

Agenda Supplement – Economy, Infrastructure and Skills Committee

Meeting Venue:	For further information contact:
External Location	Gareth Price
Meeting date: 9 March 2017	Committee Clerk
Meeting time: 09.00	0300 200 6565
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Please note the documents below are in addition to those published in the main Agenda and Reports pack for this Meeting

– Rail Franchise & The Metro: Consultation Responses

Rail Franchise & The Metro: Consultation Responses

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*Ar gael yn Gymraeg | *Available in Welsh

Rhif Number	Sefydliad	Organisation
01	Phil Inskip (Saesneg yn unig)	Phil Inskip
02	Swyddfa Rheilffyrdd a Ffyrdd (Saesneg yn unig)	Office of Rail and Road
03	Cymdeithas teithwyr rheilffordd Sir Benfro (Saesneg yn unig)	Pembrokeshire Rail Travellers Association
04	Cyngor Telford a Wrekin (Saesneg yn unig)	Telford & Wrekin Council
05	Grŵp Defnyddwyr Rheilffyrdd Gogledd Sir Gaer (Saesneg yn unig)	North Cheshire Rail Users' Group
06	Cymdeithas Defnyddwyr Rheilffordd Wrecsam-Bidston (Saesneg yn unig)	Wrexham-Bidston Rail Users' Association (WBRUA)
07	Campaign for Better Transport (Saesneg yn unig)	Campaign for Better Transport
08	Heart of Wales Line Development Co Ltd (Saesneg yn unig)	Heart of Wales Line Development Co Ltd
09	Undeb Cenedlaethol y Gweithwyr Rheilffordd, Morwrol a Thrafnidiaeth (Saesneg yn unig)	National Union of Rail Maritime and Transport Workers
10	Thomas Wheeler (Saesneg yn unig)	Thomas Wheeler
11	Railfuture Cymru (Saesneg yn unig)	Railfuture Cymru
12	Defnyddwyr gwasanaeth rheilffordd Maesteg i Gaerdydd (Saesneg yn unig)	Users of the Maesteg to Cardiff rail service

13	Cyngor Sir Gaerloyw (Saesneg yn unig)	Gloucestershire County Council
14	Merseytravel (Saesneg yn unig)	Merseytravel
15	Yr Athro Stuart Cole (Saesneg yn unig)	Professor Stuart Cole
15a	Yr Athro Stuart Cole - Gwybodaeth ychwanegol (Saesneg yn unig)	Professor Stuart Cole - Additional information
16	Network Rail (Saesneg yn unig)	Network Rail
17	Gydbwyllgorau sy'n cynrychioli Gorsafoedd Magwyr, Cyffordd Twannel Hafren, Cil-y-coed, Casgwent a Lydney (Saesneg yn unig)	Joint committee representing Magor, Severn Tunnel Junction, Caldicot, Chepstow and Lydney Stations
18	Dr Mark Lang (Saesneg yn unig)	Dr Mark Lang
19	Orsafoedd Cyffordd Twannel Hafren a Chil-y-coed (Saesneg yn unig)	Severn Tunnel Junction and Caldicot Stations
20	West Coast Rail 250 (Saesneg yn unig)	West Coast Rail 250
21	Rhydian Mason - Swyddog Datblygu Rheilffyrdd Partneriaeth Rheilffordd y Cambrian (Saesneg yn unig)	Rhydian Mason - The Cambrian Railways Partnership's Rail Development Officer
22	Y Sefydliad Cynllunio Trefol Brenhinol yng Nghymru (Saesneg yn unig)	Royal Town Planning Institute Cymru
23	Transport Focus (Saesneg yn unig)	Transport Focus
24	Bus Users Cymru (Saesneg yn unig)	Bus Users Cymru
25	Caer Yr Amwythig Partneriaeth Rheilffordd (Saesneg yn unig)	Chester - Shrewsbury Rail Partnership Community Rail Officer

26	Cymdeithas Partneriaethau Rheilffordd Cymunedol (Saesneg yn unig)	Association of Community Rail Partnerships
27	Canolfan Cydweithredol Cymru (Saesneg yn unig)	Wales Co-operative Centre
28	Ynni Glan (Saesneg yn unig)	Ynni Glan
29	Age Cymru (Saesneg yn unig)	Age Cymru
30	Trawsnewid Bro Gwaun, Abergwaun (Saesneg yn unig)	Transition Bro Gwaun, Fishguard
31	Fforwm Trafnidiaeth Gogledd Penfro (Saesneg yn unig)	North Pembrokeshire Transport Forum
32	Federation of Small Businesses (Saesneg yn unig)	Federation of Small Businesses
33	Growth Track 360, Tasglu Rheilffyrdd Gogledd Cymru a Merswy Dyfrdwy (Saesneg yn unig)	Growth Track 360, the North Wales and Mersey Dee Rail Task Force
34	RNIB Cymru (Saesneg yn unig)	RNIB Cymru
35	Associated Society of Locomotive Engineers and Firemen (ASLEF) (Saesneg yn unig)	Associated Society of Locomotive Engineers and Firemen (ASLEF)
36	Angel Trains (Saesneg yn unig)	Angel Trains
37	Rail Delivery Group (Saesneg yn unig)	Rail Delivery Group
38	Cabinet Rhanbarthol Bargaen Ddinesig Prifddinas- Ranbarth Caerdydd ac Awdurdod Trafnidiaeth Prifddinas- Ranbarth Caerdydd (Saesneg yn unig)	Cardiff Capital Region City Deal Regional Cabinet and the Cardiff Capital Region Transport Authority (CCRTA)

1. This is a personal response from a rail user starting or ending journeys on the Cardiff to Cheltenham line and this response does not represent the views of any particular organisation or group.
2. Having responded to the online questionnaire it was felt some of the questions were too broad (such as views of staff on trains and stations – the requirement for trains is different to that on stations) and required breaking down or further explanation.
3. As a user this response will concentrate more on the priorities for the specification than effectiveness of the Welsh Government.
4. This response will also concentrate on local issues in this area (Monmouthshire) as global averages and generalisations tend to overlook highly relevant issues specific to one area or line.
5. This is best explained by looking at the improvements of the suburban services into Cardiff over the first ten years of the Wales and Borders Franchise from 02/03 to 12/13. The details below were produced a couple of years ago so fares etc. will have changed but the comparisons remain valid.
6. Comparison of the Arriva Trains Wales Franchise outer suburban services to Cardiff in the 10 years since the start of the Franchise. The Line description defining the stations which are included in the line calculations are given in the table. The 'line' extends up to the point it joins a converging line.

..	Merthyr Tydfil	Aberdare	Treherbert	Rhymney	Maesteg	Ebbw Vale Parkway	Chepstow (Cinderella Line)
Distance to Cardiff	23¼ miles	23¼ miles	23 miles	23¼ miles	23½ miles	28¾ miles	29¼ miles
Journey less 50 min	X	X	X	X	X	X	✓
Av. journey time	1Hr 5m	1Hr 5m	1Hr 5m	1Hr 3m	54m	57m	39m
Fare Single	£5.50	£5.50	£5.50	£5.50	£5.50	£5.50	£9.30
Anytime Day Return	£7.70	£7.70	£7.70	£7.70	£7.70	£7.70	£12.40
Annual Season	£1052	£1052	£1052	£1052	£1052	£1052	£2176
Change in the number of ATW Trains	+27	+15	+6	+1	+5	N/A	-2
Trains per Weekday	59	57	61	36	32	34	24
Hourly or better	✓	✓	✓	✓	✓	✓	X
Incl. Half Hourly	✓	✓	✓	✓*1	X	X	X
Line Description – Stations From -To	Merthyr to Quakers Yard	Aberdare to Penrhiwceiber	Treherbert to Terhafod	Rhymney to Heath H L	Maesteg to Wild Mill	Ebbw Vale Parkway to Rogerstone	Lydney to Caldicot
Average footfall per station on the line*	131,355	149,034	127,029	204,882	49,534	130,592	151,589
Line growth based on station footfall figures for stations on the line	+39.04%	+31.27%	+12.96%	+39.73%	+49.63%	N/A	+131.31%.
Inc in Electrification	✓	✓	✓	✓	✓	✓	X
Inc in Metro Rail	✓	✓	✓	✓	✓	✓	X

* = Footfall as at 2012/13

✓*1 = Rhymney Peak service

N/A – Line opened after start of Franchise

7. The point about the averages is that the Chepstow line is the only one of the seven not to even have an hourly service. In fact four of the Valley lines already had a half hourly service. So the point about a 'fast and frequent' service is highly important regarding a more frequent service on the Cardiff to Cheltenham service but would be lost in the overall average responses where a majority already have an hourly and many already have a half hourly service.
8. Conversely despite Chepstow being only six miles further out from Cardiff compared with the other Heads of the Valleys towns; the journey time to Cardiff is 39 minutes compared with an hour and a quarter from the Heads of the Valleys. So improved journey time is not an issue on this particular line whereas it would be for the majority of the rest of the suburban lines. In fact the inclusion of the

- opening of additional stations en route to Cardiff such as Magor & Undy Walkway would still keep the Chepstow service well within the 'magical' fifty minutes looked for in METRO services.
9. It should be noticed that despite a growth of over 130% over the first ten years of the franchise compared with a 12% to 50% growth on the other Valley Lines and despite having a fare structure of double the standard Valley lines there has been no increase of services funded or provided by the Welsh Government. Hence the line being locally dubbed the 'Cinderella line'.
 10. Despite arguably being the most financially remunerative and efficient of all these lines in terms of both growth and fares; Arriva Trains Wales has actually reduced the number of trains down to the contractual minimum safeguard level of twelve in each direction. This is in sharp contrast to the additional services contracted and funded by the Welsh Government on all the other lines.
 11. SEWTA the Transport Consortia for South East Wales proposed in its Regional Transport Plan that the Chepstow line should have an hourly service in 2010 and a half hourly service at least as far as Chepstow by 2014.
 12. This would deliver the service level identified as needed following the investigation in the joint DfT / Welsh Assembly Government 2007 Wales Rail Planning Assessment.
 13. There are several reasons why the improvements have not materialised, below are some of them.
 14. The initial assessment for the hourly service was considered by Network Rail in its Wales Route Utilisation Study (RUS). This concluded that the Value for Money was low and did not recommend further action. The reason was the low anticipated growth of new traffic on the line. The growth assumption was included in the RUS "[Section 4.1 Anticipated Changes in Demand – The Wales RPA was developed on this basis and forecasts all day growth of approximately 23 percent in eleven years to 2018/19 for all journeys, within, to and from Wales](#)".
 15. With the knowledge of hindsight this estimate of growth was severely underestimated at 23% by comparison with the actual 130% growth recorded over ten years on the Chepstow line as confirmed by the officially published ORR Station Footfall Statistics.
 16. Having missed out in the first five year plan it was re-evaluated By SEWTA. To great surprise this also determined that it had a low Value for Money and so was not high on the list of projects recommended to the Welsh Government for consideration for inclusion in the next five year National Transport Plan.
 17. It was not possible to initially investigate this as the details had been redacted out of the Report based on confidentiality issues because the organisation that would be paid to deliver any services that would be authorised was party to the various evaluations used in the recommendation report.
 18. Eventually after a lot of lobbying it was possible to talk to the consultants involved and it revealed that they had used the wrong figures which were immediately evident as the cost of providing the service in their report was just under five times what Network Rail had calculated just five years earlier for the identical services.
 19. It also transpired they had developed a unique specific model for the Valley Lines into Cardiff for SEWTA. As will be seen from the Table above this average would mean the growth figures would have been half the actual for the line concerned. In addition the revenue from each ticket if evaluated on the Valley Line Fares would deliver only about half the financial return. So with overestimated costs and under estimated benefits it was no surprise the services only appeared as low Value for Money. Three months after tabling the over 100 page Report and after the errors were pointed out to SEWTA, a short nine page report was tabled and authorised by the SEWTA Board acknowledging the wrong estimation but as far as I am aware this second Report was never submitted to the ultimate deciding and authorising Body – the Welsh Government. So the improved services did not appear in the next five year National Transport Plan issued by government.
 20. The third also was a result of confidentiality issues and the loss of public scrutiny of important evaluations. Again in this case because Private companies were involved it had been decided to exclude the public from sitting in on the Council meetings discussing the report and also not to publish a DRAFT for public consultation before finalising. This was the "South East Wales Integrated Transport Task Force - Report to the Minister for Economy, Science and Transport - Proposals for the delivery of the future public transport network".
 21. This Report evaluated options on a different criterion and was based on predominance of existing and proposed population densities.
 22. There are many different models to determine costs and benefits and to provide the comfort blanket demanded by decision makers by producing a so called scientific evaluation of 'Value for Money'.

The classic was the reopening of the Ebbw Vale Line. The original assessment was based on the "Trip end" Model. A couple of years later in finalising the Value for Money for authorisation a revised model the "Trip Diversion" model was used and this predicted only half the passengers that the original method had suggested. The scheme was dramatically trimmed back to save costs and the long passing loops that would allow a half hourly service were stripped out of the authorised scheme. It always appeared strange to me that for a part of Wales that based on the official census had the highest proportion of houses without access to a motor vehicle that it would be calculated using the 'Trip Diversion' method rather than the 'Trip End' model. Hindsight has shown twice the number of passengers compared with the authorisation proposals resulting in the unexpected need to allocate additional carriages and also the costly going back and building in the extended passing lines to allow an increased future service level. The Point is the actual numbers heralded as a great success are in fact almost exactly what the original model predicted. So far from being a great success the use of the different model resulted in shortage of rolling stock, overcrowding and greater cost of the Infrastructure compared with if it had all been included in the original build.

23. The Task Force Report stopped short of any transport proposals coming east from Cardiff crossing the boundary into Monmouthshire. Again within one day of the Report coming into the public domain it was apparent that a mistake had been made when considering the urbanised belt between Newport and Chepstow. The population density had been calculated on the total population of the large mainly agricultural County of Monmouthshire divided by the total area of the whole County. It would be a bit like calculating the population density of the City of Cardiff by taking the population of the whole of Wales and dividing it by the geographical area of the whole of Wales.
24. A quick calculation of the actual and proposed population densities of the belt through Magor, Rogiet, Caldicot, Portskewett, and Chepstow revealed that the value would put it well within the areas being considered and higher than many already proposed for improvement in the Report.
25. This was reported to the CEO of the Council but he decided that as the public issuing of the Report was more than three months after the Minister had received it and presumably acted on it, there was no point in him approaching the Minister to point out the error. There was also the fact some of his own Officers and Councillors were involved in the Task Force and should arguably have picked up on and dealt with the mistake before the report was ever finalised and issued for action.
26. The local MP for Newport East - Jessica Morden managed to arrange for us a quick meeting with Mark Barry whose own Metro Consortium Report on the Metro was due to be delivered to the Minister in a couple of weeks time. His Report equally excluded the whole of Monmouthshire as he had taken the base information calculations from the Task Force statistics. He immediately saw and accepted the mistake and made a last minute modification to his own report reinstating Metro proposals as far as Severn Tunnel Junction at least. That is why Monmouthshire only appears in the Metro Consortium Report and not in the South East Wales Task Force Report.

Service Improvements requested for the new Franchise

27. Half hourly local all stations stopping service between Cardiff and Cheltenham – This would meet the identified requirements in the joint DfT / Welsh Assembly Government 2007 Wales Rail Planning Assessment. The detail above explains the background and why it has not been achieved before now.
28. I will also quote from the Railfuture Cymru 'On Track for the 21st Century – A Development Plan for the Railways of Wales and the Borders' as this supports this proposal and also provides a wider perspective :-

4.1.2.2 Chepstow line (Cardiff - Newport – Chepstow – Gloucester)

[.1] *There should be an enhanced limited stop west Wales - Cardiff - Birmingham – Derby (and beyond) service at hourly intervals, with all trains calling at Severn Tunnel Junction and Chepstow.*

[.2] *An additional hourly local service should operate between Cardiff, Gloucester, Cheltenham and Worcester, giving onward connections.*

[.3] *As well as this, the existing Cardiff to Cheltenham service should operate each hour, without the current gaps*

[.4] *This would result on the Gloucester line in Severn Tunnel Junction and Chepstow having three trains an hour, with Caldicot and Lydney being served half-hourly.*

[.5] *The stopping services in [.2] and [.3] should also call at new stations at St Mellons, Celtic Lakes / Coedkernow, Llanwern and Undy/ Magor. This would help to reduce road congestion in and around Newport and on the eastern side of Cardiff.*

[6] We further suggest that, in addition to the currently proposed park-and-ride facilities at Severn Tunnel Junction and Chepstow, similar provision should be made at a new park-and-ride station at Newnham (Elton Corner), between Lydney and Gloucester, to give better access to the rail network for the Cinderford, Ross on Wye and Forest of Dean areas.

29. The item [1] refers to enhancing the present Cross Country service between Cardiff and Nottingham.
30. The item [2] extends the "half hourly" additional service to provide the much needed onward connection through Gloucester and Cheltenham to Worcester and also fills the gap in the services to Ashchurch for Tewksbury. This along with the item [6] highlights the difference in the ability of Railfuture Cymru to look at the Railway in totality rather than just being constrained and blinkered by the historical Franchises defined twenty five years ago and by country boundaries.
31. It raises an interesting point both politically and financially. The much needed station at Newnham is in England but the only rail service would be Welsh Government funded and managed Cardiff to Cheltenham. So what is the mechanism for such a station to be opened and how do you get the Welsh Government to put as much interest, backing and support into it as it would for say a new station in West or North Wales?
32. The new Franchise should mandate that the service goes through to Cheltenham where onward connections can be made. The present Franchise only specifies the service to go as far as Gloucester which is idiotic as almost all of the West of England to the Midlands and North services through Bristol do not call at Gloucester but only at Cheltenham.
33. The extension from Gloucester to Cheltenham is in the gift and at the discretion of the Operator on purely commercial grounds. You can see this by looking at the existing timetables that the last train of the day terminates at Gloucester on Saturdays so there is no return service starting from Cheltenham and on Saturdays there is no onward connection out of the Edinburgh Cross Country services. The reason is simple the Operator has anecdotally admitted that it does not want the hassle of providing Bus replacements and as Engineering work is usually at weekends starting late Saturday night they simply do not provide the service in order to avoid having to put on replacements in case there happens to be engineering work that weekend. The service needs to be specified so the operator cannot just opt out for their own convenience of providing this connection.
34. Another Cross Border and 'which Franchise' issue is the much requested commuting service from Lydney, Chepstow and Caldicot reversing at Severn Tunnel Junction to Filton Abbey Wood and Bristol. The passenger reversing facility was installed as part of the recent Newport Area Signalling Renewal a couple of years ago, but at present is only used for occasional engineering diversions.
35. This was identified as a 'Gap' in the Great Western RUS but unfortunately was evaluated as an all day Gloucester to Bristol Service which according to Network Rail required two additional trains, six sets of crew and it assumed only a 3.2% annual growth rate. This all day service from Gloucester failed to meet the DfT Value for Money requirement. What had been asked for was purely a morning and evening commuting service from Lydney, Chepstow, Caldicot and Severn Tunnel Junction.
36. What is required is a service from Lydney to Bristol departing at around 07:07 arriving Bristol Temple Meads at 08:10 and ideally a second departing at 07:29 arriving at Bristol at 08:27. (The timings are designed to pick the maximum demand and also to slot between all the existing services into Bristol without the need to alter the timings of any other service in either direction in any way).
37. These would relieve the severe overcrowding at Severn Tunnel Junction as the first would pick up at 07:39 mid way between the two busiest trains the 07:25 Cross Country Voyager Cardiff to Manchester via Bristol at 07:25 that daily picks up approx. 75 at the Junction and the 07:55 Great Western Cardiff to Portsmouth that picks up approx. 120 at the Junction. This is the train that every year there are recorded instances of morning commuters being left behind on the platform unable to squeeze onto the severely overcrowded train. The Severn Tunnel Action group STAG can provide documented evidence of days and numbers when this occurs as they record these daily problems.
38. The second train from Lydney would pick up at 08:05 between the busiest and the third busiest the Great Western Cardiff to Taunton at 08:25 that picks up around 50 passengers every day.
39. The growth of Interchanges at Severn Tunnel Junction between the Chepstow line and the Bristol line has been one of the largest growths in rail usage in Wales. Starting at 5,373 in 2000/01 it has reached 40,054 by 2015/16 equivalent to a compound growth rate of more than 14% per year (c.f. the Network Rail assumption of 2.3% in their Value for Money Calculation and this greater than 14% growth is without even having the additional direct services that would tap into the latent demand.)

Staff on Stations and Trains

40. At all unstaffed stations there should be CCTV supervision of the platforms, real time train running information including audio for those with poor eyesight, a means by which passengers can contact and talk to a member of staff if problems arise, appropriate covered waiting accommodation and adequate lighting on both the platforms and access positioned so Notice Boards can easily be read and at all times there should be the provision of up to date timetables.
41. With hundreds of small stations it is not realistic to consider that every station could be manned. I would turn again the Railfuture Development Plan that in my view defines exactly what should be provided:-

6.3 Interchange stations (rail/rail or rail/ other modes) must have all of the above and:

**a "dispatcher" on duty for the whole period of the day when connections are possible at that station;*

**clear announcements of the necessity to change and for which main destinations, together with clear signs directing passengers to connecting bus services;*

**toilet facilities, including provision for the disabled;*

**at least basic refreshment facilities, even if only a snacks/drink machine (commonly provided even at local stations in such countries as Switzerland).*

All of these facilities must be available throughout the period in which the train service is operating.

42. The above would enable the Operator to identify when and where staffing should be provided.
43. On trains there should always be a member of staff who can be contacted. It is noted that in 2015 when the woman was trapped in the closing doors of the Driver Only Operated Train at Hayes and she was pulled along the platform tripped and was dragged; it was the on board revenue collection staff who managed to initiate the emergency stop before she was killed. If a passenger had simply operated the passenger emergency button the train would not have stopped so quickly with a potential fatal outcome. A trained competent member of staff on trains should be specified.
44. On all new and refurbished trains on board CCTV should always be provided.

Other Items

45. Because of the local situation connections are vital. While I may start or finish my journey on the Cardiff to Cheltenham service it is used to connect into other services and less than 5% are probably completed on the one train. As demonstrated above connections at Severn Tunnel Junction have grown by 645% over the last fifteen years equivalent to an annual growth rate of over 14%
46. We negotiated with FGW and they put on an additional stop on their evening service to specifically provide a connection into the ATW service for Chepstow an hour after the last bus of the evening from Bristol to Chepstow (18:00 Bristol Bus Station X7 Severnside Express) The connection had only been in operation for six months before ATW withdrew the outward and return service and severed the connection reverting to more than an hour's wait for the next onward train. ATW's response was that it had only attracted a regular half dozen passengers in the six months and they needed to save money due to the declining annual subsidy. As such it was in their gift as they were operating one train in each direction above the contracted minimum and they could chose which train to withdraw and this one made the best financial savings for them.
47. I hope the above will provide the local requirements needed and the factual reasons behind the request. It also demonstrates the advantage of open management and allowing public consultation on Draft proposals to pick up detailed aspects that can easily be overlooked in the volume and magnitude of the larger proposals. ~end ~

Cynulliad Cenedlaethol Cymru / National Assembly for Wales

Pwyllgor yr Economi, Seilwaith a Sgiliau/ Economy, Infrastructure and Skills Committee

Masnachfrait Rheilffyrdd a chyflwyno Metro / Rail Franchise and the Metro

Ymateb gan Swyddfa Rheilffyrdd a Ffyrdd / Evidence from Office of Rail and Road

We fully support increased devolution and we have been working closely with devolved funders and decision makers to help secure its benefits.

We have increased our monitoring of Network Rail in Wales and have followed this through to more regular and detailed advice to the Welsh Government. We have also been working closely with the Welsh Government on our 2018 Periodic Review of Network Rail; the Welsh Government is a member of our Joint Steering Group for this work, together with DfT, Transport Scotland and Network Rail.

Specifically on the new rail franchise, we have been advising Transport for Wales on regulatory issues.

We recently met all the bidders for the franchise individually to answer questions on their proposals.

We will be meeting the bidders again shortly. I am the responsible director for this advice within ORR.

Given this context, as you will understand, we will not be submitting written evidence to the inquiry.

If I can provide any further help, please let me know.

Yours sincerely

John Larkinson

Cynulliad Cenedlaethol Cymru / National Assembly for Wales

Pwyllgor yr Economi, Seilwaith a Sgiliau/ Economy, Infrastructure and Skills Committee

Masnachfaint Rheilffyrdd a chyflwyno Metro / Rail Franchise and the Metro

Ymateb gan Swyddfa Rheilffyrdd a Ffyrdd / Evidence from Office of Rail and Road

1) Infrastructure projects

- a) The Pembroke Dock Interchange is now complete – all bus services using Laws Street should be persuaded to use it. Currently the 349, 508 and 528 do not. Pembs CC say they are working on this.
- b) Milford Haven transport interchange planning is currently in the hands of Pembrokeshire County Council. It should continue through to completion.
- c) Reduce Whitland to Pembroke Dock and back time to under two hours to improve reliability, improve efficiency and increase capacity – probably by getting rid of the three level crossings at which the train is required to stop, but there are other possibilities! Recent road improvements have reduced the road journey time Pembroke Dock to Carmarthen to 40 minutes. We have always said that we don't mind road improvements as long as there are equivalent rail improvements. The Rail journey Pembroke Dock to Carmarthen still takes about an hour and 20 minutes – double the road time. Network Rail have said that work on the Llanion crossing is imminent, but that Beavers Hill and Manorbier Newton will require significant bridge work.
- d) Retain Swansea district line in double track form – improve speeds and headways, and build park and ride station near Morriston (see later).
- e) Preserve diversionary routes (such as Swansea District line and Vale of Glamorgan line) as diversionary routes when engineering work or breakdown prevents trains from using the main line, ensure that they have decent line speeds and are signalled with the same capacity(headway) as the mainline.
- f) Ensure that electrification to Swansea from London will improve travel for Pembrokeshire Travellers (eg will NOT require more changes, will NOT reduce services between London and Carmarthen, will NOT reduce services between Milford Haven and Manchester, and will continue to offer and maintain good connections where changes are required)
- g) Technology improves apace. Train information systems need to keep up. For example, ticket scanners could permit a central system to know the destinations of everyone on a train. A central system could then reschedule connections in the event of late running. (No more "We are sorry, but due to late running, this Cardiff-bound train will terminate at Newport")

2) Joined up thinking and joined up journeys:

- a) More long distance trains to different destinations (travelling by motor-car – major competitor for rail, you never have to switch your self, your family and your luggage from one car to another at a motorway service station!)
- b) Better interchange train to train at stations where a change is essential (Design stations for interchange, minimise walk between connecting trains, arrange timetables to connect, and manage the trains to connect on the day) Don't allow National Rail Journey planner to recommend changing trains at Newport, when Newport is not designed for interchange and Cardiff is clearly better. Our classic experience is the three minute late arrival at Newport (from Reading) which resulted in a Four hour twenty minute late arrival at Milford Haven.

Swansea is not a hub – it has only two spokes – it is just a station on the line between Paris and Ireland.

- c) Easier physical interchange between transport modes at Pembrokeshire Stations (we have produced a separate survey on this). Land at Clunderwen, Manorbier and Saundersfoot stations is reserved in the county strategic plan for parking developments.
- d) Specifically ensure that through trains from London to Pembrokeshire destinations will be able to continue to run – more specifically, ensure that lines in Pembrokeshire are capable of hosting IEP trains.
- 3) Recent health service changes in health service reorganisation suggests that more people (patients, visitors and staff) may need to travel from Pembrokeshire to Glangwili and Morriston, and this needs a public transport appraisal and response (better still if all the departments had worked together in the first place).
- 4) All Pembrokeshire stock should be proper main-line stock – the lines in Pembrokeshire are not branch lines, but limbs of the Trans-European Network. Many Pembrokeshire travellers are going beyond Carmarthen and will probably be on their first train for more than two hours – the quality of that first train is important, as the provision of well-presented toilets and refreshment trollies.
- 5) Overcrowding on the Milford Haven line needs addressing either via use of three car trains every two hours or by an hourly service. Overcrowding is especially likely on Saturday, when it needs to be possible to provide additional coaches – especially important when there are sports fixtures in Swansea or Cardiff.
- 6) There should be one Fast train from Milford to Cardiff and back each day – target of knocking half an hour off the regular stopping train time.
- 7) Fishguard Harbour should have a late afternoon service in addition to those it has at present.
- 8) Sunday must have a decent train service. In the year 2017, it is unacceptable that on Winter Sundays, the earliest we can reach Swansea from Pembrokeshire by train is 13.15, and Cardiff 14.15 – can't have a day out in Cardiff, can't go to Llanelli for a Scarlets midday kickoff.
- 9) Longer trains on match days would reduce road congestion. There needs to be spare stock, and a mechanism to encourage provision of extra trains.
- 10) Bustritution (replacing trains with buses during engineering possessions) should be minimised. Single track working, overnight possessions and train diversions should be the norm. On the rare occasions when replacement buses are required, replacement buses should have equivalent facilities to the trains they replace, and transfer between bus and train should be seamless (your luggage transported, your bicycles and prams accepted etc.etc)
- 11) In general there should be greater cooperation between the franchisee and Network Rail and other rail companies such as GWR over engineering possessions, diversions, how a passenger's journey is impacted by a delay – just passing the buck is not good enough.
- 12) There should be proper connections between west wales trains and HOW trains at Llanelli (currently, Pembrokeshire passengers are directed to go through Llanelli to Swansea, have a coffee and come back an hour or more later on a HOW train). Llanelli is more of a hub than Swansea, but it doesn't have hub connections!
- 13) Improve bus-rail time connections in Pembrokeshire, for example Milford to Neyland or Johnston to Neyland
- 14) We seem to be the only Welsh Community Rail partnership without a community rail officer – we would like one again please.
- 15) We are pleased that Traws Cymru has at last reached Pembrokeshire in the shape of the T5 bus, and look for further developments

- 16) The recent Swansea district transport strategy proposes a Blackbridge Port road link. Ensure that this is a valid response to a particular transport need – there are various rail links that could be made as alternative solutions to particular needs.

Telford & Wrekin Council
Aspirations for the Wales & Borders Rail
Franchise



Introduction

Telford & Wrekin is a unitary authority in the West Midlands region. Telford is a new town designated in the 1960s but the borough also includes the towns of Dawley, Madeley, Newport, Oakengates and Wellington and unparalleled environmental assets in the Ironbridge Gorge World Heritage Site. The population of the borough is circa 167,000 people.

During 2016 Telford & Wrekin Council along with the Telford Business Board created an Economic Development Strategy to promote growth and prosperity in the borough. Going forward the Economic Development Strategy looks to extend and support the diverse range of businesses represented in the borough and continue to be a major contributor to the region's economy.

The Economic Development Strategy recognises that transport connectivity and infrastructure underpins economic growth and efficiency. Telford & Wrekin Council has agreed a growth deal with the Homes & Communities Agency that has identified 400 acres of employment land and sites for close to 3,000 new homes. As part of this there is a commitment from Government to invest over £44million into site preparation to deliver this land to market.

Strong domestic demand is boosting production levels across a wide range of manufacturing activities and investment in new facilities, machinery, research and recruitment by Telford based manufacturers is creating a solid outlook for growth.

The attractiveness of Telford & Wrekin as a place to invest is also enhanced by the expansion of the two Universities with sites in the borough – Harper Adams University and the Telford Innovation Campus of Wolverhampton University. The Ministry of Defence in Donnington has also committed to expanding its facility with a £70million fulfilment centre that is a major enhancement to Telford's position as a centre for the logistics sector.

Telford's central location and connectivity to both the wider West Midlands and beyond is a strong part of our offer to inward investors. Transport connectivity plays an essential role in supporting economic activity and growth: it enables access to markets nationally and internationally; improves labour market efficiency; unlocks employment and housing sites; reduces the costs of doing business and stimulates business investment and innovation.

To support this Telford & Wrekin Council is involved in the Midlands Engine initiative to grow the combined economy of the East Midlands and West Midlands creating 300,000 jobs and boosting the national economy by £34billion. Telford & Wrekin Council is also involved in developing the vision and strategy to transform transport connectivity across the Midlands Engine area through Midlands Connect, the cross-region transport group, which is working towards better integrated transport systems across the Midlands.

Telford & Wrekin Council now needs to work with partner agencies such as the

Wales & Borders Rail franchisee to improve the quality and reliability of connectivity to, from and within the borough, to further enable people to access employment sites.

The response to this consultation is framed with the needs of supporting the Council's approach to economic development in mind and making the best use of the rail network in achieving the goals of the Telford & Wrekin Economic Development Strategy.

1. Have NIL detriment to any of our existing service provision and preferably deliver betterment. The current service levels should be seen as a base to build upon.

Telford & Wrekin Council's view is that the current rail services provided by Arriva Trains Wales should be maintained into the next Wales & Borders Rail Franchise. This should include the additional trains on the Cambrian line introduced during 2015 and trains to Birmingham International.

The Wales & Borders Rail services provide valuable connectivity to Telford & Wrekin allowing residents access to health, education, leisure, employment, retail and tourism destinations. For businesses the rail services allows them to access markets and bring in new employees.

The rail service is an important asset to the Telford & Wrekin area and additional services, for example during Sundays, would strengthen this and the associated benefits.

2. Maintain and improve rail connectivity to international gateways.

The existing rail timetable for Telford & Wrekin includes rail services to Birmingham International and Holyhead.

Telford & Wrekin Council supports the retention and development of these services.

Connectivity to airports and ports brings visitors to the area, for example to the Ironbridge World Heritage Site and gives impetus to economic development.



3. Reflect the passenger demand for services that link cross border access to health provision, academic institutions and business.

The cross border rail services operated by the Wales & Borders Rail franchise are of importance to people living in Telford & Wrekin with many people travelling across border for school, college, to hospitals and for employment. Many people travel to the holiday towns on the Welsh coast.

The rail services allow this cross border travel to happen but the services provided do not often reflect the realities of the travel demand created. Additional capacity is needed on services to the coast during the summer, to the University towns at the start and end of term and to Birmingham during late November and December.

The new Wales & Borders Rail franchise needs to be let with sufficient rolling stock capacity to allow the operator to provide the capacity for day to day flows on cross border route but also to allow the operator to respond to the additional demand

created by seasonal fluctuations and special events traffic. In the Telford area this can include the Air Show at Cosford and the V Music Festival at Weston Park.

4. Provide connectivity to future HS2 agglomeration benefits.

Improved transport connectivity generally means the ability to reach a wide range of places in a short amount of time. The development of High Speed Two in coming years will bring high quality transport infrastructure to the West Midlands.

The next operator of the Wales & Borders Rail Franchise should be a position to deliver connectivity to High Speed Two. This will allow businesses from Telford & Wrekin to benefit from sustained economic growth and maintain competitiveness in a developed economy.

There has long been recognition of the link between connectivity and economic growth. International competitiveness is driven by productivity growth which is underpinned by trade, foreign investment and innovative activity, all of which are facilitated by connectivity. The most innovative and productive firms tend to be those that are competing at a global level. Connectivity to High Speed Two will help business across the Telford & Wrekin borough to progress further.



5. Increases in train service frequencies to meet passenger demands.

Higher train service frequencies to Telford Central and Wellington would bring a valuable addition to the rail services and would support planned increases in housing and support economic growth in Telford & Wrekin. It would attract investment to outlying areas and support the national Industrial Strategy bringing development to deprived areas.

6. Connectivity with inter city rail services including services to London.

The conurbations of Greater Manchester, Merseyside and the West Midlands are within easy reach of Telford & Wrekin and are therefore significant destinations for rail passengers from Telford.

These centres also act as interchange stations for onward travel to other regions of the United Kingdom and these centres have international airports.

The borough currently has limited direct rail services to London but there are opportunities for changing to rail services to London at Birmingham New Street and Wolverhampton so connections with the Wales & Borders rail franchise at those stations should be maximised.

The improvements to rail services to the conurbations should include enhanced evening services and Sunday services. The cities are open 24 hours and with varied events throughout the year at the National Exhibition Centre and continued attraction of the Birmingham Christmas Market, the services to the conurbations are of importance to the people and the economy of Telford & Wrekin Council.

7. Increased and appropriate rolling stock.

Steps should be taken with the new Wales & Borders Rail franchise to order new rolling stock for the franchise. The older trains in the fleet need replacing and the fleet also needs to be increased in size.

Whilst we are aware that the older trains have been upgraded in recent years the Council still considers that there is a need for new rolling stock on the Birmingham routes with appropriate room and facilities for passengers with luggage, cyclists and disabled passengers.

In addition to air conditioning the new trains should also come with new passenger information systems, 4G wifi, USB charging points and toilets adequate for long distance journeys.

Some thought should be given to other luxury features or innovations such as sofas in group seating areas.

Telford & Wrekin Council welcomes the installation of wi-fi by Arriva Trains Wales and looks forward to further improvements to the trains operating on the Wales & Borders Rail franchise lines.



8. The Wales & Borders Franchise should have appropriate governance arrangements allowing meaningful engagement, cross border and representative of the area it serves.

The next Wales & Borders Rail Franchise needs to continue and strengthen the work that Arriva Trains Wales has done in areas of stakeholder liaison particularly in England, as there is no direct link between the English authorities and the Welsh Assembly Government.

Telford & Wrekin Council would welcome the involvement of the rail franchise in the Marches Strategic Rail Group's meetings to assist the group with information on franchise issues and progress.

The terms of reference for the existing Cross Border Forum involving the Department for Transport and the Welsh Assembly Government should be adjusted to allow representation from relevant Welsh and English Councils (and consortia) and Department for Transport, so the forum can cover other cross border rail franchises and so the forum is able to have strategic input, including dialogue with Midlands Connect and Transport for the North. The forum should meet quarterly.



Cynulliad Cenedlaethol Cymru / National Assembly for Wales

Pwyllgor yr Economi, Seilwaith a Sgiliau/ Economy, Infrastructure and Skills Committee

Masnachfaint Rheilffyrdd a chyflwyno Metro / Rail Franchise and the Metro

Ymateb gan Grŵp Defnyddwyr Rheilffyrdd Gogledd Sir Gaer / Evidence from North Cheshire Rail Users' Group

NCRUG are pleased to have been given the opportunity to submit their comments against the above inquiry.

We should preface our remarks by stating that we attended the Rail Summit promoted by the North Wales Economic Ambition Board, (NWEAB), in Llandudno on 12th November 2015. This event left us with the clear message that future rail infrastructure enhancements in Wales should ignore political, geographical and national boundaries if the economic and social benefits of the 'Northern Powerhouse' and 'Transport for the North' initiatives are to be realised. We heartily agree with this philosophy; our campaign to re-open the Halton curve to bi-directional traffic has been our main project for many years and the connectivity of North East Wales and the North Wales Coast to Merseyside, including Liverpool Airport, has played a significant part in building the Business Case for Halton curve re-instatement.

The importance of the recognition that the economy of Wrexham and North East Wales is strongly orientated towards Merseyside, is an important first step towards promoting growth in both areas, provided the infrastructure reflects this fact. Likewise the North Wales Coast, and easy access to Liverpool Airport, with its preponderance of budget airlines, presents an ideal opportunity to expand tourism.

Borderlands Line:- In addition we are supportive of improvements in both service and infrastructure on the Wrexham to Bidston line. Better connectivity at Shotton High and Low level stations and a new Deeside Parkway station would be a vital first step in progressing the synergy which exists in the economies of North and East Wales and Merseyside and the whole area covered by Transport for the North, especially when the Halton curve is opened. A half hourly service would greatly improve connectivity at both Shotton and Wrexham and open up rail travel opportunities to south Liverpool and the Liverpool Airport.

Saltney/Rossett redoubling:- The re-doubling of the Chester/Wrexham line between Saltney Junction and Rossett is welcomed and is further proof of the need to increase capacity on this line not only to benefit Holyhead/Cardiff services but also, and perhaps more importantly, to allow new services northwards from Wrexham to Merseyside and Liverpool Airport via the Halton curve. Re-doubling of the rest of this line, south of Rossett, should be considered for urgent execution in CP6, if not earlier, in order to realise the full potential of this line in developing economic growth in the Wrexham area. The new prison on Wrexham Industrial Estate is due to open this year. Easy public transport to/from the prison is essential to dissuade the use of cars and the congestion and pollution which follow.

In addition to the prison, we understand, there are approximately 7000 employed on Wrexham Industrial Estate many of whom could be persuaded to use rail and a dedicated bus either from Wrexham General or from a new station at Bradley. This would allow a direct and dedicated bus service to access the Trading Estate via the A5156/A534 and thus avoid the town centre.

Electrification:- Whilst some less expensive schemes for smaller gains should not be dismissed or delayed, there is no doubt that electrification of Holyhead to Crewe, Runcorn, (via Halton curve), and Warrington are essential if the full benefits of the Northern Powerhouse and HS2 initiatives are to be gained.

Not only will line speeds and dwell times be improved, thereby giving faster journey times and improved connectivity, but rolling stock and infrastructure maintenance costs and pollution will also be reduced.

Electrification of the North Wales Coast Main line would present an ideal opportunity to re-instate sections of four tracking and passing loops to increase capacity and allow freight movements from Holyhead to be developed thus relieving the congestion on the A55 Trunk Road, (see our comments on 'Freight' below).

HS2:- It is essential that Welsh infrastructure and services are designed in such a way as to exploit the advantages which will be available when HS2 reaches Crewe. Classic Compatible rolling stock would permit through running to London and the West Midlands without having to make connections.

