

Roadmap to bus reform

Update to franchise areas

November 2024



Update to franchise areas

In March 2024, Transport for Wales and Welsh Government jointly set out [Our Roadmap to Bus Reform](#), which provided an outline of our proposed approach to bus franchising.

In the Roadmap, we said that we would rollout the change across franchise areas and that a timetable for the roll out of franchise areas and packages is under development. We initially suggested nine potential franchise areas.

Since the publication of the Roadmap, we have continued to engage with local government, Corporate Joint Committees (CJCs) and industry representatives. As a result it has been agreed that it would be better to condense the rollout to four areas that mirror the CJC boundaries.

The rationale for this change is outlined below. Rolling out the change across four franchise areas, which mirror the CJC boundaries will help:

- Align the franchising plans with the Regional Transport Plans, which the CJCs are currently developing.
- Build on the existing regional working that exists across local authorities today and coordinate planning.
- Reduce the complexities around transitioning into the franchised system, making it as simple and smooth as possible.

The change still lets us ensure the key considerations we need to take into account when agreeing the sequencing of rolling out franchise zones. In the Roadmap, we said these include:

- Complexity of the network, including cross-county and cross-border movements
- Current levels of control and competition within those zones¹
- Ability to grow revenue in the area
- Bus decarbonisation opportunities available.

We have looked at these key considerations, and are currently planning to commence franchising in South West Wales. In sequence, the current working timeline is to rollout franchising across:

1. South West Wales (2027)
2. North Wales (2028)
3. South East Wales (2029)
4. Mid Wales (2030)

The rollout sequence will be confirmed at a later point in time.

¹ Current levels of control and competition in an area refers to the make up of the bus market. Where a high proportion of bus services are contracted by local authorities, public sector control is expected to be high, particularly where contracts are gross-cost. Where a high proportion of bus services are commercially viable services, there may be a lot of competition.

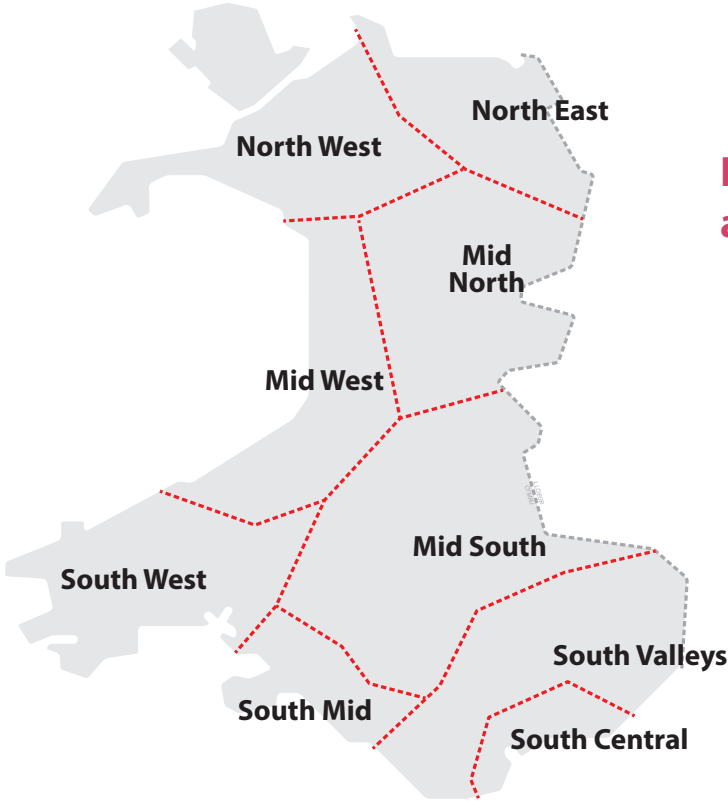


Figure 1.1: Potential franchise areas (in Roadmap)



Figure 1.2: New proposed rollout areas

