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Welsh Government
Consultation – summary of responses

One Network, One Timetable, One Ticket: Planning Buses as a Public Service for Wales

DECEMBER 2022

Mae'r ddogfen yma hefyd ar gael yn Gymraeg. This document is also available in Welsh.
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Overview

This document provides a summary of the responses to the consultation on – One Network, One Timetable, One Ticket: Planning Buses as a Public Service for Wales

Action Required

This document is for information only.

Further information and related documents

Large print, Braille and alternative language versions of this document are available on request.

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Additional Copies

This summary of responses and copies of all the consultation documentation are published in electronic form only and can be accessed on the Welsh Government's website.

Link to the original consultation document: <https://gov.wales/one-network-one-timetable-one-ticket-planning-buses-public-service-wales-html>

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SECTION ONE: Overview

Introduction

This white paper consultation was a key step towards creating a new model for running buses in Wales, and a chance for us to raise our sights on what we want from our public transport services. We wanted to hear the voices of people across Wales and across the industry, to help us take this opportunity to re-design our delivery model for bus services as effectively as possible and implement a world-class bus system for Wales.

The white paper “One Network, One timetable, One Ticket: Planning Buses as a Public Service for Wales” proposed changes to the way bus services are delivered in Wales to design and deliver a bus network fit for the climate emergency, fit for the future and fit for the people of Wales.

The consultation asked for views on the proposals through 21 questions. Questions were based on the key themes and proposals within the paper:

- Climate change
- Legislative proposals
- Franchising
- Allowing municipal bus companies

Our proposals have passengers as the focus. People need a well-planned, easy to understand network; buses that are timetabled to connect with each other and with trains; and a single, simple, easy to use ticketing system. The white paper proposed a franchising model to deliver this and build a network of buses that can tie in with the wider transport system.

The proposed model aims to enable coordinated network planning between the 22 local authorities and through the 4 regional Corporate Joint Committees (CJCs), focusing on providing the services people need. The Welsh Ministers will hold ultimate responsibility for ensuring a national network plan is produced and delivered for bus services across Wales. Rather than competing for franchising skills and experience across Wales, we are proposing to create a centralised franchising team within Transport for Wales, acting on behalf of Ministers. The proposed franchising team will both support local authorities and CJCs with network planning and let and manage franchise contracts, on behalf of the Welsh Ministers, making sure the whole of Wales has access to the same procurement power and resource. This will also aid with the aspiration to tie in with the full public transport network to be able to truly deliver One Network, One Timetable, One Ticket.

The Climate Emergency demands urgent action. We have to make more progress over the next 10 years than we have in the last 30. Franchising will allow us to design a network that gets people where they want to go easily and reliably, and drive vehicle decarbonisation standards. This is key to supporting the scale of modal shift we need to see to hit our climate targets. It will also support our ambitions to cut emissions from our bus fleet, moving people around as sustainably as possible.

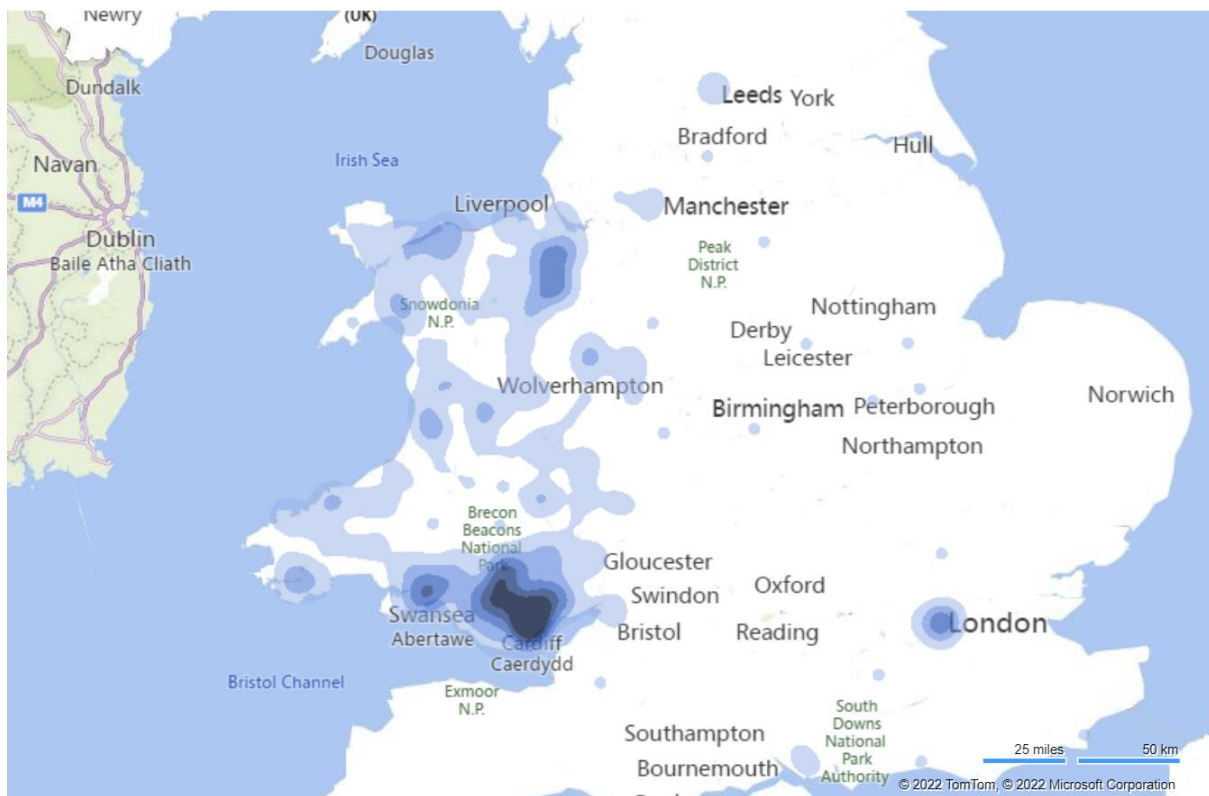
This consultation

The white paper was launched on the 31st of March 2022, with the consultation opening on the same day. The consultation ran for 12 weeks and closed on the 24th of June 2022. The consultation was published on the consultation pages of the Welsh Governments website. Responses could be submitted via post, email or online – through the online questionnaire. Welsh and English language responses were both accepted. The link to the consultation was also shared with partners including all Welsh local authorities and relevant professional bodies and representative organisations. Virtual events were organised to speak to local authorities and bus operators to explain our proposals, answer questions and support their response to the consultation, with officials attending other virtual events upon request.

Who responded?

There were 739 responses to this consultation.

91% of respondents stated that they lived in Wales. The map below shows where the respondents were located based on the postcode information they gave in the questionnaire. The darker shades denote higher numbers of respondents in that area.