It is important, therefore, that steps be taken to ensure Classic Compatible stock can run through to Holyhead and Wrexham with any necessary gauge enhancements and track layouts undertaken before the arrival of HS2 at Crewe.

Northern Powerhouse:- The opening of the Halton Curve in December 2018 and future electrification from Chester to Warrington Bank Quay and to Halton Junction will provide the vital links required to connect North and East Wales to the Northern Powerhouse area thereby promoting growth throughout Wales and northern England.

The Welsh Assembly Government and its Agencies should maintain constant discussion with Transport for the North in order that the full economic benefits of close integration of rail infrastructure and services permeate throughout the whole of Wales, particularly North Wales, and the north of England.

Overcrowding:-

For a number of years NCRUG have witnessed a huge increase in passenger numbers on the Chester/Warrington Bank Quay/Manchester service. This has led to extensive overcrowding on peak trains, (usually three cars), and is now also progressing into off peak services.

To remedy this we suggest a ½ hourly instead of the current 1 hourly service.

Connectivity:- This is a most important consideration as poor connectivity can be a barrier to rail travel and thereby have an adverse effect on economic and social growth. Conversely good connectivity encourages rail travel and helps to influence modal shift from road to rail. This, in turn, improves the environment and reduces congestion on the road system, particularly the A55 Holyhead/Chester Trunk road, which is often subject to lengthy delays.

We are concerned that the new Wales & Borders franchise and the possible advent of partial electrification, could lead, at least temporarily, to existing services, such as Manchester/Llandudno, being truncated at Chester. We would strongly advocate that this well used and profitable service be maintained as a through service between Manchester and Llandudno without the burden of changing at Chester.

Freight: - The A55 Trunk Road is the main artery for freight traffic to and from Ireland and the UK and Continental Motorway networks. Consideration should be given to transferring much of this traffic to rail. Facilities at Holyhead need to permit easy transfer of container traffic from and to the ferry from a rail terminal. To the best of our knowledge such facilities do not currently exist at Holyhead although, in the past, such facilities did exist.

The rail infrastructure will require enhancement by provision of passing loops and some four tracking using existing alignments which, in turn, will require enhancement to bring them up to present day standards.

Looking ahead to the opening of HS2 it should be noted that this will be built to Berne Gauge standard thus permitting whole trailers, without tractors, to be loaded onto special low-loader wagons. This method is widely used on the Continent and helps to reduce HGV movements. Whilst current plans for HS2 do not include freight movements this could change, particularly as HS1 does accommodate freight to and from the Continent as far as Barking.

Considerable work was done in the 1990's by the 'Piggy-back Consortium' to develop the transport of trailers, (plus containers) by rail on specially designed low-loader wagons but this was not pursued. It may be time to re-consider this concept as a way of relieving HGV congestion on our roads.

New Opportunities:-

Liverpool John Lennon Airport is particularly relevant to the North Wales coast tourists attractions. Budget Airlines offer unique opportunities for expanding tourism in the area for both long weekend visits from the near Continent and longer week or fortnightly stays from further afield. Tourism in North Wales employs considerable numbers of EU workers which could generate more demand for home visits once Halton Curve opens up direct travel to Liverpool Airport.

Business travel to/from North and North East Wales is hampered by the lack of rail connections to both Liverpool and Manchester Airports. Whilst recently the current franchise does allow through rail travel from the North Wales coast to Manchester Airport there is no opportunity to connect with Liverpool South Parkway and on to Liverpool Airport. However, this will change with the opening of the Halton Curve in December 2018.

We hope you find our comments useful and would be grateful if you would keep us informed on future developments and consultations.

Cedric Green, 17/02/2017

Cynulliad Cenedlaethol Cymru / National Assembly for Wales

Pwyllgor yr Economi, Seilwaith a Sgiliau/ Economy, Infrastructure and Skills Committee

Masnachfrait Rheilffyrdd a chyflwyno Metro / Rail Franchise and the Metro

Ymateb gan Cymdeithas Defnyddwyr Rheilffordd Wrecsam-Bidston / Evidence from Wrexham-Bidston Rail Users' Association (WBRUA)



Representing rail users, potential rail users and the rail transport interests of communities along the Wrexham-Bidston rail corridor

www.wbrua.org

President: The Rt Hon Lord Jones PC

17 February 2017

From: John Allcock, Chairman of the WBRUA (chairman@wbrua.org)

Submission to: the National Assembly for Wales' Economy, Infrastructure and Skills Committee

Wales and Borders rail franchise priorities

1. Introduction and Overview

1.1. As the Chairman of the Wrexham-Bidston Rail Users' Association (WBRUA), representing rail users, potential rail users and the rail transport interests of communities along the Wrexham-Bidston rail corridor, I am pleased to submit a short paper on behalf of the Association.

1.2. In this paper the WBRUA recommends that the new Wales and Borders Franchise prioritises early improvements to service frequency together with a station for the Deeside Industrial Park, better service reliability and improved ticketing/fares on the Wrexham-Bidston line alongside improvements to communication with passengers during disruption across the Franchise. A brief rationale for each of these recommendations is provided below.

2. Wrexham-Bidston Service frequency / Station for Deeside Industrial Park

2.1. The current hourly daytime service between Wrexham and Bidston on Monday to Saturday falls back to a less frequent service during the evenings and on Sundays. The first train into Wrexham Central from stations on the Wrexham-Bidston line arrives after 08.30; too late for many workers. Although there is a significant population, together with employment centres and leisure opportunities directly served by the line, the currently infrequent (and unreliable) service fails to attract many potential users.

2.2. The potential for connectivity between the Wrexham-Bidston line and other routes at Shotton and Wrexham General is lost because of tight connections (which will be missed with even a slight degree of late running) or excessive waiting times. For example the rail travel time from Chester to Hawarden is a respectable 13 minutes but the wait between trains at Shotton during most of the day is 52 minutes.

2.3. Rail connectivity linking communities and employment locations in North-East Wales and across the border into North-West England is poor, forcing many to drive to work on heavily congested roads and denying work opportunities to those who can't afford, or who are unable to drive to work. Young people are at a particular disadvantage if they need to drive

because the cost of running a car can represent a significant element of their salary which many may not be able to afford.

- 2.4. About 30% of the Welsh economy is in North-East Wales alone. There is also significant and growing economic activity immediately over the border in North West England which employs many Welsh residents. The 2011 census however shows rail's share for travel to work as 1% in Flintshire and 0.9% in Wrexham; both less than half of the overall Welsh average of 2.1%.
- 2.5. The WBRUA also notes that 1 in 5 applicants for work on the Deeside Industrial Park are subsequently turning down interviews or job offers due to inaccessibility; the Deeside Industrial Park is one of the largest and most successful parks of this type in Europe, yet there is an unattractive, infrequent service and no convenient station on the adjacent Wrexham-Bidston railway line.
- 2.6. *The WBRUA believes that the new franchise must prioritise, for introduction as soon as possible, a more frequent service on the line which starts earlier, runs later and connects effectively with other services at Shotton and Wrexham General together with a suitable station for the Deeside Industrial Park (a new station, 'Deeside Parkway' near the A548?).*

3. Wrexham-Bidston Service Reliability

3.1. Service reliability on the Wrexham-Bidston line is recognised as being poor by the communities it serves in North East Wales and North West England. In terms of the rail industry's Public Performance Measure (PPM), in recent years that for Wrexham-Bidston has usually been lower than the overall PPM for ATW and has been consistently lower than that for Merseyrail, which operates a similar stopping service on other nearby lines (albeit running much more frequently). See Figure 1 below for details of the PPM.

Railway Industry Reporting Period	From	To	Overall ATW PPM	WXC-BID (Borderlands) PPM	Average difference between overall ATW and WXC-BID PPM over last 13 reporting periods	Merseyrail PPM (for comparison)	BID-SHT trains not run (www.recentraintimes.co.uk)		
							Mon-Fri	Sat	Sun
17/11	08/01/2017	04/02/2017	93.0%	92.9%	1.0%	97.0%	1.92%	3.57%	0.00%
17/10	11/12/2016	07/01/2017	88.3%	90.6%	0.8%	95.6%	4.51%	5.56%	0.00%
17/09	13/11/2016	10/12/2016	86.8%	86.4%	0.7%	92.2%	2.50%	0.00%	4.17%
17/08	16/10/2016	12/11/2016	88.6%	77.6%	1.5%	94.5%	5.36%	8.93%	0.00%
17/07	18/09/2016	15/10/2016	94.0%	89.8%	1.2%	96.3%	4.64%	5.36%	0.00%
17/06	21/08/2016	17/09/2016	92.6%	94.3%	0.9%	95.6%	1.82%	7.14%	0.00%
17/05	24/07/2016	20/08/2016	90.2%	90.9%	1.1%	96.2%	3.93%	5.36%	8.33%
17/04	26/06/2016	23/07/2016	91.1%	91.5%	1.3%	96.1%	2.50%	3.57%	0.00%
17/03	29/05/2016	25/06/2016	92.4%	91.5%		95.7%	1.09%	3.57%	0.00%
17/02	01/05/2016	28/05/2016	93.8%	96.4%		96.6%	1.09%	1.79%	0.00%
17/01	01/04/2016	30/04/2016	94.4%	92.3%		97.0%			
16/13	06/03/2016	31/03/2016	92.6%	92.1%		97.1%			
16/12	07/02/2016	05/03/2016	91.9%	91.0%		94.0%			
16/11	10/01/2016	06/02/2016	92.2%	94.7%		95.4%			
16/10	13/12/2015	09/01/2016	89.9%	92.7%		95.4%			
16/9	15/11/2015	12/12/2015	87.8%	77.7%		89.7%			
16/8	18/10/2015	14/11/2015	90.1%	81.9%		93.4%			
16/7	20/09/2015	17/10/2015	92.7%	93.0%		96.0%			
16/6	23/08/2015	19/09/2015	93.2%	91.8%		96.1%			
16/5	26/07/2015	22/08/2015	91.5%	90.5%		96.1%			
WXC-BID PPM BETTER than overall ATW PPM									
WXC-BID PPM WORSE than overall ATW PPM									

Figure 1 – Comparison of Wrexham-Bidston, ATW and Merseyrail PPM by period

- 3.2. The PPM figures in Figure 1 do not however fully reflect the impact of unplanned, short notice cancellations which occur throughout the year. Such cancellations deter many potential users who know, after experiencing such a cancellation, that the service can not be relied upon.
- 3.3. With little recovery time available in the timetable (the working timetable is so tight that the public timetable shows many trains arriving in Wrexham Central xx.32 but leaving at xx.30), any late running will accumulate with each successive service until control terminates late running northbound trains at Shotton and turns them back to Wrexham. With two trains working the route on weekdays, when conditions are such that late running develops with both of them, this results in two consecutive trains being turned back in Wales. Such trains do not reach Bidston to connect with Merseyrail services to Liverpool and a gap of three hours or more between trains at the intermediate stations in England (Neston, Heswall and Upton) frequently occurs.
- 3.4. There has been no significant vegetation management on this steeply graded route in recent years; indeed vegetation overhangs the track and brushes against trains at many locations. When poor rail conditions develop during the leaf fall season the Class 150 units (which currently operate the service) are physically incapable of maintaining the timetable; late running then develops resulting in some services being cancelled at short notice or, in extreme circumstances, the entire service can be suspended (as happened in 2016).
- 3.5. *The WBRUA believes that performance on the Wrexham-Bidston line could and should be better and that the new franchise must seek to achieve a comparable performance to that of Merseyrail for the line.*

4. Ticketing / Fares

- 4.1. On the Wrexham-Bidston line it is only possible to purchase tickets at Wrexham Central, Wrexham General, Shotton and Bidston stations. Passengers joining at any of the 11 other stations without a ticket have to buy tickets from the conductor after joining the train. As the conductors have to operate train doors at all station stops, it is sometimes impossible for them to sell tickets to everyone boarding the train (owing to the volume of passengers and proximity of stations on some sections) and revenue is lost. It is also not possible to buy tickets on rail replacement 'buses. The resultant lower ticket sales have a consequential adverse influence on rail industry passenger flow data, which is partially derived from an analysis of recorded ticket sales.
- 4.2. Owing to franchise and political boundaries, the cost of a through ticket to stations in Merseyside from stations on the Wrexham-Bidston line stations located outside Merseyside is higher than that on Merseyrail's Wirral line, which runs out of Merseyside to Chester and Ellesmere Port. For example Merseyrail's off-peak Day Saver fare available from Chester for £5.10 will cover a return journey to Liverpool or even as far as Southport whereas the cheapest Neston to Liverpool return fare is £6.50 (off-peak) and that to Southport is £13.50 (anytime) even though the distance by rail from Neston to both Liverpool and Southport is 4 miles less than that from Chester.
- 4.3. Notwithstanding the current deficiencies with both the service and ticketing identified above, patronage of the Wrexham-Bidston line service, as shown in Figure 2 below, is steadily increasing with an overall growth of around 75% between 2006/7 and 2014/15. These

figures have been abstracted by the WBRUA from the Office of Rail and Road's (ORR's) Station Usage Data, which is again partially derived from ticket sales. This level of increase on those sections where the conductor has historically struggled to collect fares between stations indicates that further revenue is being lost and that passenger estimates are increasingly likely understate the true number of people travelling.

All stations except interchange stations.

Station Name	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015	Growth from 2006/2007
Bidston										
Upton	12,976	15,477	20,842	21,036	22,720	24,118	23,750	27,960	31,460	142.45%
Heswall	23,409	24,670	44,592	45,180	48,660	54,628	51,820	58,408	55,860	138.63%
Neston	32,716	35,922	36,960	36,230	44,598	46,546	48,476	51,886	53,702	64.15%
Hawarden Bridge	3,652	2,932	9,750	6,632	4,540	4,472	5,422	4,088	4,872	33.41%
Shotton										
Hawarden	30,987	30,407	36,778	38,066	37,896	39,140	38,156	39,932	36,422	17.54%
Buckley	36,328	40,658	43,038	48,364	51,472	52,404	52,100	50,544	51,684	42.27%
Penyffordd	16,910	14,980	16,606	18,700	21,082	21,856	21,212	22,156	24,582	45.37%
Hope (Flintshire)	20,148	22,525	23,800	22,648	24,186	25,522	27,652	54,052	27,470	36.34%
Caergwrle	20,065	21,056	19,780	23,778	22,186	21,886	24,264	24,438	23,034	14.80%
Cefn-y-Bedd	6,616	7,795	8,526	8,492	9,284	8,898	9,372	9,388	8,918	34.79%
Gwersyllt	22,433	23,883	28,234	32,036	34,026	35,524	37,386	40,172	39,938	78.03%
Wrexham General										
Wrexham Central	20,457	19,736	19,680	23,338	31,952	33,098	41,746	53,142	73,444	259.02%
	=====	=====	=====	=====	=====	=====	=====	=====	=====	
	246,697	260,041	308,586	324,500	352,602	368,092	381,356	436,166	431,386	74.86%
Growth from 2006/2007		5.41%	25.09%	31.54%	42.93%	49.21%	54.58%	76.80%	74.86%	

Figure 2 – Wrexham-Bidston Line Patronage (From ORR Station Usage data)

4.4. The WBRUA believes that the new franchise should seek to improve revenue collection by the provision of smart-card and credit/debit card compatible ticket machines at all stations (or possibly on the trains), introduction of a penalty fare system for those who fail to buy tickets and consider Driver Controlled Operation (to free the conductor from door duty and thus improve revenue protection).

4.5. The new franchise must also address fare anomalies so that the communities it serves have comparable fares to other communities in the region which are served by other franchises.

5. Communication with Passengers during Disruption

5.1. Key issues to note:

- Although trains run until much later, Arriva Trains Wales (ATW) Customer Service Centre (CSC) closes at 20.00. The National Rail Enquiries (NRE) call centre in India is the only accessible telephone number for ATW passengers at unstaffed stations when ATW's customer service centre is closed.
- The Customer information screens (CIS) on the Wrexham-Bidston line's stations are usually on automatic (with any late running train not showing shortly after its expected departure time) and often not providing adequate information when disruption occurs.
- The Public Address (PA) system on the Wrexham-Bidston line's stations has rarely (if ever) been used to make announcements during disruption.
- There is no visibility of the location of rail replacement 'buses or the time that they will arrive at intermediate stations.

5.2. The WBRUA believes that the CIS and PA systems need to be used effectively when disruption occurs, that the franchise operator's CSC should be operational at all times that there are passengers on the network and that rail replacement 'buses are tracked so that the CSC can identify where they are and when they can be expected to arrive at stations.

1. Campaign for Better Transport welcomes the opportunity to respond to the Assembly's inquiry. Established for over 40 years, we are a national charity working in England and Wales to promote more sustainable transport. Through research and campaigning, we advocate policy and public investment decisions that support better bus and rail services and alternatives to major road building. Our comments, below, are organised around the question of priorities for a future franchise specification to ensure rail services meet the needs of current and future travellers throughout the franchise area, and deliver value for money for both passengers and the taxpayer.
2. We support the devolution of this franchise to the Welsh Government. Where local authorities have taken control of franchises, it has led to increased accountability, improved frequencies and reliability; and ultimately better passenger satisfaction. Our 'Going Local' report sets out the experience of rail devolution with MerseyRail and London Overground - http://www.bettertransport.org.uk/sites/default/files/research-files/Going%2520Local%2520web_2.pdf
3. We support stronger passenger involvement in the railway, not only in the development of the Invitation to Tender but on an ongoing basis. To ensure plans for rail are properly integrated into other decision making, we propose more and stronger local involvement in the franchising process, including from passenger group representatives, local authorities, Local Enterprise Partnerships and Sub-National Transport Bodies. We also support passenger representation on the franchise board.
4. The 2013 Brown Review of the Rail Franchising Programme recommended more attention be paid to improving service quality for passengers, with the National Rail Passenger Survey (NRPS) being used in both bid evaluation and subsequent franchise management [see for example paragraph 1.7 https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/49453/cm-8526.pdf].
5. Relevant findings from the NRPS are now included in public facing elements of the re-franchising process, in particular prospectus. This has been a welcome development but is often used as a proxy for all passenger interests, something it is unsatisfactorily positioned to do:
 - Closed process - while it is reasonable to assume the NRPS findings carry some weight, no detail is made public on how any bidders responded specifically to issues raised in the survey

- No visible opportunity cost - similar to the previous point, no information is available on what failed bids offered in relation to issues identified in the NRPS, raising the prospect that beneficial initiatives could have been lost
- Backward looking - the NRPS is a backward-looking comment on past performance; while it helps identify immediate priorities for improvements, it does nothing to shed light on medium term transformative improvements passengers may want to see, and have the right to expect over a 7-10 year franchise.

The Wales and Borders franchise is in a position to consider passenger interests more broadly throughout the franchise.

6. This franchise presents significant opportunities to improve the current fares system, in order to increase passenger satisfaction; attract new users onto the railway; and make the current fares system more social just. These opportunities include:
 - **Introducing part-time season tickets which give part-time commuters a fair discount** Cardiff Buses plan to introduce this in May this year and it is right that rail should do likewise – eventually a multi-modal ticketing scheme could be introduced across train and bus. Part time workers are disproportionately penalised by rail fare structures at present, with season tickets offered only on a 7-day-a-week basis. With more and more people (predominantly women) disadvantaged by the current discriminatory fares structure, the Welsh Government has the opportunity to rectify this.
 - **Concessionary travel extending to 16-18 year olds** Currently, 16-18 year olds must pay an adult fare on peak-time trains (the Young Person's Railcard is not valid on season tickets), despite the fact that 16-18 year olds must now be in full time education or training. Where, as in Cambridgeshire, a discount for 16-18 year old students has been introduced (see <http://www.bettertransport.org.uk/blog/rail/cambridgeshire-50-cent-discount-student-rail-fare-national-standard>) there has been an uplift in passenger numbers; and anecdotally when this was introduced in the MerseyTravel region (see <http://www.merseyrail.org/seasonal/young-person-tickets.aspx>), there was a decline in truancy as young people could afford to get to school and college. As 16-18 is the age where many people decide to learn to drive and to buy a car, there is an important long-term advantage in setting the habit of public transport, which could influence travel habits and therefore environmental impact for years to come.
 - **Cap fare increases** Fare increases should be calculated using CPI rather than RPI. This is fairer and would reduce ticket price rises and increase passenger numbers. Annual fare increases should be capped at 2% (rather than at 5% as is now the case) and off-peak fares should be regulated as well as peak fares.
 - **Simplification** We encourage the Welsh Government to simplify ticketing, for example by ending split ticketing by ensuring that the end-to-end journey is always the cheapest option (as Scotland have done – see <http://www.bbc.co.uk/news/uk-scotland-scotland-politics-22002256>). The franchise should include a "Passengers' Charter" with a right to be sold the cheapest ticket for any journey on the network

More information on the opportunities for future rail funding and introducing simpler, more flexible fares, albeit on the UK level, can be found here:

<http://www.bettertransport.org.uk/sites/default/files/research-files/future-rail-funding.pdf>

7. We encourage the franchise to mandate better integration between rail and bus, and consideration of the end-to-end journey. This might include co-ordination of routes and timetables; multi-modal ticketing; and making the interchange between rail and bus as easy as possible through signage provision and, where necessary, relocating the bus stop. Arriva's work on bus-rail connections at Rhyl station provides an example of how this can be done effectively. Over time, this could include bringing rail and the Traws Cymru bus network together under one brand, as Cornwall is planning to do (see <https://www.cornwall.gov.uk/community-and-living/communities-and-devolution/devolution/devolution-to-cornwall/devolution-deal-newsletter/devolution-deal-newsletter-edition-one/freedom-to-create-an-integrated-public-transport-system/>). Greater integration is likely to lead to an increase in patronage and thus would make the whole network more financially viable.

8. At present, disabled passengers are poorly served on the Welsh rail network. Many stations lack stepfree access, and Arriva Train Wales 'strongly recommends' that passengers requiring assistance book 24 hours in advance – a recommendation which is incompatible with most people's working lives and social lives. We recommend that the new franchise introduces turn-up-and-go assistance during staffed hours at every station, and across the whole Metro. In addition, we recommend that an independent accessibility forum, comprised of older and disabled pan-impairment passengers, is set up to advise the train operator throughout the life of the franchise. The new franchise should also include a timetable of accessibility improvements including making stations stepfree – an investment which has been proven to have benefits to *all* passengers and to station footfall; and a very strong benefit-cost ratio (see <http://www.steerdaviesgleave.com/news-and-insights/access-for-all-benefit-research-report-released>).

9. There is ample opportunity to use franchising to more strongly incentivise improving the passenger experience. Opportunities include:
 - **Better door-to-door journeys** written into the franchise, e.g. links between stations and the towns they serve, through signage and through integration with other modes of transport, e.g. cycling, walking. At present, the link between Cardiff station and Cardiff bus stops is very poor. Our research report 'Fixing the Link' (<http://www.bettertransport.org.uk/sites/default/files/research-files/13.11.04.fixing-the-link.pdf>) shows that where this has been done, it has encouraged active travel and thus had a positive influence on public health; it has created more attractive places; and it has boosted local business. See also our report on door-to-door journeys: <http://www.bettertransport.org.uk/sites/default/files/research-files/door-to-door-journeys-full-report.pdf>

 - **Better stations:** Improvements such as regular station cleaning; repainting, real time information and good quality waiting facilities are highly valued by passengers; and can be delivered relatively quickly. A franchise commitment to upgrading station quality early in the franchise would be a 'quick win', and demonstrate very visible and tangible passenger benefits from the new franchise

 - **Better quality trains:** We welcome the intention to replace outdated rolling stock on these routes. Priority should be given to comfort and capacity, with standards for maximum passenger numbers on trains and maximum time passengers should expect to stand, as on the London and South East commuter network.

- **Better staffing:** Rail devolution through London Overground and Merseyrail decreased fare evasion and increased passenger's perception of security through mandating station staffing from first to last train. A visible, trained staff presence makes people feel safer and passengers value the availability of assistance and advice. We would like to see staff availability improve at stations through the Wales and Borders franchise.

10. Setting strong franchise commitments is of no use unless there is strong enforcement and regulation of these commitments. Unlike the rest of the UK, the Welsh Government funds people to monitor and report on bus timetable compliance, with the result that there is much better timetable compliance than in England. We would like to see the Welsh Government fund the monitoring of franchise commitments (e.g. how ticket office opening hours; average queuing times at peak and off-peak times; compliance with assistance commitments for disabled passengers; levels of crowding and cleanliness), including through mystery shopping, with real consequences for failure to comply.

Views on the future of the Wales and Borders Franchise

This response, from General Manager of the above organisation, is focussed on the connectivity needs of rural communities in Wales and the Border Counties but also takes account of the wider issues with which WG has to be concerned.

Issue 1: The effectiveness of WG approach (etc as set out in brief, with particular reference to key risks)

1. We are glad to learn that Welsh Government, through Transport for Wales, has adopted an innovative approach to the franchising process. We are led to believe that the approach adopted has worked well in securing advantageous deals in major road procurement projects and hope that such benefits transfer across to the rail sector.

We hope that the franchise specifiers will be encouraged not to be risk averse and that pressure will be exerted on bidders to come up with ideas that are truly innovative and cost effective. It is widely thought that conventional railway operations cost more than they should. Key Risk No 1 is if the outcome is 'business as usual'.

2. The existing franchise agreement is agreed not to have been fit for purpose. It assumed no growth, whereas passenger numbers carried have increased significantly and the measures taken to deal with this, including the introduction of new services as 'add ons' , are believed to have cost far more than if they had been specified in the first place.

Clearly it is hard to predict how demand will change over the period of a franchise. So the ITT must build in some form of cost effective measure that enables TfW to introduce new or different services without incurring punitive extra costs. Key risk No 2 is that this future flexibility is not built in, or that TfW finds it unaffordable.

3. Rolling stock is probably the single most important factor in meeting customer demands. The fact that Wales has some of the oldest stock in the UK has been well rehearsed, as has the fact that by and large ATW do a good job in keeping the fleet operational. Given the shortage of public sector funds, Key Risk No 3 is that not enough suitable new stock is made available, especially outside the Metro areas.

The specification of rolling stock needs careful consideration. Units suitable for intensive commuter services need to differ from those used on longer distance services, especially where

it is the intention to attract tourists. Currently some of the trains that serve the Valleys are also used on lines such as the Heart of Wales, where they are not suitable.

A related risk is that on Wales' scenic lines, the money and time spent on attracting new customers is wasted because reality does not match up with customer expectations. 21st century passengers are sophisticated and expect more than just the basics.

4. There has been continual comment within the transport community in Wales, in the media, and off the record from representatives of the bidders, to the effect that WG and TfW are less well prepared than is desirable for the implementation of this process, that the team carrying out the work is smaller and less robust than might be expected, and that the WG - TfW - DfT relationship is not as strong or effective as is desirable.

All of these issues are imponderables to 'outsiders' but if true are Key Risk 4 to the success of the process. It may well be that all is well: if so then keeping stakeholders better informed as to the state and nature of the process would be reassuring.

5. Key risk 5, therefore, is that the franchise will not be as well negotiated as is desirable. Linked to this is the concern that the franchising process could hardly be taking place at a worse time. Brexit uncertainties, poor funding settlements for Wales, and the ongoing climate of financial uncertainty and austerity all combine to a concern that it will be hard for Wales to afford the enhanced rail and Metro system it so clearly needs. There needs to be a considerable amount of flexibility and future proofing built into the franchise agreement.

6. This is particularly the case for rural areas such as those served by the Heart of Wales line- Key Risk 6. Political and population pressures can all too easily lead to a situation in which preference and resources will be given to the North and South Metro schemes, leaving the rest of the country, especially mid and West Wales, poorly provided for. In this respect we would urge the Committee to broaden the scope of its enquiry and examine this matter.

There is little enough public transport provision in rural areas as it is. The franchise focusses on rail: consideration also needs to be given to the other modes of transport that link the user to the railhead, be it taxi, community transport, bus, cycle or on foot.

Bus services in particular have taken a big hit in recent years]: Wales needs a high quality 'seamless' public transport network, using rail as a major part of the 'skeleton', deliberately integrated with other modes rather than randomly linked as is so often the case at present. 'Let's make the most of what *can* be provided.'

7. The franchising process focusses on the rail services provided in Wales and the Border Counties. However, to the passenger, boundaries do not matter. They need a service that gets them to their chosen destination. The current terms of reference seem to run the risk of ignoring significant opportunities in the form of the services provided to, and within, Wales by operators such as GWR, Virgin, Cross Country, and London Midland. Key risk 7 is that if there is no

joined up thinking, passenger needs will not be met as well as they might, and also that extra resources that will benefit Wales and the Border counties might not be accessed.

Issue 2 Priorities for the franchise specification

Rolling Stock and Timetables

The franchise specification must set out rail services, frequencies and the provision of support facilities such as stations, that *meet passenger needs* rather than simply being dictated by resource availability. There is obviously a balance to be found here: trains (and train crew) are expensive but at present many of the problems expressed by passengers are due to a lack of resources.

Better use of the limited resources available

For a whole range of reasons, rail in the UK is arguably more expensive than it needs to be. Community Rail Partnerships, Business Units and the development of Rail - Community 'Hubs' such as those being developed by Heart of Wales Line Development Co Ltd can provide a more cost effective way of delivering some rail sector services for the industry.

We are working to ensure that the bidders develop strategies for using organisations such as ours as a significant part of the franchise process, and will be glad of support from TfW in so doing.

Proper integration of public transport modes

As referenced under Issue 1, Wales, especially rural Wales, has relatively few public transport services and so it makes sense that best use is made of what is available, using all modes and with strong Governmental support.

Making the most of tourism

Tourism is one of our major industries. At present relatively few visitors to us use public transport, either to travel to us or to move around when they are here. The potential demand for public transport based tourism is considerable. For example Wales has been successful in attracting more and more cruise ships to our ports. Their passengers need to move around, and trains are a good way of doing this.

Other recently let franchises - notably in Scotland - have focussed on the development of rail based tourism products. So should Wales.

Serving the old, the young, and the disadvantaged

We have an elderly population, increasingly unable to drive or fearful of doing so. At the other end of the age spectrum, many young people are unable to afford the costs of running a car. And there are many 'Just About Managing (!)' people who need to travel around but find their range curtailed by limited services, especially on a Sunday, after 18.00, and at Christmas and the New Year when public transport is not available.

The economic and social benefits of 'social tourism' are considerable: the franchise needs to ensure that they can be delivered.

A superb rail (and by extension, public transport, system) that is clearly Welsh....in a distinctive way.

A previous WG Transport Minister frequently set out his aspirations as being to have a system similar to the one enjoyed in Switzerland. High quality rolling stock, frequent services, clockface timetables, bus - rail integration etc etc. All of these cost money but It would make sense to set our sights high, to have a 10 or 15 year vision, and a plan that will move us close to being a leader.

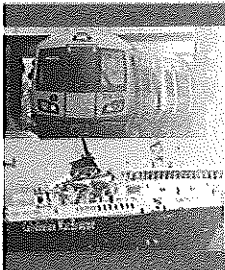
Whether by accident or design all four of the bidders have considerable experience to draw on from elsewhere in the World. We need to ensure that what they propose, and what WG agrees to buy, is visionary, unique to us, and something we can, in due course, be proud of.

Cynulliad Cenedlaethol Cymru / National Assembly for Wales

Pwyllgor yr Economi, Seilwaith a Sgiliau/ Economy, Infrastructure and Skills Committee

Masnachfrait Rheilffyrdd a chyflwyno Metro / Rail Franchise and the Metro

Ymateb gan Undeb Cenedlaethol y Gweithwyr Rheilffordd, Morwrol a Thrafnidiaeth / Evidence from National Union of Rail Maritime and Transport Workers



National Union of Rail Maritime and Transport Workers



Economy, Infrastructure & Skills Committee
National Assembly for Wales,
Ty Hywel,
Cardiff Bay,
CF99 1NA.

28 February 2017

Dear Colleagues,

Economy, Infrastructure & Skills Committee Consultation Rail Franchise & The Metro

The National Union of Rail, Maritime and Transport Workers (RMT) welcomes the opportunity to respond to the Economy, Infrastructure & Skills Committee Consultation *Rail Franchise & The Metro*. The RMT is the largest of the rail unions and organises 80,000 members across all sectors of the transport industry. We represent and negotiate on behalf of our members with some 150 employers and we are the only rail union representing all grades in Wales.

In order to ensure that the franchise meets the needs of current and future travellers throughout the franchise area, and deliver value for money for both passengers and the taxpayer, RMT believes that a number of matters need to be addressed. These include:

Rail Devolution

RMT believes that Network Rail should not be fragmented and/or privatised. It is essential to ensure that the Welsh Government is not used to further advance the fragmentation of Network Rail. Network Rail's successful expansion of railway capacity and the ability to direct national income to cross invest across England, Scotland and Wales should be recognised and protected.

RMT believes that economies of scale are best achieved through a centralised structure and that such a structure should include strategic control and management, economic cohesion, industrial integration, social unity and cohesion of the railway as a whole. Additionally the setting of strategic, economic, social and technical policy directions can only be achieved efficiently when undertaken centrally. The coordination of activity between train and track is another function where a national centre can gain improvements, in addition to raising revenue from real estate and managing (with a view to reducing) the rate at which debt is accrued.

Where there is the potential for genuine rail devolution, on elements of the network which are almost entirely self-contained and where there is already established a significant level of political devolution with the capacity (as is the case in Wales), both in funding and expertise, to manage a section of the network this should be limited to passenger train operations (not infrastructure) and RMT wish to reiterate that Network Rail's functions should include acting as a "guiding mind" for such endeavours in rail operations.

Head Office: Unity House 39 Chalton Street London NW1 1JD

General Secretary: Mick Cash

Tel: 020 7387 4771 **Fax:** 020 7387 4123 **Helpline:** 0800 376 3706 **Email:** info@rmt.org.uk

In relation to passenger train operations, RMT believes that the Welsh Government should be granted powers similar to those enjoyed by the Scottish Government, including the ability to operate rail passenger services in the public sector.

RMT is also concerned that the so-called not-for-profit concession model is being advocated by some forces in Welsh politics as an alternative to genuine public ownership. Such a model, as that used by Merseytravel for the Merseyrail, does in fact continue to pay very substantial dividends to the private operator of the concession (in some cases amounting to almost 25% of passenger revenue, which alternatively could be used to invest in services or reduce ticket prices).

Rolling Stock

RMT is concerned at the specification of new rolling stock where it is being introduced across the rail network. We are particularly concerned that new rolling stock is often specified to be capable at running without a second safety critical member of staff on-board (DOO/DCO), a practice which increases risk to both passengers and staff. Current and future passengers should be able to expect adequately staffed rail services which recognise the following points:

- RMT believes there should be a specified minimum number of staff on every train and this must, as an absolute minimum, be a Driver and a Train Guard with a safety critical operational role.
- RMT believes that drivers should focus only on driving the train. There should be no Driver Only Operation (DOO), Driver Controlled Operation (DCO) and Driver Door Operation (DDO) specified within franchise documentation.
- RMT and passengers recognise the benefit of having a second member of staff on every train and properly staffed stations. In respect of train and station staff the contract must be specified to maximise the availability of such staff for passengers. Stations and trains should be staffed on a first to last service basis as adopted by Transport for London and should be full time directly employed staff and not agency workers or sub-contractors

RMT responded to the earlier Welsh Government Consultation 'Setting the Direction for Wales and the Borders Rail' and the UK Government Welsh Affairs Committee and I have attached both for further information.

RMT has engaged positively with the Welsh Government in the past, and looks forward to continuing to develop that relationship in the best interests of passengers and railway staff in Wales.

We are also available to give oral evidence and would welcome the opportunity to do so.

Yours sincerely



Mick Cash
General Secretary

Risks

R1. An hourly Halton curve service between Liverpool and Chester is due to start in December 2018. Given that the new franchise will not begin until October 2018, at the earliest, there will be very little time to acquire the necessary additional rolling stock (assuming 4-car class 150s would be used initially, that is a requirement of 4 additional trains).

R2. The Great Western summer Saturday services to/from Pembroke Dock are due to be withdrawn in 2018ⁱ. The new Wales & Borders operator will need to provide significant extra capacity to and from Tenby from May 2019, which will require additional rolling stock. This is barely six months after the start of the new franchise.

R3a. Accessibility regulations come into force on 1st January 2020. This could make it even harder to source additional rolling stock to cover the requirements noted in R1 and R2, since accessible trains may not be available in time and anything else would be expensive to bring into service and only usable for a short time.

R3b. It should not be assumed that sufficient cascaded trains from other franchises will be available to enable the W&B fleet to be made compliant. The four franchisesⁱⁱ (including ATW) that have not yet announced plans to make their fleets compliant will between them have 74 units requiring replacementⁱⁱⁱ. This figure does not include ATW's uncomfortable class 150 units, which could be made compliant if refurbished. I have been able to identify less than 61 compliant DMUs becoming available^{iv} in the necessary timeframe.

R4. The combination of accessibility regulations and the future electrification of the ValleyLines raises serious concerns, given that the current DMUs in use on the ValleyLines (Pacers and class 150s) are not currently accessible. If the current fleet is made accessible, the owners may require a long lease to ensure they see a return on the investment. That rolling stock will be redundant once the ValleyLines are electrified (Pacers and class 150s are inappropriate for limited-stop services or any journeys over 1hr in duration).

R5. There is a risk that the Welsh Government's specification for the franchise may require a sub-optimal service pattern. For example, as pointed out by SARPA^v, if the government insists on hourly Holyhead-Cardiff services, opportunities for more lucrative services may be lost due to a lack of train paths or resources. For example, these might be at the expense of Holyhead-Birmingham through-services. Perhaps more seriously, regular Holyhead-Cardiff services damage the case for electrification of the north Wales coast line (they would have to be diesel trains since the marches line from Newport to Chester would not be electrified). Reducing the Holyhead-Cardiff service to 3 express services each way daily would allow maximum through trains from

north Wales to attractive destinations such as Crewe, Liverpool, Manchester, Birmingham and London, all of which could support electric trains.

Priorities for the franchise specification

P1. I believe that the current thinking is that the new franchise will be another long-term contract (a 10-15 year term). This approach has its advantages, but it is essential that flexibility is built-in so that changes can be made to cover unforeseen circumstances and to take advantage of any opportunities that arise. For example, it should be possible to introduce additional services and/or rolling stock on fair terms for both the operator and the authority funding the service.

P2. With a long-term franchise, it should also be recognised that the priorities will shift over the course of the contract; the overall theme however should be one of continuous improvement.

P3. At the start of the franchise, the priority should be to get the basics right. This should include the following, most of which are intended to ensure that the railway operates in the interests of passengers:

P3.1 Addressing the immediate requirements for additional rolling stock outlined in R1. and R2.

P3.2 Keeping railway staff on-side, in order to avoid strike action as seen on Southern over the past few months (see also SARPA^{vi}).

P3.3 Ensuring sufficient capacity is provided on every service to avoid passengers having to stand for more than 10 minutes on peak suburban services and not at all on off-peak and longer-distance services.

P3.4 Ensuring that rolling stock of an appropriate type is diagrammed for every service (eg. no suburban trains on regional or regional express services) and that the fleet has sufficient 'slack' to ensure substitutions for less-comfortable types are extremely rare

P3.5 A suitable member of staff should be available to assist all passengers at all times while on-board, checking and selling tickets (this means either that trains must allow free passage along their entire length or there needs to be a member of staff in each part of the train).

P3.6. Trains should not divide in service (as Cambrian trains do at Machynlleth) unless they allow free passage along their entire length.

P3.7 Trains that serve platforms shorter than the train must allow free passage from every carriage to at least one usable door.

P3.8 Establishing basic standards for stations, including a fully-enclosed waiting room at all stations used for interchange between trains (except where the connection is guaranteed to be held and the wait time is less than 10 minutes) or any interchange between trains and buses. Ideally, toilets will also be provided at these stations (perhaps jointly with local authorities, as public toilets). Station toilets must be free-to-use.

P3.9 Service levels on Sundays should be the same as Saturdays.

P4. Having established a basic level of service, the focus should shift to incremental improvements, optimising and/or adding routes to attract modal shift away from private cars. Possibilities include:

P4.1 Provision of direct services from the north Wales coast to Birmingham (ie. via Crewe not via Wrexham). Perhaps these could run through to London.

P4.2 Addition of regular fast Cardiff-Carmarthen services (avoiding Swansea) followed by linespeed improvements with an eventual aim of making these time-competitive with driving.

P4.3 Enhanced services to Milford Haven (hourly, preferably alternating between a Swansea service and the fast Cardiff service proposed in 4.2) and Fishguard (all trains extended to Swansea or Cardiff, including two additional services to reduce the maximum gap between trains to three hours).

P4.4 Increased frequencies on the Conwy valley line (to every two hours) and Heart Of Wales Line (at least 8 trains per day, 4 stopping and 4 semi-fast, providing towns such as Llandrindod with faster services)

P4.5 A new passing loop between Whitland and Tenby, permitting an hourly service between the latter and Swansea.

P4.6 Creation of new line from Bangor to Caernarfon, with passive provision for extension further south. I have read unconfirmed reports that Arriva's bid for the current franchise originally included this. I hope the new franchise will include this and other prospects denied by the 'no growth' franchise.

P4.7 Reopening the mothballed lines from Gobowen to Oswestry, Blaenau Ffestiniog to Trawsfynydd and Gaerwen to Amlwch.

