been underfunded in terms of rail infrastructure investment. Part 2 of the Silk Commission should examine whether responsibility for rail infrastructure funding should be devolved to Wales on a similar basis to Scotland; particularly as the Welsh Government already has many of the other levers around public transport needed to increase integration.



## **Methodology**

This submission will be split into two broad sections. The first section will deal exclusively with general principles that FSB Wales believes should be adhered to in promoting integrated transport. This includes examining why businesses use the transport system and the likely ramifications of inefficiencies that exist as a result of poor integration. To inform this, a number of statistics will be used from FSB Wales member surveys that will provide an indication of the small business view of transport.

The second section will deal with some of the more detailed questions being considered by the Committee. This includes the nature of decision making in Wales around transport as well as the future of bus and rail services and their operation. This will be analysed in the context of current Welsh Government priorities, such as the city region approach, in order to provide an analysis of where small businesses would see benefit from reform.

## **Introduction**

Wales' transport infrastructure is of vital importance to micro, small and medium sized enterprises across Wales. The SME sector currently represents around 99.2 per cent of businesses in Wales, with micro-businesses alone representing 94.6 per cent<sup>1</sup>. The vitality of Wales' SME sector is therefore inextricably linked with Wales' current and future prosperity. Now more than ever, Wales' transport network requires a step change in approach to increase efficiency, flexibility and the possibilities for sustained economic growth. Integrated transport is just one aspect of this holistic approach to transport in Wales that needs to be addressed in order to provide the conditions for growth.

## **The current situation**

There is consensus emerging amongst stakeholders in Wales that Wales' transport management needs a step change in order to produce the flexible, efficient transport system seen elsewhere in Europe. Indeed, all political parties carried commitments in their 2011 election manifestos to promote more efficient use of our existing transport network and made the vital link between economic wellbeing and investment in transport.

At present, the way transport is planned and operated in Wales is far too fragmented with 22 local authorities setting their own priorities within the context of weak voluntary arrangements for regional working. In this respect, Wales is behind the curve where other countries with similar topographical challenges, such as Scotland, have put in place management and planning processes that lead to more integrated and strategic outcomes.

This is also reflected in Wales' economic performance relative to the UK and EU27 averages, with productivity lagging behind at an insufficient £15,145 per capita or 74 per cent of the UK average during 2010<sup>2</sup>. The productivity gap has recently slowed but is still significant. Transport policy is one of the key levers with significant devolution to the Welsh Government where issues leading to Wales' productivity gap, such as the agglomeration effect, can be remedied<sup>3</sup>. FSB Wales would like

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<sup>1</sup> Welsh Government. 2012. *Size analysis of Welsh Business* [Online]. Available at: <http://wales.gov.uk/docs/statistics/2012/121025sdr1862012en.pdf> (Accessed 30th October 2012)

<sup>2</sup> StatsWales. 2012. *Regional Gross Value Added (GVA), by UK Country* [Online]. Available at <http://www.statswales.wales.gov.uk/TableViewer/tableView.aspx?ReportId=114> (Accessed 30<sup>th</sup> October 2012)

<sup>3</sup>Transport Works. *The case for investing in the city regions* [Online]. Available at: <http://www.transportworks.org/evidence-base/agglomeration-effects> (Accessed 30th October 2012).



to see far greater connectivity to allow economic activity and productivity to improve, closing the productivity gap and producing wealth for Wales’ citizens.

It is not difficult to see that the current state of affairs is insufficient and a step change is required. Developing and facilitating truly integrated transport would allow Wales’ economic centres to maximise their potential by allowing greater interaction and innovation. The Welsh Government has recognised this in its reprioritised National Transport Plan and is taking tentative steps towards adopting a city region approach that could provide improved strategic responses to the current transport problems faced in Wales<sup>4</sup>:

*“The Wales Spatial Plan identifies the need for fully integrated, high-quality public transport to underpin the vision for south-east Wales as a networked city region. Making better use of the area’s existing infrastructure will contribute to the Plan’s 20-year vision for all the key settlements in south-east Wales to be linked to Cardiff and Newport by suitable high capacity public transport.”*