Further information about the respondents to this consultation can be found within the annex of this document.

Approach to developing the summary of responses

This document is intended as a summary of the responses received. It does not aim to capture in detail every point raised by respondents.

The consultation asked a total of 21 questions. The summary of responses has been set out in line with these questions. Respondents were not required to answer every question.

Some respondents provided a single general response or only responded to specific issues on the consultation under a more general response. Welsh Government included those responses under question 21 *“We have asked a number of specific questions. If you have any related issues which we have not specifically addressed, please use this space to report them.”*. The Welsh Government will consider those comments as part of the overall conclusion as appropriate.

Responses that were received through email and post have been submitted by our team onto the online survey in order to analyse the data in one space. These responses will hold the same IP address on their entry. All other fields contain only data they have submitted.

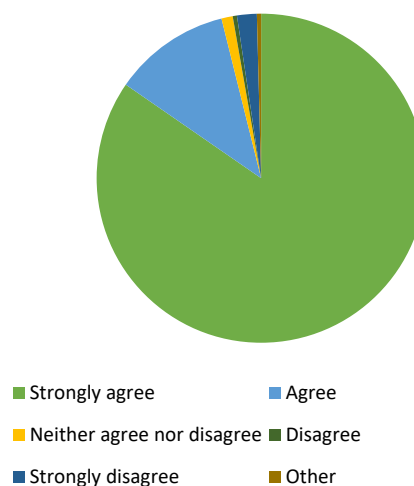
SECTION TWO: Summary of Responses

Question 1 – (Reducing our carbon impact)

Do you agree that change is required in how we deliver bus services to meet the needs of Wales’ citizens and respond to the climate emergency?

Please score from strongly agree to strongly disagree.

Answer Choice		Response Percent	Response Total
1	Strongly agree	84.6%	609
2	Agree	11.5%	83
3	Neither agree nor disagree	1.1%	8
4	Disagree	0.4%	3
5	Strongly disagree	1.9%	14
6	Other	0.4%	3
Comments:			257
<i>answered</i>			720
<i>skipped</i>			19



The general overwhelming view is supportive towards the proposals within the white paper with clear strong public support. 84.6% of respondents selected “strongly agree” to this question.

We received 257 comments to accompany this question: respondents’ comments were mainly in agreement that change is necessary.

Many comments stated it is currently difficult to find out when a bus was going to arrive owing to the mix of companies operating routes and no clear timetables available.

There is clear desire for low emission and upgraded vehicles. A few people commented that in order to attract higher patronage, the buses need to be more attractive to users – cleaner, more reliable, upgraded, greener.

However, the majority of those citing climate change also mentioned that affordability must come first in order to drive people out of their cars and onto buses.

Many respondents from more rural areas of Wales welcomed the chance to improve bus services to their area, some requesting that their areas are focussed on above more urban areas. Many mentioned specific areas and route numbers that they wanted to be improved or that lacked any cohesive service at all.

“The piecemeal approach to the public transport network makes it really difficult to use and strongly incentivises people to use their cars instead”

“People in all parts of Wales should be treated equally. A person (old or young) should be provided with a reasonable bus service whatever the location”

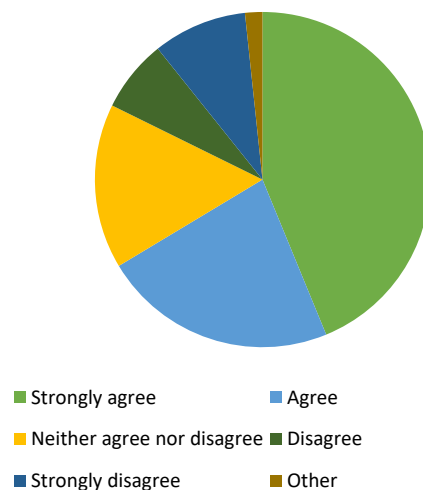
“There is general agreement amongst local authorities that improvements can be made to the way bus services are currently managed and controlled in Wales. There is also complete consensus that radical action is needed to address the challenge of climate change and reduce emissions”

Question 2 – (Legislative proposals)

Do you agree that franchising is required to deliver the depth and pace of change to the bus network that is required in the context of the climate emergency?

Please score from strongly agree to strongly disagree.

Answer Choice	Response Percent	Response Total
1 Strongly agree	43.6%	312
2 Agree	22.7%	162
3 Neither agree nor disagree	15.9%	114
4 Disagree	7.0%	50
5 Strongly disagree	9.1%	65
6 Other	1.7%	12
Comments:		237
	answered	715
	skipped	24



Overall, respondents agreed with the need for franchising, with a total of 66.3% either agreeing or strongly agreeing and only 16.1% disagreeing. We also had a comparatively large number of respondents (15.9%) who neither agreed nor disagreed. Comments suggested that this reflected the strength of response to question 1, where many respondents want to see major improvements to services, but did not have a view on the model used to deliver them or saw franchising as part of the solution.

Those who disagreed and offered comments gave varied reasons for doing so. Some would prefer an even stronger public service delivery model: 61 comments (25.7% of those who commented, including some who agreed with franchising and some who disagreed) indicated a preference for a publicly owned or not-for-profit delivery model for bus services across Wales. Others who disagreed raised concerns about the cost risks associated with a franchised model.

Many local authorities and bus operators pointed to elements of the English model as an alternative, where franchising powers are available locally, but local authorities also have recourse to the statutory enhanced partnership model we used as a comparator in our draft Regulatory Impact Assessment (RIA).

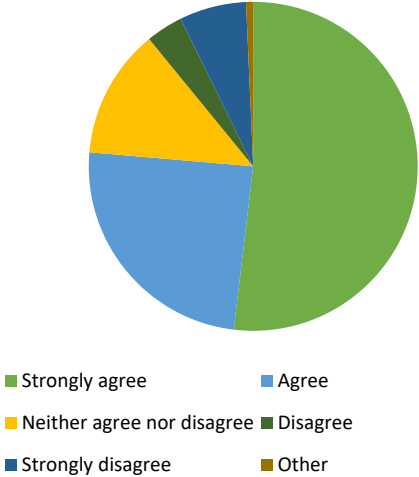
Many respondents, however, commented to express their support of a franchised model, highlighting the importance of planning and delivering buses as a public service and taking a needs-led approach to ensure people can access public transport.

Question 3 – (Embedding local knowledge and accountability)

Do you agree with the Welsh Government’s preferred franchising model as described above?

Please score from strongly agree to strongly disagree.

Answer Choice		Response Percent	Response Total
1	Strongly agree	51.8%	369
2	Agree	24.5%	175
3	Neither agree nor disagree	12.8%	91
4	Disagree	3.6%	26
5	Strongly disagree	6.6%	47
6	Other	0.7%	5
Comments:			167
answered			713
skipped			26



A significant majority of respondents (76.3%) agreed or strongly agreed with the proposed franchising model, with over half strongly agreeing. Many of those who commented explained their support on the basis of it giving the public sector the power to plan and deliver bus services in the public interest.