P4.8 Building a new link between Gowerton and the Swansea District Line via Gorseinon to provide services to Gwaun-Cae-Gurwen and speed up journeys to the Heart Of Wales Line.

P4.9 Continued introduction of additional rolling stock.

P4.10 A Swansea metro, including routes to Swansea Fabian Way from Seven Sisters and Aberdare/Hirwaun, Swansea Fabian Way to Swansea High Street via the Swansea District Line and trams from Swansea to Mumbles and Morriston.

P5. If the franchise runs for 15 years, there may be opportunities for transformational improvements. Some examples are included, but these are areas where the flexibility mentioned in P1 becomes really important. These could include construction of new railway lines in Network Rail's Control Period 8, such as:

P5.1 from Caernarfon to Porthmadog

P5.2 a brand new A470 parallel route from the Merthyr Tydfil area to Newtown through Brecon and Builth Wells

P5.3 from Carmarthen to Aberystwyth

Appendix: Glossary

ATW: Arriva Trains Wales

DMU: Diesel Multiple Unit (self-propelled carriages)

EMU: Electric Multiple Unit (self-propelled carriages)

LHCS: Locomotive Hauled Coaching Stock (train formed of un-powered coaches pulled/pushed by a separate locomotive)

ROSCO: Rolling Stock Leasing Company

ⁱ https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/583945/first-great-western-service-level-commitment-3a-22032015.pdf

ⁱⁱ These are ATW, Chiltern Railways, London Midland and East Midlands Trains.

ⁱⁱⁱ The trains in question are class 121 (slam-door units used by Chiltern), Pacers (class 142 and 143, used by ATW) and class 153s (single-car units used by ATW, London Midland and East Midlands Trains and being withdrawn before 2020 by Great Western, Northern and Greater Anglia).

^{iv} 14 class 156, 17 class 170, 8 class 172 and 22 class 185. The latter fleet is due for release between November 2019 and March 2020, so the actual number of units available by the accessibility deadline will be less than stated here. Dates of release for the other fleets listed here are not known, so may also not be available until after the deadline.

^v Page 8 of the document here: <http://www.sarpa.info/pdf%20archive/sarpa71.pdf>

^{vi} Pages 2-3 of the document here: <http://www.sarpa.info/pdf%20archive/sarpa71.pdf>

Response to Welsh Assembly Economy, Infrastructure and Skills Committee inquiry into Wales and Borders Rail Franchise

Qu 1. The effectiveness of the Welsh Government's approach to the development, procurement and delivery of the rail franchise and South Wales Metro, including key risks and how they can be mitigated.

1 The Welsh Government has established a separate company (Transport for Wales- TfW) to undertake the task of obtaining the new rail franchise including the South Wales Metro. Railfuture notes that this provides the potential of having the actions required to obtain the new franchise the responsibility of a body separate from the Government's transport division which should potentially help provide clarity to the outputs. However, the establishment of the company may not in itself lead to desired outcomes as illustrated by the outputs from the now disbanded Strategic Rail Authority which was responsible for rail franchising when the present franchise was let. The letting of the current Wales and Borders franchise on a no growth basis in 2003 has subsequently been found to be a serious error. There is also a risk that Transport for Wales will have indistinct links with government, local authorities and local communities as it has no clear democratic accountability.

2 Railfuture Wales has sought the Welsh franchise to be let on a 'not for dividend' basis. This, or the similar 'not for profit' objective, has been the stated aim of Welsh ministers but it is recognised that in achieving this the Welsh Government's freedom is restricted by the fact that the more strategic aspects of rail regulation have not been devolved from the UK government to the Welsh Government. Therefore, the Welsh Government is not able to restrict consideration of franchise bids to not for dividend operators. This presents a significant challenge for TfW as it seeks to balance the quality of rail services against the level of subsidy required whilst attempting to ensure that the financial surplus which will potentially accrue to the franchise holder is not regarded as excessive.

3 The knowledge, skills and experience required to undertake bid assessments, which will be detailed and extensive, and negotiations in these circumstances are likely to be possessed by relatively few people and this is a key risk. As the franchise procurement task has not previously been undertaken in Wales it will have been necessary for staff to be recruited with rail franchise experience elsewhere. The capabilities of TfW staff needs to be evaluated at a relatively early stage in the franchise process and kept under review.

4 The procurement process has involved the shortlisting of four bidders. Railfuture Wales has met all four companies on the initial shortlist and noted that all four have extensive experience in rail operations. However, not all have experience in the UK in the full range of operations that the franchise holder will be required to provide, i.e. from rail service provision in lightly populated rural areas to the high frequency service in urban conurbations as is envisaged by the South Wales Metro. The criteria to be used for evaluating the bids has not been publicised by TfW. It is therefore not possible for Railfuture Wales to comment on the selection process to be used although the challenge posed by the not for profit issue is highlighted in paragraph 2 above.

5 Railfuture Wales has doubts about the wisdom of including the development of light rail as part of the franchise for the continuation of the Wales and Borders rail services. Railfuture suggests that

the new franchise operator will have to work with some form of passenger transport executive, which would be responsible for all public transport services in the SE Wales Region. The governance of this could be the responsibility of a new board relating to the local government structures which are in place at the time and linked to the City Region deal.

6 Railfuture Wales welcomes the intention for the new franchise to have responsibility for rail infrastructure in parts of the Metro area as this will improve the ability of the franchise's Metro arm to be able to better procure its routes needs and result in better integration between services and track/signalling. However, it is noted that this presents a risk of adequate finance for infrastructure not being devolved from Network Rail and the risk of the ability of franchise holders/train operators to manage infrastructure in the UK is not yet proven.

7 There are further risks in the franchise process resulting from the devolution of the responsibility for selecting the new Wales and Borders operator to the Welsh Government. The interface with the Department for Transport (DfT) franchise team needs to work well to ensure that the services serving Wales provided by non Wales based operating companies are integrated with services delivered by the new franchisee. Likewise, a dialogue will be necessary with DfT and the English regions served by the new Wales and Borders franchise to ensure services are co-ordinated with services in England provided by other train operators.

8 There is a relatively short timetable leading to the commencement of operations by the new franchise in 2018. In light of this and the complexity of the franchise resulting from the inclusion of the Metro, Railfuture Wales considers it would be wise for TfW to have a contingency proposal to extend the existing Arriva Trains Wales franchise for one year or whatever the necessary time required to enable the franchise process to be properly concluded. However, the procurement process must not be hurried but must be one that can provide for the transport requirements for Wales and the Borders for the next ten years or more.

9 The risk of the Welsh Government not being willing or able to provide adequate funding for the new franchise for the entirety of its duration needs to be acknowledged. The government has not made clear the funding that it is willing to make available and if insufficient money is budgeted this is likely to result in a reduction of services on some routes compared to recent years.

10 Finally, the continued lack of Welsh Government/Transport for Wales responsibility for and ability to influence Network Rail (apart from Metro rail services where the new operator could have this responsibility) is a further risk. This has recently led to Wales receiving a proportionately less funding for its rail infrastructure than England and could limit the ability of the new franchise to improve services (e.g. where signal upgrading is required to improve service frequencies). An important associated matter as it is dependent on Network Rail funding determined by the UK Government, is the uncertainty of when and if main line electrification will occur. Whilst it appears to be reasonably certain that the main line to Cardiff from London will be electrified in the next few years, uncertainty remains over the Cardiff- Swansea route and the lines to Bristol Temple Meads. This makes creates difficulties in the planning/ordering of new rolling stock and may result in the new for orders for stock which can operate as diesel and electric train (bi mode).

Qu 2. Priorities for the franchise specification and Metro delivery to ensure rail services meet the needs of current and future travellers throughout the franchise area, and deliver value for money for both passengers and the taxpayer.

11 The first Railfuture priority is to ensure that the specification allows for changes in the number of passengers and the routes which they use over the franchise period. This will avoid the franchise holder having the potential to unreasonably benefit from significant increases in passenger demand and passengers suffering from overcrowding. A minimum franchise length of 10 years is suggested to ensure that the successful operator has sufficient time period in which to invest in new rolling stock and services and obtain a satisfactory financial return.

12 A second priority is for the franchise to be let on the basis of all passenger rolling stock to be replaced with new stock within five years of the commencement of the franchise. This requirement extends to all routes in Wales including the metro services which will be operating routes not subject to electrification. This priority is justified for the reason that the majority of the existing rolling stock in the franchise area being approximately 30 years old with the most modern stock being over 15 years old and although the current operator has made some effort to update passenger facilities. Passengers now deserve to be served by modern trains which will provide greater levels of comfort such as full air conditioning, seats aligning with windows on longer distance services, Wi-Fi and luggage storage space closer to seating areas. All rolling stock must have compatible couplings and corridors at the end of the units to provide maximum flexibility to form longer trains by joining two or more units of different types together and to allow staff to move through the entire train and for refreshments services to be accessible to all passengers. Refurbishment of the rolling stock at appropriate intervals should also be required.

13 In terms of timetabling of services the following priorities are taken from the Railfuture Wales Development Plan:

- * A service frequency of no less than two hours on all routes with higher frequency services in the more populated areas. More specific improvements include the provision of 30 minute interval services on the Ebbw Vale, Maesteg and Vale of Glamorgan branches in South Wales and on the Wrexham to Shotton/Bidston line in North Wales/Wirral.

- * 'Clock face' timetabling; i.e. Departure times are at the same minutes past the hour throughout the day. However, where there is evidence that a long established timetable for local services is valued by local residents, there may be a case to retain existing patterns.

- *The retention of services to Manchester Airport, Birmingham International and Cheltenham

- * Better integration with other public transport modes such as buses, ferry ports and airports. This should include comprehensive facilities for through ticketing. Provision of bus turning circles and adequate car parking facilities

- * Improved connectivity with other parts of the UK by the provision of more through services to destinations in regions such as northern England including Liverpool and Swansea to Bristol and beyond

- * A maximum wait time of 15 minutes when a change of train is required. Guidelines are suggested on ensuring passengers make connections when services are running late

14 With regard to stations to be managed by the new franchise holder Railfuture Wales has the following priorities:

- * All stations should provide minimum facilities: notice boards, covered waiting accommodation, real time running information with speakers providing opportunities for announcements from a control centre, a means to call the control centre, cycle parking and access for disabled passengers to all platforms .

- * provision of adequate parking and interchange facilities

- * Interchange stations (rail to rail or rail to bus) should in addition provide a member of staff on duty during hours when passengers are changing services, toilets and basic refreshment facilities (vending machine).

15 The new rolling stock should be maintained and operated to meet the following standards:

- *Carriage interiors must be clean, well heated and provide functioning toilets including disabled toilets .

- *Announcements from staff should be clear and audible and provide information on connections at forthcoming stops. Delays and reasons should be announced within one minute

- *Refreshments should be available on services over two hours' duration.

16 Performance indicators for the new franchise should cover overcrowding (passengers unable to obtain seats for journeys over 15 minutes), provision of advertised on board refreshment facilities and working toilets as well as retaining the existing indicators of punctuality and reliability.

17 The development of the South Wales Metro's rail services presents separate challenges from the remainder of the franchise area. Railfuture considers that 'heavy' or traditional rail services should be retained (some diesel, some electric dependent on the routes to be electrified by the Welsh/European /UK Government funding) on services to the 'outer' points of the 'Valleys' rail network (Ebbw Vale, Rhymney, Merthyr, Aberdare, Treherbert, Penarth, Barry and Maesteg). Bi mode trains should be considered to enable electrification to be extended during the franchise. Light rail (trams) could have a useful role in journeys on the 'inner' network between Pontypridd, Caerphilly, Coryton and Cardiff city centre and Bay area with new routes to provide direct services via street running to the University Hospital Wales site. However interchange must be provided with the heavy rail routes and especially at Cardiff Central. Elsewhere in the Cardiff Capital region, light rail provides opportunities to provide frequent services to other destinations not served by rail such as the proposed new residential areas to the north east and north west of Cardiff. The metro arm of the franchise should be required to keep opportunities for such new services under review with close working local authority transport and planning services being required as the capital funding for such services is likely to be partly met by the sites' developers. For any integrated transport system including a metro to work there must be connections with bus services at properly provided interchange points. These need to be part of the franchise .

<http://www.railfuture.org.uk/display702> 2013 Devlt plan

<http://www.railfuture.org.uk/display1368> 2016 Devlt plan summary

The effectiveness of the Welsh Government's approach to the development, procurement and delivery of the rail franchise and South Wales Metro, including key risks and how they can be mitigated

1 There has not been a clear definition of the South Wales Metro and what it will achieve made available to the public for prior consultation. Most interpretations of Metro is a turn up and go service with a minimum waiting time of 15 minutes, However this could be a stated aim but there are also references at half hourly rail services in some parts which is not to true Metro status. There has been no mention of services at weekends and bank holidays. It is not known what specifications have been given to the bidders.

2 There has been no prior consultation on the replacement of heavy rail by light rail or where this will take place .If this takes place there will be considerable disruption for the routes concerned. However using light rail could have its place serving the suburbs of the large towns and cities in Wales.

3 The setting up of Transport for Wales has created an additional body from Welsh Government. This could result in Transport for Wales not being in touch with local communities or in fact the Assembly itself.

4 Although many functions are now devolved to Welsh Government there is still not control over the services provided by other operators in Wales. This has in the past lead to disjointed service patterns and the inability to provide an integrated service with good connections. These operators have in the past withdrawn and altered services which the Wales and Borders franchise has had to replace. There must be closer links with the Dft controlled franchises.

5. There is uncertainty about the present route extensions to Cheltenham, Birmingham International and Manchester Airport and the ability to provide services to Liverpool and Bristol. These are essential for rail travellers to and from Wales.

6 Some services in the new franchise will be cross border services and consequentially the will need to be excellent cooperation between Dft and Welsh Government and also the communities served by Cross Border services.

7 Infrastructure maintenance is by Network Rail which is controlled by Westminster Government. Recent research has shown the Wales does not get the same proportion of Network Rail expenditure as other parts of Britain. This is evidenced by the failure to electrify any lines in Wales at the present time. The Welsh Government has no direct control over Network rail schemes and in fact has used its own and European money for many of its infrastructure improvement schemes. The relationship with Network Rail is a risk especially with regards to funding and also the priority given to improvement schemes.

8 The delay in delivering an urgently required half hourly service from Cardiff to Maesteg including the main line stations of Pontyclun, Llanharan and Pencoed indicates a delivery difficulty between Welsh Government and Network Rail although Network Rail in its latest planning document indicates such an enhancement is possible. This has been further facilitated by the re signalling of Cardiff Central station.

9 The proposal for the moving maintenance of some lines from Network Rail to the franchise operator creates the risk of inadequate funding from Network Rail/Dft, the availability of specialised equipment and infrastructure risks such as bridge replacement and landslides.

These risks have been managed promptly in the past by Network Rail and there are a number of recent examples eg on the Maesteg branch there has been a river bridge and repairs after a landslide.

10 There have been no prior plans for the provision of more and new rolling stock in advance of the new franchise stating. It can take at least three years to acquire new rolling stock. Thus there is a risk in the first years of the franchise that there will be little improvement in services. This is in contrast to the purchase by Mid Glamorgan council of rolling stock to operate the reintroduced service to Maesteg.

11 The Welsh Government has throughout its existence sought integrated transport but only achieved it to a very limited extent eg Traws Cambria services and a few bus interchanges. There is the risk that Welsh Government will not achieve this again with the fragmented provision of rail and bus services in Wales. The Bridgend Transport scheme has not been delivered although European funding was available.

12 The Government's aspiration for light rail, which is appropriate for short distance travel, could lead to consideration of its introduction elsewhere including links from Bridgend to Porthcawl , Blaengarw and, Nantymoel

Priorities for the franchise specification and Metro delivery to ensure rail services meet the needs of current and future travellers throughout the franchise area, and deliver value for money for both passengers and the taxpayer.

This section relates to the provision of rail services serving the stations in Bridgend County Maesteg to Bridgend and the stations between Pyle ,Bridgend and Cardiff ie Pencoed, Llanharan and Pontyclun .

1 There is an urgent need for at least a half hourly service from Maesteg to Cardiff (and beyond- to reduce platform capacity at Cardiff).

Passenger services from Maesteg to Cardiff were reintroduced in 1992 using rolling stock purchased by the local authorities and at present used by ATW as part of its fleet.

There are many reasons for the enhanced service for all stations in Bridgend and those at Llanharan and Pontyclun.

Employment opportunities in Maesteg have decreased and there is a high volume of outward travel to Bridgend, Cardiff and other South Wales locations. Peak hours see a continuous stream of traffic on the roads to/from Maesteg with long waits at roundabouts and traffic lights.

The Bridgend to Maesteg road A4063 has not been upgraded in recent years. Overtaking is not possible and there are slow journey times. The road continues north to serve communities in the Upper Llynfi and Afan valleys.

There is no through bus service from Maesteg to Cardiff and unlike many other valleys an express service between Bridgend and Maesteg is impossible because of road conditions.

The early morning service to Cardiff is not fit for purpose for commuters with arrival times in Cardiff at 07.34 and 08.48. The return services are at 16.18 and 17.18. There are additional services from the main line stations which have been introduced by ATW to reduce overcrowding however the rapid rise in passenger numbers has resulted in the peak hour through services from Cardiff to Maesteg being standing room only to and from Pencoed or Llanharan.

Many connections require long waits at Cardiff with some up to 55 minutes. Changes made 10 years ago to the westbound service from Paddington service extended connectional times at Cardiff and Bridgend. West bound connections at Bridgend include waits of up to 30 minutes

There is a significant flow of passengers including school children and college students on the Maesteg branch to and from Bridgend and an increased service could more than double passenger numbers.

The Maesteg line has no Sunday service and no late evening service. It has some of the earliest last evening departures from Cardiff at 21.10 on Saturdays and 22.35 on weekdays.

2 The need for an half hourly service from Maesteg to Cardiff was first identified in 'The Transport Framework for Wales' in 2001 which also identified new stations at Brackla and Llanharan. The only developments since that have been- the opening of Llanharan station in December 2007, the extending of platforms between Bridgend and Maesteg for four car trains in 2008 and new car park facilities at Sarn and Pencoed.

3 The transport consortium SEWTA approved the introduction of a half hourly service to Maesteg in its initial plans and subsequently made a bid for funding the additional service. At the same time SEWTA made a bid for an additional service between Bargoed and Rhymney, in both cases including European funding. Both service enhancements were approved and funded and the Rhymney line now has the infrastructure for a half hourly service but for some unknown reason the Maesteg line enhancement did not take place although the funding was available. The Bridgend to Maesteg section also has higher passenger useage than Bargoed to Rhymney section even though the later line has a much better including Sunday service. Rolling stock for the new services was also acquired but was diverted to be used on West Wales lines.

4 The Bridgend County Transport Plan 2001-5 listed the following rail transport developments the reopening of Vale of Glamorgan line, a new station at Brackla Station with Park and Ride facilities Maesteg line service enhancement, Wildmill, Pencoed and Pyle to have Park and Ride facilities and a new Rail / Bus interchange at Bridgend Railway station. The plan was approved by Welsh Government. European funding was made available for the development of Bridgend Interchange but the development never took place and the money was reallocated elsewhere.

5 When the new franchise was awarded to Arriva Trains Wales in 2003 there still was no Government financial support for additional services including a Sunday service to Maesteg. However ATW as part of their bid added three weekday evening services and two Saturday evening services (the third was not allowed by Railtrack for a now defunct reason)

6 All subsequent Government and Network Rail plans have included an enhanced/half hourly service for the Maesteg line. The latest was the National Transport Finance Plan 2015 which stated work would be completed to GRIP4 by 2016 over 15 years since the initial approval.

7 It is now time that Welsh Government delivered the promised and much needed half hourly service enhancement including a Sunday service and ensure that it is included in the new franchise agreement and that the required infrastructure is in place for this to happen.

Other lines in Bridgend

Vale of Glamorgan The reintroduction of a passenger service on the Vale of Glamorgan line was first identified in 'The Transport Framework for Wales' in 2001 and passenger services were reintroduced in 2005

There is a need for an half hourly service on the Vale of Glamorgan line especially to serve the growing community of Llantwit Major and the expanding Cardiff Airport for travellers especially from West Wales. The National Transport Plan March 2010 lists an additional half hourly service on Vale of Glamorgan line

Main line Bridgend should have a 15 minute interval service to Cardiff. This has been achieved for smaller valley communities such as Abercynnon and Bargoed Pyle serves the communities of Cornelly, Pyle and Kenfig Hill as well as being a rail head for Porthcawl. Pyle station reopened in June 1994 when the Swanline service Originally, the service was provided through a partnership between British Rail and local government, with the local authorities securing EU development funding and retaining ownership of the trains needed to operate the service. However at present the Swanline service itself as unattractive to users at its current low frequency, with extremely restricted journey to work options for Swansea commuters, but takes up valuable space on the busy section of line between Bridgend and Cardiff.

Signalling renewal work in 2007 introduced a new turnback facility at Port Talbot station and the service could be amended to an hourly all stations service from Swansea to Port Talbot with Pyle served by the hourly West Wales to Manchester trains. However Bridgend Country

Council has suggested a turn back at Bridgend which is also possible and would give Pyle an even more frequent service.

Another anomaly is the Pyle is excluded from the zonal ticketing for the Cardiff Valley and should be added to this arrangement

Appendix

The Welsh Government's Moving People- Improving Rail Five Year Plan July 2005 approved the Maesteg enhancement with a new passing loop and associated track works and new station at Brackla. It also approved Interchange facilities at Wildmill where a large site owned by Railtrack was available for a bus interchange and large car park. Network Rails' Wales Rail Planning Assessment July 2007 was committed to platform lengthening between Bridgend to Maesteg to four car trains which was completed in 2008. It also provided short term options including to improve service capacity and frequency on Maesteg line to two trains per hour improvements and this was confirmed in Network Rails', Wales Route Utilisation Strategy which supported SEWTAS request half hourly service to Maesteg a similar sized town to Aberdare and Merthyr Tydfil and proceeded to design a passing loop north of Tondy at GRIP 3 stage. Welsh Government's National Transport Plan March 2010 states 'Extend the half hourly service from Maesteg to Brackla and Cardiff ; as if the half hourly service from Maesteg to Bridgend was already approved.

Introduction

Thank you for giving Gloucestershire County Council (GCC) another opportunity to contribute to the National Assembly for Wales Economy, Infrastructure and Skills Committee Inquiry into the Wales and Border Franchise and Metro delivery. I have the following officer comments to make to the second point raised in your email dated 27th January 2017 set out below.

Priorities for the franchise specification and Metro delivery to ensure rail services meet the needs of current and future travellers throughout the franchise area, and deliver value for money for both passengers and the taxpayer.

Commentary

The lack of car parking capacity at Lydney railway station has been an ongoing issue for a number of years. Passengers unable to find a space in the existing car park have parked on the footpath or on the approach road causing a potential hazard to traffic. Lydney is the only mainline railway station in the Forest of Dean. As such it acts as a gateway to the area and is an important piece of transport infrastructure for the wider area. Lydney is allocated around 1900 houses up to 2026 along with a considerable amount of employment land. Lydney station has seen a 140% increase in passenger numbers over the past 10 years and is key in enabling residents to access employment opportunities as well as encouraging tourism to the Forest of Dean.

GCC with other stakeholders including Lydney Town Council (LTC), Forest of Dean District Council (FoDDC) and the local MP have lobbied Network Rail (NR) and Arriva Trains Wales (ATW) in an attempt find a solution to this problem. However, a number of factors prevented any progress being made, notably a lack of available funding.

Eventually in May 2014 NR offered GCC the lease on an area of land adjacent to the existing car park, which was coming up for renewal. After a period of protracted negotiations the car park was opened by GCC on 16th February 2017. GCC have taken on the lease for a period of two years expiring in March 2018.

Despite GCC having no statutory responsibility to provide additional car parking at Lydney station it has invested a considerable amount of time and money to break the deadlock and find a way forward. This has included installing fencing, lighting and additional disabled parking adjacent to the station as well as removing rubbish that had been left behind or subsequently fly tipped.

Recommendation

It is therefore requested that in the new franchise the future maintenance and lease of the extended car park at Lydney is taken over by the new franchisee as is the case with the existing car park and others across the franchise area. As well as alleviating the immediate capacity issues the increase of approximately 90 spaces will encourage greater use of the rail services across the Wales and Border franchise area. In turn this will reduce traffic on the road network whilst increasing demand for rail services between Cardiff and Cheltenham.

I hope these comments are useful in informing the Committee in their deliberations.

Rob Niblett
Planning Officer
February 2017

1. Merseytravel welcomes this important opportunity to submit evidence to the National Assembly for Wales's Economy, Infrastructure and Skills Committee's Inquiry into the Rail Franchise and South Wales Metro.
2. It is noted that the Committee's inquiry is focused on the following issues:
 - The effectiveness of the Welsh Government's approach to the development, procurement and delivery of the rail franchise and South Wales Metro, including key risks and how they can be mitigated; and
 - Priorities for the franchise specification and Metro delivery to ensure rail services meet the needs of current and future passengers throughout the franchise area, and deliver value for money for both passengers and the taxpayer
3. Merseytravel's evidence will focus upon the latter point, namely priorities in respect of the rail franchise, rather than on the effectiveness of the Welsh Government's procurement processes. Neither does this submission comment upon the delivery of the South Wales Metro, as Merseytravel would not wish to comment on devolved issue, and one with no direct bearing on the LCR.
4. Merseytravel is the Liverpool City Region Combined Authority's (LCRCA's) lead advisory body and executive body on transport issues. It also advises the LCR's Local Enterprise Partnership (LEP) on transport matters. The LCRCA is a statutory body covering the local authority districts of Halton, Knowsley, Liverpool, St Helens, Sefton and Wirral with a collective population of 1.5 million. The LCRCA is responsible for strategic transport planning across the city region, together with other strategic policy areas such as economic development, housing and planning, and employment and skills.
5. Operationally, Merseytravel has responsibility for managing the devolved Merseyrail concession, developing public transport infrastructure, such as new bus and rail stations, operating the tolled Mersey Tunnels and procuring non-commercial bus services. It is also responsible for administering concessionary, pre-paid and 'smart' ticketing and providing travel information. One of the largest projects now in development concerns the £460 million replacement of the 40-year old Merseyrail rolling stock. The new fleet will be owned by the Liverpool City Region and leased to the train operating company. Notably, the new fleet also has the flexibility to operate beyond the current confines of the Merseyrail 750V DC-electrified network¹.
6. Merseytravel, as part of the LCR Combined Authority (which has a river boundary with Wales) recognises the fundamental linkages between North Wales and North West England in terms of jobs, retail, tourism, education and healthcare. North East Wales, West Cheshire and parts of the Liverpool City Region form part of a common, recognisable economic and travel-to-work-area, which necessitates safe, affordable and efficient cross-boundary, multi-modal east-west movements.
7. Furthermore, transport networks rarely respect administrative boundaries, meaning that cross boundary travel planning can be fragmented and prove complex to deliver. As a result,

¹ <http://www.merseytravel.gov.uk/about-us/Pages/New-Trains-For-Merseyrail.aspx>

Merseytravel enjoys a close working relationship with adjoining local authorities and key alliances such as the Mersey Dee Alliance, the Growth Track 360 Alliance and the North Wales Economic Ambition Board to address these cross-boundary issues in a strategic and co-ordinated way. At a wider geographic level, Merseytravel played a key role in the Rail North governance arrangements and processes, in respect of the re-franchising of 'Northern' and 'Trans-Pennine Express'. This led to transformational improvements to the specification of these franchises. As a related point, the effectiveness of the Rail North process, in drawing together relevant partners from local and central government is one that Welsh Government may wish to replicate in respect of the Wales and Borders franchise.

8. Merseytravel has a long history of working jointly with Welsh Government on cross boundary transport issues², and has contributed significant evidence to relevant consultations and inquiries. These include: the Enterprise and Business Committee's into cross border rail infrastructure priorities³ and input to the Welsh Government's development of the new Wales and Borders franchise⁴. Evidence has also been submitted to the Welsh Affairs Committee of the UK parliament on key cross boundary rail issues⁵. This evidence is consistent with these earlier submissions.
9. The current Wales and Borders franchise was specified on a "no growth" basis, and the actual growth that has been experienced has led to congested trains, cancellations and poor service levels overall. Equally, the static nature of the franchise has meant that services have not been able to respond to changing work and travel patterns, especially in cross-boundary terms. Transport is now firmly recognised as a core component of sustainable economic growth, through enhanced access to goods and services, for the workforce and in supporting agglomeration – these being fundamental principles that underpin the creation of 'Transport for the North'. More locally, the strong evidence base that exists compels the next Wales and Borders franchise to be specified not just on a growth scenario, but on one that is reflective of functional economic geographies extending beyond arbitrary administrative boundaries and service patterns.
10. Equally, at a strategic level, the new franchise should provide for an enhanced level of service that will better connect the major towns and cities and across the border in England, and not just those within Wales. Services in North Wales should also better serve international gateways in the form of Manchester Airport and Liverpool John Lennon Airport, recognising that these airports enjoy a significant market share from North Wales and the Marches. This is discussed further below in respect of the reinstatement of the Halton rail curve.
11. Consideration must also be given to improving and increasing rolling stock levels, to support growth and address issues of overcrowding and reliability. The new franchise should provide the additional capacity to bring crowding levels in line with Rail Executive's standards, but more importantly, to support growth and modal shift. It is appreciated that 'cascading' rolling stock from other franchise areas is needed to support this. However, building on the strong business case developed by the LCR, innovative rolling stock solutions should be explored, including the acquisition of new, bespoke rolling stock by the Welsh Government, which would be leased to the franchisee(s). From Merseytravel's experience, this approach will be 30% cheaper than a conventional ROSCO model over the lifetime of the fleet, with no risk that the new stock is subsequently cascaded to another franchise area. The new fleet, which will become operational by 2019-2020 is also a highly relevant consideration, given its potential to extend beyond the existing electrified Merseyrail network.

² <http://www.merseytravel.gov.uk/about-us/media-centre/news/Pages/View-from-Merseytravel-chair---cross-border-rail.aspx>

³ <http://www.senedd.assembly.wales/documents/s48046/EBC4-03-16%20p.3%20Evidence%20from%20Merseytravel.pdf>

⁴ <http://moderngov.merseytravel.uk.net/ieListDocuments.aspx?Cid=326&MID=1331#AI9536> – item 73

⁵ <http://data.parliament.uk/writtenevidence/committeeevidence.svc/evidencedocument/welsh-affairs-committee/wales-and-borders-rail-franchise/written/36343.html>

12. At a more specific geographic level, Merseytravel's priorities are to promote an enhance two key cross-boundary routes that fall within the scope of the franchise:-
- a) The Borderlands Line between Wrexham and Bidston; and
 - b) The development of the Halton Curve and new services into Liverpool South Parkway and Liverpool Lime Street from Chester and North Wales
13. Looking at (a) in more depth, Merseytravel is working closely with the Welsh Government to improve service quality and train frequencies on the Borderlands line between Wrexham and Bidston. The service currently takes the form of a sub-standard, hourly diesel service to Bidston, where it connects with Merseyrail services to Liverpool. This line should be recognised as a high priority by the Committee and by the Welsh Government in terms of its economic importance in linking three mutually supportive Enterprise Zones (Liverpool Waters, Wirral Waters and Deeside Industrial Park) and in supporting access to leisure, culture, health facilities and retailing on both sides of the border. It links university and college sites in Wrexham, Deeside, Wirral and Liverpool, and will serve an increasingly important social and economic role for HMP Berwyn in Wrexham which is scheduled to open shortly.
14. Many work-based trips in the Deeside area are typically made by car at present, exacerbating congestion and associated costs and disbenefits on cross border road links such as the M53, M56, A494, A55 and A483. The 'Growth Track 360' Prospectus estimates that 1 million cross bore commuter trips are made each month, whilst 85% of these are made by car.
15. Equally, evidence shows that lack of access to a car can lead to worklessness if convenient and affordable transport options do not exist. As a cross-border example, residents in Rock Ferry, east Wirral, live around 12 miles from significant employment opportunities at Deeside Industrial Park. Deeside Industrial Park is served by Hawarden Bridge station, but only 4 services each weekday call from Bidston, and the three leg rail journey takes around 70 minutes. This is not considered a viable or attractive proposition. The Growth Track 360 prospectus estimates that 1 in 5 people will turn down job offers due to inaccessibility⁶. As the Borderlands line directly serves Deeside Industrial Park, an enhanced service specification, linked to a new transport hub in the Hawarden Bridge area, would open up access for all from across the travel-to-work area.
16. A recent technical demand study commissioned by Merseytravel and the Welsh Government highlights the positive benefit-to-cost ratios and economic returns that would arise from enhanced service levels on the Borderlands line. A multi-party steering group has been established under the Growth Track 360 governance structures to oversee the next steps, where the clear priority is to improve the existing hourly diesel service to a 30 minute frequency. Operationally, this may require the second train to operate as a semi-fast service, calling at the busiest stations only, but this would offer a faster journey time and improve performance. This should be a clear specification within the new franchise in recognition of the strategic potential of this line.
17. As a related issue, the franchise specification should also seek to equalise the fare scales and ticketing options that apply across the wider city region; fares from stations in south Wirral (e.g. Neston) are considerably greater than fares for trips of a similar distance on the Merseyrail network (e.g. from Hooton). These are issues that arise from differences in the franchise specifications, but from a passenger perspective, they are barriers to growing patronage on the Borderlands line. They also distort travel patterns when residents living adjacent to the Borderlands line opt to drive to Merseyrail stations such as Hooton or Birkenhead North for onward travel to Liverpool and beyond.
18. Turning to (b), the long-standing ambition to reinstate the Halton Curve, together with capacity enhancements in the surrounding area, will facilitate direct rail links from the North Wales Coast

⁶ <http://www.growthtrack360.com/home/key-facts/>

Line and from Wrexham to Liverpool. The rail link has specific economic importance in improving rail access to Liverpool John Lennon Airport and linking three mutually supportive Enterprise Zones (Sci-Tech Daresbury, Cheshire Science Corridor and Mersey Waters), and in supporting access to education, leisure and retailing.

19. In recognition of its importance, the LCR has committed £16 million from its devolved Growth Deal funding to reinstate the link and deliver associated signalling and junction works⁷. It is anticipated that work will be completed by May 2018, with services starting from December 2018. Initially, Merseytravel will subsidise an hourly Chester-Liverpool service via the Halton Curve, as a first step in the development of enhanced services using the Curve. This initial service provides value for money, and benefits rail users in the West Cheshire area and in serving Liverpool South Parkway (the interchange for Liverpool John Lennon Airport), but is clearly is not the optimal solution. Neither is it a sustainable solution in the long term to the LCR, given the element of duplication that exists with Merseyrail services operating between Chester and Liverpool.
20. As such, a priority for the new Wales and Borders franchise will be the inclusion of enhanced, regular cross-border services along the Halton Curve to Liverpool South Parkways and Liverpool Lime Street from significant stations in North Wales including Bangor, Llandudno and Wrexham. These have been shown to enjoy positive benefits in the scheme's business case⁸. Merseytravel would wish to see such cross-border services forming part of the base franchise, in recognition of the significant benefits afforded to Welsh residents, and in order to fully complement the LCR's significant capital investment in the Halton Curve.
21. It is recognised that service enhancements are hindered by infrastructure capacity constraints. In respect of the Halton Curve, these constraints stem from lack of capacity and the poor configuration of Chester rail station, together with track and turnback constraints in the vicinity of Wrexham General. The significant capital scheme promoted by Welsh Government to partially redouble the Wrexham-Saltney Junction line in the Rossett area is clearly welcomed, and its role in improving north-south journey times in Wales is fully appreciated. However, as the line will remain singled between Rossett and Wrexham, with capacity constraints in Wrexham and Chester, this situation does not currently support enhanced service provision to Liverpool and Liverpool John Lennon Airport from Wrexham and destinations south, and from the North Wales Coast line.
22. Merseytravel would strongly urge the Committee to identify the above infrastructure constraints as very high funding priorities, to release much needed rail capacity to support growth and to secure modal shift. The specification of the rail franchise is considered an ideal opportunity for potential solutions to these infrastructure constraints to be scoped and addressed by prospective franchise operators, in conjunction with the Welsh Government.

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⁷ <http://councillors.knowsley.gov.uk/documents/s42372/Final%20Liverpool%20City%20Region%20Growth%20Deal%20Schemes.pdf?StyleType=standard&StyleSize=none>

⁸ <http://www.merseytravel.gov.uk/about-us/local-transport-delivery/Documents/Halton%20Curve%20FBC%20-%20Final%20Version%20Feb%202016%20REDACTED%20VERSION3.pdf>

INTRODUCTION

1. Two part rail franchise

This franchise has been split into two parts. The south Wales Metro (Metro) which has the highest risk and the remainder of the franchise which is a conventional rail franchise with a train operating company (TOC) running trains and Network Rail. The first covers 80% of Wales' land area with about 35% of the population; the latter 20% of the land and 65% of the people. The passenger trips are split approximately 50 – 50. Despite much of the public discussion being centred on Valley Lines with its infrastructure implications and higher risk; full cognisance must be given to the remainder of Wales and Borders rail franchise services.

The 'rest of Wales element is familiar ground for letting a rail franchise. Not so in the *competitive dialogue* and transfer of track / signals from Network Rail (NR) which is one possibility for Valley Lines and is relatively unknown waters. WG has to be clear on what is affordable, what is being promised and what passengers want the outcome to be.

There are therefore quite different needs and possible service levels. The railway in west and north Wales provides for mobility and with the TrawsCymru network, the core public transport network much of which is subsidised (both buses and trains). The proposed Metro in its widest sense of both buses and trains must provide mass transit provision especially in peak periods into / out of major centres. Without a significant transfer of motor car users to the rail network, road congestion in the south east will continue to worsen and have an adverse effect on economic efficiency.

2. Radical Change

A change in culture / ethos and the degree of expertise available in the public sector decision making process (WG / TfW) is the biggest challenge facing the successful franchise bidder (or grant bids as WG now refers to the funding process). The Welsh Government's (WG) concept of an Operational Development Partner (ODP) is the way forward with far more collaboration with a far closer relationship between WG and the TOC / OpCo / ODP. Passengers will expect cleaner stations and trains; less overcrowding in peak periods; more frequent trains; electric trains throughout the network – but this is a major challenge.

WG has to be looking for radical change with more innovation compared with the old system. The *competitive dialogue* process should identify what the market has to offer and it has been suggested that WG can then cherry-pick the best aspects.

The timescale is intended to fit the current franchise termination in October 2018. There is the possibility of an extension subject to an agreement between Arriva Trains Wales (Deutsche Bahn) and WG. This may however lead to a legal challenge by other bidders and may not be perceived as the best outcome for passengers.

The process has to be watertight particularly from now on as bidders prepare detailed proposals. A repeat of the WCML challenge by Virgin Trains when the award was made to First Group cannot occur. WG must have the ability to prove its decision was right at any possible judicial review.

3. Bids

The bidders now (February 2017) have to consider whether to follow through with their bid. The costs and timespan are higher and longer than for a DfT bid process. At W&B the success odds are 4:1; at south west England they are 2:1. The costs may be £12m compared with £7m - £9m for a more lucrative bid in England – e.g. East Midlands, WCML + HS2 (which is also very exciting).

The Wales Audit Office report on *Welsh Government investment in rail services and infrastructure* (6 September 2016) provides a useful insight into the contractual arrangements WG proposes to fund.

SECTION 1- WELSH GOVERNMENT APPROACH TO THE *DEVELOPMENT, PROCUREMENT AND DELIVERY* OF THE W&B FRANCHISE AND SOUTH WALES METRO EFFECTIVENESS, KEY RISKS, DELIVERY

4. Implementation

WG set up Transport for Wales (TfW) in January 2016 along with a strategic advisory board to manage and advise on procurement. Its primary role at present is to re – let the Wales and Borders (W&B) rail franchise
The Government will have provided the Committee with its proposed structure of the InfraCo (infrastructure and the OpCo / TOC (train operating company)

The InfraCo would only apply to that part of the Valley Lines commuter network where electric traction would be introduced and in particular a tram / light rail option. Elsewhere the track and signals would be provided by Network Rail as at present.

The Pre – qualifying process should have identified that all the bidders on the short list have satisfied the selection criteria

Currently (14 February 2017) the outline solutions from bidders are with TfW. It will process and assess these

5. Process – Summary note

TfW would have put high level questions (for outline solutions) to all bidders on how they would approach aspects such as:

- Bidders to indicate investment levels
 - Inside Metro
 - Outside Metro (e.g. NWML, community rail e.g. Heart of Wales line; Marcher line)
- WG priorities indicated
- Quality score based on what can be provided – with affordability estimate and revenue projections
- Expectations on Valley Lines (VL) modernisation
- ERDF funds as long as available
- Frequency on different lines; outline timetable plans; differences between high capacity / demand commuter lines and rural services; main line services e.g. SWML, NWML ; cross border links to Manchester (Northern Powerhouse) and Birmingham
- Ticketing and fare levels; market based offers e.g. advanced purchase and how will these be made simple without the loss to passengers of low cost fares. This will test the ODP principle and co-ordination of WG and TOC / ODP interface. One option is a Netherlands style fares system with WG and regional transport authorities determining fares and with a national ticket (Chipkaart) for all trains (and buses – please see integration below)
- Stations strategy for improved facilities – waiting areas, ticket sales, cleanliness.
- Fleet strategy for diesel (the majority of services); electric train and tram / light rail
- Community rail (mainly deep rural e.g. Heart of Wales Line)
- Links to Cardiff Airport (despite WG already having its TrawsCymru airport express
- Managing solutions which were carbon friendly and environmentally positive and were compliant with the future generations and active travel legislation and WG policy. How will these be measured and what is the WG target.
- Human resources policy

The questions would form the criteria for selection – journey time; frequency; energy efficient; environment. In effect the *Sell to Wales* contract note which sets out the procurement process and has a section on the Wales & Borders rail franchise procurement. They would have to flesh out issues on infrastructure and rolling stock.