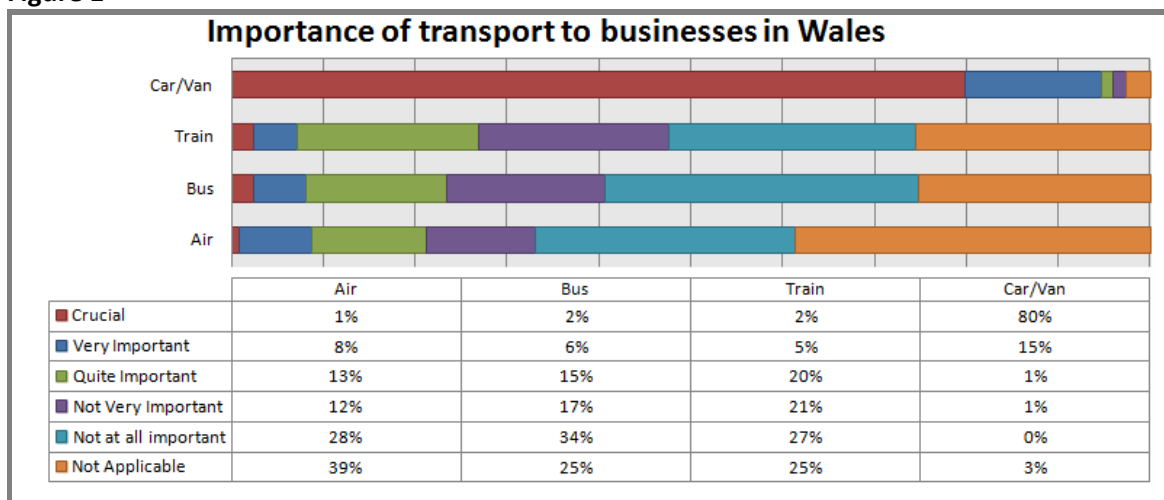
However, this must now be translated into bold and meaningful action that produces the flexible, efficient and sustainable transport network Wales’ small businesses need.

#### How do SMEs use the transport network?

Transport, particularly road transport, is crucial for the day-to-day operation of a business in Wales. Many businesses often rely on the transport network to be reliable and effective in order for them to access their customer base, deliver and receive goods and to enable their employees to reach the workplace. Inadequate coordination of transport can lead to undue costs and losses in productivity.

FSB Wales frequently surveys its members to build a picture of the issues that are challenging them. Our most recent survey on infrastructure highlighted the nature of transport use for small and medium sized enterprises in Wales and could inform the Welsh Government’s approach to developing transport priorities.