Amongst the 167 comments received, a variety of reasons were given for agreeing or disagreeing, perhaps best summarised by the following comment from Transport Focus Wales:

“The ideal model should provide bus services that are consistent, achieve a high standard of service and are easy to understand. This requires a level of country-wide and regional oversight, while allowing for local input to reflect local needs and challenges”

Many respondents echoed the need for consistency and national-level direction to deliver high quality, consistent services as well as integration with rail. Others stressed the need for local knowledge and input, both from local authorities and particularly from engagement with local communities. Some of these highlighted the

importance of alignment with local road functions and ensuring authorities are incentivised to improve bus infrastructure.

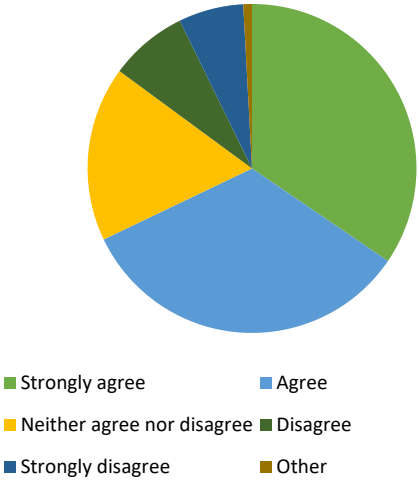
Some, including operators and representative bodies, raised questions about the number of different levels of government involved in the system, and whether this would lead to additional bureaucracy. They highlighted the importance of the system being adaptable, flexible and responsive to change. Conversely, some respondents expressed their view that there should be more consultation, both with communities at the initial planning stage and with a wider range of input at the supervisory board level.

Question 4 – (Embedding local knowledge and accountability)

Do you agree that this model provides sufficient local input for designing local bus networks?

Please score from strongly agree to strongly disagree.

Answer Choice		Response Percent	Response Total
1	Strongly agree	34.3%	241
2	Agree	33.5%	235
3	Neither agree nor disagree	17.2%	121
4	Disagree	7.7%	54
5	Strongly disagree	6.4%	45
6	Other	0.9%	6
Comments:			160
answered			702
skipped			37



Overall, there was agreement that the proposed model provided sufficient local input for designing bus networks with 34.3% strongly agreeing and 33.5% agreeing.

There were 160 comments. Many expressed the general view that local input was vital to ensure the most effective local bus networks were developed, which met the needs of passengers in different geographical locations.

The importance of the role of the local authority in gathering and assessing local views was noted by many respondents. Meaningful consultation with local communities by the local authority was highlighted as a prerequisite to enable the model to work successfully in capturing local needs.

Many respondents emphasised the importance of engagement with all sectors of the public. Not only bus users, but engagement with specific groups, for example, older people, those from rural communities, disabled people, including learning disabled people and people from minority ethnic groups. Some respondents suggested guidance should be issued to local authorities on how engagement and consultation should be conducted.

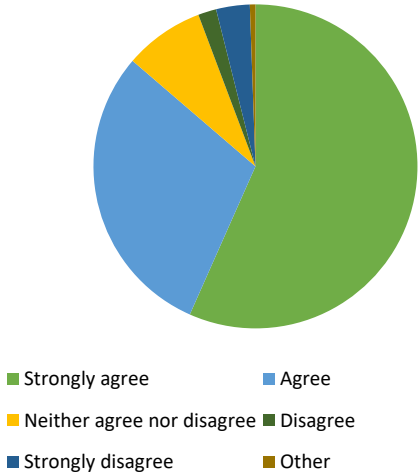
Some respondents were concerned that local accountability for decision making would be diluted under the proposed model. Other respondents thought local skills and knowledge in local authorities would be lost. Some respondents noted that the right balance needed to be struck between the local the regional and the national levels of decision making in the governance structure of the model

Question 5 – (Embedding local knowledge and accountability)

Do you agree that there is a need for regional consideration and coordination of bus network plans by Corporate Joint Committees, before combining them at a national level?

Please score from strongly agree to strongly disagree.

Answer Choice	Response Percent	Response Total
1 Strongly agree	56.5%	403
2 Agree	29.7%	212
3 Neither agree nor disagree	8.0%	57
4 Disagree	1.8%	13
5 Strongly disagree	3.4%	24
6 Other	0.6%	4
Comments:		162
	answered	713
	skipped	26



Overall, there was agreement that there was a need for regional co-ordination and consideration of bus network plans by Corporate Joint Committees (CJCs) with 56.5% strongly agreeing and 29.7% agreeing.

There were 162 comments. Many respondents acknowledged that regional planning was self-evidently needed to plan a bus network that had strategic coherence and to better take account of cross border journeys. Connectivity with rail services was also mentioned by some respondents as an important consideration on a regional basis.

Some respondents expressed concerns that the regional planning aspect of the model would add additional layers of bureaucracy or administration which would impede the process. There were also concerns that local needs would become subsumed at a regional level and some respondents foresaw conflict between local and regional aims.

While some respondents expressed confidence that CJCs have the expertise and experience to conduct the regional co-ordination process, other respondents pointed out that CJCs are relatively new organisations, have other functions and do not necessarily have local and technical knowledge of public transport infrastructure.

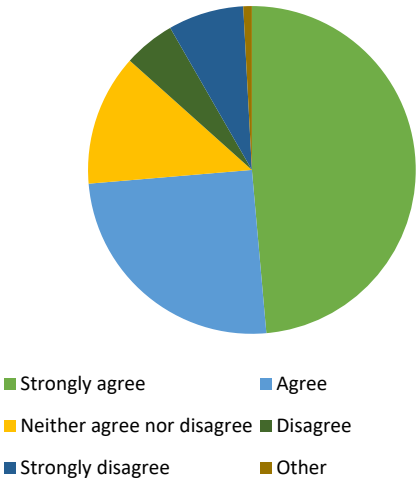
Some respondents suggested a wider range of inputs at the regional level, and that representatives of bus drivers, passengers, disabled people and other user groups, from different age groups and geographical locations should input to regional planning. One suggestion was to have a bespoke bus users forum which could inform local/regional service development. Some respondents wished to see a clear engagement process to capture members of the public’s views on regional plans.