Normally this is done through internal working on the operational implications of the new structure. In Valley Lines there is a vertical integration management process. How does NR fit into that or, if it doesn't, how is the InfraCo to be set up 'from scratch'

Overall it is a sound process for supply side competition (Supplementary Note 4). It enables WG to establish what it wants in general from the franchise but requires considerable input from the TfW team. It has however placed a more than usual financial burden on the bidders.

6. Process Timetable

The procurement timetable for determining the new OpCo / TOC / ODP as I understand it is currently:

October 2016: Pre-qualify with criteria –

- can the bidder deliver the franchise - what experience in rail operation
- financial position of the bidder or parent company
- technical position – are the skills available
- construction element in relation to Metro

December 2016: Short list bidders' outline solutions

Jan / Feb 2017: Assessment of outline solutions by TfW

Feb – June 2017: Competitive Dialogue

June 2017: Invitation to submit final bids

January 2018: Selection of Operational Development Partner

October 2018: New OpCo / TOC takes over the franchise

This is a tight timetable and has slipped from the original by a few months. What one might also say is that the process began about two years later than it should have with TfW being set up in January 2014 and full time staffing put in place.

7. Bidder Flexibility

The SWML date of electrification between Cardiff and London is expected to be December 2018 but extension to Swansea is uncertain.

So each bidder will need to be flexible in providing:

- The change from diesel to electric trains
- Will there be hybrid / bimodal for pre and post electrification
- From where will they get the compliant rolling stock for pre electrification
- Persons of Reduced Mobility (PRM) compliance is required by 2020. The EU date was 2023. The Westminster Department for Transport DfT is not mindful at present to allow derogation until new rolling stock is available. There are compliance problems in other franchises which are also not PRM compliant.

- Are there compliant fleets available?
 - Northern have new build diesels
 - WG may get bidders to suggest a hybrid (heavy rail) for conversion to electric only later (as in Great Western Main Line IEP trains)
 - Light rail on VL presents a serious challenge as interim stock will have a short life in the new W&B franchise.
- Lease on current rolling stock runs out in October 2018:
 - WG could purchase trains or enter a leasing arrangement between WG, a train manufacturer and a finance house / PWLB.
 - Leasing companies (ROSCOS) have been reducing their prices since Scottish Government began buying their own r/s
 - Northern – a bidder could join into another order for new build more efficient diesel or diesel / electric bi – modal trains and achieve a lower cost per train unit. These might initially be less efficient but could be the future proof option
 - Some diesel rolling stock could be made compliant but the economics is difficult.
 - ROSCOS not really interested in diesel new build but might be forced to or purchase the hybrid bi – modal trains

8. Integration bus / rail / cycling / walking

In all cases integration of train and bus services using the 4I's principle

Information + Interchange + Investment + Imagination

is a key aspect of the post 2018 rail franchise. This requires some form of planned integration of train / bus services / active travel in Wales on which bus companies have not been inclined to move forward on bus / rail / active travel integration. The establishment of a Traffic Commissioner exclusively to Wales will assist in setting up such a scheme. TfW could then prepare the ground for legislative changes regarding the bus industry.

The ScotRail franchise currently operated by Abellio has the provision of cycle storage and routes to stations as a contractual obligation. To assist in implementing the Active Travel Act such conditions will need to be included in the W&B franchise

There is no control by TfW over adjoining franchises other than through negotiation with DfT or with the companies (currently – GWR (First Group), West Coast Main Line (Virgin) and Cross Country (DB Arriva UK).

TfW has no control over bus operations but can provide infrastructure (e.g. bus / rail interchanges; bus stations; bus stop waiting facilities. While this is important nationally, the higher frequency of bus and train service along Valley Lines makes it a facility which to date has been largely ignored

Integration between bus and rail services has been difficult since the 1980's bus competition legislation (seen by transport planners as providing a disservice to the traveller). There are success stories such as WG's TrawsCymru operations which are physically aligned to rail stations. Several bus stations are adjacent to rail (e.g. Rhyl, Caerffili, Aberystwyth) but integrated ticketing is limited to e.g. Plus Bus, rover tickets. A south east Wales ticket system would be a positive element in the proposals for the Metro and a south east Wales joint transport authority on a statutory basis (under the Transport (Wales) Act 2006) should be established to franchise bus operations and integrate with WG's TfW and TrawsCymru services.

The Go Cymru multi operator / ride ticket experiment has lost momentum. It should now be a requirement for the new franchisor to introduce the basis of such scheme nationally and for TfW to introduce it to bus operators as agreement / legislation allows. The Oyster (London region) or Chipkaart (Netherlands national) and Over 60's card (Wales national) shows a payments formula can be agreed between government and operators. TrawsCymru services (owned by WG) can be used from the start

TfW should expand its present position of one director alone to a core team for integration. It does not at present appear to be a priority activity

9. Risk – Funding

WG have to source the capital expenditure for Valley Lines electrification if DfT / NR are not prepared to increase their infrastructure contribution above £125m out of a possible £700m. NR has said that the Wales Route may not be able to deliver all that the WG want with NR's constraints from the centre. Any funding WG can provide (including Welsh block grant provision, City Deal funding and post Brexit funding guarantees to replace EU funds) enables WG to provide more investment or subsidy.

EU structural funding has been generous to Wales' transport system through its clear financial and economic criteria against which successful bids could be made. These funds were specifically targeted at low income and low economic growth areas such as the south east valleys and rural Wales. Such fixed criteria become variable in negotiating the increases in block grant funding with HM Treasury.

Track / signalling maintenance costs and the cost of subsidy will of course be additional to the infrastructure loan repayments.

10. Risk – Revenue

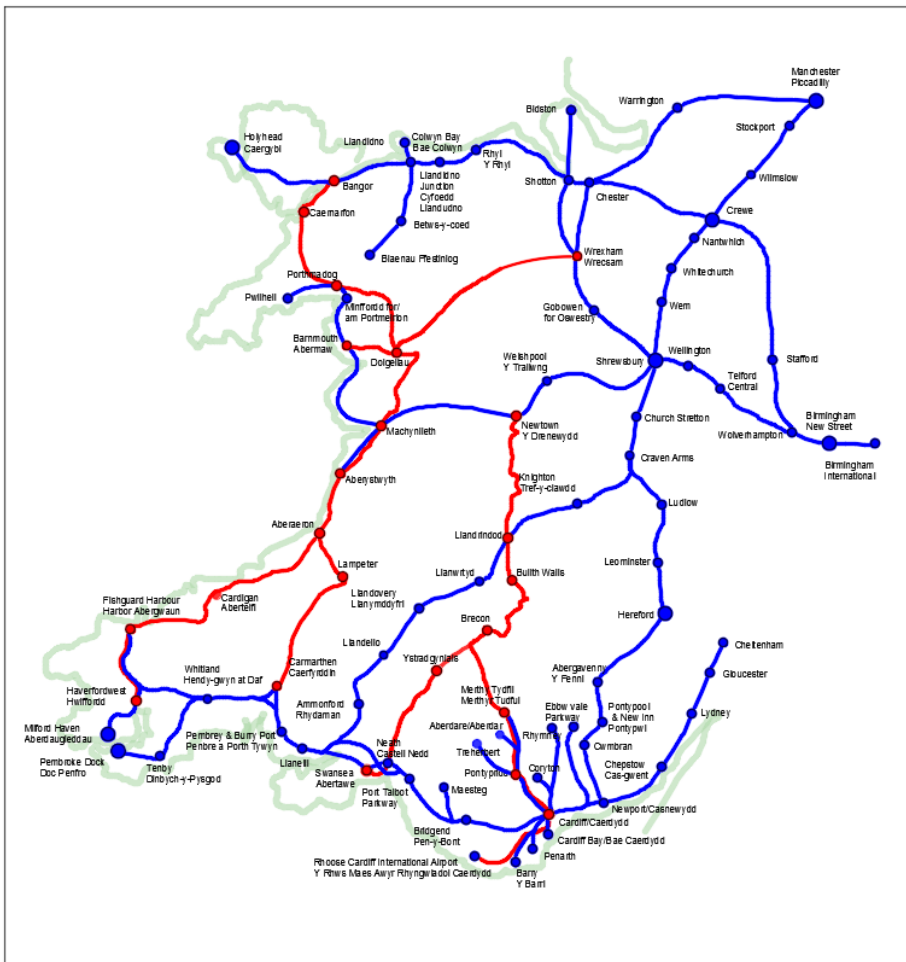
There is an assessment of risk transfer of course but which company takes the revenue risk – the franchisor (Government) or the franchisee train company).

- TfW could, as does TfL, take all the revenue paying the TOC a management fee. The TOC would then only have the cost risk to bear

- The TOC could take the revenue and cost risk. This would be based on its expertise in the market as a private centre company which should be its strength

So a decision has to be made by Welsh Government on whether franchising is possible without the transfer of revenue and /or cost risk when TfW could become the ‘train operator of last resort’. To achieve this, the franchise conditions have to be clearly set out and a whole range of possible options built in. This involves considerable vision and forward thinking and the provision of break clauses where neither party has unfair advantage.

11. Risk – Franchise map Map of current rail franchise and TrawsCymru services



TrawsCymru routes // Wales & Borders rail franchise routes

The majority of the Wales and Borders franchise should remain intact. There has been considerable delay in transferring the Wales & Borders rail franchise from DfT to WG. That this has not been achieved despite being discussed for over a year presents serious problems for WG. WG cannot be expected to acquire skilled

permanent staff and set up financial arrangements for train procurement (purchase or leasing) or electrification when DfT remains the prime franchisor

The routes from the Canolbarth and north Wales into England (in particular Manchester and Birmingham) have to be retained as they meet Welsh train journey patterns. They also provide a net contribution to the W&B subsidy budget

The operational logic also applies to the marcher line from Newport to Chester. This is the only link between the three east – west main lines and provides the backbone of Wales' network (see Supplementary Note 2)

12. Risk – Vision

While competitive dialogue has advantages (see above) there is also the risk that in place of one WG vision there may be four different visions. Rail franchise procurement requires a vision leader and where it has not been present in depth; plans have not come to fruition.

13. Risk – Division of resources

As the journey numbers split between south east Wales and the 'rest' is 50 – 50, TfW should ensure the successful bid has criteria for sharing both capital and revenue accounts fairly across Wales. Services to Aberystwyth, south west Wales, NWML, and community rail lines such as Borderlands and Heart of Wales have passenger demand potential which could be realised by a radical approach to operations and investment taken within the franchise agreement, and not on an ad hoc basis (as takes place now).

The north east Wales Metro can only be so named if there is an electrified core rail network from Chester – Wrexham – Bidston with an integrated bus network. This would provide a through commuter route into key employment areas and interchange with an electrified NWML at Shotton. (See Supplementary Note 2)

14. Risk – Infrastructure

This only applies to a position where WG takes on responsibility for the Valley Lines or part of that network. It involves a major property purchase / lease by TfW and involves depreciation of assets, maintenance and potentially large structures. The question of who takes liability for these structures arises – is it the ODP or TfW. A successful bidder might put forward a case that for a 10 – 15 year franchise it would be unable to do so. The high level of risk and the negotiations for transfer of ownership and inherited liabilities would not be viable for under 25 years (as the Severn Crossing concession indicates).

Each of the four bidders has a civil engineering partner with appropriate experience and skills

This partner will be responsible on VL for construction of electrification system and the maintenance of the network. This may only relate to part of the VL network to the north of Queen Street station and the Cardiff Bay line but this is unclear. This network could either be procured from NR through purchase or leasing.

Insurance covering network maintenance and major rebuild (of many 150 year old structures) would be an expensive process through commercial channels. Actuarial advice to British Railways and to its successor Network Rail was to self – insure most structural rebuilding with other aspects insured commercially. NR has suggested the proposed sections of network if taken over, are too small for self – insurance and that commercial insurance costs may be prohibitive.

NR could lease the structures / formation to TfW and NR would discharge major repair liabilities (e.g. rebuild costs or closure compensation to passengers / TOC) which could be included in negotiations for reimbursement by TfW. Major capital infrastructure repairs would be outside the current TOC / ODP tender; day to day maintenance costs would be included in the tender.

15. Risk – protection of lines of routes.

On several occasions land suitable for reopening for rail use has been taken for commercial retail / housing development often but inadequate statutory planning procedures and lack of vision at the time have prevented protection. Examples are

- Cardiff Bay station – a current proposal affecting further rail extension southwards
- Danescourt – housing on an old railway formation limits a link from Creigiau into City Line
- Llanidloes to Builth – developments lie on a potential route between the Heart of Wales and Cambrian lines
- Aberystwyth to Carmarthen retail and a new road form obstacles to reopening the line between the towns

16. Risk – Staffing Skills

There a small number of permanent staff in place currently. Advice given in 2013 (by Professor Stuart Cole) indicated a need for a high level permanent team with experienced support staff covering the rail franchising processes (to TOC's), interface with Network Rail and procurement options for new or cascaded rolling stock. The consultants currently seconded and contracted to the team form an experienced 'interim' management with high quality skills for assessing the bidders' plans. However a permanent team is required to take forward this large enterprise and one might ask why the delay in doing so. The Scottish model is ideal with staffing of 25 providing the range of skills in a permanent team

The competitive dialogue process is used in some industries (e.g. construction) but has not previously been tried in railway franchising. The risk for WG is that it has

never let a rail franchise tender in the past and now faces an untried method with very limited past experience on which to draw.

This is a major challenge for WG in its biggest ever single procurement valued at about £3.5 bn

17. Value for money

The tight timetable increases the risk of hurried decision making and scrutiny. The objective is value for money for public funding balanced with an improved passenger experience – reduced journey time, increased frequency, capacity (track and passenger) reliability and passenger numbers (to reduce road congestion and energy benefits).

As the final proposals for tendering are not currently available it is not possible to make any judgement

18. Rolling stock and station waiting requirements

New rolling stock is needed for the new franchise if journey quality is to improve as this with station waiting quality are the primary passenger experience factors.

Before any move is made to procure rolling stock the analytical process below has to be completed:

Demand > Capacity > Services > Rolling stock > Depot locations

- Demand – how many passengers, growth rates, journey origin / destination; what mode or integrated modes
- Capacity – how many seats / standee space is required
- Services – frequency, reliability
- Rolling stock – train types, tram, ~~tram-train~~ (see below and Supplementary Note 1)
- Depots – primary maintenance which may as in the case of GWML require new construction, new depots for overnight stabling.

The rolling stock procurement process is considered in more detail (supplementary note 2) but a specific risk arises from the high percentage (estimated 70%) of the current ATW fleet is not usable after 2020 as these trains are not compliant with PRM legislation. DfT has made clear it is not minded to provide derogation (reference to flexibility for bidders above). In evidence to the National Assembly in 2013 both Professor Stuart Cole and Porterbrook, the train leasing company, indicated that new trains required for a 2018 franchise would have to be ordered in 2014 (diesel) or 2015 (electric) unless there is a possibility of being added to another order e.g. the order for new DMU's for the Northern franchise through DfT.

Depending on the operational options chosen the choices of rolling stock are between

- cascaded and new trains
- bi – modal electric / diesel

The rolling stock to match the service requirements outlined in Section 2 is:

- Metro style electric trains with three / four double double-door locations
- Regional electric express services with two / three double-door locations
- Regional diesel trains with two double-door locations
- Local diesel trains with two double-door locations
- trams / light rail
- tram trains (but this technology is nowhere near sufficiently low risk per se and particularly when the process and the radical potential changes in track ownership (VL) and traction type are taken into account,

19. Core Valley Lines – definition and consequences

Most commuters see Valley Lines as the whole of the commuter network extending from Treherbert, Aberdare, Merthyr, Rhymney, Barry Island, Penarth, Bridgend, Maesteg and Ebbw Vale.

However reference has been made by WG to the *core Valley Lines*. This is restricted to services from Treherbert, Aberdare, Merthyr, Rhymney and Cardiff bay into Queen Street. It appears to exclude the City Line from Radyr to Cardiff Central and the line between Cardiff Central and Queen Street. If this is an option, it should be reconsidered as it would require passenger interchange inconvenience and passenger transfer infrastructure (bridges and platforms currently providing inadequate capacity) at Queen Street station.

SECTION 2

PRIORITIES FOR THE FRANCHISE SPECIFICATION AND METRO DELIVERY ENSURING RAIL SERVICES MEET THE NEEDS OF CURRENT AND FUTURE TRAVELLERS OVER THE WHOLE FRANCHISE DELIVERING VALUE FOR MONEY TO PASSENGERS AND TAXPAYER

20. Current franchise passenger experience

The decision to privatise the train operating companies and the track operation separately resulted from a European Commission directive to split both elements. The format was further influenced by the realisation that a free market such as that which had been created for the bus industry could not provide the network benefits required by passengers. Hence the franchising system was set up.

The Wales and Borders Franchise is a conventional rail franchise awarded to Arriva Trains Wales by the Secretary of State for Transport (Westminster Government) was on a 'no growth' basis. A joint parties agreement (April 2006) between the Welsh Government and DfT made the former responsible for funding and performance management of all ATW services following a budget transfer in the block grant of

£140m (2011-12). The Welsh Government then used its own powers to provide a further £30m funding for additional services.

In 2003 when the franchise was let to Arriva Group it had a low level specification with no allowance for growth in passenger numbers, no extra train capacity and indeed one of the competitors pulled out of the bidding process because of what it saw as running down the railway in Wales by the Strategic Rail Authority (subsequently the Department for Transport).

Trains such as Pacers and Class 150's are 35 years old and it is to the credit of Arriva Trains Wales engineering staff that the reliability figures are so good.

Annual passenger growth varying between 8% and 13% over the network is a positive move but it was not forecast and providing additional capacity through the contractor Arriva Trains Wales has resulted in an additional subsidy cost for the for the Welsh Government. No allowance in the block grant is apparently made for this.

Further additional capacity cannot be provided at present because no suitable diesel trains are available.

The problem of high load factors (up to 130%) arises on certain journeys. Examples are:

- Morning inbound and evening outbound on Valley Lines
- North Wales main line services where only two car sets are in use (particularly at holiday periods, Sunday afternoons and where a delay in the Irish ferry arrival into Holyhead after the departure of the Virgin Trains 'boat' train.
- Cardiff / Bristol commuter services have been alleviated with the use of 3 – car sets on this great western franchise. Turbo trains (5 – cars) currently operating GWR Thames Valley trains are a possible source of additional capacity following electric train operation between London and Reading.
- Certain school time journeys
- Summer services to west Wales

Passenger service improvements expected in 2018 franchise

21. Passenger Forecasts

Passenger demand forecasts should take into account any potential shifts in demand and demand patterns. The demand and train supply options should be set out as measures to meet changes in demand. This flexibility will protect the Government and the new OpCo (train operating company) against risks of lower or higher demand affecting increased capacity provision or revenue shortfalls.

Demand growth is expected to continue at 8% per annum so the DfT assumptions of 2.5% are unrealistic though the use of more realistic demand figures can increase costs of future provision and may reduce the short term benefit cost ratio

The franchise has to be specified in terms of demand and rolling stock both diesel and electric (please see later section). The working relationship between the train operating contractor and Network Rail who operate the infrastructure makes this

easier with the Network Rail Wales Route (division) now in place and for south Wales the presence of NR / ATW staff at Canton control room.

This would have enabled the Welsh Government to have considered the best option for example for:

- North south services and their increase to hourly
- Additional capacity on Valley Lines
- The impact of reopening the Glyn Ebbw and the Vale of Glamorgan lines
- Procuring additional rolling stock

The current penalty system relies too heavily on timekeeping alone. The new franchise should consider factors such as passenger growth, journey experience, train cleanliness and passengers personal security perception.

22. Franchise Specification

The franchise specification should improve the passenger experience, including for example franchise length, targets / incentives and the core service standards which should be included;

The key justification for any changes – electrification, re-signalling, different rolling stock, alternative franchising structure – would be the benefits received by end users. These include the passengers, the primary subsidy funder – the tax payer, the Welsh economy, the environment and society in general in Wales. Any other rationale should be unacceptable.

The benefits which will show the new franchise to be a success (and could form the basis of incentives) are:

- Improve reliability and timekeeping
- Reduced journey times through faster trains
- The same level of service at lower cost to the taxpayer
- Improved service at lower cost because of some inherent faulty aspect of the alternative structure
- Improved passenger satisfaction
- Increases in train frequency
- More modern, more comfortable trains
- Increasing in passenger demand (peak and off-peak; rural, urban and inter-urban) as a franchise condition
- Higher levels of infrastructure investment at stations and on track and signals
- Improved services and capacity for the same cost
- Information: high standard of presentation and easy to understand
- Information: breadth of availability (from posters / hard copy to on-line / aps)
- Increased capacity on trains (e.g. with new possibly electric trains) particularly on commuter routes to meet expected demand increase. This may be jointly with the Welsh Government and TOC

- Any significant aspects of the present system which are shown to be deficient which one of the alternative structures will remove

Specific schemes upon which improved passenger services depend, These are infrastructure schemes to be primarily funded by Network Rail / DfT or by other means for electrification / light rail on Valley Lines. WG can 'do what they want to but It is possible that NR Wales Route will not be able to provide all that WG have asked for'. There are constraints from the centre and are dependent on funding for the rail network. Possible infrastructure investments (Supplementary Note 2) are:

- North Wales Main Line electrification
- North east Wales Metro based on electrification of Chester – Wrexham – Bidston to provide a loop through bi directional rail service between north east Wales and employment centres at Airbus, Chester and Liverpool. Interchange between NWML and the Metro at Shotton
- Double track Wrexham – Chester to increase services
- South east Wales Metro

The train operating company (TOC) would be set targets such as service frequency, reliability (trains operating), timekeeping, station facilities and market growth. The TOC would then be financially rewarded for achieving the targets but with financial penalties for failure.

The objective of this is to ensure that the passenger obtains the best service, that shortcomings are put right, that good quality is rewarded and that the Government gets what it pays for.

However all these expectations are limited by affordability connected to adequate provision for rail services in the block grant, both capital and revenue

23. Bus Integration - please see section 1

SUPPLEMENTARY NOTES

SUPPLEMENTARY NOTE 1: ROLLING STOCK

Rolling stock and station waiting requirements

New rolling stock is needed for the new franchise if journey quality is to improve as this with station waiting quality are the primary passenger experience factors.

Before any move is made to procure rolling stock an analytical process has to be completed. This is

Demand > Capacity > Services > Rolling stock > Depot locations

Stage 1 Demand analysis

The expected growth rates in the rail passenger market have to be determined.

There is an assessment of risk transfer of course but which company takes the revenue risk – the franchisor (Government) or the franchisee train company).

Forecasting revenue over more than three years is a difficult task as markets change rapidly in retailing – clothing, food, motor cars, DIY, and of course railways and buses. Cost forecasting is also tricky as many transport companies have found in trying to forecast the price of oil products which once were only about five per cent of total costs but have now risen to nearly twenty per cent in some companies.

So a decision has to be made by Welsh Government on whether franchising is possible without the transfer of revenue risk. To achieve this, the franchise conditions have to be clearly set out and a whole range of possible options built in. This involves considerable vision and forward thinking and the provision of break clauses where neither party has unfair advantage.

This is not easy particularly for long term franchises. In 2003 for example when the Wales and Borders franchise was let forecasting the electrification of the southern network would be underway was not a consideration. The Government will be involved in revenue support interventions if it wishes to achieve other economic, social and environmental objectives thus accurate subsidy projections are essential.

Stage 2 Capacity

Having determined the potential demand levels the size of vehicle will have to match that and several options for future vehicle procurement have to be determined. The capacity of the rolling stock has to be balanced against purchasing vehicles in which space will never be used (thus 'overspending') and not procuring enough capacity making it necessary to procure at a later date either assuming the same vehicles are available or having a non-standardised fleet if demand expands.

Stage 3 Services

The services to be provided will vary from route to route. See Supplementary note 2

In all cases integration of train and bus services using the 4I's principle

Information + Interchange + Investment + Imagination

is vital to the success of the post 2018 rail franchise. This requires the reregulation of bus servicers in Wales as proposed in the Buses Bill for England currently going through both Houses.

Stage 4 Rolling Stock

Wales requires a mix of rolling stock to match the service requirements outlined above. They are:

- Metro style electric trains with three / four double double-door locations
- Regional electric express services with two / three double-door locations
- Regional diesel trains with two double-door locations
- Local diesel trains with two double-door locations

There are several options for rolling stock procurement and several potential suppliers. Please see Supplementary Information 1.

In evidence to the National Assembly Enterprise and Business Committee report *The Future of the Wales and Borders Rail Franchise* December 2013, both Professor Stuart Cole and a train leasing company, Porterbrook, advised that detailed plans should begin at that time to achieve deadlines in 2018 for new trains. The lead time for new electric trains can be 2 / 3 years and 3 / 4 years for diesel units. In exceptional circumstances if another order is in place with manufacturers for an appropriate train this time lag can be reduced slightly.

Cascaded stock v new trains and latest procurement date

Cascaded rolling stock will derive from existing franchises. This will require options to lease agreed with ROSCO's by the end of 2014 or a similar date with manufacturers if new trains are to be procured. This applies to both electric and

diesel trains. However cascaded rolling stock will require replacement within 15 years.

The fact that the current Wales and Borders franchise will have a good supply of local diesel trains (e.g. Class 150 / 158) this does not mean that they will automatically be available to the new franchise. The contractual arrangements will have to be made anew by the Welsh Government and the TOC. There is competition for trains (excluding Pacers) such as we have at present. The Northern franchise, for example, will take up trains in 2016 so the Government will have to be clear about Wales rolling stock needs if they are to bet the best deal

Cascaded electric rolling stock which formed the basis of the south Wales electrification Transport Business Case to HM Treasury is currently in use on for example London Suburban Essex (e.g. Class 313 / 315) Greater Anglia services (Class 321) and on Thameslink from Bedford to Brighton (Class 319). New trains either have been ordered or are being negotiated for these services. In either event the existing trains are 20 years old and have an expected life of 15 years. The risk here is that the cascaded trains will not be available by 2018 and in Wales we will have electrified track and no electric trains.

These trains could be available from one of the ROSCO's. A complete refurbishment internally and mechanically would be required but they are cascaded (i.e. second hand) trains. This might not be acceptable both in terms of the image of Wales and its railways and maintenance and leasing economics.

Alternatively trains could be procured directly or through a Special Purpose Investment Vehicle (SPIV) 'owned' by the Government.

Which company if new build electric trains are chosen?

Although the Treasury's Transport Business Case was based on cascaded trains the Welsh Government can make a policy decision to lease or purchase (becoming a ROSCO itself) new electric trains.

The unit cost is reduced as numbers of train units purchased increases. The Welsh Government could buy trains in co-operation with other authorities. Merseyrail have to replace their complete fleet by 2018 and new trains are being procured for Thameslink and Crossrail in London. It should consider entering into a procurement agreement for new trains with such organisations.

There are three manufacturing companies:

Siemens produce the Desiro Class 380 which has operated successfully in Scotland since 2010 and has the advantage of a proven operating record

Hitachi produce their AT range of trains. The AT – 100 Metro suitable for Valley Lines (*CwmFro / Valley Vale Metro*) and the AT – 200 Regional. These are now in the design / prototype stage and may be available by 2018

Hitachi with Agility Trains, are also the providers of the Great Western Main Line InterCity electric trains and will have a maintenance depot in Maliphant Sidings, Swansea and therefore a rail presence in Wales.

Bombardier produces the 'S8' type rolling stock currently in use on the Metropolitan Line of London Underground. This is not a dissimilar service in terms of distance and mainly surface operation to Valley Lines... The local suburban version (same train different interior) the 'S7' recently introduced on the Hammersmith and City, Circle and District Lines and can be seen at Paddington Station. These have a similar profile to the other trains above. These are not deep level tube trains

There are also other sources

Arriva Trains Wales it should be recalled are owned by DB German railways who of course have a long standing supply relationship with Siemens. This is another channel that might be pursued. It has advantages and disadvantages.

Specialist rolling stock companies (ROSCO's) were created at rail nationalisation to lease rolling stock to train operating companies. The ROSCO's ownership is generally outside the railway industry and more in the financial sector.

There is an argument that government should own and lease to franchisors the rolling stock in particular new rolling stock but some suggest this is 'back door' part-nationalisation. This however is not being said about the DfT's actions as indirect financiers of the new Intercity Express Programme (IEP) trains for use on the Great Western Main Line. On this basis the Welsh Government with appropriate borrowing powers and a funding stream (Severn Bridge tolls have been suggested) could from 2018 become the owners of the Wales and Borders railway fleet. The Transport Wales Act 2006 does appear to give it those powers.

Stage 5 Depot location

Depots provide the operating base for maintenance (either routine or heavy) and overnight and off peak stabling of trains.

The location has to fit the logistics of train operations to minimise 'dead' mileage (out of service running) particularly at the start and end of the operating day. They also have to be located to minimise the recovery time (and passenger inconvenience) to replace a failed train. The present depot at Canton was designed for diesel trains and would require major changes or replacement for joint electric / diesel operations

SUPPLEMENTARY NOTE 2: TRAIN SERVICES

The intensive service on **Valley Lines Metro** should operate at eight – ten minute intervals. The Swansea – Cardiff – Bristol Temple Meads route will require an electric fleet to provide stopping and express services on a half hourly frequency to

supplement the InterCity IEP London service and the Great Western Franchise Cardiff – Portsmouth Harbour service.

There is a decision on whether this should operate as a tram (light rail) or a heavy (conventional) rail basis. Trams operation could provide further penetration onto the road network into roads such as Greyfriars Road and Westgate Street and the planned public transport interchange.

Carmarthen – Manchester should continue on an hourly basis. It provides for Wales the link between south and mid Wales with bus or rail connections at for example Pontypool, Abergavenny, Hereford Church Stratton and Shrewsbury. This should remain a part of the W&B franchise as it provides an essential link between south Wales and parts of mid and north Wales and has a limited role in England. It also provides one through service each hour between Carmarthen and Cardiff.

Aberystwyth – Birmingham through services. This route provides commuter and international airport journeys and should be retained within the W&B franchise

To separate these two sets of services at Shrewsbury as has been suggested by the DfT and HM Treasury detracts from the current convenient through journeys provided. Shrewsbury Station has insufficient track / platform capacity for interchange; train unit and train driver interchange between companies / franchises presents serious negative implications for insurance, financial penalties for late running and customer convenience – the most important element form this Committee's consideration.

On the **Cambrian Line to Aberystwyth** an hourly service is now operationally possible with connections at Machynlleth for the Pwllheli service

Services **to / from west Wales** would be expected to increase in frequency providing a half hourly service between Swansea, Llanelli, Carmarthen and Whitland and hourly to Pembroke Dock and Milford Haven. Whitland should become a major park and ride facility using available railway land and its nearness to the A 40 trunk road. These west Wales diesel services will require a change at Swansea into a high frequency (3 / 4 trains per hour) electric service east of Swansea.

The **Heart of Wales** line services require the results of the current analysis into its markets and if / how a five train a day service may be justified.

Wrexham – Bidston services are currently a diesel service and thus a W&B franchise operation as Merseyrail is entirely electric. The logical objective is to electrify the line and create a 'circle line' service between Liverpool – Birkenhead –

Chester – Wrexham General – Wrexham Central - Wirral Stations – Bidston – Birkenhead – Liverpool. When this is complete the service would transfer to Merseyrail with a Memorandum of understanding between Welsh Government and Merseytravel on fares, train frequencies and reliability and service interchange for Welsh travellers.

The Liverpool City Region Combined Authority is looking to bi-modal trains to transform the Borderlines Line but the most likely option in the shorter term is to double the frequency of the existing diesel service. This would still require changing trains at Bidston.

A key impact to be considered in this ‘North East Wales Metro’ is the traffic reduction possibilities on commuting routes into Chester and Liverpool centre

On the **North Wales Main Line** the combined services of the Wales and Borders and the West Coast Main Line will require increased capacity to match expected growth. The electrification on this route should begin within the timespan of the next franchise beginning in Control Period 6 (2024 – 2019)

Llandudno to Blaenau Ffestiniog services will continue to have a summer peak demand.

SUPPLEMENTARY NOTE 3: FRANCHISE – ADDITIONAL LINES; INFRASTRUCTURE NEEDS

Additional lines, enhancements to existing lines, new stations or other infrastructure – set out below are investment options

Electrification

- Valley Lines and Vale of Glamorgan (*CwmFro Metro*)
- North Wales Main Line
- South Wales Main Line
- Marches Line

Higher line speeds on primary routes

Creation of a *CwmFro / ValleysVale Metro*

Increase in capacity to meet future demand

High Speed Rail between Bristol / Cardiff (HS3) and London

Integrated public transport policy and planning (bus/rail/car/cycle/taxi)

Current investment

Network speed and capacity improvements CP 4

- Aberystwyth – Shrewsbury frequency increased to 1 tph
- Cardiff area re-signalling
- Track doubling from Cockett (Gowerton) to Llanelli and the new Afon Llŵchwr viaduct provides capacity for increased service frequency west of Swansea (e.g. half hourly to Llanelli / Carmarthen and hourly to Pembroke Dock and Milford Haven)
- Re-signalling of the GWML and SWML

In the case of increased capacity provisions for Aberystwyth and Llanelli, the current shortage of rolling stock makes the increase in frequency unlikely. However if electrification is introduced in time for the next franchise in 2018 (the target date) then considerable diesel rolling stock will become available for refurbishment and re-releasing to the Wales and Borders franchise (please see section on rolling stock above)

Investment - planned/under consideration

Network speed and capacity improvements CP5 and beyond

- *Valley Lines / CwmFro* electrification / *City Line* capacity
- SWML Electrification
- Wrexham – Chester redoubling
- Wrexham / Bidston / Liverpool / Chester electrification

New / reopened stations / increased frequency

- Gateway Wales – Cardiff Airport frequency at 3 tph
- Bridgend frequency increased to 2 tph
- Swanline stations: east - increased frequency
- Queen Street Station Cardiff – two new platforms to increase capacity; new frontage to improve station quality
- Cardiff Central Station new platform for valley Lines; new south side entrance to improve passenger experience. The role of Cardiff Central Station in the proposed transport interchange – including rail, bus, car setting down / picking up, cycles, walkers, taxis, car parking
- Swansea Station - £3m refurbishment of the platforms and redesigned concourse. Interchange issues with buses remains

Integrate bus and rail/car and rail

Additional P&R stations; expanded capacity at existing P&R

P&R becomes significant player to/from:

- Whitland station P&R (enlarged to major regional P&R)
- Central Cardiff/Newport/Swansea
- Port Talbot Parkway
- Swanline (e.g. Gowerton, Baglan. Skewen)
- Llanelli , Carmarthen

New * P&R / increased capacity p&r (examples)

- SWML/ *South Wales Metro De Cymru*
- Bridgend
- Pencoed
- Llanharan
- Pontyclun
- St Mellons *
- Llanwern *
- Coedkernew *
- Severn Tunnel Junction

CwmFro / ValleysVale Metro (South)

- Gateway Wales – Airport *
- Llantwit Major
- Barry Docks *
- Dinas Powys (? Land availability) *

CwmFro / Valleys/Vale (North)

- Llandaf
- Taffs Well
- Trefforest
- Abercynon
- Merthyr Tydfil (to include enlarged bus facilities)

Potential new / re-opened lines

- Beddau / Talbot Green / Creigiau to Danescourt (City Line)
- Re-opened lines: Creigiau from *City Line*; Aberdare to Hirwaun
- New lines and river bridge Coryton to Radyr (for inner circle line)

- Aberdare – Hirwaun
- Vale of Glamorgan line – branch to Gateway Wales / Cardiff Airport (Govt. owned); PPP / Section 106 scheme.

Platform extensions

On planned electrified services the current platforms will mainly accommodate any 4-car sets being considered. However the City Line (Radyr to Cardiff Central via Danescourt) platforms will require extending. If 6-car sets are to be used some platforms will accommodate them but all Valley Lines platforms will require extensions to accommodate 8-car sets required if passenger demand rises significantly in the future

Cardiff Central

The current annual passenger footfall is 13m; by 2028 this is expected to reach 23m (Network Rail estimates). Capacity was increased with platform 0 some years ago and platform 8 opened in 2017. However platform with may not be consistent with safety requirements at peak periods. In addition with Cardiff aiming to be an events city as well as an economically successful city it is clear during major events that Cardiff Central was not designed to move 35k to 50k passengers each day (as has happened in rugby events (with concentrated post- match departures and during the Christmas shopping period 2017). Additional platforms will be required and a suggested solution to the west of the station where development land could be available (Brains brewery site)

SUPPLEMENTARY NOTE 4: COMPETITIVE FRANCHISING – BENEFITS OF SUPPLY SIDE COMPETITION

Whichever of the options outlined above is selected there will be a requirement for competitive procurement referred to here as supply side competition or competition for the contract to operate the Wales and Borders rail network. The only exception could be Option 3 above where the Government owned NfD Company has sole position in the process

There are significant benefits to be derived from the franchising system whether it is competition between PLC's as at present, Not for Dividend companies or Co-

operative suppliers. The control of the rail network remains in the hands of the Welsh Government. The benefits of franchising are:

- it allows competition in terms of service provision ideas and funding levels
- it provides a more secure train market and service not entirely dependent on the commercial market
- it allows other economic, environmental and social factors to be taken into account
- it prevents instability in the market through an operator of the last resort i.e. the Welsh Government (see the parallel in South Central and the east Coast Main Line)
- it retains network benefits such as integration of services within the Welsh operation and in relation to Great Britain rail operations
- it prevents 'cherry picking' of the most profitable routes leaving loss making operations to the public authority (under free market competition)
- it gives value for money
- it can provide for the transfer from one operator to another and any phased changes required in connection with rail electrification
- subsidy forecasting can be more accurate
- efficiency without instability
- Integrated bus and rail branding
- increase integration of timetables / ticketing / inter TOC discounts

Professor Stuart Cole

18 February 2017

Response to the National Assembly for Wales' Economy, Infrastructure and Skills Committee Inquiry: Rail franchise and Metro

Network Rail: the national System Operator

Great Britain relies on railways for economic growth, creating jobs and building sustainable communities. Across Wales and the English Borders the railway is the economic and social lifeblood of many towns, cities and rural communities.

Network Rail operates, maintains, renews and enhances Britain's railway infrastructure. Following the reclassification of Network Rail as an arm's-length public sector body in 2014, we continue to manage Britain's railway infrastructure within our regulatory frameworks. As a public sector body, we are committed to delivering value to customers and taxpayers.

We have one of the safest and fastest-growing railways in Europe. The number of passenger journeys in Wales is at the highest point in modern times with over 30m journeys in 2015/16 - double the number travelling less than 20 years ago.

At the same time, over a half of Europe's most congested infrastructure is found in Britain and Network Rail is responding by delivering our railway upgrade plan. Some recent examples include the £300 million Cardiff Area Signalling Renewal project, the upgrade of the Severn Tunnel as part of the electrification of the South Wales mainline, and the resignalling of the North Wales coast line currently underway.

Network Rail is a national business with devolved Routes running the railway day to day for the benefit of passengers and communities. The Wales Route was established in 2011 and is accountable for the safety, punctuality, operation, maintenance, renewal and improvement of the network. The devolved structure of the business in Wales means that Network Rail is prepared for further devolution of rail powers from Westminster to Cardiff, and we indicated our readiness in our evidence to the Silk Commission.

Our principal stakeholders are the Department for Transport, the Welsh Government and Transport for Wales, and our key customers are the Train and Freight Operators and the passengers and industries they serve. The Wales Route employs over 1,500 staff directly with thousands more skilled people employed through our local, regional and national supply chain. Across the Wales Route there are 246 stations, 1,545 track miles, 1150 level crossings and over 2,920 bridges.

Network Rail recognises the clear link between improving railway services for passengers and growing the economy. The railway will need further investment in order to modernise services and stations so that it is fit for the future. We welcome the Welsh Government's ambitious proposals to invest in better services for passengers and the economy.

The Welsh Government owns the business case for the new rail service and the Metro. As custodian of the national rail network, Network Rail is supporting Welsh Government to understand the impact of the proposed rail service, as passengers and markets cross geographic and political boundaries.

As a public sector body, Network Rail wants to make sure the proposals are of value to all passengers and there is a benefit to taxpayers, as passengers elsewhere in the UK should be no worse off in terms of connectivity or cost of tickets. This is critically important because as System Operator for Britain's railway, Network Rail must make sure that all of the plans and proposals fit together in the context of planning a reliable timetable that allows for journeys across Great Britain. The System Operator function is the glue that bonds the national timetable together.

Wales Route Study: dealing with growth across the route

Network Rail has a licence condition to forecast demand growth for the rail market (both passenger and freight), and present options to accommodate that growth for governments and other funders. Our Wales Route Study covers much of the geography of the new rail service, and was published in March 2016.

In that document, we showed that the route had experienced a 46% increase in passengers since 2003, and we predict an increase in rail commuting to the Cardiff city region of 68% by 2023 and 144% by 2043. In the long term market major growth is also expected from South Wales to London, from North Wales to the English Midlands and the English North West, and from the Cambrian routes into the West Midlands.