Figure 1

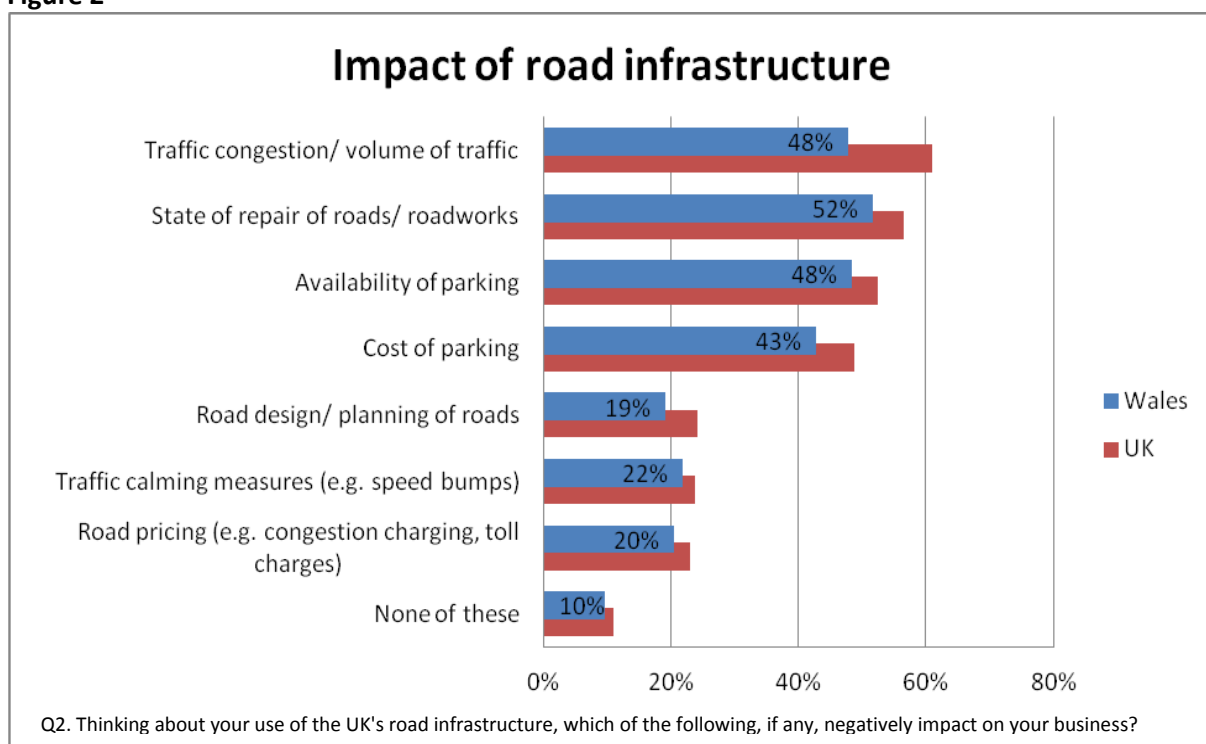


<sup>4</sup> Welsh Government. 2010. *National Transport Plan* [Online]. Available at: <http://wales.gov.uk/docs/det/publications/100329ntpen.pdf> (Accessed 30th October 2012).

Clearly, figure 1 highlights that for the vast majority of FSB Wales members the use of their car or van is crucial to their day-to-day operation<sup>5</sup>. Only one per cent of members believed the car was unimportant to the wellbeing of their business. This indicates two things. Firstly, that private transport and the road network are vital to businesses and secondly that any moves towards encouraging greater transport integration must be on the basis that the use of private transport will be essential. Therefore, integrating the use of private vehicles and public transport should be the starting point for integrated transport solutions for business.

This does not mean that public transport is not important; however, it is of less significance than private transport. In the survey 27 per cent of members cited rail travel and 23 per cent bus travel as important to their businesses. The emphasis on private transport use could be due to a number of reasons; including a poorly integrated transport system that deters businesses from exploring alternative modes of transport. Evidently, more work is needed to persuade businesses of the merit of public transport and to capitalise on the economic opportunities more integrated transport systems would provide.

**Figure 2**



Focusing on the road infrastructure in Wales; figure 2 explores the negative impact of road infrastructure on businesses in both Wales and the UK<sup>6</sup>. Congestion and volumes of traffic are an issue of grave concern for businesses in Wales. As businesses in Wales are disproportionately reliant on private transport for their day-to-day operation (the UK figure for car/van use is 70 per cent<sup>7</sup>) it is likely that the issues highlighted above will be exacerbated by poor transport integration and a lack

<sup>5</sup> FSB Wales Survey Panel. *Infrastructure Survey April 2012*.