Some respondents were worried that a regional planning structure would mean that local accountability could be lacking, and local circumstances could be overlooked. The question was asked how the CJC accountability to local communities would be ensured

Question 6 – (Embedding local knowledge and accountability)

**Do you agree that letting and managing contracts at the national level by the Welsh Government through Transport for Wales offers the best opportunity to pool franchising expertise, deliver economies of scale?
Please score from strongly agree to strongly disagree.**

Answer Choice		Response Percent	Response Total
1	Strongly agree	48.4%	343
2	Agree	25.1%	178
3	Neither agree nor disagree	13.0%	92
4	Disagree	5.1%	36
5	Strongly disagree	7.5%	53
6	Other	0.8%	6
Comments:			162
answered			708
skipped			31



Overall, respondents agreed that letting contracts centrally at the national level offers the best opportunity to pool franchising expertise and deliver economies of scale with 48.4% strongly agreeing and 25.1% agreeing.

There were 162 comments. Many comments agreed that for a unified, coherent service, franchising contracts at the national level is the obvious way to lead to better services. Some respondents emphasised that local input was critical to ensure the needs of small communities were not overridden. Some respondents expressed the view that public ownership of the transport network was the best model.

Several respondents referred to the possible negative effects on SME firms that were already operating in Wales. Concerns were expressed that smaller operators would lose out to larger operators and, over time, the sector would become less competitive.

Some respondents were not convinced that Transport for Wales (TfW) had the necessary expertise to run the bus franchising model. Other respondents were worried about a perceived conflict of interest between rail and the potential bus franchising.

Several respondents, mainly local authorities, expressed their worries local expertise would be lost if franchises were awarded by TfW. Staff recruitment and retention in local authorities could become problematic if staff transferred to TfW and left local authorities without sufficient expertise to manage their statutory functions in regard to school transport.

Several suggested that the letting and managing of contracts would better be done at regional rather than national level. Other suggestions, as an alternative to TfW letting and managing contracts, were CJs or local authorities or a process involving local stakeholders to include the operators, local authorities and customer representative bodies.

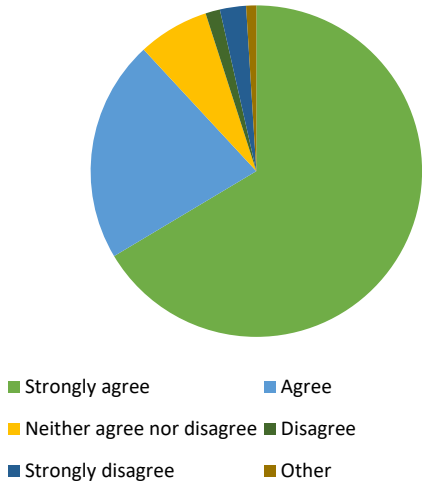
One issue that worried respondents was the issue of school transport and how the central franchising model would affect the existing arrangements. Some local authorities make use of the local bus network rather than having separate dedicated contracts. Concerns were raised that the proposals could impact local authorities' current school transport arrangements.

Question 7 – (Embedding local knowledge and accountability)

Do you agree with the need for a duty to ensure plans are designed to be affordable?

Please score from strongly agree to strongly disagree.

Answer Choice		Response Percent	Response Total
1	Strongly agree	66.3%	467
2	Agree	21.7%	153
3	Neither agree nor disagree	7.0%	49
4	Disagree	1.4%	10
5	Strongly disagree	2.6%	18
6	Other	1.0%	7
Comments:			170
answered			704
skipped			35



The overwhelming majority of responses agree that there is a need for a duty to ensure plans are designed to be affordable, with only 4% of respondents disagreeing with this statement.

The most common response was about affordability for the end-user with complaints that current ticket prices are too expensive, especially for those who rely on public

transport for essential travel and social contact. Many people stated that bus travel should be affordable or even free in order to encourage modal shift and a few comments mentioning the cost of living crisis, and this being a good opportunity to assist end users. However, many had reservations about how affordability would be achieved and its impact. Those concerns included compromise on services levels or quality and the cost and sustainability to the public purse of affordable ticketing.

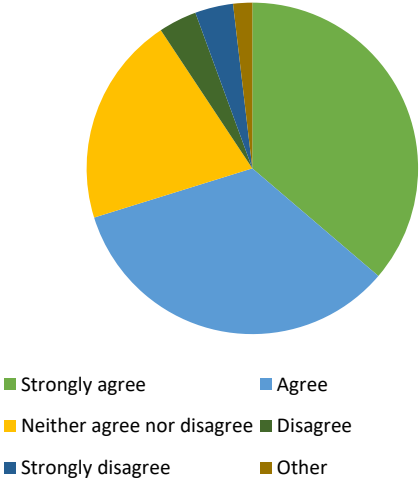
Respondents also highlighted that affordability should be viewed in a long-term context, highlighting the need for upfront improvements to services and infrastructure to promote modal shift. A number of respondents also highlighted the need to consider the long-term external costs of Wales not improving its public transport network when defining affordability (such as climate change, poor air quality, social benefits and its impact on health and wellbeing).

Looking at organisational responses specifically, the majority also agreed that plans should be affordable but many highlighted concerns about how this would be approached and would welcome more detail. These ranged from calls for multi-annual budget allocations, to fears of aspirations being constrained and whether mandating affordability as a duty was the best approach.

Question 8 – (Additional requirements, regulations and guidance)

**Do you agree that the proposed powers to make regulations and guidance are suitable to ensure franchises are let successfully and sustainably?
Please score from strongly agree to strongly disagree.**

Answer Choice	Response Percent	Response Total
1 Strongly agree	36.1%	251
2 Agree	34.1%	237
3 Neither agree nor disagree	20.5%	143
4 Disagree	3.7%	26
5 Strongly disagree	3.7%	26
6 Other	1.9%	13
Comments:		116
	answered	696
	skipped	43



Overall, the respondent agreed that the proposed powers to make regulations and guidance are suitable to ensure franchises are let successfully and sustainably, with 36.1% strongly agreeing and 34.1% agreeing. The percentage who neither agreed nor disagreed was 20.5%.

There were 117 comments made to this question. Many respondents commented that they didn't feel able to judge if the proposed powers were suitable. Several respondents thought that a performance management or annual review process

would be needed to judge if franchises are successful and sustainable. One concern was whether TfW or local authorities would have the planning skills necessary.

Many agreed that robust guidance was key and some suggested it should cover additional matters, for example comfort standards, infrastructure standards or customer services standards. Some respondents thought quality standards such as air pollution or accessibility would be better dealt with by regulations.

Some respondents expressed concerns about the governance arrangements surrounding the franchise model. These included the membership of the Supervisory Board, potential conflicts of interests between the parties to the franchising model, having a fair dispute resolution procedure and Welsh Minister’s veto over the Supervisory Board.