Network Rail has set out a number of solutions to meet this growing demand for rail travel and these are set out as Choices for Funders. We provided evidence to a previous Committee Enquiry about these and a summary of some of the Choices for Funders follows:

- To introduce longer trains or more frequent services on the Valley Lines;
- Upgrade the relief lines between Severn Tunnel Junction and Cardiff;
- Redevelop Cardiff Central station to improve capacity and experience;
- Lengthen selected trains on the Cardiff to Manchester route;
- Improve speeds and train intervals on the North Wales Coast line;
- Improve frequencies of trains from Wrexham;
- Continuation of hourly services on the Cambrian line.

Other recommendations were made for funders, and more detail can be found in the document which is available via the Network Rail website

Network Rail's aspirations for the new rail service

Network Rail has a number of aspirations for the new rail service, both tactical and strategic. They include (but are not limited to):

- Deepening collaboration between Network Rail and the ODP so that both organisations are driven to put passengers first;
- Aligning performance and punctuality incentives of both Network Rail and the ODP;
- Bringing Network Rail and ODP teams together to improve communication;
- Commitment to reliable timetables and joined up planning processes;
- Provision digital railway capability across the system, including rolling stock;
- Fitment of on-train infrastructure monitoring equipment;
- Preventing the uncontrolled discharge of effluent onto the railway from the toilets on older trains, improving station environments and our workers' welfare.

Network Rail believes the new rail service provides a great opportunity for the infrastructure provider and the train operator to work more collaboratively in order to improve the public transport offer to passengers in Wales and the English borders. We have spoken with bidders about the potential for deepening our mutual incentives through the duration of the rail service grant to better align both partners in delivering for customers.

In the opportunities presented by Welsh Government's procurement approach we continue to work with both bidders and Transport for Wales to progress these aspirations, many of which require integration with a rolling stock strategy.

Network Rail's assistance in the procurement of an Operator & Development Partner (ODP)

Welsh Government is procuring an ODP to provide passenger service throughout the Wales & Borders network, as well as propose infrastructure changes on the Core Valley Lines and potentially operate those routes as an Infrastructure Manager for Welsh Government.

Network Rail is assisting the procurement through the following activities:

- Providing information to bidders directly into the procurement data room and through the Clarification Question process managed by Transport for Wales;
- Meeting directly with bidders in Competitive Dialogue sessions overseen by Transport for Wales, helping bidders develop their proposals through meaningful exchanges;
- Assisting Transport for Wales in developing proposals to further devolve management of the Core Valley Lines (as below).

It should be noted that this is a live procurement exercise, and at the time of writing Network Rail has been given neither outline nor detail of what the bidders are proposing.

This is a novel procurement, both in terms of programme and award, which provides Welsh Government a vehicle to enable transformation of the Core Valley Lines. The procurement programme is driven by two determining factors: the expiry of the current franchise (October 2018) and the bringing into service of Core Valley Lines service enhancements to meet European Funding deadlines (2022/2023). Challenges also exist in the wider rail service geography, including the introduction of new rolling stock accessible to people of reduced mobility (2020 unless deferred).

Network Rail's view is that the procurement timeline is both understandable and very challenging, particularly in relation to the delivery of interventions in the Core Valley Lines. Wherever possible, Network Rail is planning its own activities to facilitate Welsh Government's programme.

Further devolution of the Core Valley Lines

Since January 2016, Network Rail and Welsh Government have in place a Memorandum of Understanding regarding the parties' aspirations to further devolve parts of the Welsh rail network (the 'Core Valley Lines' from Cardiff Bay to Cardiff Queen Street and all points North thereof – see Figure 1 below). Our main relationship in delivering this further devolution has been with Transport for Wales.

Network Rail will support Welsh Government's aspirations provided there is no net adverse impact on Network Rail's business, and that the programme demonstrates a positive whole-industry business case. Network Rail has made further in-principle commitments for the comfort of Bidders in the procurement exercise, to the extent that it will facilitate a wide variety of outcomes including:

- the retention of the Core Valley Lines as part of Network Rail's infrastructure;
- the divestment of the Core Valley Lines to Welsh Government;
- the amendment of Network Rail infrastructure to facilitate interconnected services on a different pattern to present;
- the complete segregation of the Core Valley Lines and facilitation of the impact on Network Rail infrastructure.

Network Rail has an obligation to the Government to demonstrate the realisation of value from either transaction according to Treasury Green Book rules through the development of a Five Case Model business case. Any of the options above will need to satisfy a Network Rail business case which will be predicated on a commercial arrangement to hold Network Rail harmless from:

- inefficiencies incurred as a result of a changed geography for Wales Route;
- a reduction in our income which is not matched by a reduction in our costs;

- effects on our current or future Control Period settlements that cannot be renegotiated with the Office of Rail and Road;
- liabilities related to the Core Valley Lines, principally the value of the debt associated with the assets but also including obligations relating to the infrastructure.

Network Rail manages assets by class rather than on a line-of-route basis. Nevertheless it has tried to estimate the likely costs and benefits arising from the Core Valley Lines infrastructure (as part of the national rail network) to inform both Welsh Government and the Bidders of the scale of Network Rail's business in the Core Valley Lines.

Network Rail will assist Welsh Government in identifying the obligations currently met by Network Rail which may need to be undertaken either by the future owner of the asset, or the future Infrastructure Manager. It is helpful to think about the further devolution of the Core Valley Lines as being formed of two distinct elements:

- 1) Transfer of the Core Valley Lines' assets from the ownership and control of Network Rail to Welsh Government; and
- 2) The relinquishing of Network Rail's Infrastructure Manager role over the Core Valley Lines routes, to be assumed by the ODP.

These two elements need not occur at the same time. The infrastructure can continue to be managed by Network Rail as an agent of the new owner, Welsh Government, until such a time as the ODP is in a position to assume the responsibility of Infrastructure Manager. This might even be done on a line-by-line basis, if appropriate. Network Rail continues to offer a flexible approach to Welsh Government to mitigate risks that might arise from the challenging programme.

Wales & Cross Border services: the wider network

Among the principal challenges relating to the wider network is the delivery of the Cabinet Secretary's priority of new rolling stock within the legal timescales related to provision of access for people with reduced mobility. Unless derogations are successfully obtained, rolling stock must be compliant with statutory obligations in 2020. A rolling stock strategy within an existing franchise would normally provide for this but as the rail service commencement falls close to the compliance deadline, Welsh Government have chosen to include new (or retrofitted) stock as a condition of the grant award. Different bidders will have different proposals to meet this need, and therefore industry process relating to the introduction of new rolling stock may come under significant pressure.

Other deliverables across the rest of the network may include bidders' proposals for new infrastructure including platforms, passenger facilities and potentially system enhancements. Network Rail is open to a range of appropriate delivery routes for new infrastructure, notwithstanding its need to protect its own infrastructure and the integrity of the wider network. When we are informed of bidders' proposals we will happily give advice about possible delivery routes for such work.

Programme and risk

Network Rail anticipates two challenges in Welsh Government's procurement programme, particularly in relation to the Core Valley Lines elements:

- 1) Scale of commercial transactions

The accurate description of the Core Valley Lines and their conveyance from Network Rail to Welsh Government, as well as the transfer of the Infrastructure Manager business to the successful ODP, is a large and complex transaction. Due diligence and final terms for both will not be complete prior to the award of the rail service grant.

2) Technological outcomes

The potential creation of a separate network with interconnecting services – if this is procured by Welsh Government – will introduce novel interfaces to the Cardiff area, potentially with new technologies and new rail vehicles. Network Rail will facilitate this to the greatest extent possible while maintaining the integrity of our infrastructure and the safety of the network.

Summary of Network Rail's support for Welsh Government

- 1) Provision of options for funders in the 2016 Wales Route Study, creating the case for investment and change;
- 2) Clear statements of intent to government and the rail industry with our Memorandum of Understanding and In-Principle Commitment;
- 3) Support for bidders at both Outline Solutions and Competitive Dialogue phases of procurement, including direct meetings and provision of information;
- 4) Provision of novel and detailed information far in excess of classic refranchising;
- 5) Preparing with Transport for Wales a joint programme for procurement and delivery;
- 6) Drafting and agreement of a joint commercial plan relating to regulatory, financial and commercial changes related to the Core Valley Lines;
- 7) Preparation of Network Rail's business for future changes, and the recruitment of staff to facilitate the transition.

Figure 1: Core Valley Lines



Cynulliad Cenedlaethol Cymru / National Assembly for Wales

Pwyllgor yr Economi, Seilwaith a Sgiliau/ Economy, Infrastructure and Skills Committee

Masnachfaint Rheilffyrdd a chyflwyno Metro / Rail Franchise and the Metro

Ymateb gan gydbwyllgorau sy'n cynrychioli Gorsafoedd Magwyr, Cyffordd Twannel Hafren, Cil-y-coed, Cas-gwent a Lydney / Evidence from Joint committee representing Magor, Severn Tunnel Junction, Caldicot, Chepstow and Lydney Stations

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- 1. Introduction and aim**
- 2. Minimum criteria sought**
- 3. Key Benefits to Franchisee**
- 4. Profile of Geographic area**
- 5. Rail use**
- 6. Station-by-station features and benefits**
- 7. Appendices**

Introduction and aims

- On 3rd February a meeting was held to consider the future of the Wales & Border Rail Franchise, Cardiff Metro and public transport in a geographic area covering:
 - South East Monmouthshire, taking in the towns of Magor, Caldicot and Chepstow, and
 - Lydney and the Forest of Dean area of Gloucestershire

- Those present included Westminster politicians or their representatives, a member of the National Assembly of Wales, local authority representatives from South West Gloucestershire (including the Forest of Dean) and Monmouthshire. Also present were academics and others representing National and local rail interests.

- The intention of the meeting was to gather information that would help in the formulation of a presentation to:
 - The Welsh Government
 - Transport for Wales
 - The bidders for the Wales & Borders rail franchise
 - The Cardiff Metro planners

- We aim to help ensure that local public transport grows in use, that it is effective, meets the needs of the communities it serves, and that the benefits to providers are maximised.

- All that follows in this document aims to provide comprehensive and accurate information. It's constructed to provide facts and figures useful in helping to decide what public transport is necessary for the area

Minimum Criteria Sought

- **Local Economy & infrastructure** – The new rail franchise, along with all future passenger and freight transport providers, must not only meet the needs of the General Public, but also those of Business, Commerce, Health, Education and Leisure (including sport). Their delivery should also reflect the socio-economic and logistical requirements of the area.
- **Frequency of rail and bus passenger service** – Customers expect to see, at a minimum, a half hourly service on all passenger routes between the hours of 5am and 11pm (weekdays and Saturdays) and 7am and 10pm (Sundays).
- **Capacity** – All time-tabled services should be able to accommodate 100% of passengers even at the most intense of peak-times. We recognise that standing may be necessary on occasions but no passengers should ever be left at a station or bus stop due to capacity being reached
- **Reliability** – Services should never be cancelled due to lack of rolling stock, vehicle or staff unavailability.
- **Rolling Stock and Buses** – Should be consistent with the international expectations of a passenger transport system in a leading world economy. This must include an adequate number of train units and buses to meet current and future requirements, trained and skilled maintenance of those units, classes of rail unit that can be operated as a single walk-through train, and good communication systems on and off the transport units.
- **Infrastructure, such as stations and car parks** – like train units these must be consistent with international expectations including provision of adequate passenger shelter; good and clear signage, up-to-date electronic timetables displaying departure times; access for the disabled; ticket availability at the point of delivery; high standard of cleanliness; clean public toilets; and good security and safety systems including sufficient lighting and CCTV.
- **Passenger facilities** – In addition to the above full consideration needs to given to the need for cycle storage at stations and on trains and buses, the movement of luggage and its stowage both on trains, buses and at major stations; disabled passengers and their ease of movement and safety along with prams and buggies; the need for refreshments at interchange and other major stations; and Power/Wifi
- **Management** – Structured to provide well trained staff, adequate forward planning and control of finances consistent with progressive ideology. Management should also enable good communication strategies (including information and publicity) to both staff, franchised ticket providers and the general public consistent with maintaining an efficient and progressive transport system.

- **Pricing** – Customers expect a simpler and more equitable fare regime for journeys - the ticket price per mile should never vary by more than 20% between ‘routes’ for the same type of ticket and the same periods of the day.
- **Integration** – Passengers expect there to be good inter-working between train operators so that journeys that rely on connections are successful. [A measure for this needs to be defined]
 - Customers not only expect good rail and bus services within Wales, but emphasis should also be placed on rail and bus services into Wales to encourage inward business investment and skills. Ensuring the Welsh economy’s transport needs are met must be a core requirement of the new rail franchise.
- **Growth and future-proofing** – Customers expect to see the company proactively:
 - Gauging demand and acting accordingly. Evidence of such monitoring should be published and what action is being taken to accommodate growth and to mitigate potential service failures well communicated (e.g. earlier than originally planned replacement of rolling stock, pressing for modified or new stations)
 - Influencing the Metro plans for the future benefit of customers (and the environment), i.e. developing the ‘integration’ theme to all forms of public transport
- **New stations**- Support the development of new stations in line with needs of communities and local authorities strategic transport plans, i.e. Magor & Undy Walkway Station.
- **Service Disruptions: planned and unplanned**-ensure such events are managed effectively, working in co-operation with other train operating companies where possible, and with lessons learned from past successes and failures, such as the recent six week closure of the Severn Tunnel.
- **Public consultation** – In the interest of meeting the needs of the public we will encourage ‘User Group’ participation in the operation of all public transport, and the use of Market Research to determine customer needs and operational failings.

Key Benefits to the Franchisee, Transport for Wales and Welsh Government

Aims –

1. To have the Wales and Borders franchise recognised as the best Train Operating Company in the United Kingdom. (Pride in our public transport is to be encouraged)
2. To have shared goals with local interest groups, public and private, in the interest of Public Transport efficiency, effectiveness and value for money.

Uniqueness –

To move from the current service levels where the current disparity - when compared with other routes from Cardiff – includes:

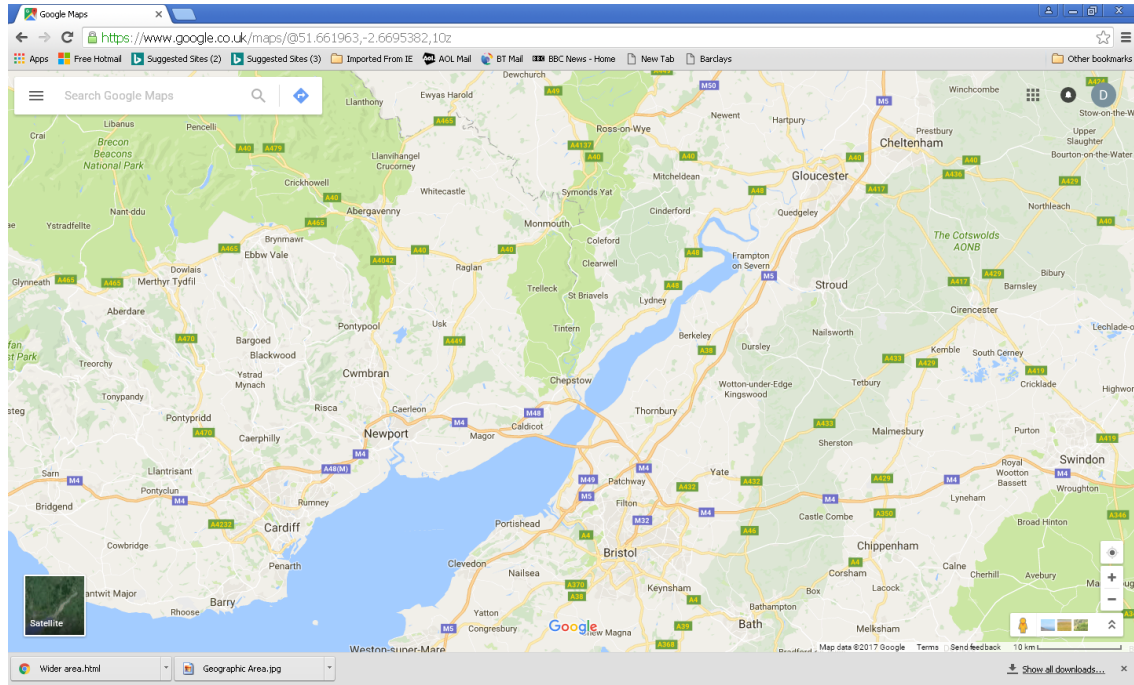
- Continuing growth of passengers (above UK average)
- Timetable delivery and journey times,
- Fare pricing,
- Access and interchange with public and private transport, including safe walking and cycling
- Local reporting (as with current ‘Adopt a station.’)
- Support the development of new stations in line with the needs of communities and given local authorities strategic transport plans EG. Magor & Undy Walkway Station.
- Service Disruption, planned and unplanned, can be managed better with local user input. For example the recent six week closure of Severn Tunnel..

What’s in it for you –

Become known as deliverers of ‘best practice.’ This can be achieved by working closely with local Passenger Groups and local authorities, thereby ensuring you meet local passenger needs, and efficiencies in your own operation.

Profile of the geographic area

The area being discussed covers the towns of Magor, Caldicot, Chepstow and Lydney including the station at Severn Tunnel Junction.



Profile for Forest of Dean

Population: 68,100 (Estimate at 2015) [District Council area is approx. 82,000]

Age profile: 26.6% are age 65+

Unemployment: 2.9% (England – 5.6%)

Socio-Economic: 23.3% of employed adults earn less than £20,000pa

Education: 3.9% have no qualification (England – 0.1%)

Source: Sport England 2015

Lydney

Population of:

- 8,776 at official census on 27.03.2011
- 9,035 at 8.11.2016 (Source: Oxford Consultants for Social Inclusion (OCSI))

Profile:

- 19% of Children living in Poverty (Compatible with English National average)
- Lower crime rate than across England
- Higher than average (England) long-term illness among residents (20% v 18%)
- 27% of residents have no qualifications (22% across England)
- Car ownership is higher (81%) than across England (74%)

(Source: OCSI)

- “There is a high level of commuting out from Lydney, with people working in areas such as Gloucester, Chepstow and Bristol.” (Source: Lydney Development Plan 2015)

- Gateway to tourism with facilities planned for Lydney Docks see: <http://www.fdean.gov.uk/media/1965/lydney-cct-economic-plan-2016-v2.pdf>; also Dean Forest Railway with access to the Forest of Dean, etc.

Transport – Planning Ahead (as stated in the ‘Forest of Dean Council’s Core Strategy Policy’)

- In the next 13 years Lydney will increase by 1,900 homes
- The Forest of Dean Council’s Transport aims include the creation of a link between the centre of Town and the bypass, thus improving the link to the station.
- Pedestrian & Cycle access – Provide improved pedestrian & cycle access between key areas such as residential areas, shops, schools & railway station.
- Rail Services: Increase the number of trains stopping at Lydney along with upgraded parking, passenger waiting facilities and ticket purchasing. Provide better access for pedestrians to the west-bound platform.
- Bus Services – Increase bus services to railway station; integrate times to coincide with arrival/departure of train services and improving the bus terminus. (Note:

Profile for South East Monmouthshire:

House Ownership:	39.9% (Wales – 35.4%)
Age profile:	28.4% over age 60 (Wales – 25.0%), Mean average age: 40.6%
Benefits claimants:	12% on all benefits, 2.2% on Jobseekers (Wales – 17.4% on all benefits, 3.6% on Jobseekers)
Socio-economic groups:	56.8% - ABC1 (Wales – 47.2%), 21.7% - DE (Wales – 29.7%)
Education:	20.7% have no qualifications (Wales - 25.9%)

Sources: Office for National Statistics & Department for Work & Pensions.

Chepstow

Population of: 12,350 at official census on 27.03.2011

Chepstow Urban area had a population of 16, 254 in June 2015 (Source: www.CityPopulation.DE)

Key issues:

Housing:

- Currently have applications for over 900 new homes yet are failing to meet the quotas imposed by Welsh Government.
- Additional housing (approx 110 homes) is planned in the Sedbury/Tutshill are of Gloucestershire (an NP26 (Chepstow) postcode),
- The MOD has recently announced the closure of Beachley Barracks (1st Rifles Regiment) and a question mark hangs over the future of this area

Roads:

- A48 Trunk road through Chepstow suffers from among the worst for air quality in Europe, due mainly to vehicle emissions.
- In addition, A48 vehicle congestion is seriously bad from both ends of the route through Chepstow and into Gloucestershire at Tutshill. The alternative will be to construct a new by-pass which Welsh Government are reluctant to fund. Lowering of the Severn Crossing tolls may add to the problem.
- There is inadequate Car Parking in the Town and at the station.

Key Industries:

Tourism:

- Wye Valley & Forest of Dean & leisure facilities
- Chepstow Races
- Events at Chepstow Races (eg. Tom Jones concert)
- Chepstow Walking Festival
- Chepstow Castle and walled Roman Town .
- Warehousing and other service industries.

Other:

- A large proportion of the population commute to Bristol and Cardiff partly due to good motorway connections
- A Bus Station is located at the top of the town, about eight to ten minutes walk from the station.
 - On Horse Racing Days at Chepstow Racecourse, there is a bus from the station to the course.
 - National Express operate a two hourly coach to Heathrow and Gatwick, and to London (Victoria)
 - Local buses service Chepstow Hospital, and outlying suburbs including the Army Base at Bulwark.
 - There are also regular buses to Cribbs Causeway (Bristol's main out-of-town Shopping Mall) and Bristol Bus Station; to Newport via the A48 villages; to Newport via Caldicot; and an Express bus to Newport via M48)

Caldicot

Population of: 11,200 at official census on 27.03.2011. (Includes Portskewett)

Nearby villages of Rogiet – 1, 813 and Caerwent – 1,201 at official census on 27.03.2011
Since the census a new housing development in Caerwent is estimated to have raised that village's population to approximately 1,500 (Source: www.citypopulation.de)

Industry

- Tourism with Caldicot Castle and nearby Black Rock and Dewstow Gardens
- Light engineering and warehousing

Deprivation:

- Two Council Wards on the outer side of Caldicot have a high number of Benefits Claimants than most in Wales, these are West End and Dewstow Wards.
- Town Centre has a lot of empty shops: this area is being considered for re-development

- Housing list has more than 700 applications (Source: Monmouthshire Housing)

Housing:

- Over 1,000 houses are planned, mainly in the villages of Caldicot, Portskewett, Sudbrook, Rogiet and Caerwent
 - The largest development will be on the site of the former Paper Mill in Sudbrook,
 - The second largest is on the outskirts of Portskewett
- (Source: Development Plan 2014)

Medical:

- The Gray Hill Surgery (including its satellite in Magor) is the third largest practice in Wales with 20,000 registered patients

Bus Service:

- Poor bus service. Bus to Newport City Centre can take nearly 90 minutes. Students wanting to get to Nash College (College for FTE) leave centre of Caldicot at 07:30 to arrive at 08.31am. No direct bus to Bristol or Cardiff.
- Bus to Spytty Retail Park, Newport, has three hour gaps.
- Limited bus service to local villages of Caerwent and Sudbrook.
- Alternative bus service provided by the Grass Routes Service (Dial and Ride)

Magor with Undy

Population of Magor with Undy – 6,140 at official census on 27.03.2011

Housing:

- 631 homes are planned for Undy and Magor, 200 on the Rockfield Farm Estate in Undy (Source: Development Plan 2014)

M4 Motorway:

- Current plans to build the M4 around Newport are quite controversial in this community. Under the plan a new on/off ramp and motorway services area are planned for the eastern side of Undy (about a mile and a half from Severn Tunnel Junction Station.)

Education:

- There is no higher education available in the community

Bus Service

Similar to Caldicot, with no connections to local villages.
Weekday 07:55 bus to Newport takes an hour

NB Over next ten years a new village at **Llanwern** is expected to be built and house around 10,000; this is likely to impact on the village of Magor, especially if Magor Walkway Station goes ahead

Rail use

ORR Station stats for 2015/16 compared with ten years ago

(Expressed to the nearest 100)

Entries and Exits

Station	2005/06	2015/16	Growth (Decline) %
Caldicot	60.3	96.9	60.7
Chepstow	120.5	246.7	104.7
Lydney	77.0	185.2	140.5
Severn Tunnel Junction	119.7	249.2	108.1
Newport (Gwent)	1,906.0	2,560.9	34.4

Interchange

Station	2005/06	2015/16	Growth (Decline) %
Severn Tunnel Junction	9.0	40.1	345.5
Newport (Gwent)	413.1	590.2	42.8

Source: ORR Passenger Rail Usage

Key Timetable gaps of more than one hour*

(Monday to Friday, ATW and CrossCountry Rail)

Heading north (toward Cheltenham Spa)

Severn Tunnel Junction	Caldicot	Chepstow	Lydney
07.38 & 09.37	07.40 & 09.39	07.49 & 9.18	08.25 & 09.57
10.38 & 12.39	10.40 & 12.42	10.49 & 12.18	10.58 & 11.25
13.37 & 15.37	13.40 & 15.41	13.49 & 15.18	11.25 & 13.00
18.35 & 20.15	18.37 & 20.18	20.26 & 21.49	14.25 & 15.59
20.15 & 21.38	20.18 & 21.40	21.49 & 00.10	18.55 & 20.35
21.38 & 23.58	21.40 & 00.01		20.35 & 21.58
			21.58 & 00.19

* Allowing for a few minutes difference

Note: CrossCountry Trains' additional stops at Chepstow and Lydney have helped reduce some gaps in service.

Heading South (toward Cardiff)

Severn Tunnel Junction	Caldicot	Chepstow	Lydney

Junction*			
	09.35 & 11.35	09.51 & 11.27	09.17 & 10.44
	12.36 & 14.35	12.51 & 14.27	12.18 & 13.44
	15.35 & 17.35	20.27 & 21.49	15.07 & 16.44
	20.35 & 21.58	21.49 & 23.42	20.17 & 21.40
	21.58 & 23.51		21.40 & 23.33

* Also has GWR service to Cardiff so not included

Early morning peak services at Lydney, Chepstow and Caldicot rely on Cross Country Trains. For instance, there is no ATW service, Monday to Friday at Chepstow between 06.19 and 08.27 yet there are Cross Country trains at 06.42 and 07.29

Saturday services are not dissimilar to the above

Sunday services (actual) toward Cheltenham Spa

Severn Tunnel Junction*	Caldicot	Chepstow	Lydney
	11.03	11.12	11.21
	12.58	13.07	13.16
	15.00	15.09	15.18
	17.00	17.09	17.18
	18.59	19.08	19.17
	20.59	21.08	21.17
	22.59	23.08	23.17

* Also has GWR service to Cardiff so not included

Sunday services (actual) toward Cardiff

Severn Tunnel Junction*	Caldicot	Chepstow	Lydney
	11.25	11.17	11.07
	13.09	13.01	12.51
	15.10	15.02	14.52
	17.13	17.07	16.56
	19.25	17.17	19.07
	21.10	21.02	20.52
	23.09	23.02	22.52

* Also has GWR service to Cardiff so not included

Interchanging to/from Bristol & Bath from Caldicot, Lydney and Chepstow

Interchange at Severn Tunnel Junction

For those wishing to commute from Lydney, Chepstow and Caldicot to Bristol there is currently a poor connection at both Severn Tunnel Junction, particularly in the evenings.

The following table sets out to describe the interchange timings in the late afternoon/early evening peaks.

If the Cross Country Trains departures from Newport at 17.00 and 18.00, could start a little later and stop at both Severn Tunnel Junction (STJ), Chepstow and Lydney, the situation would be much improved. Currently the Newport arrival time from Bristol and CCT departure times from Newport are near impossible for interchange purposes.

Travellers to Caldicot have the option of the Grass Routes Bus from Severn Tunnel Junction to their homes

The alternative rail arrangement would be a half-hour Wales and Border franchised service every half hour at peak times, and ideally reducing the interchange wait at STJ to a maximum of fifteen minutes.

Bristol Temple Meads (BTM) to Chepstow & Lydney

BTM Departure	16.25	16.54	17.21	17.54
STJ Arrival	16.48	17.15	17.46	18.14
STJ Depart toward Cheltenham Spa		17.38	-	18.35
Caldicot		17.41	-	18.37
Chepstow		17.50	18.18	18.46
Lydney		17.59	-	18.55
Newport arrival from BTM	17.02	17.27	17.58	18.25
Newport departure to Cheltenham Spa	17.00 or 17.28	17.28	18.00	18.24
Possible connections (if they all stopped!)	(17.00 – CCT) 17.28 - ATW	17.28 - ATW	(18.00 – CCT)	18.24 - ATW

CCT – Cross Country Trains ATW – Arriva Trains Wales

The introduction by GWR of new trains, and perhaps services as a result of the electrification of the line from London to Cardiff, may present new opportunities. We continue to work with GWR in the prospect of London bound trains stopping at Severn Tunnel Junction.

Other points:

- The Cardiff to Cheltenham line produced the highest user growth of any Welsh line emanating from Cardiff:

Station	No. Timetabled Trains /Day (Weekdays)	% Growth in Passenger use	Cost of Anytime Day Return to Cardiff
Chepstow	24	131.3	£12.40
Merthyr Tydfil	59	39.0	£7.70
Aberdare	57	31.3	£7.70
Treherbert	61	13.0	£7.70
Rhymney	36	39.7	£7.70
Maesteg	32	49.6	£7.70
Ebbw Vale Parkway	34	N/A	£7.70

As produced by RailFuture Cymru in September 2014

It should also be noted that any Welsh Bus pass can be used on the Valley network, including Maesteg and Ebbw Vale, and giving a third discount off rail fares. There is also the 60 + discount Valley's Card which gives 50% off 'Seniors' and a Valley's Student Railcard which gives 26% off all-day fares, and 10% off Season Tickets for students!

How do Passengers get to the stations?

Basis: STAG/BT4C Research carried out in 2010

	Station Car (Park)	Kiss & Drop	Cycle	Bus or Taxi	Walk
Caldicot	7%	16%	10%	1%	62%
Chepstow	24%	18%	4%	2%	52%
Severn Tunnel Junction	37%	28%	5%	1%	19%
Lydney	44%	20%	8%	3%	22%

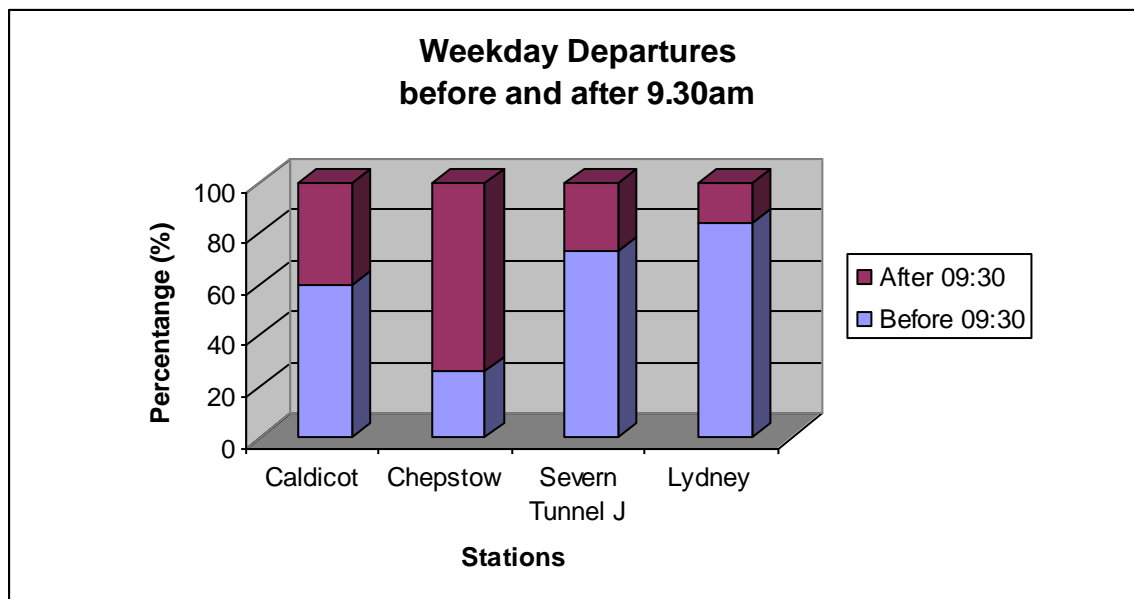
Where do local rail users go?

Basis: STAG/BT4C Research carried out in 2010

Caldicot	34% - Cardiff 33% - Newport 15% - Chepstow & 6% - Bristol stations
Chepstow	39% - Cardiff 14% - Newport 8% - Gloucester, 7% - Lydney 6% - Cheltenham & 5% - London
Severn Tunnel Junction	61% - Bristol 24% - Cardiff 4% each to Bath and Newport
Lydney	35% - Gloucester 20% - Cheltenham 19% - Cardiff & 10% - Chepstow

Percentage of Station Departures before/after 9.30am

Basis: STAG/BT4C Research carried out in 2010



- There is evidence from local Estate Agents that eighty per cent of homes being bought in South Monmouthshire are coming from the Bristol area (see: <http://www.bbc.co.uk/news/uk-wales-south-east-wales-38466651>) This may in part be due to the Severn Crossing Toll reductions due in 2018. We believe this will lead to more demand for rail travel to Bristol
- Bristol has the highest economic growth and, along with Aberdeen has the highest growth in productivity, of any city outside of London. This growth could be good for SE Wales were we to attract business across the border. To do this good rail connections are vital. (Source: Office for National Statistics)
- Cardiff, often the second most popular destination from the stations on this route, is among the fastest growing cities in the UK. The City Outlook 2015 report shows that Cardiff is in the top 10 of 64 cities for population growth and new homes. Cardiff is one of only two cities outside the south of England to feature in the top 10 for population growth
- Peak time trains into both Bristol and Cardiff are suffering from overcrowding, which continues to worsen as train use increases.
- Inadequate number of carriages when key events are taking place such as Rugby Internationals in Cardiff and Gloucester; Concerts and International Soccer in Cardiff.

Station-by-station features and benefits

Lydney Station

- Current station car park has 169 spaces, four of which are disabled, plus a Taxi Rank. There is no charge.
- Ticket machine is often broken and doesn't accept cash payments. The ticket machine is also some way from the Cardiff bound platform.
- Waiting rooms are old (brick built) and smelly (often being used as urinals). Some passengers feel insecure waiting inside them.
- CCTV security present at the station
- Access to Cardiff bound trains is over an automatic level crossing which often closes sooner than regular passengers expect. This raises security issues as some passengers have been known to 'jump the barrier.' Some have asked for the tunnel that goes under the line to be fully restored to public use.
- Footpath access to Dean Forest Railway (DFR) station (plans exist to extend DFR to Cinderford)
- Lack of a public phone on the station premise
- No cycle storage facilities
- No bus service to the station, however 'Dial-a-Ride' is available

Market Research was carried out at Lydney Station on Wednesday 15 September, 2010. The questionnaires were handed out between 6.00am and 9.00pm. Of the 500 passengers who joined and/or left trains at Lydney that day there were 166 responses. The research was carried out by Rail Lobbyists from Lydney, Chepstow and Severn Tunnel Junction. Further details are available on request.

The summary of results:

- All the people using Lydney station lived either in the Forest of Dean or South West Gloucestershire, with 38 percent coming from Lydney itself
- 49% of rail travellers from this station are using it daily and 69% more than once a week
- Gloucester (35%), Cheltenham (20%), Cardiff (19%), and Chepstow (10%) were the most popular destinations
- Twenty two percent of all Lydney passengers had to make a connection before reaching their destination. Cheltenham, Newport, Gloucester and Severn Tunnel were the most popular places for changing trains.
- Forty four percent of users parked their car at the station (or nearby). Walking (22%) was the next most popular means of travelling to the station.
- The lack of station car parking was the single biggest issue raised about the station (28% of those who commented (44 persons)). The next biggest issue was the lack of shelter and seating on both platforms.
- When asked to comment about the trains sixty four percent mentioned the lack of a regular hourly service. Trains from Gloucester to Lydney at around 16.00hrs, from Lydney to Gloucester between 07.58 and 09.57, and from Cardiff to Lydney either between 16.05 and 17.12, or between 17.12 and 18.12. This last request was more to do with overcrowding than anything else!
- By far the biggest issue outside of the station and trains is the lack of bus service: some even mentioned that there were a thousand people working on the Industrial Estate to which there is no public transport.

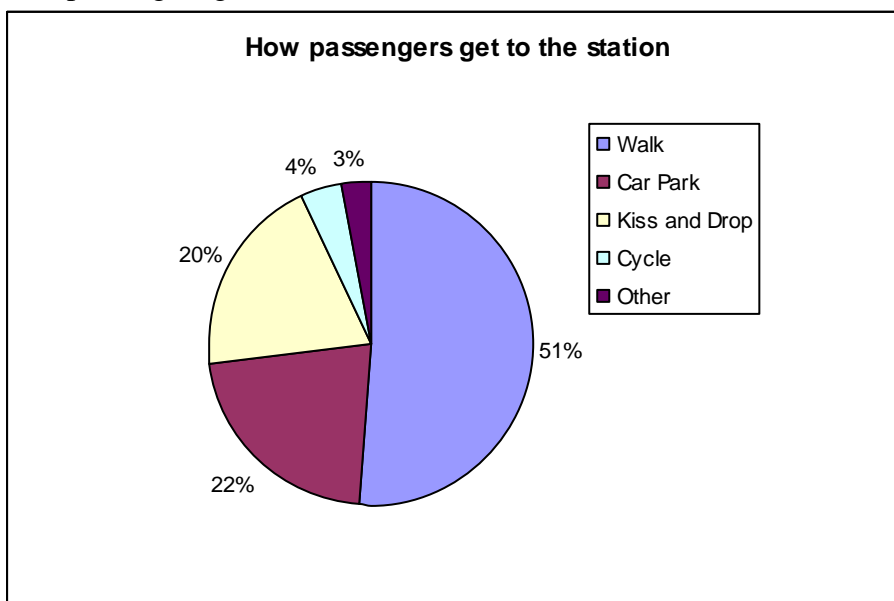
Chepstow Station

- Current Station Car Park (County Council owned) only takes around 55 cars and is full by 08.30. Many using it work in the town, and use it because unlike some alternative Town Centre parking, it's currently free! From March it will only be free to rail users.
- Station forecourt allows for short-term parking for about twelve cars: but this is badly managed. In addition there is a bus bay and a small taxi rank.
- Station is about 10 to 15 minutes from the Bus Station, although a couple of buses do pick up or start here, or nearby at the Tesco Store. During (Horse) Racing Days a special bus is used to take race-goers
- Ticket Office operates six days a week. Open weekdays from 6.00am to 4.00pm and to 7.00pm on Fridays. Saturday opening is from 6.00am to 1.30pm
- There is no 'Access for All' passenger bridge: passengers needing to access the down platform to Cardiff would need to travel to Lydney for boarding trains to Cardiff, or to Caldicot for alighting the train.
- No cycle storage facilities
- Refreshments available in the Station Café from early morning until about 4.00pm
- No toilet facilities
- Passenger shelter on the down platform to Cardiff is inadequate, on wet days passengers use the footbridge for shelter
- Land next to the station, is expected to be used for building approx. 350 homes. Local rail lobbyists expect consideration be given for station parking for 200 cars on this site.

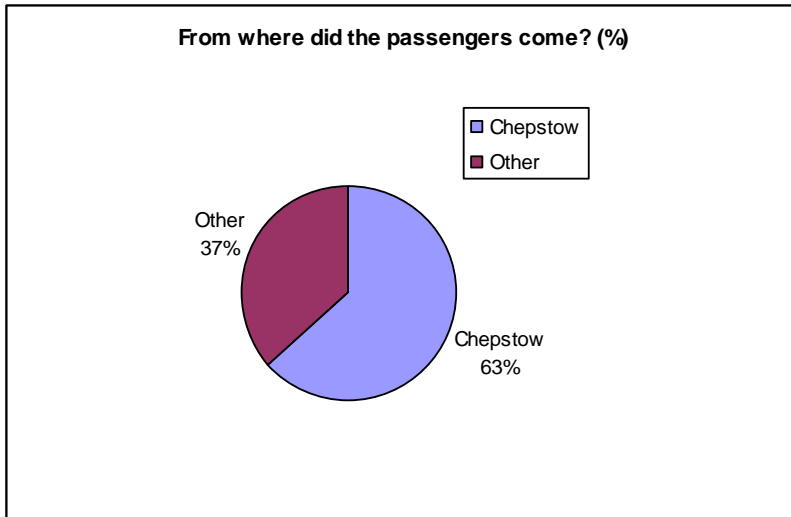
Market Research was carried out at Chepstow Station on Monday 5 July, 2010, between 10.00am and 4.00pm. Questionnaires were handed out and completed by 97 respondents. The research was carried out by Better Trains for Chepstow. Further details are available on request.