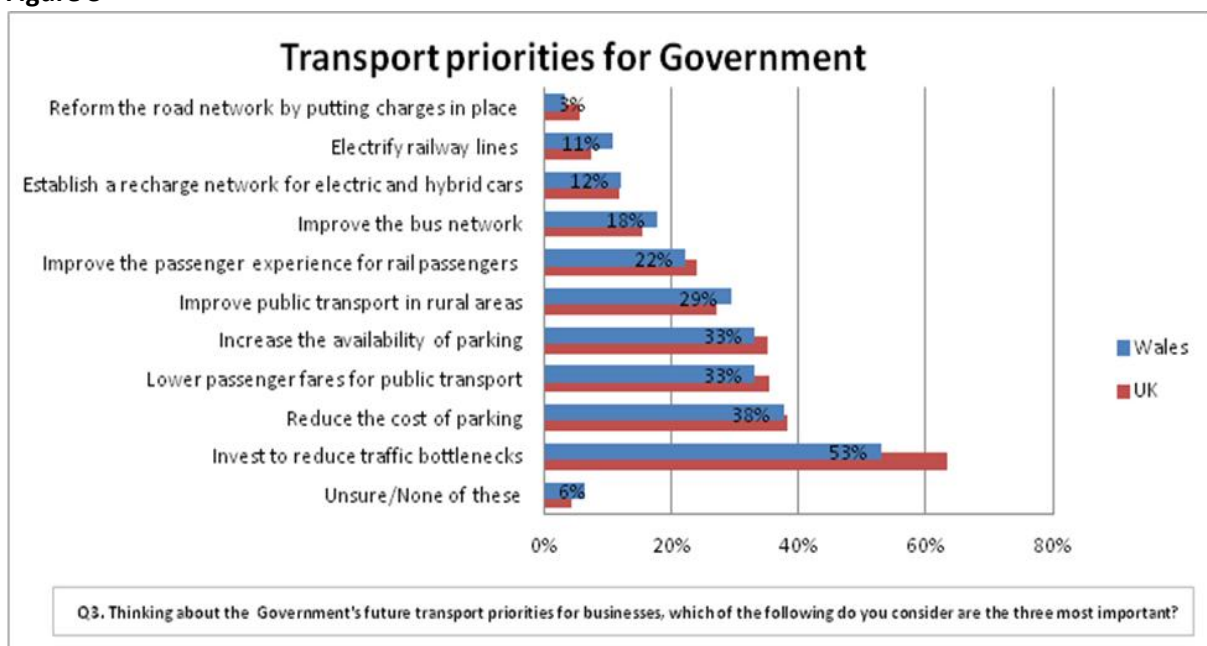
<sup>6</sup> *Ibid*

<sup>7</sup> FSB Survey Panel. *Infrastructure Survey April 2012*.

of a viable alternative mode of transport. Therefore, should a business experience traffic congestion or high volumes of traffic it is less likely to be able to reduce the resultant or future productivity and profitability losses. This highlights the issue of resilience as a prime concern for transport in Wales.

Figure 3 examines the priorities FSB Wales members would like to see decision makers focus on in order to alleviate their problems around the transport network<sup>8</sup>. For obvious reasons, 53 per cent of members in Wales highlight investment in traffic bottlenecks as the key area where the decision makers could intervene to improve conditions. However, significant interest is also taken in reducing fares for public transport (33 per cent), improving transport in rural areas (29 per cent) and improving the bus network (18 per cent).

**Figure 3**



These figures emphasize the need for a coherent, coordinated and actively managed and maintained transport network. In a challenging economic climate, small businesses can ill-afford additional costs to their business, they need to remain competitive and maintain their margins to help them survive and grow. In this context, transport should be a prime concern of the Welsh Government in its policy development, including the use of structural funds where possible.

<sup>8</sup> FSB Wales Survey Panel. *Infrastructure Survey April 2012*.