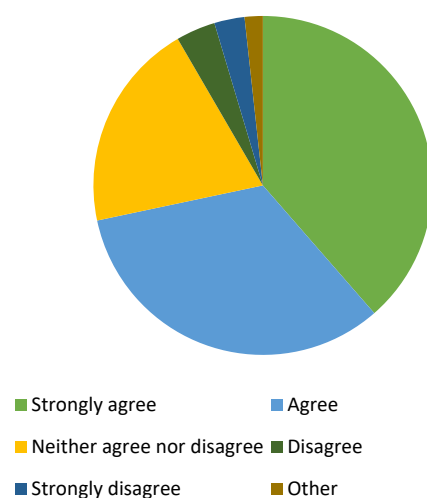
Several respondents drew attention to the risks of franchising for SME bus operators and municipal bus operators. These were seen as being at a disadvantage compared with other operators. It was suggested SMEs would need help with the bidding process.

Question 9 – (Additional requirements, regulations and guidance)

Do you agree with the proposed requirement to consider the impact on SME bus operators when franchising?

Please score from strongly agree to strongly disagree.

Answer Choice	Response Percent	Response Total
1 Strongly agree	38.4%	265
2 Agree	33.2%	229
3 Neither agree nor disagree	20.0%	138
4 Disagree	3.8%	26
5 Strongly disagree	2.9%	20
6 Other	1.7%	12
Comments:		137
	answered	690
	skipped	49



Respondents showed a clear preference for the need to consider the impact on SME bus operators when franchising at 71.6% responding positively, with a smaller minority selecting neither agree nor disagree: 20%.

Some respondents were unclear on what is defined as an SME operator. However, many were eager to share their strong opinions on the importance SME operators have in providing services that larger operators do not, particularly in rural and less well-served areas. Respondents also noted inconsistency in the quality of service offered by SME operators, with comments on issues such as service intervals and fleet standards.

Many respondents who agree with the question did highlight that any interventions to incorporate SMEs into franchising should not be at the cost of passengers and that some SMEs will need a change in behaviour to ensure they see the bigger picture on how they integrate into a franchised area.

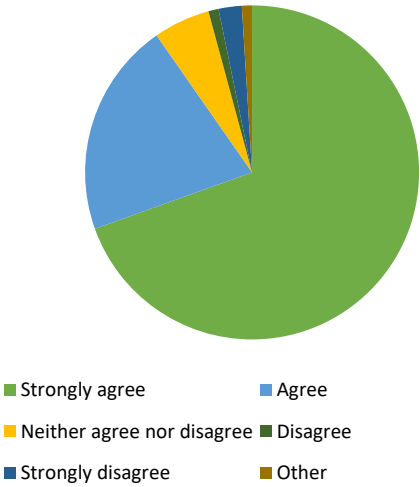
Organisations were keen to highlight the importance of a varied supply market, highlighting regional and rural areas which are underpinned by SME operators, school bus transport provisions which are predominantly run by SME operators and the local employment that they bring. Some organisations were concerned that franchising would have a negative impact on SME operators and shared concerns on their ability to meet franchising contract terms, whilst others expressed a more positive view that this will give SME operators a good opportunity to utilise their greater knowledge and community links to their advantage in competing for routes that serve their communities.

Question 10 – (Additional requirements, regulations and guidance)

Do you agree with the benefits of establishing a mechanism to allow a public service operator of last resort to ensure services keep running if a franchise fails?

Please score from strongly agree to strongly disagree.

Answer Choice		Response Percent	Response Total
1	Strongly agree	69.4%	493
2	Agree	20.8%	148
3	Neither agree nor disagree	5.5%	39
4	Disagree	1.0%	7
5	Strongly disagree	2.3%	16
6	Other	1.0%	7
Comments:			155
answered			710
skipped			29



It is evident from the results that the majority of respondents agree that having a mechanism in place to allow an Operator of Last Resort (OLR) is a good option in the event of a franchise failing, with 90.2% of respondents either agreeing or strongly agreeing. Continuation of service is a necessity.

155 people commented further on this question. A large majority of comments agreed to the need to have such a failsafe, some calling it a critical part of the plan. Many commented that having seen how an OLR can work within rail, it is evident that this needs to be in place for bus.

Some commented that thought needs to be given to what would be needed for the OLR to immediately start services such as whether organisations would be able to

have the right scalability and licensing in place, enough staff to cover services, the right fleet and depots or would adhere to existing route plans.

Respondents commented that thought needs to be given to the initial contracts that are let to franchisees. These contracts need to be manageable for the operators. Routes need to be packaged in ways that are attractive and achievable and monitored and maintained. It should be made clear that “franchisees can’t dump routes which can then be picked up and covered by the state”

It should be noted that some of the respondents that stated “strongly disagree” have gone on to further comment that this option should be “provider of first resort” and that we should have a fully nationalised system in place instead of franchising.

Question 11 – (Transitional Arrangements)

Do you think further specific legislative provisions are needed for the transitional period until franchising is introduced?

There were 423 responses to this question. The majority agreed that further specific legislative provisions may be required for the transitional period. Of those that mentioned what the provisions might cover, the largest number related to the stability of the network and the need to protect existing services during the transition to franchising.

Some respondents noted the risks in the transition period as: bus operators winding down routes, leaving gaps in the networks or operators exiting the market completely, local authorities needing time to plan for the ending of existing contracts, and investment in bus services being deterred by uncertainty. Some thought SMEs may find it more challenging to compete and this may have an effect on other services e.g., school transport.

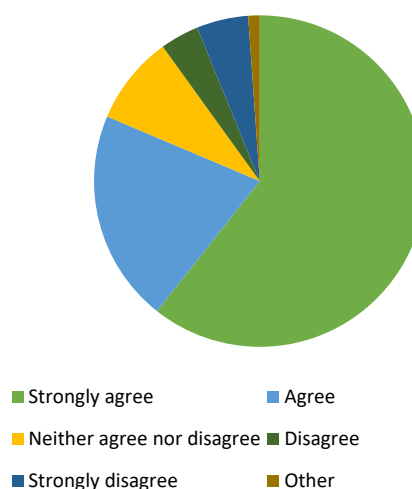
Some respondents suggested that a pilot scheme or some sort of probationary period or a phased roll out across the country would be a helpful step in advance of introducing full franchising to ensure the services are maintained with no substantial gaps.

Some respondents said that quality standards for contracts, service frequency standards, provision of information and employment conditions of staff of bus operators could be protected through regulations or guidance during the transitional period. Some respondents thought that specific sectors might need additional support to grasp the opportunities offered by franchising, for example SMEs and the Community Transport sector.

Question 12 – (Municipal bus companies)

**Do you agree that local authorities should be able to run bus services directly?
Please score from strongly agree to strongly disagree.**

Answer Choice		Response Percent	Response Total
1	Strongly agree	60.5%	431
2	Agree	20.8%	148
3	Neither agree nor disagree	8.7%	62
4	Disagree	3.8%	27
5	Strongly disagree	5.1%	36
6	Other	1.1%	8
Comments:			195
answered			712
skipped			27



There is clear support for local authorities in Wales to be able to run bus services directly. 81.3% of respondents selected strongly agree or agree.