The key results were as follows:

How passengers got to the station:

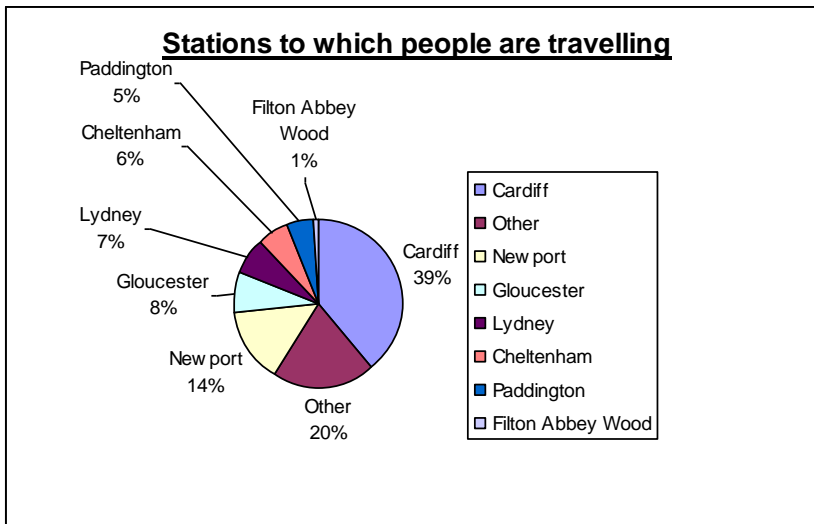


Where do passengers live?



NB. The 'Other' was mainly nearby villages or places in the Wye Valley

Stations to which respondents are travelling



Caldicot Station

- About fifteen minutes walk from the Town Centre
- No Station Car Park, and limited parking on near-by streets. Kiss-and-drop is also not easy.
- Infrequent Bus service to/from bus stop nearest the station
- No ticket office or ticket machine.
- There is access through a tunnel and ramps onto the platform for disabled access.
- No toilet facilities
- No cycle storage
- No phone box at the station
- Passenger shelters are small and not adequate on the down platform to Cardiff during peak times.
- Land near the station, is expected to be used for building approx. 350 homes (Garth Allen Drive). Local rail lobbyists expect consideration be given for station parking on this site.
- Badly maintained ash path link to Severn Tunnel Station (approx one mile distant). Section 106 monies could be used to improve this, however path goes through Network Rail land.

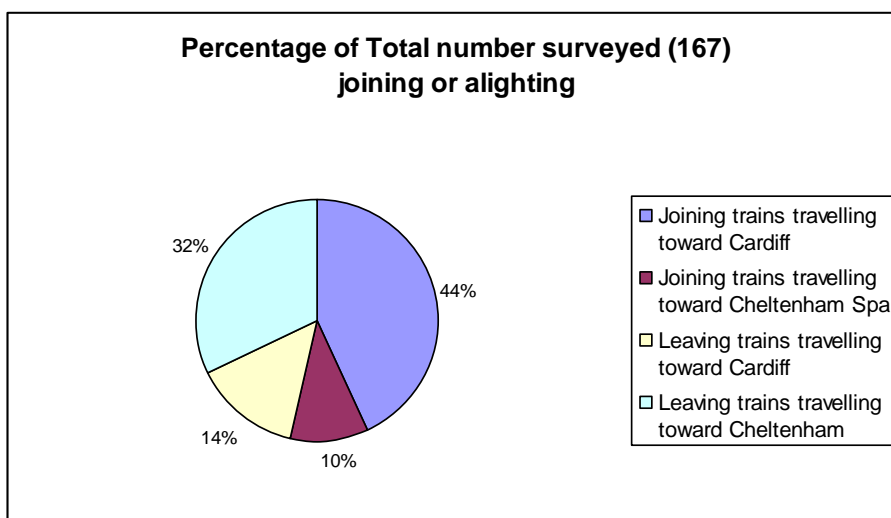
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The following information results from **Market Research** carried out at Caldicot Station on Tuesday 2 November, 2010. The questionnaires were handed out between 06.10 and 11.45hrs, and between 15.15 and 19.00hrs.

During the course of the day we interviewed 81 passengers and saw 167 either join and/or leave the train. The research was carried out by STAG (The Severn Tunnel Action Group). Further details are available on request.

The summary of results were:

- Most local people using Caldicot Halt live within a mile and a half of the station
- Over eighty percent of rail travellers from this station are using it more than once a week
- Cardiff, Newport and Chepstow are the three most popular destinations
- Most regular travellers either walk to the station, or are dropped off in a car.



- The lack of Car Parking in the area is an issue particularly among:
- The travellers themselves who either use cars to reach the station, or those who would prefer to use cars,
- Residents in nearby streets and
- The management of the Severn View Club. They have recently prevented commuters and others from using its car park during the day.
- A combination of the cost of parking at Severn Tunnel Junction (a mile away), and the lack of parking space there, is reputed to have resulted in more people parking on the local streets around Caldicot Halt station.
- Lack of cycle storage at the station could act as a deterrent to otherwise “would be” cyclists. All those using cycles to get to the station are taking them onward by train.
- Most regular rail travellers travelling to the station by train are commuters working in the Castle Gate Business Park, Portskewett. These travel onward by bike or on foot.
- Lack of an hourly service, particularly at peak times, is frustrating to regular passengers; and a better Sunday Service with trains toward Cardiff at around 9.00am, are eagerly sought by those who work on Sundays or want a day out.
- Signage /information at and around the station need improving.
- No phone box at the station

Severn Tunnel Junction Station

- Lies to the south of the Village of Rogiet
- Over past five years has enjoyed infrastructure improvements on the track, and with signalling. Other improvements include:
 - New platform
 - New ramped ‘Access for All’ footbridge
 - New Passenger shelters
 - New Ticket Office
 - New Cycle storage facility
 - Car park surfaced and lined
 - Additional lighting and CCTV cameras
 - Additional Car Parking provided by Welsh Government and GWR funding on adjacent Sports Field site (see note below). County Council additionally made land on the nearby Countryside Park, to the south of the line, available for parking
 - Bus service to the station (now terminated)
 - A dedicated Grass Routes service for commuters
 - Improved signage
 - Additional information boards
 - Toilet (albeit with restricted opening)
- No ticket machine when ticket office is closed
- Ticket Office only opens from 06:30 to 10.30am, Monday to Friday
- Huge growth in interchange use off Cheltenham line
- Station use was affected by the Severn Tunnel closure last August. In January this year the drop was thought to be about 14%.
- Issues were identified in Market Research survey conducted last year (see below)

Note re parking

- Current parking at the Station:
 - 105 cars paying £3.50 a day, and
 - The adjacent sports field 74 cars currently parking without charge, but in late March this is due to be charged at £2.40 a day.
- Parking is currently limited due to the Station Road traffic bridge being rebuilt.
- Formerly over seventy cars are known to have parked to the south of the line accessing it via the road bridge.
- The County Council are currently working with Welsh Government and others to build a sizeable car park on their land currently dedicated for Countryside Park use, but which the Countryside Park Authority is prepared to relinquish)

Market Research

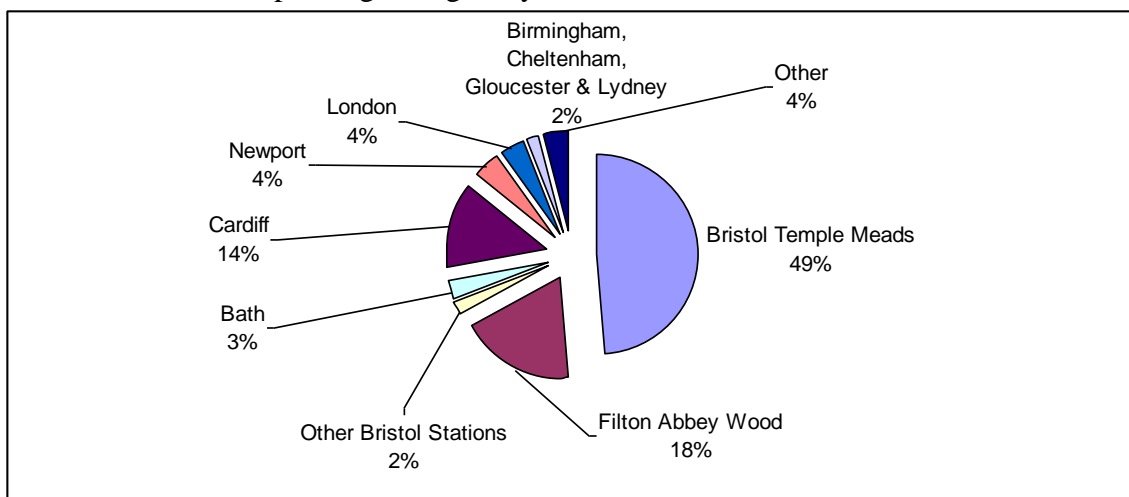
Market Research was conducted by Monmouthshire County Council, the Severn Tunnel Action Group and other supporters between 14 April and 26 May 2016.

The survey was conducted with the aid of The Survey Monkey, and with 197 written manually, and 229 completed on-line. A Footfall Study was additionally undertaken on differing weekdays during this period.

The responses led to the following main conclusions:

- Users come from a wide geographic area, with forty per cent of travellers residing outside the Magor, Undy, Rogiet and Caldicot area.
- From Monday to Friday the station is primarily used by commuters
- There are approximately 1,200 passenger movements (entries, exits and interchanges) a day (weekdays: Monday to Thursday)
- Station user growth continues at around eight per cent per annum. Twelve per cent of respondents started using the station within the past twelve months.
- Busiest time is from 6.50am to 8.00am during which period around 300 passengers catch trains
- Overcrowding of trains are the users biggest concern
- Lack of car parking spaces is suppressing use of the station, and is the second largest area of concern.
- Over 300 cars park in the various parking zones, or on residential streets. Most of these are parked by 8.00am
- Pedestrian safety is a major concern for those walking along the station entrance lane, and through the station car park. There is a call for a dedicated safe walking route. Vehicle safety in these areas is also a concern to motorists.
- Ticket Office opening hours and manning levels is subject of much detrimental comments. Clearly some passengers are unaware of their options for season ticket purchasing elsewhere, or on another day.
- Lack of passenger shelter on the platforms is a concern. Other services are seen to be lacking (toilet, catering, sufficient secure cycle storage, etc.).
- Interchange passengers living near stations on the Severn Tunnel Junction to Cheltenham line cite an inadequate train service, and poor connection times for those wishing to travel to Bristol or Bath. They also comment on the lack of a warm and secure waiting area.
- Rogiet residents voice concern about road safety, and use of residential streets for free parking.

To which stations do passengers regularly travel:



Fuller Market Research information available on request

Magor with Undy Walkway Station

A new station is currently proposed, and which could serve a local community of over 10,000 persons. It could also serve some local businesses and hotels, including those on nearby business parks.

It is intended to site the station down-line platform near the underpass close to where Elm Avenue and the B4245 Main Road. The up-line platform to be staggered next to the proposed community centre on the 'three field site.' Here, it is felt, the proposed station could be easily accessed by foot or bicycle in less than 15 minutes.

Monmouthshire County Council would like to see the Magor & Undy Walkway Station and the proposed Community Centre (Hub) projects going forward as a joint initiative.

At this time Monmouthshire CC have agreed to fund phase one of Grip 3, to the sum of £35,443 from Section 106 money, as approved by cabinet.

Grip 3 Phase 1 should be completed by the end of February with phase 2 completed by the middle of April (assuming further funding is approved).

A meeting seeking funding towards the cost of the GRIP 3 study, was held in November 2016, with Welsh Assembly Government rail officials. A decision is still awaited. Depending on full funding being approved, all three GRIP 3 phases should be completed by July 2017.

The original aim was to open the new station on St David's Day 2018, but has since been revised, in the bid to the 'New Station Fund', to 2020-21

Appendix

Wish list from Monmouthshire CC (Provided by Christian Schmidt)

- Integration between heavy rail, Cardiff Metro and local bus services – this is based on the premise that the new Wales & Borders franchisee will be partly responsible for developing Cardiff Metro
- Park+ride at key points (eg. Chepstow and Severn Tunnel Junction)
- High frequency of delivery
- An extendable Metro network allowing for population and industrial/commercial growth, and development of roads and communities. (There is an acceptance that elements of the Cardiff Metro will be for the local authority to provide)
- Integrated ticketing
- Development of new stations, including Magor Walkway Station
- At least 2 trains per hour between Cardiff and Abergavenny, at fixed intervals, calling at all stations, with Mon-Fri am arrivals before 07:00h and evening departures after 23:00h.
- At least 2 trains per hour between Cardiff and Chepstow, at fixed intervals, calling at all stations, with Mon-Fri am arrivals before 07:00h and evening departures after 23:00h. Services run by other operators within the 2 trains per hour is reasonable, however in such cases the franchise must include a requirement to run the services should they be withdrawn by the other operator.
- At least 2 trains per hour from Severn Tunnel Junction to Bristol Temple Meads, and an experimental service of at least 2 direct trains per day from Lydney and Chepstow to Bristol (outward 07:25, return 18: Bristol Temple Meads). While most South Wales to Bristol services are currently provided by GWR, we understand that the agreement with the DfT allows services to Bristol to be included in the Wales and Border franchise.
- Fares to be equalised across the franchise and based on a rate per mile. This to include Metro and other bus provision
- Sufficient rolling stock as to ensure no passenger should need to stand for more than twenty minutes, both at the start of the franchise and in fifteen years time
- Rolling stock to be of a standard conducive to that of a leading world power.
- Stations to be upgraded – e.g.:
 - Chepstow to have a DDA footbridge, toilets, waiting rooms with ticket office, access from south side, improved walking access, additional cycle parking, bus interchange, extended car parking),
 - Caldicot to have car parking, additional passenger shelters, ticket machine, more lighting and CCTV, improved communication systems,
 - Abergavenny (DDA footbridge, upgraded ticketing/waiting/toilet facilities, additional cycle parking, bus interchange, new car park), and
 - Severn Tunnel Junction (café/shop, toilets, waiting room, safer walking/cycling access, additional cycle parking, additional car parking)

Gloucestershire CCs response to Welsh Government Infrastructure Inquiry

Strategic Planning
Shire Hall
Gloucester
GL1 2TH

robert.niblett@gloucestershire.go.uk

01452 425695

13th January 2016

Dear Sir/Madam

National Assembly for Wales - Inquiry into the Priorities for the future of Welsh Rail Infrastructure

I have been made aware of the above Inquiry. On behalf of Gloucestershire County Council (GCC) I have the following officer comments to make.

GCC's main interest is the Maesteg/Cardiff to Gloucester/Cheltenham service operated by Arriva Trains Wales (ATW) and Lydney station also operated by ATW. Lydney is the only main line railway station within the Forest of Dean and as such is an important component of the area's infrastructure providing sustainable transport options for residents and visitors alike. Lydney has an allocation of approximately 1900 houses along with additional employment land up to 2026 in their Adopted Core Strategy. Consequently, investment in local rail infrastructure is essential to enable sustainable growth and provide connectivity to the wider area.

I have confined my comments to the questions below and they reflect the County's position as a neighbouring 'border' authority.

High level priorities for the development of rail infrastructure to provide the capacity and connectivity necessary to support the social and economic well-being of Wales;

Response

Electrification of the valley lines around Cardiff will improve capacity and connectivity across the city and wider area as well as improving links to other areas of Wales and England including Gloucestershire. The scheme will improve travel opportunities related to leisure and jobs both into and out of South Wales.

Development of the Cardiff Metro scheme will provide opportunities for developing services from Ebbw Vale/Newport to Chepstow/Lydney which would improve connectivity for residents and visitors of the Forest of Dean alike.

Signaling renewals/enhancements in the Newport and Cardiff areas will increase capacity on the network.

A significant improvement for passengers in the Forest of Dean would be the opportunity to travel from Lydney direct to Bristol and surrounding area via the Severn Tunnel. This specific issue is raised on a regular basis by local politicians and residents and would significantly enhance social and economic opportunities for people travelling from the FoD. New infrastructure in terms of track to allow the direct running of these services would be welcomed. It is acknowledged that this is outside of Wales but does fall within the current Network Rail Wales route.

How the development and exploitation of rail infrastructure in England affects Wales, and vice versa;

Response

As I understand it the Welsh Route comes into Gloucestershire finishing just north of Lydney where it becomes part of the Western Route network. Consequently whatever happens in South East Wales at least will potentially have an impact on the Cardiff to Gloucester/Cheltenham services. A joined up approach appears to be in place as demonstrated by the various Route Studies being produced by Network Rail. Broadly speaking infrastructure improvements in both countries should offer improvements to each Country depending on where the improvements are taking place.

There is discussion in the Route Studies of running new services from Cardiff to the East Midlands and Yorkshire with the possibility of some of them running up the western side of the estuary via Gloucester due to capacity constraints through the Severn Tunnel. This is an example of how infrastructure improvements in both countries would be mutually beneficial by improving connectivity between areas not currently directly served by rail services thus opening up new markets. This is supported as it would also improve connectivity between South Wales and Gloucestershire via Lydney.

The impact on Wales of key planned developments in England including High Speed Rail, electrification, Northern Power House / Transport for the North, and wider devolution of responsibility for rail within England

Response

In theory these developments should improve connectivity and journey times for people travelling to and from Wales particularly via Birmingham in the case of HS2. Similarly electrification schemes such as that along the Great Western Route will improve journey times and capacity between and London and South/West Wales and stations in between notably Bristol Parkway.

Presumably one of the impacts will be that of funding for Welsh schemes in terms of ensuring that Wales gets it's share of the available funds for key developments.

How Welsh Government can best engage with and influence infrastructure developments in England and the development of passenger and freight services using the network;

Response

The most obvious mechanism for achieving this is through the Network Rail Long Term Planning Process Route Studies. Clearly, the Wales Route Study is relevant but also the Western, West Midlands, West Coast and North of England Route Studies will have an impact on the Welsh network. Cross boundary analysis is an integral part of this process.

Clearly close cooperation between the Welsh Government and the DfT is crucial in ensuring that an integrated approach is taken to achieving optimal benefits to both England and Wales with regard to the provision of infrastructure developments to enable the delivery of additional passenger and freight services.

If you would like to discuss any of the officer level comments raised in this letter please do not hesitate to contact me. I look forward to being kept informed of future developments relating to this matter.

Yours faithfully

Rob Niblett
Planning Officer

Changes in the Arriva Trains Wales outer suburban services to Cardiff in 10 years since start of Franchise

..	Merthyr Tydfil	Aberdare	Treherbert	Rhymney	Maesteg	Ebbw Vale Parkway	Chepstow Cinderella Line
Distance to Cardiff	23¼ miles	23¼ miles	23 miles	23¼ miles	23½ miles	28¾ miles	29¼ miles
Journey less 50 min	X	X	X	X	X	X	✓
Av. journey time	1Hr 5m	1Hr 5m	1Hr 5m	1Hr 3m	54m	57m	39m
Fare Single	£5.50	£5.50	£5.50	£5.50	£5.50	£5.50	£9.30
Anytime Day Return	£7.70	£7.70	£7.70	£7.70	£7.70	£7.70	£12.40
Annual Season	£1052	£1052	£1052	£1052	£1052	£1052	£2176
Change in No. of Trains	+27	+15	+6	+1	+5	N/A	-2
Trains per Weekday	59	57	61	36	32	34	24
No. arrive by 08:30	3	3	4	4 + 2*2	1	1	1 + 2*4
Last Return Service	22:30	22:45	22:50	22:35	22:35*3	23:05	23:20
Sunday Service	✓	✓	✓	✓	X	✓	✓
Hourly or better	✓	✓	✓	✓	✓	✓	X
Incl. Half Hourly	✓	✓	✓	✓*1	X	X	X
Incl. Quarter Hourly	X	X	X	✓*2	X	X	X
Line Description – From -To	Merthyr to Quakers Yard	Aberdare to Penrhiwceiber	Treherbert to Terhafod	Rhymney to Heath H L	Maesteg to Wild Mill	Ebbw Vale Pky to Rogerstone	Lydney to Caldicot
Line growth	+39.04%	+31.27%	+12.96%	+39.73%	+49.63%	N/A	+131.31%.
Inc in Electrification	✓	✓	✓	✓	✓	✓	X
Inc in Metro	✓	✓	✓	✓	✓	✓	X

✓*1 = Peak service ✓*2= From Bargoed *3= 21:10 Saturday *4= Includes the two trains a day from the Cross Country Franchise

Source: RailFuture Cymru (20.09.2014)

Introduction

This short paper provides a summary version of '[On the Right Track?](#)' (Lang, 2016), which was a report prepared with the support of the Federation of Small Businesses Wales to consider the potential local economic impacts of the Cardiff Capital Region Metro.

The Report considered the broader economic context and debates within which the Metro proposals fall, the international evidence around the impact of large-scale transport investments, the socio-economic context in South East Wales, as well as the arguments proposed in support of the Metro. It offered some tentative analysis of the case for the Metro investment, and sought to raise a series of concerns rather than prescriptive conclusions.

The concerns related to the economic rationale; the lack of international evidence to support the view that transport investment *necessarily* leads to positive economic or social outcomes; and, the lack of a detailed spatial understanding of South East Wales against which to plan an integrated transport network.

The key points of the Report were:

- Many of the arguments and justification put forward in support of the public investment for the Metro appear to derive from a belief that it will make the Cardiff city region more 'competitive', and therefore more prosperous. Debate and discussion about the Metro has so far failed to question the 'collaborate to compete' perspective on local economic development, nor to fully consider the alternatives such as foundational

economics. Should the Metro investment proceed, its manifestation is therefore likely to follow the priorities of its dominant rationale and it may miss important opportunities to support local and distributed economies across South East Wales for a more 'inclusive' economy.

- There is little international evidence concerning the non-transport benefits associated with transport infrastructure investments, and there is a real lack of robust methodological approaches to establish the investment, or planned investment, and social or economic outcomes. Despite this, much of the justification for the Metro proposals appears to be based on the likely economic benefit to the Cardiff city region. The spatial context appears to be critical to determine who benefits from investment, yet there has been little spatial analysis forthcoming, and what analysis has been undertaken has some major shortcomings. The question of who will benefit from the Metro investment – centre of periphery – remains unanswered. Metro hubs appear to offer a potential aid to hyper local economic uplift, but the context is critical, and internationally, such transport hubs have had negative and indifferent, as well as positive effects.
- There is very little evidence available on the spatial interconnectedness of places in South East Wales. Without this understanding it is unclear how a truly effective and integrated transport network can be created, as it is not possible to conclusively say what the network is seeking to connect. If delivered inaccurately, the network could cut across existing local economies and weaken them even further. The Metro consortium in its reports and recent Welsh Government statements have indicated that they believe future economic opportunity for South East Wales lies in Cardiff. Without a full spatial understanding, however, it is not possible to determine whether the proposed Metro will benefit the city of Cardiff at the expense of other towns and communities across South East Wales, boost local economies in locations outside of the City, or simply have no impact at all.

The Potential Impact of the Cardiff Capital Region Metro

There is no doubt that the Cardiff Capital Region Metro proposals offer a significant scheme for improved public transport connectivity throughout South East Wales. It is also clear that the region suffers from poor internal connectivity resulting from a weak and fragmented transport system. The case presented offers a range of measures that are likely to lead to improved reliability, integration, travel-times and network planning. From a service user perspective new rolling stock is likely to lead to an improved passenger experience and therefore may boost the numbers of commuters that utilise public transport as a means to travel and commute. The focus of the 'On the Right Track?' report, however, was to consider the potential economic and social impacts of the Metro. In this respect, the evidence is mixed.

The Metro has the potential to offer a scheme that garners widespread political support, and help to build the architecture for the city region experiment and City Deal programme. This approach fits with an emphasis on internationally competitive cities, the rationale that has come to dominate economic priorities in Wales. Placing an overriding emphasis on securing foreign direct investment, however, risks overlooking opportunities to support Wales' existing and small businesses. It also risks overlooking the existing spatial interconnectedness in a quest to impose city region architecture on the socio-economic landscape of South East Wales, which is little understood. In the context of the Metro, it is important to understand that the economic rationale for the investment is based on a particular view of how to grow the Welsh economy.

The international evidence about the impact of major transport investment is mixed. There are a range of potential unintended consequences, which have been seen to have negative effects on poorer communities. It may actually become more difficult and more expensive for the very poor to access public transport. The idea of the 'Metro hub', which was introduced in the second Metro report to illustrate how the Metro might aid development across parts of

the network outside of Cardiff, may have unintended consequences. The Report also showed that the spatial planning evidence presented by advocates of the Metro contains some significant shortcomings.

There is little robust international evidence around the measurement of non-transport impacts arising from major transport investments. Part of the reason appears to be the existence of too many variables to assess impact accurately, and the most commonly ignored factor is equitable outcomes. This can lead to inaccurate assumptions around the impacts of investment and the confusion of cause and effect in post-investment evaluations. The international evidence of who benefits from investment, centre or periphery, is mixed. It cannot be assumed that the wider city region will benefit, as it may actually suffer. This is part of a much wider debate about city regions. Distance is also a key socio-economic consideration. Those living closest to the core of a planned transport investment may benefit far more from the investment than those at the periphery. The overwhelming balance of international evidence shows that understanding the context to major transport investment is critical to determining its likely success. Context appears to be critical. This work has not adequately been undertaken in the case of the Cardiff Capital Region Metro.

That said, the extremely poor transport network in South East Wales cannot be ignored. Nor can the ignorance of the extremely poor economic performance of the region, or its social consequences, be acceptable. The reality is that transport, or any other form of infrastructural investment, will not of itself address the underlying economic problems of South East Wales or the social consequences. Perhaps, just perhaps, if steered toward the best approach to equitable outcomes, it could form part of a broader answer. The balance of international evidence suggests that transport investment is not, as some would argue, an economic 'silver bullet'. Context is critical, and in that respect South East Wales, and Wales more generally, needs to have a more open and honest debate about what sort of country we want to be and what is important to us.

Dr Mark Lang, February 2017

1.0 Caldicot

- Caldicot is the largest settlement in the area.
- Population of: 11,200 at official census on 27.03.2011. (Includes Portskewett)
- Nearby villages of Rogiet – 1, 813 and Caerwent – 1,201 at official census on 27.03.2011 Since the census a new housing development in Caerwent is estimated to have raised that village's population to approximately 1,500
- (Source: www.citypopulation.de)
- Most economically active residents use private transport to get to places of work, with more residents leaving the town each day for work than those who come to it.
- According to the Town & Community Council Census of 2011, Caldicot had a
- higher percentage of non-vehicle ownership than the average for Wales, with
- 20% of residents not owning a motor vehicle.

Further census information may be found at:

<http://www.monmouthshire.gov.uk/app/uploads/2015/08/Census-2011-Town-and-Community-Council-Statistics.pdf>

- Industry
 - Tourism with Caldicot Castle and nearby Black Rock and Dewstow Gardens
 - Light engineering and warehousing
- Deprivation:
 - Two Council Wards on the outer side of Caldicot have a high number of Benefits Claimants than most in Wales, these are West End and Dewstow Wards.
 - Town Centre has a lot of empty shops: this area is being considered for re-Development
 - The Social Housing list has more than 700 applications (Source: Monmouthshire Housing)
- Housing:
 - Over 1,000 houses are planned, mainly in the villages of Caldicot, Portskewett, Sudbrook, Rogiet and Caerwent
 - The largest development will be on the site of the former Paper Mill in Sudbrook. The second largest is on the outskirts of Portskewett
(Source: Development Plan 2014)

- Local Estate Agents report increasing interest in local housing from persons currently living in the Bristol area (Half the price, lower Community Tax, only 25 minutes by train from Severn Tunnel Junction, and attractive area with new Secondary School about to open, and appealing local countryside)
- **Medical:**
 - The Gray Hill Surgery (including its satellite in Magor) is the third largest practice in Wales with 20,000 registered patients
- **Bus Service:**
 - Poor bus service. Bus to Newport City Centre can take nearly 90 minutes.
 - Students wanting to get to Nash College (College for FTE) leave centre of Caldicot at 07:30 to arrive at 08.31am.
 - No direct bus to Bristol or Cardiff.
 - Bus to Spytty Retail Park, Newport, has three hour gaps.
 - Limited bus service to local villages of Caerwent and Sudbrook.
 - Alternative bus service provided by the Grass Routes Service (Dial and Ride provided by the County Council)
 - Transport for Shopping, Entertainment & Leisure, and visiting local Hospitals (Chepstow, Newport, Cardiff, etc) can be difficult to access; and at the start and end of the school day private hire (taxis) is almost impossible to locate.

2.0 Caldicot Station

- About fifteen minutes walk from the Town Centre
- No Station Car Park, and limited parking on near-by streets. Kiss-and-drop is also not easy.
- Infrequent Bus service to/from bus stop nearest the station
- No ticket office or ticket machine.
- There is access through a tunnel and ramps onto the platform for disabled access.
- No toilet facilities
- No cycle storage
- No phone box at the station
- Passenger shelters are small and not adequate on the down platform to Cardiff during peak times.
- Land near the station, is expected to be used for building approx. 350 homes (Garth Allen Drive). Local rail lobbyists expect consideration be given for station parking on this site.
- Badly maintained ash path link to Severn Tunnel Station (approx one mile distant). Section 106 monies could be used to improve this, however path goes through Network Rail land.

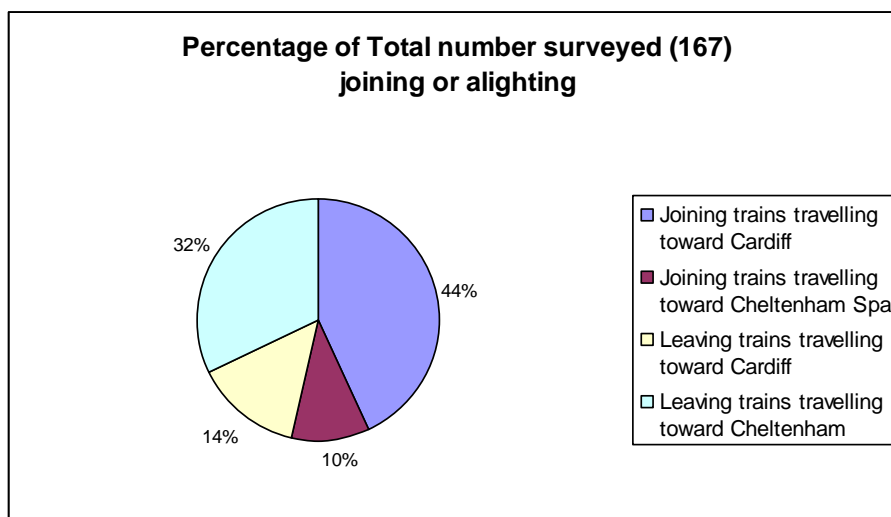
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During the course of the day we interviewed 81 passengers and saw 167 either join and/or leave the train. The research was carried out by STAG (The Severn Tunnel Action Group). Further details are available on request.

The summary of results were:

- Most local people using Caldicot Station lived within a mile and a half of the station
- Over eighty percent of rail travellers from this station are using it more than once a week
- Cardiff, Newport and Chepstow are the three most popular destinations
- Most regular travellers either walk to the station, or are dropped off in a car.



- The lack of Car Parking in the area is an issue particularly among:
- The travellers themselves who either use cars to reach the station, or those who would prefer to use cars,
- Residents in nearby streets and
- The management of the Severn View Club. They have recently prevented commuters and others from using its car park during the day.
- A combination of the cost of parking at Severn Tunnel Junction (a mile away), and the lack of parking space there, is reputed to have resulted in more people parking on the local streets around Caldicot Halt station.
- Lack of cycle storage at the station could act as a deterrent to otherwise “would be” cyclists. All those using cycles to get to the station are taking them onward by train.
- Most regular rail travellers travelling to the station by train are commuters working in the Castle Gate Business Park, Portskewett. These travel onward by bike or on foot.
- Lack of an hourly service, particularly at peak times, is frustrating to regular passengers; and a better Sunday Service with trains toward Cardiff at around 9.00am, are eagerly sought by those who work on Sundays or want a day out.
- Signage /information at and around the station need improving.
- No phone box at the station

3.0 Severn Tunnel Junction Station

- Lies to the south of the Village of Rogiet
- Over past five years has enjoyed infrastructure improvements on the track, and with signalling. Other improvements include:
 - New platform
 - New ramped ‘Access for All’ footbridge
 - New Passenger shelters
 - New Ticket Office
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 - Toilet (albeit with restricted opening)

Issues passengers have:

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- Ticket Office only opens from 06:30 to 10.30am, Monday to Friday
- Huge growth in interchange use off Cheltenham line
- Station use was affected by the Severn Tunnel closure last August. In January this year the drop was thought to be about 14%.
- Issues were identified in Market Research survey conducted last year (see below)

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 - 105 cars paying £3.50 a day, and
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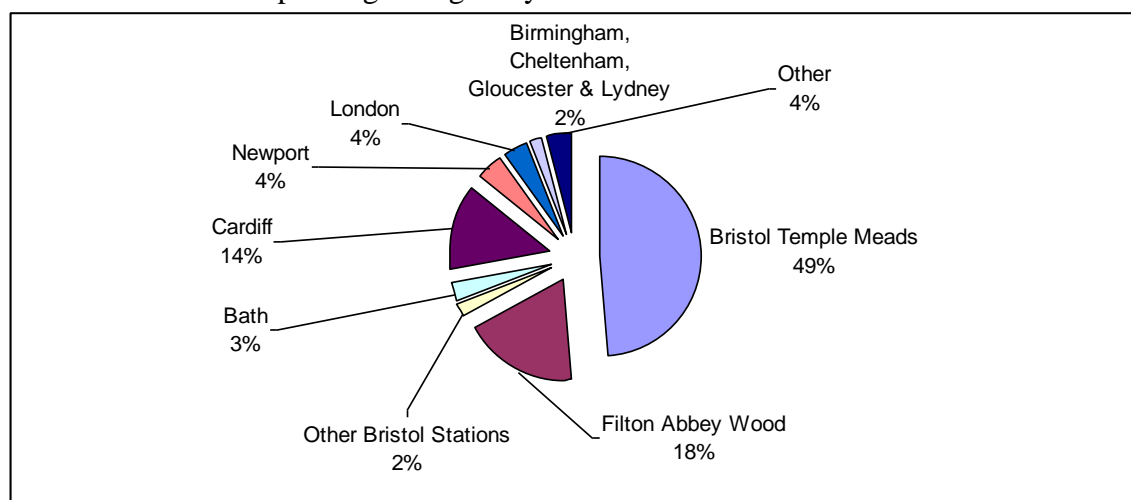
Market Research was conducted by Monmouthshire County Council, the Severn Tunnel Action Group and other supporters between 14 April and 26 May 2016.

The survey was conducted with the aid of The Survey Monkey, and with 197 written manually, and 229 completed on-line. A Footfall Study was additionally undertaken on differing weekdays during this period.

The responses led to the following main conclusions:

- Users come from a wide geographic area, with forty per cent of travellers residing outside the Magor, Undy, Rogiet and Caldicot area.
- From Monday to Friday the station is primarily used by commuters
- There are approximately 1,200 passenger movements (entries, exits and interchanges) a day (weekdays: Monday to Thursday)
- Station user growth continues at around eight per cent per annum. Twelve per cent of respondents started using the station within the past twelve months.
- Busiest time is from 6.50am to 8.00am during which period around 300 passengers catch trains
- Overcrowding of trains are the users biggest concern
- Lack of car parking spaces is suppressing use of the station, and is the second largest area of concern.
- Over 300 cars park in the various parking zones, or on residential streets. Most of these are parked by 8.00am
- Pedestrian safety is a major concern for those walking along the station entrance lane, and through the station car park. There is a call for a dedicated safe walking route. Vehicle safety in these areas is also a concern to motorists.
- Ticket Office opening hours and manning levels is subject of many Detrimental comments. Clearly some passengers are unaware of their options for season ticket purchasing elsewhere, or on another day.
- Lack of passenger shelter on the platforms is a concern. Other services are seen to be lacking (toilet, catering, sufficient secure cycle storage, etc.).
- Interchange passengers living near stations on the Severn Tunnel Junction to Cheltenham line cite an inadequate train service, and poor connection times for those wishing to travel to Bristol or Bath. They also comment on the lack of a warm and secure waiting area.
- Rogiet residents voice concern about road safety, and use of residential streets for free parking.

To which stations do passengers regularly travel:



Fuller Market Research information available on request

Interchange at Severn Tunnel Junction

For those wishing to commute from Lydney, Chepstow and Caldicot to Bristol there is currently a poor connection at Severn Tunnel Junction, particularly in the evenings

on their return. The new franchisee should seek to address this, particularly in light of the growing numbers from Lydney and Chepstow seeking rail links to Bristol and Bath. (For further information see: <http://orr.gov.uk/statistics/published-stats/station-usage-estimates>)

WCR 250 is a national campaign group lobbying for improvements to Inter City West Coast (ICWC) services. In addition to having an extensive network of local authority and other key members, WCR250 also has an All Party Parliamentary Group. WCR 250 attaches great importance to development of the ICWC network on a joined up basis with other franchises. The common geographical areas shared by the Wales and Borders (W&B) franchise and ICWC services are:

- North Wales Coast, Chester – Crewe.
- Wrexham, Shrewsbury – Birmingham

WCR250 welcomes the emerging opportunities of the recently announced West Coast Partnership (WCP), and hopes to build upon the regular dialogue WCR250 has with the Department for Transport (DfT) and the franchise operator.

WCR 250 emphasises the importance of using its members' local knowledge to help develop the prioritised outcomes of the W&B franchise. This approach worked successfully by Rail North Ltd, making a transformational difference towards the Northern and Trans Pennine Express franchises introduced from April 2016. There has only been limited scope to engage with Transport for Wales (TfW) for this to date, and it is hoped that this can be swiftly addressed. This matter was referred to within the recommendations of the House of Commons Welsh Affairs Committee inquiry on the Wales and Borders rail franchise which state that "it is vitally important that the local authorities and regional bodies whether in Wales or England have the opportunity to shape the next franchise specification".

TfW have stated that franchise bidders can only meet with officers and not councillors to hear of priorities for the franchise. We consider that having the option for joint officer and councillor representation can be important to help ensure that bidders receive an informed presentation of the context and priorities such organisations.

TfW must ensure that the next Wales and Borders (W&B) franchise will meet current and future growth projections, ensuring that a programme of infrastructure works to enable capacity growth is accelerated. There are important opportunities to co-ordinate development of the WCP and W&B services Service improvements to improve capacity and connectivity improvements between Crewe, Chester and North Wales in addition between Birmingham, Shrewsbury and Wrexham.

Improvements to service frequency on Sundays and Bank Holidays, are needed, including Boxing day services, and improvements to the times of first and last trains. – Particularly allowing connections with ICWC services.

The W&B franchise operator must be able to adopt a more practical approach to holding connecting trains when it is known that passengers will be transferring, particularly if late at night and without being penalised for late running.

Performance monitoring of the W&B franchise should include positive performance measures such as commitments to increase measured passenger satisfaction and evidence of how the franchise operator is actively engaging and supporting local communities and economies in each region.

The operator must have minimum requirements to manage planned and unplanned service disruption (affecting any franchise at W&B stations) including full use of technology, social media; availability of staff who are able to help; ensure that clear announcements at all stations and easy processing of compensation claims, including automation where possible.

The fare structure (and supporting technology) must always give the passenger the best value fare for their journey(s), including giving value for money to make travel by families or small groups by rail more viable. Fares to make rail travel by young adults and those on low income more affordable are required and be suited to a variety of travel patterns.

The franchise operator needs to be committed helping passengers to make increased use of technology for ticket payment, particularly mobile devices. As well for convenience, this provides scope to better understand passengers' travel patterns, direct and real time journey information and reduces cash handling. Commitments should also be made to introduce two way through ticketing with a prioritised network of bus services (and community transport) that are commonly used at either end of the rail journey.

All stations must meet requirements of the broadest range of needs for people with any mobility or sensory impairment. Toilet provision must be fully accessible, and be cleaned and maintained on a regular basis and be available for use free of charge. Platform length and height need to provide easy access with trains.

Minimum criteria should be applied for all stations based on passenger number categories, recognizing the needs of long distance passengers (e.g. trolleys to carry luggage). This should include specifying minimum opening hours (and days of operation) of staffed ticket offices, directions to nearby bus stops, sheltered waiting accommodation, contact details for taxi operators, provision of CCTV, live journey information including audible messages to each platform and welcoming waiting facilities

TfW needs to make available to the franchise operator, a residual value funding mechanism to enable and commit major station improvements schemes. This would allow payment of major schemes (such as improving the facilities and overall passenger experience within Chester station) to be made beyond the franchise duration.

WCR250 also recommends that the franchise operator is committed to making prioritised improvements to station car park facilities and capacity to meet rail travel growth.

The Welsh Government must make minimum contractual commitments for the franchise operator to make community rail development a strong feature of the franchise, giving financial security to existing community rail partnerships and enable expansion of the community partnership model. The community rail concept should be broadened to also include bus services / operators and community transport, as well as strengthening engagement with small and medium enterprises to encourage use of station buildings, to increase use of the public transport network and to help prioritise investment.

W&B rolling stock investment is essential to respond to the continual passenger growth and must keep pace with the commendable standards and capacity improvements being made in other franchises. Passengers using W&B services at either end of their journey on

ICWC service expect to have confidence of being able to travel in a comfortable seat with adequate leg and elbow room, luggage accommodation and in a clean and well ventilated environment with free Wi Fi availability and plug in sockets.

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Pwyllgor yr Economi, Seilwaith a Sgiliau/ Economy, Infrastructure and Skills Committee

Masnachfrait Rheilffyrdd a chyflwyno Metro / Rail Franchise and the Metro

Ymateb gan Swyddog Datblygu Rheilffyrdd Partneriaeth Rheilffordd y Cambrian / Evidence from Rhydian Mason - The Cambrian Railways Partnership's Rail Development Officer

I am rather concerned that this response may sound rather cynical, or negative. However, I believe that you deserve an honest response, and that there is little point in guilting the lilly!