Figure 4

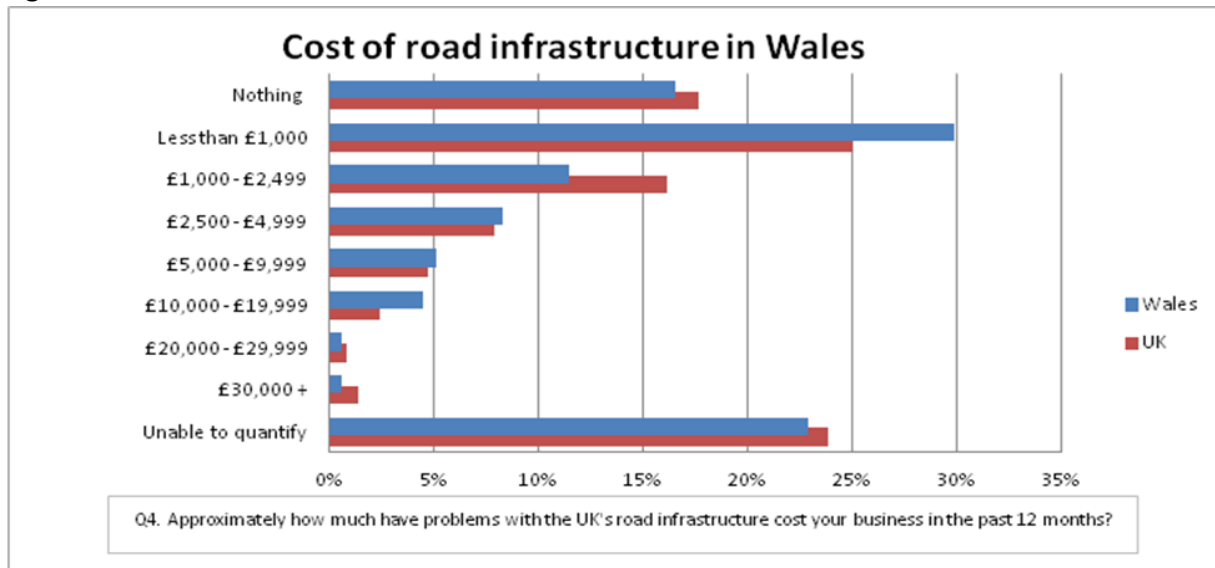


Figure 4 highlights the real cost to businesses of problems relating to road infrastructure in Wales<sup>9</sup>. Significantly, only 17 per cent of FSB Wales members believed problems with road infrastructure had not cost their business anything in the 12 months to April this year. A plurality of 30 per cent of members in Wales felt that road infrastructure problems had cost them between £1 and £1,000 pounds compared to 25 per cent across the UK. More worryingly, approximately 20 per cent of members felt that costs resulting from road infrastructure problems had been between £1,000 and £4,999. This is wealth the Welsh economy can ill-afford to lose at these times of economic difficulty. This situation could be avoided with a more strategic focus on integrated transport objectives, such as the planning of infrastructure and the management of the existing network.

### Three principles driving integrated transport

With this in mind, FSB Wales believes that the Welsh Government should seek to improve integrated transport in line with three main objectives. These are; creating effectively organised and managed networks, promoting solutions that encourage economic growth and increasing flexibility and reliability for those who use the transport network.

The Eddington Transport Study commissioned by the UK Government in 2006 stated that *“to meet the changing needs of the UK economy, the key strategic economic challenge is to improve the performance of the existing [transport] network”*. FSB Wales believes that it is appropriate and timely to consider the current transport governance arrangements in Wales to ensure that action to encourage integrated and more suitable transport solutions are taken forward. Whilst investment in future infrastructure is important, the Welsh Government should seek to ensure that the system as it currently operates is maximising its potential.

Wales’ poor relative productivity is an issue of which the Enterprise and Business Committee are likely to be acutely aware. FSB Wales believes that small businesses, if enabled to meet their potential, can be the drivers of economic activity that leads to the productivity gap being closed. The Welsh Government should examine the possibility for integrated transport with economic growth at

<sup>9</sup> *Ibid*



the heart of any reform. This means focusing on the interchange between the use of private transport, on which small businesses in Wales depend, and the public transport network. This could dramatically reduce unwarranted costs relating to the weaknesses in the current transport system.

Finally, future change must be made in a way that allows transport planning and management to be flexible to the changing needs of businesses and consumers in Wales. This should mean that transport is strategically planned and robust in a way that maximises economic activity and can actively support change where it is needed.

### **Regional Transport Consortia and Joint Transport Authorities**

At present, Regional Transport Consortia are fairly weak bodies that provide direction on a regional basis for Wales' local authorities in their transport planning and investment. However, funding remains largely within the grasp of Wales' 22 local authorities. FSB Wales has stated previously that 22 unitary authorities is a large number for a country the size of Wales and this undoubtedly contributes to a fragmented approach to transport funding.

A number of other examples from across the UK and Europe provide different approaches to transport organisation that leads to a more regionally significant impetus. For example, in Germany the federal system allows the Lander to have significant scope for influencing the transport network via Landesentwicklungsplan or LVWP (Regional Development Plans for Transport)<sup>10</sup>. The LVWPs cover planning for ordinary roads, regional railways, other waterways and airports with regional demand and lead to a strategic and integrated approach to transport planning. Crucially, the Lander are of significant size to be able to have meaningful influence over policy.