The overwhelming content of the 195 further comments is supportive for this policy intent, with many stating that the local knowledge and resource from a local authority would benefit communities.

Some stated they felt that using a publicly owned service would lead to lower costs and would be more cost efficient than a commercial operation. Some added that these companies must be under the same scrutiny and checks of a commercial business to ensure value for money and service standards are kept.

There were a few opposing comments directed at the local authorities' ability to run a bus company. Some, especially those who already have a municipal company, or those who directly run services already, were supported by respondents. Whereas some respondents were quite strong in their views that this should not be an area for local authorities, but should be left to commercial companies.

Some commented that they worried whether an in house operation could truly compete with a commercial operator, and questioned how they would be treated in a bid for franchise contracts.

It is important for us to also look at the responses from local authorities specifically as well as the overall response:

Data from local authority respondents:

Answer Choice	Response Percent
Strongly agree	22%
Agree	33%
Neither agree nor disagree	28%
Disagree	6%
Strongly disagree	0%
Other	11%

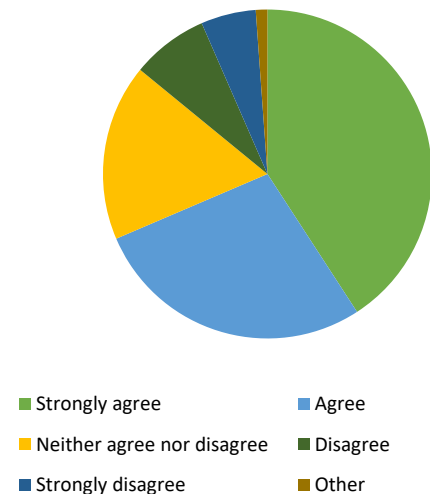
The overall comments reflected that they were supportive of the aims and that if the risk is fully considered it would be a good thing. Only one local authority disagreed based on their concerns of financial risk, however they supported the idea in the event of franchise failure and the need for an “operator of last resort” (OLR). A few said it was useful to have it available as an option should there be appetite for it.

Question 13 – (Municipal bus companies)

Do you agree that local authorities should be able to set up arms-length companies to operate local bus services?

Please score from strongly agree to strongly disagree.

Answer Choice	Response Percent	Response Total
1 Strongly agree	40.8%	286
2 Agree	27.8%	195
3 Neither agree nor disagree	17.3%	121
4 Disagree	7.6%	53
5 Strongly disagree	5.4%	38
6 Other	1.1%	8
Comments:		159
	answered	701
	skipped	38



Support is evident in the results above for local authorities being able to set up arms-length companies to operate local bus services with 68.6% choosing “strongly agree” and “agree”. However, this is not as high as the previous question (directly run operations).

There were an additional 159 comments to this question.

As with the previous question, there were comments questioning if an arms-length company could compete with a commercial operator.

Many respondents commented that, if this were to happen, the profits should be spent on improving local services and bus infrastructure in their areas and not diverted anywhere else.

There were a few comments stating they did not understand what an arms-length company was.

As with the previous question, we looked specifically into the response from local authorities:

Data from local authority respondents:

Answer Choice	Response Percent
Strongly agree	22%
Agree	28%
Neither agree nor disagree	28%
Disagree	11%
Strongly disagree	6%
Other	6%

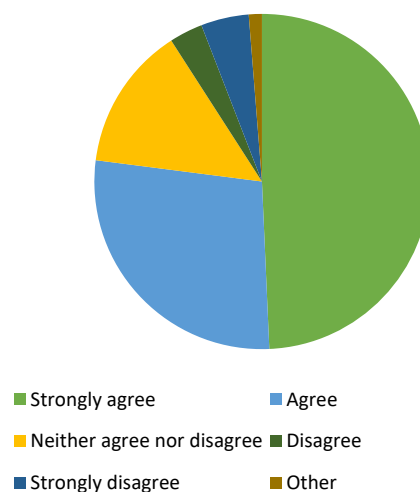
In general, they supported the intent, although there was a general concern for the potential loss of knowledge – for example should bus experts be placed into the arms-length company. Authorities commented that it would be useful to have as part of the “toolbox” for delivering bus services but concerns were raised about the funding needed. Newport City Council and Cardiff Council, who both already have municipal bus companies, welcomed this intent but did raise concerns about whether the franchising of services in their areas would put their companies at risk. Pembrokeshire County Council, who currently operate in house routes under section 22 of the Transport Act 1985 commented that they would prefer an in house rather than arm’s length operation.

Question 14 – (Municipal bus companies)

Do you agree that local authorities should be able to invest in or acquire bus companies?

Please score from strongly agree to strongly disagree.

Answer Choice		Response Percent	Response Total
1	Strongly agree	49.3%	351
2	Agree	27.7%	197
3	Neither agree nor disagree	13.9%	99
4	Disagree	3.2%	23
5	Strongly disagree	4.6%	33
6	Other	1.3%	9
Comments:			155
answered			712
skipped			27



77% of respondents were in agreement that local authorities should be able to invest in or acquire bus companies. This is a very clear strong backing of this aim.

There were 155 further comments on this question.

Many respondents who either agreed or strongly agreed caveated their answer with comments suggesting the company could not be reliant on continual public investment, profits should be put back into the local bus system and not divvied out amongst other areas of the local authority, and it shouldn't unfairly affect taxpayers. There was a divided view as to whether the company should be run as a "not for profit" or "profitable" company. Some of the respondents, especially in the "strongly agreed" section suggested that the bus industry should be entirely publicly run.

Some of the respondents commented that this would be a good idea in the event of Operator of Last Resort and should be the option favoured.

A few commented that the company would need to be subject to clear controls and not be shown to be favoured for contracts.

Many commented that it would depend on the local authority in question, and the level of expertise within it to be able to manage the company.

Again, it is important that we look specifically at the responses from local authorities:

Data from local authority respondents:

Answer Choice	Response Percent
Strongly agree	11%
Agree	33%
Neither agree nor disagree	44%
Disagree	0%
Strongly disagree	6%
Other	6%

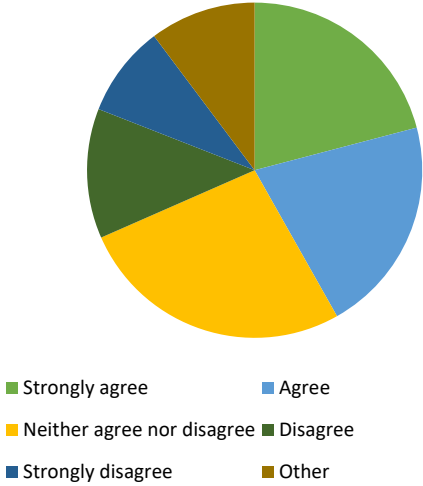
There have been a few concerns expressed that investment could be seen to give unfair advantage to municipal companies over commercial operators in a franchising regime where the LA would have a part to play in designing the network. Many feel that this would depend on local circumstances, and that each authority would need to consider the risks and benefits for their area.