The current opinion of the Rail Development Officer (RDO) of the Cambrian Railways Partnership (CRP), who has been involved in some aspects of the process thus far is that the process to date has been far from clear, with concerns being raised to the RDO in terms of the level of detail that can be discussed as part of ongoing discussions between the 4 bidders and stakeholder groups. These concerns and confusion surrounding confidentiality and sensitivity of information have emerged mainly from the bidders themselves, some of whom have indicated a high degree of confusion and little clarity emerging from the franchise team at Welsh Government. It is also apparent that there is some ambiguity concerning the 'rules of engagement' that arise from a strained relationship between WG and DfT concerning the devolved (or not) nature of rail in Wales & the Borders.

The CRP RDO represents areas in both Wales and the Borders, and thus far there seems to be confusion and ambiguity again about how the Welsh Government engages or consults with customers living outside Wales that rely on the Wales & Borders rail services. Again, there is an issue here to be resolved between WG and DfT which seems to be clouding the real objective of providing a modern, up to date rail service for Wales **AND** Borders areas.

As the RDO of a community rail partnership, there are also concerns that the whole ethos of Community Rail is not being taken seriously by the Welsh Government /TfW for the forthcoming franchise. During the current franchise, Community Rail was notable by it's absence, and it fell to the good will of local authorities and the train operating company to support the partnerships within the franchise area. Austerity, handed down to the Local Authorities by the Welsh Government (in turn handed to them by UK Government) now results in a situation where the future of all existing Wales & Borders Community Rail Partnerships is under threat. We have yet to get assurances from Welsh Government that the excellent model put forward by DfT for other franchises in England (and Scotland) to support and develop community rail partnerships will be followed, and are currently reliant on a commitment from ATW to part fund each of the Wales & Borders partnerships until the end of their tenure of the current franchise. However, this is not enough in it's own right to allow the partnerships to thrive and deliver outputs for the communities they serve.

There is also a concern that the forthcoming franchise will focus heavily on 'metro' areas, at the cost of rural lines such as the Cambrian.

Regional reports and indeed the former Regional Transport Consortia did identify a lack of investment in rail as a barrier for economic development for rural areas served by rural lines. The Cambrian Main Line is the only direct corridor East-West between Aberystwyth/Mid Wales and the Midlands, but is outdated in terms of running pattern, stocking levels, inadequate seating etc, and we have yet to have any clear acknowledgement from Welsh Government of this fact.

As of the current time, I have very little to be optimistic about in terms of the opportunity for change for the Cambrian lines. There seems to be a far more focussed approach towards North East Wales and South Wales, which are already very well served by rail.

Whilst the peak hourly service on the Cambrian was most welcomed, and indeed has demonstrated the latent demand for an improved service, this 'gift' was down to local campaigning and not down to a structured approach to investment in services.

Likewise, I also note the apparent lack of forward thinking in terms of procuring rail stock for Wales & Borders, meaning that the incumbent TOC will have to bear the brunt of this task, and will inevitably mean that South Wales will again be prioritised – although I remain hopeful this is not the case. If not, then it will be at least 5 years until any improvement in stocking can be released on the Cambrian Lines, probably more unless more of the ERTMS equipped 158 fleet can be prioritised for the Cambrian Lines.

In terms of prioritising, I can offer my views on prioritisation on the Cambrian line, and hope that these views are considered within the wider picture of the franchise specification. An hourly service between Aberystwyth and Birmingham International stations is the minimum requirement needed. This has been campaigned for by various groups for many years, and is no different. Station infrastructure improvements and/or solutions are desperately needed – car parking at Aberystwyth, Machynlleth, Caersws, Newtown, Welshpool, Shrewsbury. Access improvements needed for Dovey Junction, the down platform at Newtown, and Welshpool (to improve the awful footway/footbridge there). We also note the reduction in stock that seems to be the case on the Cambrian lines during major sporting events at Cardiff – causing 'standing room only' on Cambrian trains where journey times are often over 2 hours for passengers. Again, these views are nothing new, and I trust that the Economy, Infrastructure and Skills Committee will be aware of these basic needs for our services on the Cambrian.

Part of the ongoing problem with the above is that the current franchise was/is a 'not for growth' franchise. This was a huge mistake and one that should not be repeated. However, any growth element in the new franchise should be equally shared around the network, and not prioritised for Cardiff and South Wales only. It is good to note the 'rail franchise and South Wales Metro' heading

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Masnachfrait Rheilffyrdd a chyflwyno Metro / Rail Franchise and the Metro

Ymateb gan Swyddog Datblygu Rheilffyrdd Partneriaeth Rheilffordd y Cambrian / Evidence from Rhydian Mason - The Cambrian Railways Partnership's Rail Development Officer

for this document, which suggests that the Metro will be seen as a separate entity with a separate funding and develop programme to the rest of the franchise.

In terms of the future, and, taking into account a growing trend and appetite for rail travel from the Cambrian lines, there is a need to ensure that this trend is allowed to grow, and that the current growth is not simply restricted by the shortfalls of infrastructure that has been allowed to remain as- was in some cases since the stations were built some 150 years ago!

Community Rail Partnerships must be allowed to evolve likewise – the Cambrian Railways Partnership under my tenure has developed into something far greater than merely an organisation that prints pretty pictures on tourism leaflets and makes sure the begonias' are looking good on the platforms. Nowadays, the partnership's RDO is actively involved in strategic proposals and projects – from securing additional services to being deeply involved in new station proposals (e.g. Bow Street), and to delivering outputs and outcomes that assist the Welsh Government's own aspirations (in return for grant funding).

Developing the railways means far more than enhancing services in the biggest or most populated areas. Developing the railways means making it easier for people to get to where they need to go, to access jobs, to access education, to access healthcare (as well as tourism and leisure) – and this means that the priority has to be in those areas that are currently limited in these respects. The Cambrian lines is a key example. North Wales has excellent links with the North West of England. South Wales has excellent links with Bristol and onwards to London. Mid Wales has a two-hourly service to the midlands (with peak hourly services only as far as Shrewsbury) on trains which are close to a quarter century old.

Mid Wales will not develop without significant investment in rail.

I hope that my frankness in this response is not mistaken for cynicism or negativity. I have endeavored to give an honest opinion, and I hope that this is received in the spirit it is intended.

Diolch yn fawr

Rhydian Mason

Rail Development Officer

Cynulliad Cenedlaethol Cymru / National Assembly for Wales

Pwyllgor yr Economi, Seilwaith a Sgiliau/ Economy, Infrastructure and Skills Committee

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Cambrian Railways Partnership

February 2017.



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23 February 2017

e-mail response sent to: SeneddEIS@assembly.wales

Dear Sir/Madam,

Response to: Rail Franchise & the Metro

1. The Royal Town Planning Institute (RTPI) is the largest professional institute for planners in Europe, representing some 23,000 spatial planners. RTPI Cymru represents the RTPI in Wales, with 1,100 members. The Institute seeks to advance the science and art of spatial planning for the benefit of the public. As well as promoting spatial planning, the RTPI develops and shapes policy affecting the built environment, works to raise professional standards and supports members through continuous education, training and development.
2. The response has been formed drawing on the expertise of the RTPI Cymru Policy and Research Forum which includes a cross section of planning practitioners from the private and public sectors and academia from across Wales.
3. Our comments focus on the Metro, on important connections between economic development, housing, transport and planning, and on areas and ways that planning can help to maximise the value of the Metro investment in delivering sustainable growth.
4. A key issue for the Metro programme will be the extent to which it is integrated with spatial plans for the South East Wales region. Spatial planning can positively support the economic performance of the region through influencing factors which determine productivity, for example by defining the future role of key settlements and strengthening their interrelationships by providing enhanced connectivity through both the Metro programme and other transport investment.
5. RTPI Cymru believes there needs to be a greater integration of the Metro proposals with wider policy areas. Strategic Development Plans (SDPs) and Local Development Plans (LDPs) would be an effective way of setting proposals in an integrated context. The statutory status of LDPs and SDPs would also bring significant benefits in terms of the delivery of individual projects within an agreed development framework, thereby helping to mitigate delivery risks. In this regard, it is important that the new Wales and Borders franchise has the flexibility and capacity can respond to the growth in passenger demand that may be generated by new developments and future land use proposals. To this end, RTPI would encourage engagement between the new franchise holder and local planning authorities/ regional groupings of authorities developing Strategic Development Plans to ensure that the planning and operation of rail services fully supports local and regional land use strategies.

6. The following paragraphs set out some broad principles for strategic planning, before applying these more specifically to the Metro proposals.

The Planning (Wales) Act 2015

7. Strategic planning is an important and proven tool under the Planning (Wales) Act 2015. It enables an approach which can cover a wide range of areas of public policy and effective cooperation for planning across boundaries.

8. The RTPI has devised various general principles which strategic planning should follow irrespective of where it is practised, these are:

- Have focus - being efficient in the use of resources and clear about its purpose;
- Be genuinely strategic – dealing only with matters which require resolution across boundaries;
- Be spatial – i.e. it should make choices between places, not simply establish general criteria for later decision making;
- Be collaborative - meaning that partners work together to see how they can deliver each other's agendas;
- Have strong leadership – so that negotiations between places are productive and not protracted;
- Be accountable to local electorates.

9. If carbon reduction and the costs of road traffic congestion are to be tackled effectively within the City Region, there will be a need to focus on ways of uncoupling economic growth from road traffic growth. As an example, concentrating development around Metro nodes could be a very influential contributor to growth and sustainability in the medium to long term. Planning policies could be adjusted through the SDP and LDPs to facilitate higher density developments in these locations. There is a compelling case for an integrated approach to planning for the development of stations and the land around them.

10. A key issue is that the timeframes and the need for early investment could outpace the completion of an SDP. However, this could be overcome by accelerating work on a strategic/spatial planning framework which sets out the key spatial priorities and investment priorities for the region. Such a document could function as a form of 'staging post' towards an SDP to ensure that crucial (short term) investment decisions are strategically targeted. The framework could largely be developed from existing evidence bases and incorporate work which would need to be progressed as part of the SDP. LDPs already in place in the region would provide a strong and coherent evidence base in advance of an SDP.

Competitive City Regions

11. There is a growing body of evidence indicating that the most productive and competitive cities/city regions are those which exhibit the features of so-called 'agglomeration economies' including clustering of companies involved in high value/knowledge-based production. Cardiff and South East Wales clearly possess some of these attributes, with high concentrations of Financial and Professional Services employers/growing life sciences, digital and creative sectors/clusters of HE/research institutions/high concentrations of graduates etc. Yet the region is still lagging behind the rest of the UK in terms of productivity/GVA per capita and there are considerable disparities between the performance and prosperity of Cardiff and surrounding communities.

Connectivity

12. We believe that poor connectivity between Cardiff and its satellite settlements is also a contributing problem. Current thinking and evidence indicates that good connectivity between cities and their surrounding regions/ satellite settlements is key to development of greater productivity and competitiveness by:

- Increasing choice and range of (sustainable) travel modes
- Reducing journey times between settlements
- Increasing business to business interactions
- Expanding markets for business
- Expanding labour markets
- Increasing competition and innovation

13. Delivery of the Metro would help to address the connectivity issue. However, the issue is not just about “movement”. Accessibility to jobs, facilities and services is the key requirement. This requires a fully integrated approach to transport and development planning. Such an approach would ensure the relationship between key settlements and its satellite settlements across South East Wales is addressed across a much wider field, which is the role of spatial planning and an SDP, as discussed above.

Accessibility

14. The Metro programme provides a key opportunity to address the needs of those who are disadvantaged in accessing transport services. For example, the procurement of new rolling stock could facilitate a step change in accommodating the needs of those with push chairs and wheelchairs, as well as accommodating more bicycles.

Targeting Investment

15. There are concerns that following the funding of the Metro and interventions to stimulate economic development, funding for other infrastructure may be in short supply. It will be important that the focus on the Metro within the City Region does not lead to the development of better transport links and services with the adjoining Swansea and Bristol city regions being overlooked. This in turn could lead to a drift in skills towards the City Region, away from other regions at their expense. Skills training close to residential communities and integrated with employers should take place across the regions. There will be a need to target investment strategically at key strategic regional projects and infrastructure. Again, this is where it would be helpful to have a spatial planning framework in place with agreed regional priorities informed by robust analysis of gaps/need. This would help to resist pressures to invest in infrastructure (such as local by-pass schemes and other expansions of highway capacity, to use a transport example) which may be politically desirable at a local authority level yet run counter to the strategic interests of the wider region. The Community Infrastructure Levy could be a potential funding opportunity and is linked to both the SDP and LDP.

Well-being

16. There of course must be recognition of the Well-being of Future Generations (Wales) Act 2015. This law requires any proposals implemented by a public body to act according to the sustainable development principle. We would therefore recommend that the proposals for the Metro are developed with sustainable development as the central organising principal.

17. Engagement with the National Infrastructure Commission for Wales (NICfW) and the UK National Infrastructure Commission (NIC) who are producing a National Infrastructure Assessment (NIA) and also the National Development Framework (NDF) will be important.

18. It is important that the Metro proposals are seen within the context of the broader agenda for transport in the region, and that expenditure on transport is recognised as a mechanism to deliver broader economic, environmental and social goals. The RTPi has a policy and research programme, and the publication “Capturing the Wider Benefits of Transport Infrastructure” is particularly pertinent to the theme of this enquiry.

http://www.rtpi.org.uk/media/816110/capturing_the_wider_benefits.pdf

Challenges and Opportunities

19. Key challenges for the Metro proposals will be to ensure that they contribute to the wider needs of the region, that they can be deliverable in terms of funding and in securing stakeholder buy-in and approvals, and that investment in infrastructure is supported by sustainable revenue funding to support services. The broad concept of the “Metro” network has gained considerable currency within the region, and we welcome the Welsh Government commitment to grasp this opportunity.

Transport Integration

20. Given the lead role of the Welsh Government on the Metro, and its responsibilities for railways, motorways, trunk roads, ports and airports, alongside the local planning, highways, transportation and active travel responsibilities of the local authorities, a high level of integration in terms of planning, funding and governance will be particularly critical.

21. A challenge for Local Authorities in the South East Wales Valleys has always been that all transport routes were north south i.e. down the valley to Cardiff, Newport and Swansea. It is appreciated that Cardiff is the economic hub for the region but better cross valley transport linkages could assist the valley towns develop and maintain their economic position.

22. Much of the publicity around the Metro proposals has focused on the potential for increasing investment in rail based solutions. There is no doubt that the extensive rail network represents a major opportunity to achieve a step change in public transport connectivity. However, a large majority of the journeys by public transport are made by bus. This will remain the case over coming decades. It is important therefore that enhancements to bus services, and in particular bus priority on the highway, are recognised as key priorities for the Metro programme. Bus operators, and the local authorities who manage the highway network on which bus services operate, need to be at the core of planning and delivery for the Metro, alongside the rail industry and the Welsh Government.

23. With growing passenger numbers, the rail industry has been working to improve access to stations without generating extra road traffic. A number of stations around the UK now have Station Travel Plans. There is a strong case for the Metro programme to include travel plans for new stations.

24. It will be important that the focus on the Metro in improving links between the valleys and coastal communities does not lead to broader strategic transport issues being overlooked. Whatever conclusions are reached by the inquiry into current proposals for the M4, traffic pressures along the M4 corridor will remain. Access by road to city centres will continue to experience heavy congestion. Newport in particular remains poorly linked to its catchment by public transport services. Focused investment in public transport along the M4 corridor will continue to be important if the aims of the City Deal are to be achieved. While the issues along this corridor may be more difficult, this needs to be a key Metro priority.

25. Links to the adjoining Swansea and Bristol city regions are of growing importance to the economic future of the Cardiff City Region. It is important that planning for the Metro sits within a strategic transport and development planning framework that looks beyond South East Wales alone.

Public Consultation

26. While there have been public information exercises around the Metro proposals, opportunities for the public to express their views on the proposals have been limited. Widespread consultation can often lead to the refinement of proposals to deliver better outcomes for the user. Early consultation can also help to identify issues which might give rise to difficulties in securing the consents needed to implement proposals. There will be a need to address the current “consultation deficit” as the proposals are taken forward.

Transport Funding

27. While we welcome the proposed creation of a regional transport authority, we believe that the option of a statutory body should be further considered. The Welsh Government already has the legal power to establish a statutory passenger transport authority (PTA). A critical benefit of a PTA is the ability to levy a precept on council tax bills. This would provide a source of revenue funding for bus and rail services, which the Metro proposals will need to support the capital funding for infrastructure coming through the City Deal. As a guaranteed revenue stream, it would widen opportunities for borrowing. It would help to address concerns over affordability. It would also level up the playing field in competing with the English City Regions.

28. If you require further assistance, have any queries or require clarification of any points made, please contact RTPI Cymru on 029 2047 3923 or e-mail Roisin Willmott at walespolicy@rtpi.org.uk

Yours sincerely,



Dr Roisin Willmott FRTPI

**Director
RTPI Cymru**

1. Introduction

- 1.1 Transport Focus is the independent consumer watchdog representing the interests of rail users throughout Great Britain; bus, coach and tram users across England, outside London; and users of the Strategic Road Network in England. We have a Welsh Board Member appointed by the Cabinet Secretary for Economy and Infrastructure.
- 1.2 We have been engaged in discussions with Welsh Government (WG) and Transport for Wales (TfW) about the future operation of, and the procurement process for, the next Wales and Borders franchise. We are pleased to make a contribution to this consultation undertaken by the Economy, Infrastructure and Skills Committee of the National Assembly for Wales.

2. What standard of performance has been experienced under the current franchise?

- 2.1 Transport Focus consults over 54,000 passengers a year for the National Rail Passenger Survey (NRPS) - a network-wide picture of passengers' satisfaction with rail travel. In Autumn 2016 we spoke to 1086 Arriva Trains Wales (ATW) passengers.

NRPS is a comprehensive source of information about current and historic passenger perceptions of the ATW franchise. It can also be broken down to show variations across five 'building block' groupings of rail services in the Wales and Borders operation.

Using analysis we can identify those factors that correlate most highly with overall satisfaction and dissatisfaction.

Full details of the Autumn 2016 wave are on our website¹. For ease of reference we have included key results for ATW as Appendix 1.

- 2.2 Currently the cleanliness of the inside of the train is the key driver of satisfaction for ATW passengers at 32 per cent overall. The next most important factor is punctuality and reliability at 16 per cent.
- 2.3 How the train company deals with delays is the most significant driver of dissatisfaction at 34 per cent.
- 2.4 Between 2012 and 2013 ATW had slightly higher overall satisfaction than the Regional sector average². However, in recent years it has tended to perform less well; the most recent score for ATW is 82 per cent compared to a Regional average of 84 per cent.
- 2.5 ATW is lagging behind the Regional sector on many elements that are important to passengers. ATW scores somewhat lower than the Regional sector average on 15 out of 16 station factors and is also below on 13 out of 20 train factors.

¹ [NRPS Autumn 2016 main report](#). Transport Focus. 2016

² Regional operators include ATW, Merseyrail, Northern and ScotRail

- 2.6 Passenger satisfaction with punctuality and reliability on ATW has declined significantly in recent years. Consistently 85 per cent and above between 2011 and 2013, satisfaction has now dropped to 80 per cent. This compares to the Regional sector average of 82 per cent. Industry measures of performance also show drops. Between periods 11 of 2010/11 and 2016/17 the Moving Annual Average for PPM has fallen from 94.1 to 91.6 per cent, whilst for Right Time it has fallen from 87.9 per cent to 80 per cent³.
- 2.7 Satisfaction with the upkeep and repair of the train has also declined significantly over the last few years, from 76 per cent in Spring 2012 to 64 per cent in Autumn 2016. This compares to the Regional sector average of 70 per cent.

3. What lessons can be learnt from the current franchise?

- 3.1 The principal lessons to be learnt from the current franchise hinge on responsiveness. Since the operation commenced in October 2003 there has been unanticipated growth in passenger demand and, within the contractual terms, there has been little ability to address this.
- 3.2 A new franchise contract must be based on well-evidenced projections of passenger demand and ensure there are mechanisms within it to respond to changes.
- 3.3 The key elements that must be at the heart of a new contract are sufficient trains to provide the services required to meet demand, a timetable that provides the frequency needed and is aligned to passenger requirements, including for services earlier and later in the day and at the weekend, especially on Sundays. There is also a need to plan for, and effectively manage, the peaks of demand when special events take place on the network.
- 3.4 The new franchise must also address rolling stock – the current train fleet is largely ageing and much is in need of refurbishment or renewal. One particular challenge concerns the implications of the deadline for PRM-TSI (Persons of Reduced Mobility Technical Specification for Interoperability) compliance⁴.

4. What improvements to rail passenger services should be expected under the next franchise?

- 4.1 In 2014 we asked 3,500 passengers across the Great Britain to rank a series of train and station categories in order of their perceived priority for improvement⁵. A breakdown of results for Wales is in Appendix 3; the sample size is 750 and the vast majority of these are ATW passengers. The online database contains a wealth of information which can be

³ <http://dataportal.orr.gov.uk/displayreport/report/html/35d7377b-ab0f-40b2-bb98-f9bf582d82f8>

PPM (public performance measure) means trains arriving at their terminating station within five minutes for commuter services and within 10 minutes for long distance services. Right Time performance measures trains arriving at their terminating station early or within 59 seconds of schedule.

⁴ <http://orr.gov.uk/what-and-how-we-regulate/health-and-safety/regulation-and-certification/rail-vehicle-accessibility> - An outline of the The Rail Vehicle Accessibility (Non-Interoperable Rail System) Regulations 2010 (RVAR 2010) enforced by the Office of Rail and Road (ORR).

⁵ [Rail passengers' priorities for improvement](#). Transport Focus. 2014

analysed in many ways to explore how priorities vary by demographic and journey purpose, amongst other things⁶.

The two top priorities, by some considerable margin, are 'passengers always able to get a seat on the train' and 'price of train tickets offers better value for money'.

Summarising the findings, it is clear that passengers' top priorities for improvement largely focus on the basic elements of the rail service – value for money, getting a seat, frequency, punctuality, managing delays and provision of information.

- 4.4 Assessment of NRPS scores should also drive decisions on improvements under the next franchise. These should focus on the elements which drive passenger satisfaction and dissatisfaction and also include those factors where the absolute scores are low, those where there are high levels of dissatisfaction and those where the franchise scores below the average for the Regional sector as a whole. (See section 2 and Appendix 1 for further details of NRPS on the current franchise).
- 4.5 In 2014 Transport Focus undertook a study to explore passengers' relationship with the rail industry⁷. The main finding is that to improve passengers' trust in the rail industry, train companies not only need to get the basic service right day-to-day, they need to put effort into building long-term relationships with their passengers. For the next Wales and Borders franchise to build greater trust with passengers it is important to get the basic service right ahead of everything else. Then, building on closer relationships with their passengers is important. One way is through high quality communication. Passengers should feel that train companies are 'on their side'.
- 4.6 Analysis of the passenger priorities for improvement, drivers of satisfaction /dissatisfaction and NRPS scores highlights a number of factors that should be top level priorities for the next Wales and Borders franchise to address. The primary requirements should be for an absolute focus on the fundamentals to deliver improvements to:
- Capacity and frequency – considering service frequencies and train layouts, optimising the availability of carriages appropriate to demand, as well as how fares incentives might make a contribution to alleviating pressures.
 - Value for money – encompassing the important service elements which drive this as well as the ticket price.
 - Punctuality and reliability - specifically as this affects passengers at all stages of the train journey, not simply the timing of the train at its destination.
 - Minimise and effectively manage disruptions – with planning and contingency arrangements placing passenger interests to the fore. Four of the top ten priorities for ATW passengers relate to avoiding and managing disruption, including accurate and timely information at stations⁸. ATW passengers' satisfaction for how well disruption is dealt with is 42 per cent, the same as the regional train companies average, which is itself

⁶ [Rail passengers' priorities for improvement – simulator](#). Transport Focus. 2014. Please contact us directly to discuss the data specific to Wales.

⁷ [Passengers' relationship with the rail industry](#). Transport Focus. 2014

⁸ [Rail passengers priorities for improvement](#) Transport Focus. 2014

low. In terms of the usefulness of information, there is a gap, with ATW at 50 per cent against the regional average at 53 per cent.

- Provision of accurate and timely information – for all stages of the journey but especially during delays and disruption. Following significant disruption on the Valleys lines in July 2014, ATW asked Transport Focus to review the quality of information provided to passengers. Following discussions, we provided our conclusions and recommendations, now published together with the report from ATW on actions taken for improvement⁹. We continue to work with ATW as measures are implemented. This area of key concern for passengers will need to be a priority for the new franchise.

Alongside this, there must also be improvements to other elements of the journey experience including:

- Improvements on-board – with particular emphasis on the cleanliness and maintenance of the inside of the train and on-board toilets, layouts that facilitate luggage storage and passenger comfort and with high quality connectivity to facilitate access to information and enable a range of activities during the journey.
- Enhanced station environments – that create easily navigable spaces providing the facilities and comfort that passengers value.
- Proactive and helpful staff available to provide information, reassurance and assistance to passengers. Passengers consistently identify the presence of staff as important to providing reassurance to those travelling on the railway. Research carried out in 2011 found satisfaction with security at unstaffed stations was 9 per cent lower than the average for staffed stations in Wales¹⁰. Better lighting and CCTV were seen as key; passengers also placed a high value on being able to access real-time information via Customer Information Screens, particularly at times of disruption. In terms of improving on-train security, 75 per cent of passengers believe that staff walking through the train would be effective. On board staff are also crucial for passengers buying tickets and are seen as a main part of the solution to fare evasion.
- Seamless ticketing – which allows passengers to select and easily obtain the best and most appropriate fare for their journey delivered through the medium of their choice.
- Building trust with passengers, with clear and open communication.

The next franchise operator also needs to embed a genuinely customer-service focused culture at all levels and provide a personalised, rewarding passenger experience.

4.7 Transport Focus has long advocated more use of quality-focused targets within a franchise. Our strong preference is for targets based on what passengers think, the best judge of quality being those who have used the services in question. The NRPS is ideally suited to capture information that directly reflects the customer perspective. A financial penalty regime should apply, with resources ring-fenced for additional investment into service quality measures that are most likely to improve passenger satisfaction.

4.8 Central to improving the passenger experience of rail services are effective mechanisms for passenger and stakeholder engagement, particularly for gathering intelligence on local

⁹ [Valley lines July 2014 disruption](#) Transport Focus. 2015

¹⁰ [The passenger experience at unstaffed stations](#) Transport Focus. 2011

aspirations and developments, and for consulting on future proposals. Our research shows that passengers have unanswered desires to contribute their thoughts, both about priorities for franchise specifications and the performance of incumbents. There is also a desire for greater two-way communication about what each franchise promises – and what is actually achieved¹¹. The next franchise should provide an engagement strategy that accommodates the needs of different passengers.

4.9 There is an increasing demand for technology that drives both functional and relationship improvements. Intelligent use of technology should facilitate easier, more intuitive ticket purchase options and provide the accurate, timely information that empowers passengers to make informed travel choices. Provision of free, reliable internet connectivity, better mobile phone reception and power sockets help passengers to get the most of their door-to-door journey. The next franchise must be able to respond flexibly to the needs of a rapidly changing world.

5. The Welsh Government's approach to the rail franchise and South Wales Metro

5.1 The Welsh Government has established a clear policy position regarding their expectations for the future franchise and has established Transport for Wales (TfW) to run the procurement on its behalf.

5.2 The approach adopted is innovative and it will be some time before the success of this method can be assessed. Four bidders have been shortlisted and are now engaged in competitive dialogue. There will be a welcome further consultation and some passenger research undertaken before the bidders are invited to submit their final solution. It appears that TfW have taken steps to strengthen the team, ensuring increased rail franchise experience and additional staff resource to support the procurement activity.

5.3 Transport Focus is pleased to be engaging with TfW on matters of policy and passenger experience. They are also looking to draw on the experience of the established devolved authorities in Scotland and London.

5.4 It is important that principles of engagement and transparency are followed so that passengers and funders of the railway can be informed about and understand the decisions that are being made about the future of these vital services.

6. How do the Welsh and UK Governments cooperate in deciding how services are provided?

6.1 The fundamental principle that should guide decisions on how services in Wales are run must be what is best for the passenger.

6.2 Passengers are focused on the outputs that matter to them – how punctual their service is, how many seats are available and whether they are kept informed of delays – rather than the structures adopted by Government and the industry to deliver these.

6.3 We believe that the decisions on rail passenger services in Wales should be determined against the 'passenger test' which incorporates three core questions:

- What benefits will this bring to passengers and how will these improve services?
- Will it create any disbenefits and what effect will this have on passengers?

¹¹ [Giving passengers a voice in rail services](#). Transport Focus. 2013

- Will it inhibit/prevent development of future benefits?

A number of issues merit consideration against these criteria, not least maintaining a coherent and integrated network and ensuring appropriate funding and accountability is available on both sides of the border.

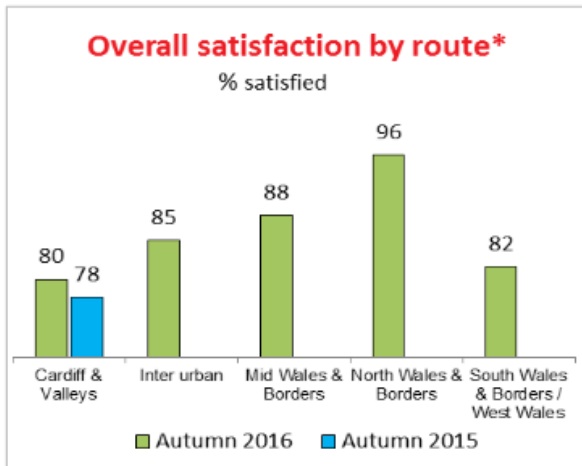
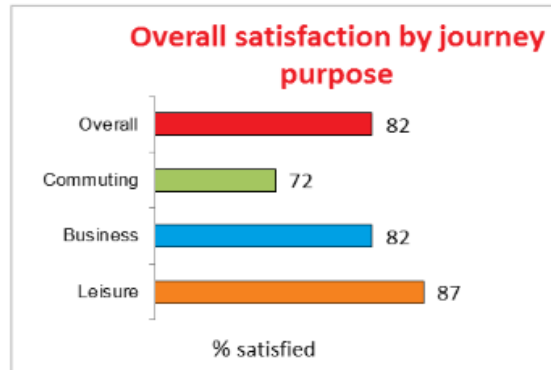
- 6.4 The Wales & Borders services need to retain smooth interaction with the remainder of the rail network. Passengers value the concept of a national rail network and the seamless delivery of service. Rail also plays an important role in promoting access and economic opportunity between regions. There is, for example, an increasing emphasis on the linkages between Wales and the 'Northern Powerhouse'. Decisions should ensure that no artificial barriers impact on passenger journeys and the seamless concept does not develop rough edges.
- 6.5 In this context the shape of the Wales & Borders network is particularly important. Important services run between destinations within and beyond both England and Wales, providing linkages in many directions. Were the franchise routes to be remapped then it would be hard to see how a coherent network could be retained.
- 6.6 Remapping would inevitably require resources to implement and may well create additional costs in future operation.
- 6.7 However, there are some challenges around access to funding, determining priorities and ensuring decisions reflect the priorities of relevant stakeholders. What structures can ensure that Welsh and English communities and stakeholders have a voice in decisions and dialogue on the issues that matter to them? How will future investment be secured and expenditure choices agreed with those who are affected?
- 6.8 Clearly, mechanisms will be required to ensure that the Welsh and English Governments maintain ongoing liaison and both bodies have a say, and a stake, in the decision making processes as they affect cross-border matters. Funding streams must also be available for stations and services on both sides of the border.
- 6.9 There may also be scope for developing the existing Cross Border Forum which brings together a range of parties, including Transport Focus and Transport for the North, to address issues relating to the rail service and estate. It is possible to conceive of a strengthening of this functioning and a remit to manage or mandate potentially ring-fenced budgets to ensure that investment and operational decisions reflect the wishes of relevant stakeholders.
- 6.10 All parties involved in decisions about the operation of Welsh services must commit to placing passenger priorities at the heart of their approach and ensure they adopt the highest standards in engagement and transparency. This will allow passengers who use, and also fund a substantial element of the rail costs, to have a voice in the future of their rail services.

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February 2017

Appendix 1: ATW passenger satisfaction scores

A1.1 Passenger satisfaction at a glance: NRPS Autumn 2016, ATW and building blocks



How routes are defined

Cardiff & Valleys: Journeys on the Valley lines around Cardiff

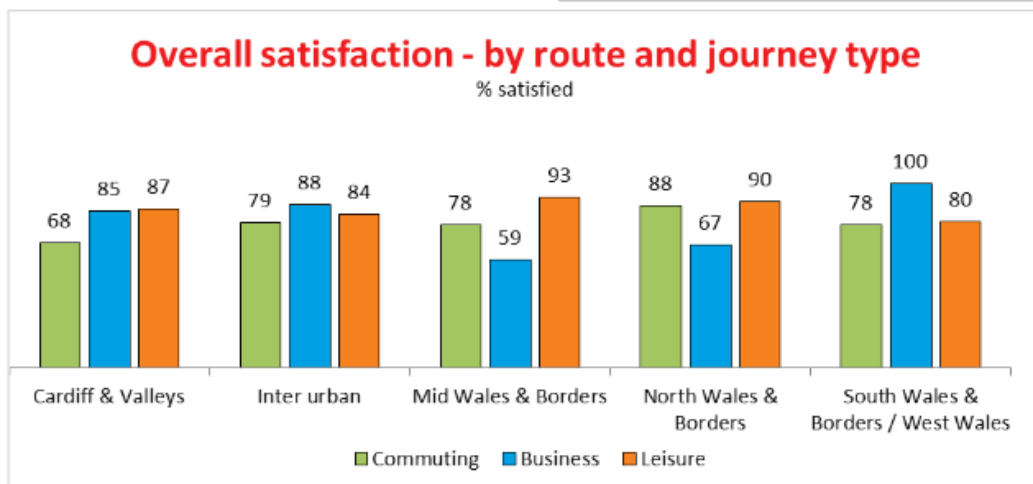
Inter urban: Journeys on the Fishguard Harbour – Manchester Piccadilly, Milford Haven – Manchester Piccadilly, and Holyhead – Cardiff Central lines.

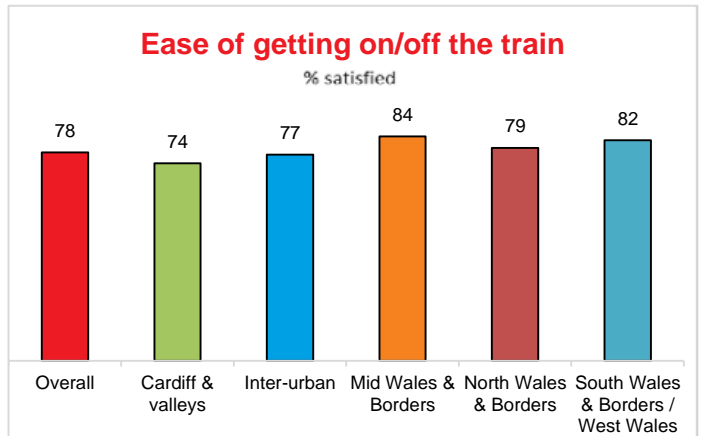
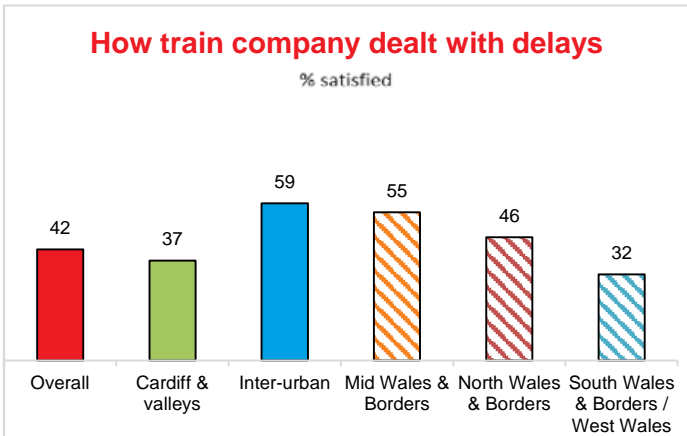
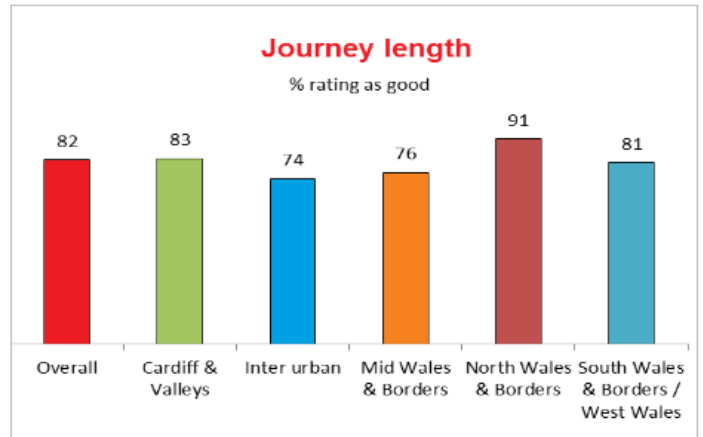
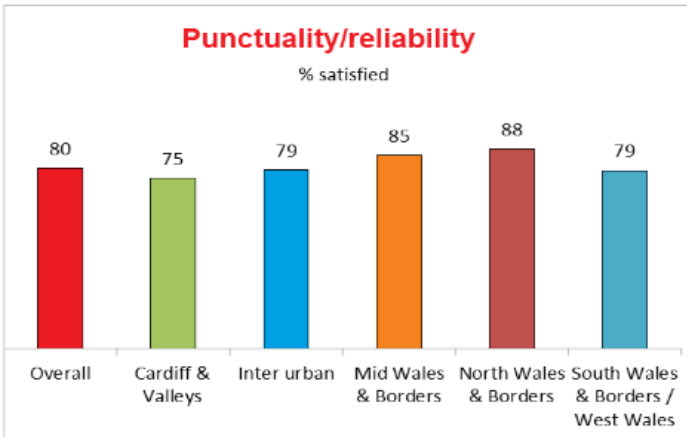
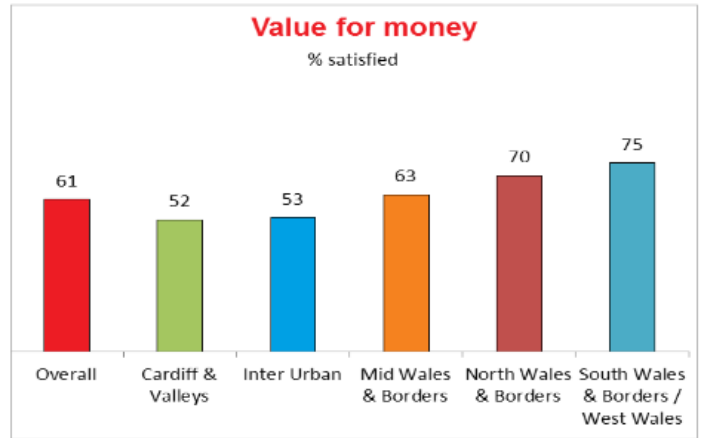
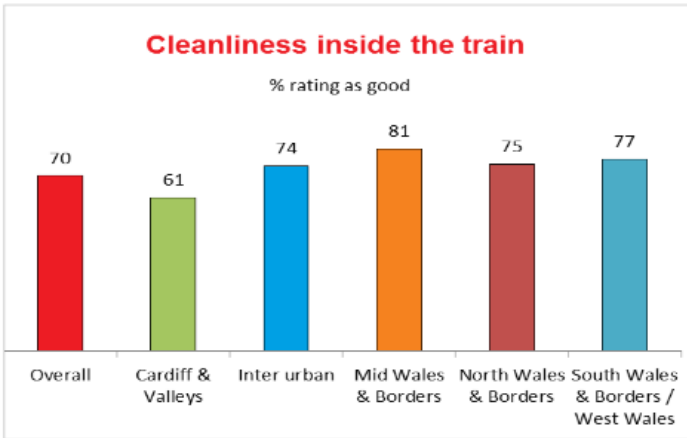
Mid Wales & Borders: Journeys on the Pwllheli/Aberystwyth – Birmingham International, Shrewsbury – Crewe, and Holyhead – Birmingham International lines.


North Wales & Borders: Journeys on the Llandudno – Manchester Piccadilly, Bidston – Wrexham Central, Chester – Crewe, and Llandudno/Llandudno Junction - Blaenau Ffestiniog lines.

South Wales & Borders / West Wales: Journeys on the Swansea – Shrewsbury, Maesteg – Cheltenham Spa, Pembroke Docks – Swansea, Swansea – Cardiff Central, and Cardiff Central – Ebbw Vale Town lines.