Alternatively, in the Netherlands transport priorities are split between national, regional and local levels of governance<sup>11</sup>. Ultimately, regional governance has significant influence over the organisation of regional public transport (buses as well as regional rail) and is responsible for roads of regional importance. Closer to home, Scotland has formalised regional working with the establishment of Regional Transport Partnerships (RTPs)<sup>12</sup>. This has strengthened the planning and delivery of regional transport to serve the needs of businesses and their consumers. RTPs prepare regional transport strategies and are independent bodies defined by the Transport (Scotland) Act 2005 along the local government model. Working with Transport Scotland, they ensure transport policy in Scotland is properly coordinated on a regional basis.

The three models highlighted above have different merits. All have significant regional working which enables priorities to be more reactive and flexible to local priorities and demands. The Welsh Government has the power under the Transport (Wales) Act 2006 to create Joint Transport Authorities. This enables the Welsh Government to forge closer partnerships between local authorities and create more regionally focused transport planning. FSB Wales believes that there is

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<sup>10</sup> EU Directorate General XVI. 2000. *Thematic Study of Transport – Country Report: Germany* [Online]. Available at [http://ec.europa.eu/regional\\_policy/sources/docgener/evaluation/trans/pdf/germanyd.pdf](http://ec.europa.eu/regional_policy/sources/docgener/evaluation/trans/pdf/germanyd.pdf) (Accessed 30th October 2012)

<sup>11</sup> Government of the Netherlands. *Mobility, Public Transport and Road Safety* [Online]. Available at: <http://www.government.nl/issues/accessibility-public-transport-and-road-safety/public-transport/organisation-of-public-transport> (Accessed 30th October 2012).

<sup>12</sup> Transport Scotland. *What is a Regional Transport Partnership?* [Online]. Available at: <http://www.transportscotland.gov.uk/strategy/Regional-Transport-Partnerships/What-is-a-RTP>





merit in this approach if it helps to foster greater regional working with meaningful dialogue with local businesses. Furthermore, the Welsh Government could consider strengthening these arrangements, particularly for the proposed city region areas, in order to create bodies that would manage public transport as well as planning future investment along the Passenger Transport Executive/Authority model used in English cities. The use of PTEs was recognised by the task and finish group on city regions as suitable for south east Wales and should be examined closely. This could enable greater integration of public transport by allowing more active management at a regional level.

### **Wales and Borders Rail Franchise**

There is little doubt that the future of rail transport in Wales is of importance to businesses in Wales and recent decisions on electrification of both the Great Western Main Line and Valley Lines are to be welcomed. It is widely recognised that the current Wales and Borders rail franchise agreement has been disappointing for Wales and has not adequately reflected the growth of passenger numbers<sup>13</sup>. The renegotiation of this franchise is at present a matter for the Welsh Government and the UK Government's Department for Transport. It is vital that both parties work closely together for a franchise agreement that is beneficial to Wales.

Proposals for a not-for-dividend rail company to administer the next franchise are at present not well developed. FSB Wales has no preference over forms of ownership for the franchise; rather, businesses are far more concerned that the franchise provides the service they need and require. Essentially, the model of ownership behind the franchise is not what will have an impact on transport integration; rather the terms of the agreement reached over the franchise will be more important. Therefore, the Welsh Government should not pursue a not-for-dividend franchise agreement at the exclusion of other possibilities. Doing so could lead to private solutions that can provide real benefit to passengers in Wales being ignored to the disadvantage of passengers in Wales.

### **Bus Quality Contracts/Partnerships**

The debate around the 1985 Transport Act and the subsequent deregulation of bus services is hotly contested on both sides. FSB Wales does not have a firm preference on how bus services should be run in Wales. However, it is worth noting that a system of a similar nature to proposed Bus Quality Contracts exists in London under the auspices of Transport for London. Quality contracts would constitute a limited re-regulation of the bus market and would move bus services closer to the franchise system used on the railways<sup>14</sup>.

FSB Wales is aware that the Welsh Government is currently examining the potential for bus quality contracts to operate in Wales; indeed this was carried as an action point for the National Transport Plan<sup>15</sup>. FSB Wales feels that if this approach is to be taken, then the Welsh Government should produce significant research into the economic impact of such a policy on communities across Wales. This would enable interested parties to take part in a public debate on the best way forward.