Question 15 – (Municipal bus companies)

Do you agree that municipal bus companies should be able to raise fund by borrowing or selling shares?

Please score from strongly agree to strongly disagree.

Answer Choice	Response Percent	Response Total
1 Strongly agree	21.0%	147
2 Agree	21.0%	147
3 Neither agree nor disagree	26.7%	187
4 Disagree	12.3%	86
5 Strongly disagree	8.8%	62
6 Other	10.3%	72
Comments:		227
	answered	701
	skipped	38



The response for this question has not shown a clear majority view as previous questions have. The 227 comments mainly follow the theme that respondents (both those who agree and who disagree) fear that it is a financial risk that perhaps shouldn't be allowed for a local authority to bear.

Many suggested that if shares were offered, that these could only be bought by local persons; local businesses; staff members. Some commented that this could be allowed, so long as the company remained majority owned by the public.

Of those that disagreed and strongly disagreed, the comments were based on the desire for a nationalised service. Some suggested that profits should be reinvested back into the bus service and not given to shareholders, or feared that shareholders would push the publicly owned bus service into private ownership.

Some comments expressed that there should be a level playing field between all operators, and that the policy should reflect this.

Again, it is important that we look specifically at the responses from local authorities:

Data from local authority respondents:

Answer Choice	Response Percent
Strongly agree	6%
Agree	29%
Neither agree nor disagree	18%
Disagree	29%
Strongly disagree	0%
Other	18%

There were middling views on this question. There were questions raised about where the profit would have to go to and whether profit would be diverted to shareholders and not reinvested to improve bus infrastructure. However, there were a few comments on the need to be able to leverage investment.

Question 16 – (Municipal bus companies)

Are there any additional safeguards you would like to see applying to the use of these powers?

218 respondents commented on this question. Many respondents reiterated points already raised in other questions. The following themes were raised in addition:

(this list is alphabetical to give no order of priority or bias to the topics)

Access:

Respondents wanted assurance that there was accountability for disabled access on services and the network.

Affordability:

Comments were made about ensuring that tickets for passengers were set at affordable and attractive prices. Affordability of the plan as a whole was also mentioned by respondents.

Awarding of contracts:

Some respondents commented that local authorities should be able to directly award contracts from a franchised/publicly owned bus network to their council owned operator.

Boards:

Any boards should equally represent all areas of the collective industry – this should include users and representatives of relevant protected characteristics.

Investment, sales and other such financial matters:

Respondents commented that there needs to be careful management of the franchise portfolio and risky investments should not be allowed, owing to it being public money. Suggestions included curbing bonuses to CEOs and shareholders, any profits should be put back into the bus system and not diverted to other public services and if publicly owned services are ever sold, that consideration is given to keeping the sale within the Welsh market.

Legislative changes:

Consideration must be given to relevant CMA/Competition law in any legislative change.

Standards and monitoring:

A few comments suggested putting an independent ombudsman in place to oversee that quality is consistent and standards are adhered to across the network. Some commented that there should be full and open scrutiny by the public. Comments were given regarding items that should be within franchise contracts. These included – Long notice period for termination of services; good staff wages; regular publishing of quality reviews; minimum service level agreements should be applied to contracts; peer review and monitoring should be encouraged.

Transitional period:

A few respondents commented that there should be a mechanism in place to support current bus owners. This is both financially and also with the franchise process; careful attention should be given so that cross-border services are not negatively affected.

Question 17 – (General)

Are there any further comments you would like to provide on the content of this white paper?

240 respondents added further comments here.

Of the comments received these were the general topics addressed -

(this list is alphabetical to give no order of priority or bias to the topics)

Accessibility:

Some comments stressed that the bus network must be accessible for all users.

Ambition:

Some respondents applauded the ambitions within the White Paper. However, some others suggested it was too ambitious, and worried it wouldn't be achievable.

Active travel:

Some comments asked for improvements to better allow people to cycle to and from bus journeys, including bike racks on buses, bikes allowed on buses, and safe storage for bicycles at key bus stations.

Climate emergency:

Some respondents commented to support the aim to get people out of their cars and onto more climate friendly public transport services.

Continuity of service across the network:

A few respondents welcomed the chance for continuity across the network. Some mentioned the need for improved customer service and welcomed an all Wales approach to training and service standards. Some worried that a centralised model may lead to a lack of "local" thinking and that issues like handling complaints may be more distant when dealt with centrally and without local knowledge, for instance.

Cross border services:

There were a few questions raised as to how cross border services will work and if the ticketing will be different on these services. Some respondents vocalised their desire for an easy to use which that is not defined by borders.

Drivers and other service critical staff:

Concerns have been raised over the ability to truly deliver a Wales wide network with current shortages of drivers and other service critical staff (for example ticketing vendors, cleaning operatives and catering teams). Questions were also raised as to what is going to be done to attract and retain people within these roles.

Fleet:

Some respondents questioned if all buses, no matter who the operator, would look the same across the network. Some welcomed this continuity "the more a service is recognisable and familiar the easier and more natural it is to use". A few questioned what would happen to existing fleet and how quickly the climate friendly buses would be introduced and if areas with currently low standards of vehicles would be addressed first.

Funding:

There were a few questions raised about how the aspirations would be funded, welcoming further information on how this will be achieved.

Infrastructure:

A few questions were asked as to whether infrastructure would be a central responsibility or the responsibility of the operator. For example, how would depots, charging stations, etc be shared? Some commented that the White Paper doesn't address issues with congestion and how the centralised network will address and help improve this.

Integrated travel:

Some respondents asked to reintroduce some of the closed rail lines in order to better link up areas of Wales. Integrating with other transport modes is important to many respondents.

Patronage:

Questions were raised by a few as to what thought has been given on how to attract passengers on to buses.

Reliability:

Many responses included comments regarding the loss of services in their area, and a wish to have services improved. There were also comments on the reliability of services, and that up to date live timetabling at bus stops and on an app was critical, as well as services delivering the promised timetable.

Rural services:

It is obvious from the comments that many respondents are eager for services to be better in rural and smaller communities. Many respondents mentioned specific areas and route numbers within their responses. Respondents were also clear in wanting there to be policy that rural and smaller communities' services aren't the first to be cut from franchises should there be a need. A desire for parity of service across the network has been clearly communicated through responses to this question.

SME operators:

There were 16 comments regarding SME operators. Many wanted there to be an assurance to protect and support the SME market within the franchise regime. Many commented further to recognise the important part that SME operators play within the current system, and what they can contribute going forward.

Ticketing:

A few people questioned how ticketing would work, especially across the full transport network. People were also eager to know if the concessionary fare scheme would continue. A few people requested an easy to use system such as "tap-on-tap-off" systems seen in other areas. A few respondents requested that ticketing didn't have to be reliant on mobile networks, as this could further isolate some rural areas of Wales, and some of the older population for who digital only access can serve as a barrier.

Question 18 – (Draft Regulatory Impact Assessment)

Do you have any comments on the draft Regulatory Impact Assessment published alongside this paper?

The draft Regulatory Impact Assessment (RIA) document is a technical document, and most respondents not associated with an organisation chose either not to respond or advised that they had no comment - with a few respondents choosing to use this opportunity to reinforce previous points raised throughout the consultation.

Those with comments raised uncertainty on whether the draft RIA was referring to franchising at a national level, or as 22 individual schemes. In addition, one comment questioned the comparison made with public transport use in other areas and whether they resemble Wales' demography.

Organisations, particularly those associated with the transport industry, were much more forthcoming with comments on the technical aspects of the draft RIA. We will consider these responses in detail when updating the draft RIA, however the following themes were raised:

- Individual franchise modelling vs national model and stress testing
- Benefits realisation calculations
- Continued uncertainty of Covid19 on travel habits
- Development of a full business case
- Benefits of Franchising over Enhanced Partnerships
- Best practice success factors
- Appraisal period durations
- The need to model beyond intra-industry effects
- Consider the scale of international or regional comparators vs an all Wales solution.
- The need to identify regional variations

Question 19 – (Welsh Language)

We would like to know your views on the effects that the proposals would have on the Welsh language, specifically on opportunities for people to use Welsh and on treating the Welsh language no less favourably than English.

What effects do you think there would be? How could positive effects be increased, or negative effects be mitigated?

332 people responded to this question.

Upon analysing the comments received, most respondents shared either a positive or neutral view on this question, or commented that they did not have a view.

Those sharing positive responses highlighted the opportunities this would bring to further promote the language. Many highlighted greater Welsh Language use on public transport would “encourage a sense of community and shared ownership and have a positive effect on people's sense of identity, including their linguistic identity.”. Respondents also pointed out that Welsh Language use on public transport would also enrich the experience of tourism and visitors to the area. One respondent also suggested “... a cheerful bore da and a few key phrases from the driver would normalise the language a little” and “... some posters near the front with the phrase of the week and a translation”.

Questions were raised on how the Welsh Language would be applied on cross-border services. In addition, one respondent asked that careful consideration is made on bi-lingual signage to ensure safety information is easily legible and not difficult to read or find.

Of those sharing neutral or negative comments, the majority raised concerns that prioritising the Welsh Language could affect the cost and complexity of delivering services, or risk exacerbating driver shortages.

Question 20 – (Welsh Language)

Please also explain how you believe the proposals could be formulated or changed so as to have positive effects or increased positive effects on opportunities for people to use the Welsh language and on treating the Welsh language no less favourably than the English language, and no adverse effects on opportunities for people to use the Welsh language and on treating the Welsh language no less favourably than the English language.



The response to this question shares the same level of positivity as Question 19. Respondents were keen to highlight the benefits of bilingually capable staff, with some highlighting this as an opportunity to promote local employment in communities with high numbers of Welsh speakers. Others were concerned that enforcement of bilingual staff would compound current issues regarding workforce shortages. Many respondents however would be content with just common phrases and greetings being taught to drivers with an overwhelming majority agreeing with the need for bilingual signage, information and announcements.

Echoing the previous question, a portion of respondents were keen to ensure that Welsh Language interventions did not come at the cost of service levels.

Organisations emphasised the importance of the Welsh language not being treated less favourably than English. Organisations also highlighted the opportunity to connect isolated Welsh speaking communities.

Question 21 – (Other Comments)

We have asked a number of specific questions. If you have any related issues which we have not specifically addressed, please use this space to report them:



In addition to specific responses to this question, we have summarised here any responses which were submitted to us without specifically answering the questions in our consultation document.

A number of respondents took this opportunity to raise concerns about current bus services which they would like to see addressed under a new delivery model. For many, this was highlighting where existing service patterns are letting them down. Comments were raised about services which had been withdrawn, or in some cases never introduced, between population centres, making it difficult for people to access work, education, training or leisure activities and in some cases isolating people. Others commented on the importance of evening services, so people who use the bus can reliably get home in the evening.

Respondents also highlighted the importance of integration with other modes. In particular people mentioned the importance of integration with rail both in terms of timetables, so people can make easy changes to continue their journeys with limited

waiting time, and journey-based ticketing so it's easy for passengers, rather than designed around which mode they're travelling by. We also received comments about integration with walking and cycling routes, particularly making sure bike space or racks are available on buses so people can easily cycle to and from the bus stop.

As well as the specific comments about where they would like to see their local services improved, respondents also raised factors which would make it easier for them to use buses. For some, this was better passenger information, including real-time information. For others it was about the critical importance of the accessibility and safety of services, be that accessibility of bus stops, non-digital timetable information, audio announcements of stops on board, or an environment which feels safe for women travelling alone.

We also received comments about both the challenges currently involved in accessing buses in rural areas, and the need for different networks and models in different areas, as well as the opportunities available from better planning and marketing our bus services for tourists, to make sure they both support and are supported by our visitor economy.

Finally, we received comments about the areas where we might be able to look beyond traditional scheduled bus services from respondents asking us to make sure we consider the role of demand-responsive transport in our bus network where it can most efficiently and effectively meet people's travel needs.

SECTION THREE: Welsh Government Response to the Consultation - One Network, One Timetable, One Ticket: Planning Buses as a Public Service for Wales

Conclusions and next steps

The Welsh Government want to offer our sincere thanks for the response we received on this white paper.

We are pleased that the overwhelming majority of respondents supported our proposals and welcome the significant volume and range of comments we have received. These will inform our thinking as we continue working with our partners to finalise our proposals to improve bus services in Wales.

Annex A: List of respondents

When asked about organisations 103 respondents identified themselves as belonging to an organisation.

Organisation Category	Count
Bus/Coach company	11
Commissioner for Wales	2
Community and Third Sector Body	24
Community/Town Council	7
Hospitality/Hotel/B&B	1
Industry Association	13
Local Authority	18
Other Business	5
Other Public Body	1
Other Transport Company	4
Political Party/Group	2
Regional Body	2
Representative Body, Professional Body or Association	7
Research/Educational body	3
Retail Business	3
	103

We asked if respondents had a business interest in Wales:

15.69% of respondents (113) stated that they had a business interest in Wales

71.44% of respondents (518) stated that they did not have a business interest in Wales

12.36% of respondents (89) gave no answer

(21 people skipped the question)