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<sup>13</sup> National Assembly for Wales – Members Research Service. *The operation of the railways in Wales* [Online]. Available at: <http://www.assemblywales.org/gg11-0009.pdf> (Accessed 30th October 2012).

<sup>14</sup> National Assembly for Wales – Members Research Service. *Overview of Bus Services in Wales* [Online]. Available at: <http://www.assemblywales.org/gg11-0013.pdf> (Accessed 30th October 2012).

<sup>15</sup> Welsh Government. 2010. *National Transport Plan* [Online]. Available at: <http://wales.gov.uk/docs/det/publications/100329ntpen.pdf> (Accessed 30th October 2012).



The creation of a more regulated bus network could increase scope for public transport integration via the use of contracts between Welsh Government/Local Authorities and bus companies. The Welsh Government should examine if this is the only way to encourage initiatives such as through ticketing and coordinated timetabling as part of its investigation. By coordinating relatively minor issues such as timetables, public transport could become far more integrated and could offer a viable alternative to the use of private transport.

Unfortunately, it is not clear that public bodies and their private sector partners are able to cooperate closely enough to ensure effective joined-up service delivery at present.

### **Network Rail**

Network Rail's recent moves towards creating a Wales devolved route is a significant development for integrated transport in Wales. The Welsh Government must now work closely with Network Rail to ensure that Wales' transport priorities are being accurately conveyed to decision makers so that investment is directed accordingly. Should the Welsh Government pursue the creation of Joint Transport Authorities, then they would be able to work far more closely with Network Rail to ensure that upgrades are made at key interchanges between the bus and rail network.

### **HLOS**

While Network Rail's moves towards the creation of a Wales route have enabled administrative devolution of rail infrastructure to Wales, it does not allow the Welsh Government any greater scope for influencing investment priorities<sup>16</sup>. Following the Railways Act 2005 funding for rail infrastructure was devolved to the Scottish Government<sup>17</sup>. Historically, Wales has attracted less than a population or Barnett share of rail infrastructure investment. Mark Barry, a consultant to the Cardiff Business Partnership, recently estimated that this was between 2-3 per cent of rail investment in the UK, despite Wales' population nearing 5 per cent of the UK<sup>18</sup>.

The significant future investment recently announced via the High Level Output Specification 2012 which includes the electrification of the Great Western Main Line and Valleys Lines is undoubtedly welcome. This could provide a catalyst for change in the management of rail infrastructure in Wales and would enable the Welsh Government to look closely at the South Wales Metro proposals, tying in with the wider city region debate. If a metro were properly implemented, a significant improvement in integration would result, albeit limited to south east Wales.

However, recent announcements mask the relative underfunding of rail infrastructure in Wales. When taken in the context of spending decisions elsewhere in the UK, Wales is clearly at a disadvantage. For example the Crossrail project will cost roughly £16bn<sup>19</sup> with one station alone,

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<sup>16</sup> National Assembly for Wales – Members Research Service. *The operation of the railways in Wales* [Online]. Available at: <http://www.assemblywales.org/gg11-0009.pdf> (Accessed 30th October 2012).

<sup>17</sup>Transport Scotland. *Rail Strategy and Investment* [Online]. Available at: <http://www.transportscotland.gov.uk/rail/rail-strategy-and-investment> (Accessed 30th October 2012)

<sup>18</sup> Barry, M. 2011. *A Metro for Wales' Capital City Region: Connecting Cardiff, Newport and the Valleys* [Online]. Available at: [http://www.mgbarryconsulting.com/iwa\\_metroreport.pdf](http://www.mgbarryconsulting.com/iwa_metroreport.pdf) (Accessed 30th October 2012).

<sup>19</sup>UK Government – Department for Transport. 2010. *Crossrail Business Case: Summary Report* [Online]. Available at: <http://assets.dft.gov.uk/publications/pgr-rail-pi-crossrail-businesscase-pdf/summaryreport.pdf> (Accessed 30th October 2012).



Tottenham Court Road, costing around £1.1bn – more than the entire investment into electrification in Wales<sup>20</sup>.

By comparison, Transport Scotland have recently invested heavily in rail infrastructure in Scotland as a result of the devolution of funding and the creation of High Level Output Specification and Statement of Funds for Control period 5 published by the Scottish Government<sup>21</sup>. Given that many of the functions over transport are devolved, including aspects of the Wales and Borders franchise, it seems an anomaly that infrastructure investment is determined outside of Wales. As a result of this, the Welsh Government has often spent over and above its requirements in order to reopen lines such as the Ebbw Vale line and invest in Newport station<sup>22</sup>. The Scottish example was cited earlier to highlight where Regional Transport Partnerships work closely with Transport Scotland to inform transport priorities. This enables greater joined-up working and integration.

The Welsh Government should examine the underfunding in Wales' rail infrastructure, in particular as part of the Silk Commission process, to ensure that Wales receives a fair share of rail investment in the future. This is particularly important if the Welsh Government is to truly integrate various modes of transport by investing in key transport interchanges across Wales. Issues such as borrowing powers must also be resolved to enable Wales to prioritise future investment in infrastructure through programmes such as rail electrification.

### **Conclusion**

FSB Wales welcomes the Enterprise and Business Committee's inquiry into integrated transport in Wales. The Welsh Government has significant opportunity to improve integrated transport in Wales and reform of the way transport is managed in Wales is overdue. Creating a strategic regional focus would enable transport to become more effectively organised and managed, could promote economic growth and deliver a reliable and flexible public transport network in Wales.

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<sup>20</sup> WalesOnline. 2012. *More being spent on a London tube station than electrification to Wales* [Online]. Available at: <http://www.walesonline.co.uk/news/welsh-politics/welsh-politics-news/2012/05/26/uk-government-spends-more-on-tottenham-court-road-tube-station-upgrade-than-wales-electrification-91466-31048014/> (Accessed 30<sup>th</sup> October 2012).

<sup>21</sup> Transport Scotland. 2012. *The Scottish Ministers High Level Output Specification: Statement of funds available* [Online]. Available at: <http://www.transportscotland.gov.uk/strategy-and-research/publications-and-consultations/j232012-04.htm> (Accessed 30<sup>th</sup> October 2012).

<sup>22</sup> Welsh Government. 2011. *Railway lines re-opened in Wales* [Online]. Available at: <http://wales.gov.uk/topics/transport/rail/projects/completed/reopened/?lang=en> (Accessed 30<sup>th</sup> October 2012).



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## The Federation of Small Businesses

The FSB is non-profit making and non-party political. The Federation of Small Businesses is the UK's **largest campaigning pressure group** promoting and protecting the interests of the self-employed and owners of small firms. Formed in 1974, it now has **200,000 members across 33 regions and 194 branches**.

### Lobbying

Our lobbying arm - led by the Westminster Press and Parliamentary office - applies pressure on MPs, Government and Whitehall and puts the FSB viewpoint over to the media. The FSB also has Press and Parliamentary Offices in Glasgow, Cardiff and Belfast to lobby the devolved assemblies. Development Managers work alongside members in our regions to further FSB influence at a regional level.

### Member Benefits

In addition, Member Services is committed to delivering a wide range of high quality, good value business services to members of the FSB. These services will be subject to continuing review and will represent a positive enhancement to the benefit of membership of the Leading Business Organisation in the UK.

### Vision

A community that recognises, values and adequately rewards the endeavours of those who are self employed and small business owners within the UK

The Federation of Small Businesses is the trading name of the National Federation of Self Employed and Small Businesses Limited. Our registered office is Sir Frank Whittle Way, Blackpool Business Park, Blackpool, Lancashire, FY4 2FE. Our company number is 1263540 and our Data Protection Act registration number is Z7356876. We are a non-profit making organisation and we have registered with the Information Commissioner on a voluntary basis.

### Associate Companies

We have two associated companies, FSB (Member Services) Limited (company number 02875304 and Data Protection Act registration number Z7356601) and NFSE Sales Limited (company number 01222258 and Data Protection Act registration number Z7315310).