*due to a change in route definitions, route data for Autumn 2015 is only included in this report for Cardiff & Valleys route (this route did not change)







 Small sample size- use with caution

A1.2 NRPS Autumn 2016: percentage satisfied, ATW compared to Regional sector¹²

	Arriva Trains Wales	Regional	TOC index
Overall			
Overall satisfaction with the journey	82	84	98
Train factors			
Overall satisfaction with the train	75	80	94
The frequency of the trains on that route	69	79	88
Punctuality/reliability (i.e. the train arriving/departing on time)	80	82	97
The length of time the journey was scheduled to take (speed)	82	87	94
Connections with other train services	75	78	96
The value for money for the price of your ticket	61	60	101
Cleanliness of the train	70	74	95
Upkeep and repair of the train	64	70	92
The provision of information during the journey	63	71	89
The helpfulness and attitude of staff on train	84	79	108
The space for luggage	63	61	102
The toilet facilities	47	43	109
Sufficient room for all passengers to sit/stand	70	72	97
The comfort of the seating area	72	72	99
The ease of being able to get on and off	78	83	93
Your personal security whilst on board	80	81	98
The cleanliness of the inside	70	75	94
The cleanliness of the outside	66	71	92
The availability of staff on the train	73	64	113
How well train company dealt with delays	42	42	99
Usefulness of information during delays	50	53	95
Station factors			
Overall satisfaction with the station	75	81	93
Ticket buying facilities	71	78	91
Provision of information about train times/platforms	78	84	93
The upkeep/repair of the station buildings/platforms	66	78	85
Cleanliness of the station	69	80	86
The facilities and services at the station	49	55	89
The attitudes and helpfulness of station staff	75	80	94
Connections with other forms of public transport	62	72	87
Facilities for car parking at the station	60	54	111
The overall station environment	67	76	88
Your personal security whilst using the station	69	76	90
The availability of staff at the station	58	70	83
The provision of shelter facilities	70	77	91
Availability of seating	56	61	92
How request to station staff was handled	84	87	96
The choice of shops/eating/drinking facilities available	38	45	85
Facilities for bicycle parking at the station	58	63	92

¹² TOC Index shows performance of TOC against the sector as a percentage (e.g. if TOC score is equal to sector score the TOC Index would be 100%. If it is 102% the performance is better).

 - five points or more above sector average
 - five points or more below sector average

A1.3 Drivers of satisfaction and dissatisfaction, NRPS Autumn 2016/Spring 2016: ATW and building blocks

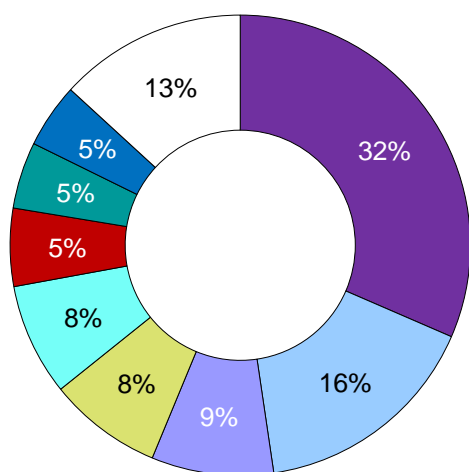
What impacts on satisfaction and dissatisfaction?

Not all factors will have equal importance - some things will have a much bigger influence on whether a passenger is satisfied with the overall journey than others.

The charts below show which station and train factors are statistically most important in determining overall passenger satisfaction and dissatisfaction for Arriva Trains Wales.

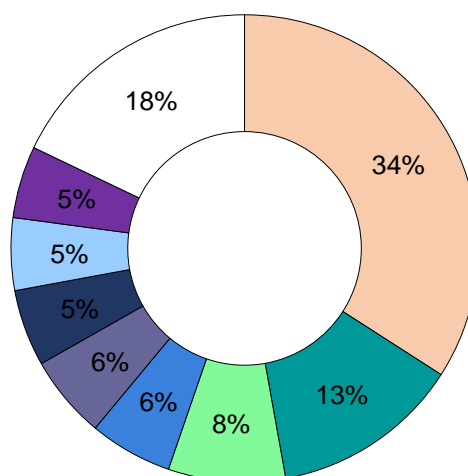
The analysis looks at which factors correlate most highly with overall journey satisfaction. For example, if those satisfied with punctuality are much more likely to be satisfied overall, then punctuality is likely to have a bigger impact on overall satisfaction. The higher the percentage figure below, the greater the influence on overall journey satisfaction.

What has the biggest impact on overall satisfaction? ATW



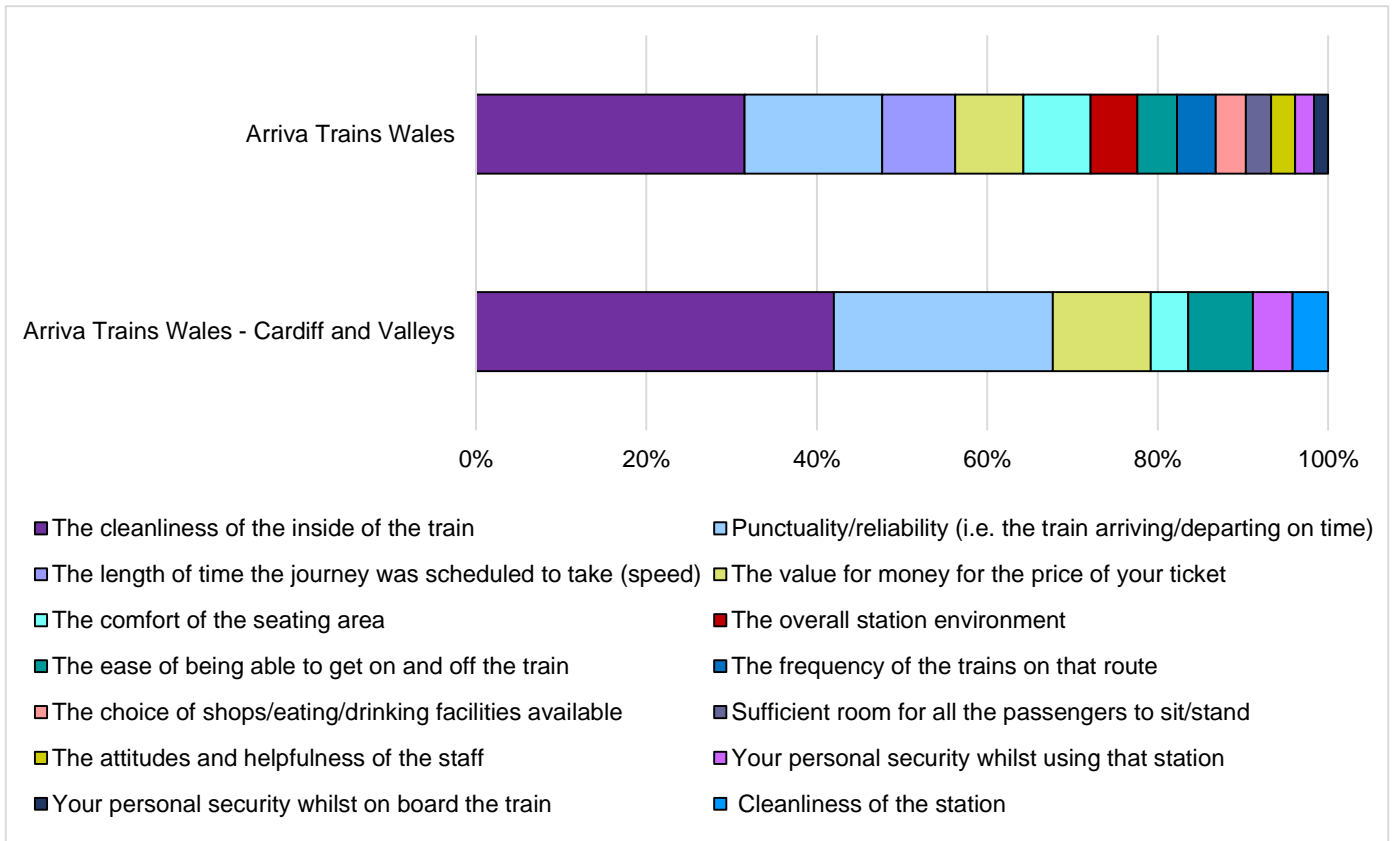
- The cleanliness of the inside of the train
- Punctuality/reliability
- Length of time the journey was scheduled to take
- The value for money for the price of your ticket
- The comfort of the seating area
- The overall station environment
- The ease of being able to get on and off the train
- The frequency of the trains on that route
- Other

What has the biggest impact on overall dissatisfaction? ATW



- How train company dealt with these delays
- The ease of being able to get on and off the train
- How request to station staff was handled
- The helpfulness and attitude of staff on train
- Sufficient room for all the passengers to sit/stand
- Your personal security whilst on board the train
- Punctuality/reliability
- The cleanliness of the inside of the train
- Other

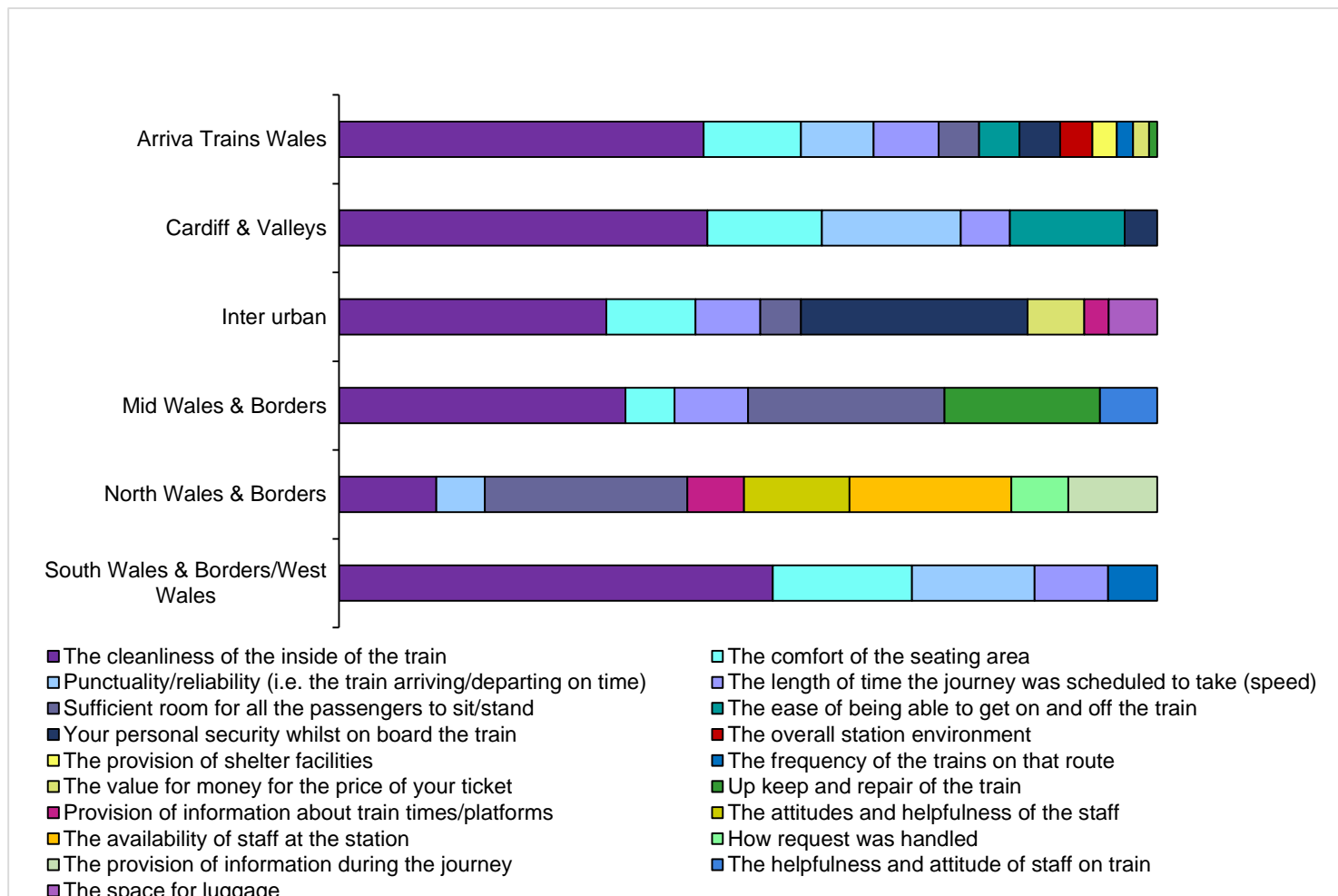
What has the biggest impact on overall satisfaction? ATW and Cardiff and Valleys building block



Please note that due to changes to the building blocks in 2016, drivers of satisfaction are only available for Cardiff and Valleys for Spring 2016/Autumn 2016 combined.

Autumn 2015/Spring 2016 drivers of satisfaction by building block are included below for reference.

Drivers of satisfaction and dissatisfaction, NRPS Autumn 2015/Spring 2016: ATW and building blocks



To download the full National Rail Passenger Survey, visit:
<http://www.transportfocus.org.uk/research/national-passenger-survey-introduction>

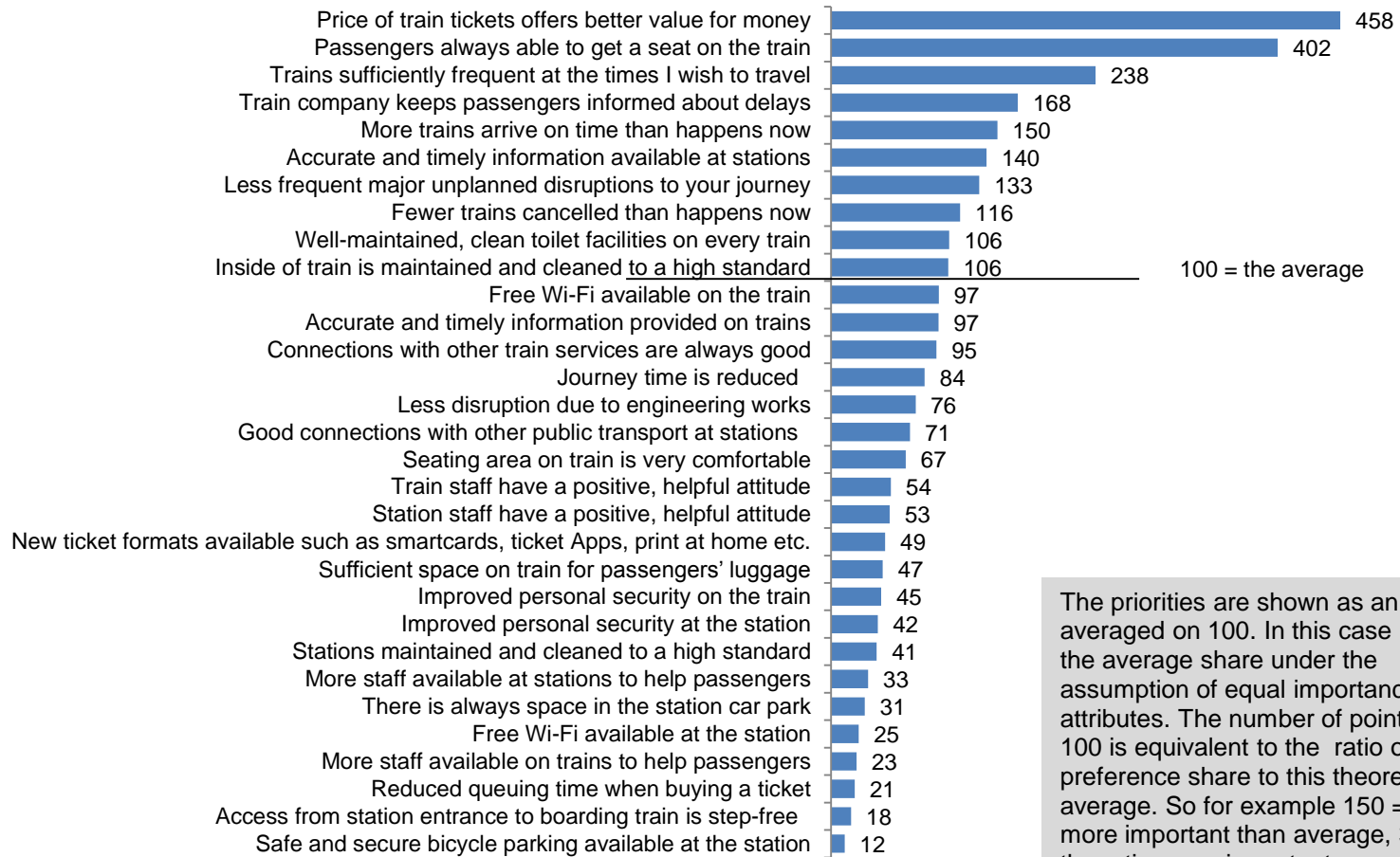
You can explore the results in more depth at:
<http://www.transportfocus.org.uk/our-open-data>

Appendix 2: Rail passengers' priorities for improvement

The table below shows the relative scores for the top 14 priorities (out of a list of 31) for Wales as a whole alongside those for commuters, business and leisure passengers. To achieve a representative sample for Wales the returned questionnaires are weighted in relation to journey purpose: commuter 32%, business 12% and Leisure 56%. ATW passengers make up nearly 700 of the 750 returns for Wales.

	ATW (697)		Total Wales (750)		Commuter (400)		Business (62)		Leisure (288)	
	Rank	Index	Rank	Index	Rank	Index	Rank	Index	Rank	Index
Price of train tickets offers better value for money	2	473	1	458	1	491	2	485	2	434
Passengers always able to get a seat on the train	1	482	2	402	3	277	1	526	1	448
Trains sufficiently frequent at the times I wish to travel	3	231	3	238	2	279	3	220	3	219
Train company keeps passengers informed about delays	4	161	4	168	6	181	5	135	4	167
More trains arrive on time than happens now	5	140	5	150	4	202	9	109	6	128
Accurate and timely information available at stations	6	135	6	140	8	143	8	115	5	143
Less frequent major unplanned disruptions to your journey	7	123	7	133	5	186	11	95	9	111
Fewer trains cancelled than happens now	8	108	8	116	7	158	14	83	11	99
Well-maintained, clean toilet facilities on every train	9	107	9	106	15	75	6	117	7	122
Inside of train is maintained and cleaned to a high standard	10	106	10	106	13	83	7	115	8	117
Free Wi-Fi available on the train	13	90	11	97	12	99	4	161	13	82
Accurate and timely information provided on trains	12	91	12	97	10	101	15	80	12	98
Connections with other train services are always good	11	98	13	95	14	82	12	89	10	103
Journey time is reduced	14	77	14	84	9	101	10	105	16	70

Priorities in rank order with index score to 100: all Wales passengers



The priorities are shown as an index averaged on 100. In this case 100 = the average share under the assumption of equal importance of all attributes. The number of points above 100 is equivalent to the ratio of actual preference share to this theoretical average. So for example 150 = 50% more important than average, 300 = three times as important as average, 50 = half as important as average.

Bus Users Cymru is funded by the Welsh Government to represent the bus passenger in Wales.

Our job is to

- handle complaints;
- improve bus services across Wales by monitoring and reporting on bus operations;
- educate transport providers and enforce compliance where necessary;
- gather the views of users and accurately reflect them to the industry and legislators;
- improve transport providers' attitude towards their passengers;
- provide guidance and support for bus users;
- help passengers to have their say and get complaints resolved;
- provide advice on proposed transport policy;
- input passengers' views before policy is written ;
- facilitate opportunities for the public to meet local authorities and the operators that provide the services;

Further to the Rail Franchise Consultation page on the National Assembly for Wales website and our attendance in Shrewsbury on 9 March 2017, Bus Users Cymru offers the following comments in the same order as shown on the Survey Monkey questionnaire (numbers 1 to 11) with some additional comments. It will be understood that Bus Users Cymru looks at all the issues from a passenger perspective.

Survey Monkey questionnaire

1. Timetable information for passengers

Information must be provided not just for rail but also for relevant bus services. If seamless integration is to be achieved, then sufficient information in many forms needs to be easily available.

2. Handling delays and disruption

Staff must be trained to be highly visible at times of disruption and also be empowered to assist passengers with their onward journey. Staff must be knowledgeable about their company's processes and much greater confidence and trust can be engendered simply by being visible. Rail replacement plans should be integrated into any new franchise agreement.

3. Staff availability on trains and at stations

Again, staff must be available and visible. It is easy to assume that everyone is local and they know where they are going. This is not so, as an hour or so on Cardiff Central Railway Station would demonstrate.

4. Knowledge and attitude of staff on trains and at stations

Staff attitude is key to improving the passenger experience and thereby increasing passenger numbers. Apart from being visible, staff should have full knowledge of their own as well as other Train Operating Companies' services and it is essential that they look as though they want to help.

5. Journey times and frequency of services

Journey times must be faster so that public transport is clearly faster than the private car and frequency of services must be such that they encourage people out of their cars and on to the railway network.

6. Punctuality and reliability

Punctuality and reliability are both essential in building passenger confidence and trust.

7. Connections with other train services

8. Connections with other modes of transport

Connection with other services is a basic requirement. Connections with other modes of transport are increasingly important and due consideration should be given to the Active Travel (Wales) Act and bear in mind that every journey starts in the home, not at the railway station.

9. Tickets that can also be used on other train services and other modes of transport

A multi modal ticket would encourage more people to use public transport, both rail and bus.

10. Smart ticketing (mobile/smart card etc)

It is essential that different means of ticketing be explored. These days most young people go out with just a phone and a card. In many cases, they go out with just a phone. Due regard must be given to this and ticketing must be developed to keep up with this behaviour trend.

11. The price of fares to use services

The competition comes from the motor car so it's important to pitch fares at the right level to encourage passenger growth and to demonstrate that public transport can be cheaper than using the private car. In addition, fares and methods of purchase must be advertised as widely as possible because potential passengers can lose confidence if they don't know the fare and lack of information discourages new passengers. In many cases a season ticket or carnet ticket can reduce the uncertainty.

12. South East Wales Metro

The S E Wales Metro covers an area containing approximately two thirds of the population of Wales and has the potential to achieve modal shift. Indeed, if congestion is not to strangle movement and the economy modal shift must be achieved. However, if modal shift is to be achieved then the rail franchise must offer high quality frequent trains with sufficient capacity in peak times and bus / rail must be integrated so as to provide the maximum reliable travel opportunities. Bus stops and railway stations must be accessible and safe. Local authorities must provide priority measures and the journey to and from the railway station must be included in the overall planning.

13. TrawsCymru pan Wales long distance bus network

If the TrawsCymru network is to fulfil its role of linking key settlements not served by rail we would like to see a requirement to work with the TrawsCymru network manager in order to provide a full network thus linking all key settlements in Wales.

14. Passenger Satisfaction

Targets should be set for improved passenger satisfaction levels

15. Provision of Information

Information must be provided in as many formats as possible, not forgetting printed matter. Whilst the world might be moving towards being paperless, many people do not have access to technology and tourists particularly like to have a printed timetable they can keep for the whole journey.

16. Consultation with stakeholders

Consultation should take place before and after the franchise is awarded, especially with passenger representatives and groups representing people with protected characteristics. Customer panels should be set up to enable regular dialogue with passengers. Liaison must take place with bus operators to enable connections to be made.

Priorities as shown on the Survey Monkey questionnaire

1. Capacity and availability of seats when you travel
2. Access and facilities for older people and people with disabilities
3. Security at stations and on trains themselves
4. The quality and cleanliness of the trains used to provide services
5. Facilities at stations
6. Reduced CO₂ emissions from transport
7. Availability of Wifi and plug sockets in carriages

I hope the foregoing will be useful in your deliberations.

Yours sincerely

Margaret Everson MBE
Director, Bus Users Cymru
21st February 2017

Question 1

The effectiveness of the Welsh Government’s approach to the development, procurement and delivery of the rail franchise and South Wales Metro, including key risks and how they can be mitigated.

1. The procurement process that is being undertaken differs greatly from other rail franchises recently awarded or in the process of being awarded i.e.

- The Northern franchise
- Greater Anglia

What evidence is there available that the process adopted for the Wales & Borders franchise will deliver a sound and robust rail franchise contract vs. the model adopted by the Department for Transport?

2. The implementation of this franchise process and the engagement with stakeholders is confusing. Workshop invitations appear to be random with many relying on word of mouth to seek an invitation.

3. The ‘rules of engagement’ with bidders apparently being con-strained to meeting with elected members with a transport port-folio or ‘of influence’ again has been restrictive.

4. The scope of the stakeholder list is also unclear. This is a Wales & Borders Franchise and this rail franchise will be vitally important for the development of those English Regions.

5. We are advised of a ‘data room’. Are we content that the data provided within is robust and accurate and covers the entire Wales & Borders franchise area including the English regions?

6. There are great hopes on this new franchise delivering a great railway. The current franchise being awarded on a no growth basis over a long 15 year period has seen us struggling daily with capacity issues as demand has grown. Passenger expectations that this will be addressed are high particularly with the introduction of new rolling stock in recently awarded franchises in England.

7. There is a lack of clarity on the way forward for Community Rail Partnerships in Wales and the Borders. Community Rail is not part of the current franchise but forms an important part of all the recent Department for Transport franchises with sound financial support for their development being an undertaking. We have the opportunity to finally redress this omission and specify a Wales & Borders Community Rail Strategy that will be cross border serving the railway and the communities of the two countries.

8. There is no information on how the governance of the new franchise will operate. We have highlighted that this is a Wales and Borders franchise and the needs of the English regions need to be appreciated and included both in the specification and the ongoing governance. The English Regions need to be included in any decisions that are made on how the franchise is developed or changes made to the services offered.

Question 2

Priorities for the franchise specification and Metro delivery to ensure rail services meet the needs of current and future travellers throughout the franchise area, and deliver value for money for both passengers and the taxpayer.

1. A franchise specification that includes a process that ensures the needs of passengers both in Wales & England are considered, assessed and addressed. This process should be clear to all stakeholders and also form the basis for ongoing consultations where services enhancements or changes may have a potential adverse affect in another locality.

2. The current franchise map accommodates important cross border services originating in Wales which we need to be maintained and enhanced such as those into Birmingham International, Crewe and Manchester. Many of these cross border services are heavily used and need to have sufficient capacity (based on current and projected demand) for peak time travel for the entire journey. Reliability of services particularly on these long distance services needs to be considered across its entire length whether that is Wales or England. The termination of the train prior to its final destination to ensure the late running does not affect the return journey needs review and consideration given to the passenger inconvenience both those who have their journeys terminated and those who lose a scheduled service.

3. Service provision on much of the Marches lines has not improved since the last franchise, indeed for some stations on the Marches Line they have seen their services decline due to retiming of services and the poor connections to onward long distance services out of Shrewsbury. We wish to see all current cross border services maintained and enhanced, from origin to destination particularly those to I important gateways such as Manchester and Birmingham International, ensuring that this franchise provides capacity for growth, at least consistent with that of the new Northern and Trans Pennine Express franchises.

4. Service provision on a Sunday is inadequate and does not meet passenger needs on all routes. Also later services in the evenings are needed to allow passengers to return from long distance journeys or evenings spent at events. At Chester the last service south to Wrexham and on to Shrewsbury is 22.28 far to early for passengers to complete their journeys.

5. We need to be aware that major investment and regeneration projects across the Border in England are being delivered which will give rise to new opportunities for rail travel in particular connections via Wrexham and the

Halton Curve to Liverpool and the airport and along the Borderlands Line and the Enterprise Zones.

6. The need to have a clear mechanism, including funding, in place that allows service and station enhancements to be rolled out throughout the life of the franchise on both sides of the border.

7. The new franchise should be seen as an opportunity for provision for fully funded Community Rail Partnerships to be established. The latest franchises awarded by the Departments for Transport have included significant financial support as a part of the specification. It is also the opportunity for Community Rail in Wales & the Borders to work to a new community rail strategy specifically tailored to the region including the cross border routes.

8. Many rail journeys do not start or end in Wales. The new Wales and Borders franchise needs to significantly improve direct access between a number of points such as:

1. Chester & Wrexham with Manchester Airport
2. Liverpool via the Halton curve to Wrexham and south to Shrewsbury
3. Improving connectivity by contractually extending the services beyond Birmingham New Street to Birmingham International.
4. Crewe Shrewsbury services extending to Telford

Sheila Dee
Community Rail Officer
Chester Shrewsbury Rail Partnership

About ACoRP:

i. The Association of Community Rail Partnerships (ACoRP) is a national, not-for-profit umbrella body working across Britain to support, advocate and represent the community rail movement. The community rail movement is made up of hundreds of small community groups, such as station adoption groups, and larger and more formal community rail partnerships (CRPs) that work along whole or multiple lines, connecting communities with their railways. Community rail partnerships and groups carry out a wide range of activities, including:

- promoting understanding and use of the railways, such as communicating local developments or encouraging rail travel for leisure and tourism purposes
- helping communities support, feed into and influence their railway and station's development so it better meets their needs, such as coordinating volunteer groups to maintain and enhance stations, or advising train operators on local needs and demand
- bringing disused station buildings and land back into community use, such as by achieving renovations, setting up community group spaces, or running social enterprises
- running a range of activities to bring people together and tackle social exclusion linked to the railways, such as local events, creative projects and educational programmes.

The value of such work has been reviewed in the 2015 report the [Value of Community Rail](#), finding that CRPs more than pay for themselves, contributing £3.4m per annum in volunteering hours alone, bringing social and economic value, and seeing above average passenger growth.

ii. ACoRP's membership includes more than 50 CRPs and many more station adoption groups. Our work includes providing a year-round programme of training opportunities and seminars, a range of written materials, annual awards recognising and sharing good practice in community rail, and supporting members through ad hoc advice, planning support, facilitating networking and relationship development, and sharing ideas and experience.

iii. We are funded annually by the Welsh Government to support and enhance community rail in Wales, including through our events and materials, advocating for the community rail movement at national and regional level, and providing direct support to the five Welsh community rail partnerships and many smaller groups. We also receive core funding from the Department for Transport and a range of industry partners.

iv. ACoRP remains a small organisation (with 11 team members), but underwent significant expansion and reorganisation in late 2016. We are therefore in the process of significantly stepping up our work to support members and promote community rail, and are in discussion with the Welsh Government about how this will take shape in Wales as we move into 2017-18.

Inquiry response:

How effective is the Welsh Government's approach to the development, procurement and delivery of the rail franchise?

1. To broadly summarise our position, we believe it is essential that the new franchise should seek to build on and enhance the value of community rail partnerships and groups. We are grateful for the continued support of ACoRP and CRPs provided by the Welsh Government and wish to develop further the relationship we have with them. However, we also strongly recommend that it

should be a franchise obligation for the new train operator to support community rail, through funding provided to community rail partnerships and groups, funding provided to ACoRP to advise and share good practice across the sector, and collaborative working with these parties. At present, we have not been informed whether the Welsh Government is committed to this type of approach, but continue to liaise with our contacts and hope this will be a key feature.

2. At the time of writing, ACoRP is also not fully appraised of the Welsh Government's plans for engaging ACoRP and CRPs in the development of the franchise. Consultation and dialogue with those directly delivering and supporting community rail is of course important to ensuring the ongoing success of the movement. There has been some engagement so far – we understand workshops have been taking place – but engagement has been varied and greater communication would be helpful. ACoRP is looking forward to attending a bidders' meeting on 15 March, but we were invited to this by the Welsh Government only after hearing about it and enquiring if we might attend. We are not currently clear how ACoRP and CRPs will be engaged beyond this, although it may be the Welsh Government's intention to provide greater clarity at this event.

3. We are unsure at present exactly what the bidding and procurement process will look like. Our broad understanding is that the process is likely to be markedly different to the Department for Transport's process for awarding franchises, taking an approach of asking bidders to explain how they will address a certain set of issues. We have some concerns about risks that may arise from this type of approach (below), but are otherwise unclear how and whether this might offer advantages or disadvantages to community rail due to not being fully appraised of the plans.

4. We understand that bidders may be asked to set out how they will respond to the 14 wellbeing objectives set out in the Taking Wales Forward strategy. We agree with the idea of working to ensure that the new franchise agreement aligns with broader strategic goals to enhance wellbeing, and believe this kind of approach could be beneficial. However, we note that some of these 14 objectives appear to have only marginal relevance to our railways, and they are designed to be specifically about wellbeing in Wales rather than the wider Wales and Borders franchise area. A significant proportion of the Wales and Borders Franchise lines (including several community railway lines) run across the border into England. We suggest that perhaps the eight more general wellbeing 'goals' in Taking Wales Forward, broadened out to ensure their appropriateness both sides of the border, might offer a strong framework for the bidding process.

Key risks and how they can be mitigated

5. We have identified the below potential risks to the community rail movement and its contribution to communities and railways, if the Wales and Borders Franchise arrangements are not appropriately robust and supportive of community rail. These are summarised below in response to the Committee's interest in this point. However, we would emphasise that all can be mitigated, and in many cases turned into opportunities, through a considered and robust franchising process, which we recommend is developed and delivered in consultation with ACoRP and its members.

6. As noted above, our understanding is that the Welsh Government's franchise process is likely to be different to the DfT's, asking bidders to explain how they will respond to a number of issues, rather than stipulating what they need to deliver. It seems possible that an approach of this kind, if not carefully designed, could involve some level of subjective decision making if it is not based on comparing like with like. This could leave the door open to accusations of the process not being entirely robust and fair, and even judicial review. Of course, this could be damaging to the Welsh Government and public trust in the way our railways are run, and disruptive to the delivery and support of community rail.

7. If provision is not written into the new franchise, there is a risk of CRPs and groups not being adequately supported through ongoing funding. If they do not have access to appropriate and continued levels of funding, their important work engaging communities and promoting the

railways will suffer, and they could be forced to close. CRPs and groups are largely dependent on investment from the Welsh Government and the current franchise holder, especially now that funding previously received from local authorities has largely dried up. If provision of funding is written into the new franchise, as is the case elsewhere, it has the advantage of ensuring money is allocated specifically to community rail for the duration of the franchise, providing security and clarity for CRPs and groups, and allowing for further growth of community rail. It also can facilitate close partnership working between CRPs, groups, ACoRP and the franchise holder towards coherent support for community rail, helping to maximise its value. We therefore recommend the Welsh Government works with bidders and uses a carefully-developed franchise process to ensure no drop or gap in funding, that adequate and ideally increased funding is available for a broad range of community rail activities, and that arrangements are communicated to ACoRP and its members in a clear, timely manner. It may be most beneficial to CRPs and groups' ongoing development to provide a combination of funding from both the franchise holder and Welsh Government. In addition, there is a need for clarity about how funding will be made available to support development to lines and stations across the franchise, including in the borders area. We believe it is important that the Welsh Government works with CRPs, ACoRP and the DfT to ensure the widest possible benefit to community rail, and that no groups fall down funding 'gaps'.

8. Related to the above, there is also a risk to the crucial support ACoRP provides to CRPs and groups in the Welsh franchise area if this work is not properly funded. ACoRP provides guidance, training and development, networking and good practice sharing (across Britain), and advice on issues and opportunities as they arise. Currently our Wales and Borders work is supported by the Welsh Government through an annually-reviewed grant. Were this work to receive increased or longer-term funding, wholly or partly through the franchise, it would enable ACoRP to further step up this work, and support CRPs and groups to deliver (and evaluate and report on) high-quality, well-organised activities that deliver maximum benefit to their communities and railways. ACoRP's long-running and broad experience, established systems, processes and partnerships, and recently-expanded, knowledgeable team, is ideally placed to continue supporting, advising and sharing best practice among Wales and Borders community rail partnerships and groups – but ongoing funding, and strong relationships with government and industry, is vital to this.

9. There is a risk to the community rail movement in Wales and Borders if there is inadequate clarity and understanding (through the franchise process and beyond) about what community rail can achieve in terms of direct benefits to communities and railways and contributing to sustainable development. An extensive range of benefits can be (and are being) realised through community rail, to do with social inclusion and community cohesion, health and wellbeing, prosperity, mobility and sustainable travel and development. While ACoRP's has many examples of such positive outcomes being delivered, we are currently considering how we might better assess and quantify such benefits. At present, the Welsh Government does not have a strategy for community rail (as the DfT does, currently being reviewed with our input), so there is perhaps a need for a clearer narrative about the potential of community rail to contribute more. There is an opportunity in the new franchise for the Welsh Government to work with ACoRP, our members and partners to develop greater clarity about what community rail does and can contribute socially and economically in Wales and the Borders, and avoid too narrow a focus.

10. Another risk to community rail, which can be mitigated through well-thought-through franchising arrangements, relates to creativity, diversity and innovation in community rail, and ensuring this is cultivated. As a membership organisation, we constantly survey (and collate and share) a huge range of activities by community rail partnerships and groups, which often find innovative ways to help communities connect with and get the most from their railways. This includes work as diverse as renovating historic railway buildings for use by local social enterprises and arts groups, to involving mental health service users in station gardening, to promoting more regular weekend rail services. This innovation and variation partly stems from responding to widely differing needs and interests within local communities. Indeed, being attentive to local needs and interests is something we actively encourage among our members, while also supporting them to

address skills gaps, improve quality and efficiency, and learn from others. While there is clearly value in helping CRPs and groups to raise standards, operate professionally and learn from each other, franchise arrangements should be devised so they encourage, rather than suppress, innovation and creativity, with acknowledgement to the fact that these are small, grassroots, community organisations and should be valued as such for their unique contribution.

11. Finally, as referenced above, there may potentially be a risk of the franchising process overlooking the cross-border nature of these railways, and missing the opportunity to ensure collaboration and sharing across England and Wales (and beyond), which is crucial for community rail and rail passengers. Four of the five Wales and Borders CRPs' lines operate across the border, and the Borders area sees a significant range of community rail activity. CRPs work along a line (or multiple lines), and it would be neither desirable nor practical for them to work differently or do more on one side of border than the other. The railways in Wales and across the border in England are of course highly inter-dependent in terms of their operation and development and passenger numbers. On this basis, we would suggest that greater clarity from the Welsh Government and DfT, about how the management of railways within and connecting to the Borders area will work, would be welcomed by those in community rail.

Priorities for the franchise specification

12. We have outlined below our suggestions for how the Welsh Government can take advantage of this opportunity to further support and enhance community rail in the Wales and the Borders franchise area, enabling greater value to be delivered to local communities and economies and the railways. Again, we emphasise the importance of ongoing communication, consultation and dialogue with ACoRP and CRPs and groups throughout the franchising process, to further plan and coordinate delivery of such priorities.

13. We suggest the franchise specification includes the following priorities in relation to community rail:

- a) Ensuring adequate, ideally increased, investment into community rail throughout the franchise period, including: direct funding of a broad range of community rail activities that seek to deliver positive outcomes to do with social inclusion and community cohesion, health and wellbeing, prosperity, mobility and sustainable travel and development; plus investment in expert support, advice and information sharing provided by ACoRP;
- b) Ensuring the community rail movement is supported and heard by the rail industry and policy makers, through understanding and constructive relationships at local and regional level, and opportunity for community rail to influence and inform the ongoing development of our railways: as CRPs and groups are rooted in the community they offer an ideal vehicle for ensuring that development is in tune with local needs, demand and opportunities;
- c) Scope and support for developing and nurturing additional CRPs, including in the borders area, and providing ongoing needs-orientated skills development, training and good practice information and advice, drawing on ACoRP's long-running experience;
- d) Encouraging and supporting (through and with ACoRP) specific development areas in community rail identified by ACoRP, its members and partners as offering particular opportunities for increased social and economic benefit, such as: development of management and planning within CRPs, station buildings development, communications and tourism promotion, social inclusion work;
- e) Promoting understanding of community rail within the rail industry and on a wider basis, making clear the benefits it can deliver, and supporting effective collaboration;
- f) Linking the rail franchise with wider work in Wales (and wider) to promote active and sustainable travel, such as under the Active Travel Act, bus service development, and community transport provision.

14. As a general point, we also propose that benefit might be maximised from this franchise process and arrangements if there is a focus not just on passengers and 'taxpayers', important

though these groups are, but more widely on the communities that these railways serve. The many excellent examples we have collated of community rail in action show how communities can be effectively connected with and engaged in their local railways, not just as passengers, but also as volunteers, students, families, tourists, day-trippers, event and activity participants, artists, gardeners, shoppers, museum and gallery visitors... the list goes on. This type of wider engagement not only provides direct benefits to health, wellbeing and prosperity, but also generates understanding, pride and enthusiasm for the railways, feeding into railway use. A broader focus, through this franchise, on how the Wales and Borders railways can best serve *communities* and meet their needs, may help bring about even greater benefit, to passengers and taxpayers specifically but also to society as a whole.

For any queries on this submission, contact ACoRP on info@acorp.uk.com or 01484 548926.

Cynulliad Cenedlaethol Cymru / National Assembly for Wales

Pwyllgor yr Economi, Seilwaith a Sgiliau/ Economy, Infrastructure and Skills Committee

Masnachfrait Rheilffyrdd a chyflwyno Metro / Rail Franchise and the Metro

Ymateb gan Canolfan Cydweithredol Cymru / Evidence from Wales Co-operative Centre



Wales **Co-operative** Centre
Canolfan **Cydweithredol** Cymru

**National Assembly for Wales' Economy, Infrastructure and Skills Committee:
Rail Franchise and the Metro Consultation**

Wales Co-operative Centre response

February 2017

About the Wales Co-operative Centre

The Wales Co-operative Centre is Wales's national body for co-operatives, social enterprises and employee owned businesses. The Centre champions and strengthens co-operatives, mutuals, social enterprises, and employee owned businesses. As well as supporting social businesses, we develop and implement co-operative solutions to tackle poverty and promote inclusion. We do this through:

- Support for social enterprise and co-operative business development and growth;
- Facilitating access to joined-up financial advice and support services, including those offered by credit unions and the wider social enterprise sector;
- Encouraging people to use digital technologies, and;
- Supporting the development of co-operative housing initiatives in Wales.

Our projects include

- Social Business Wales provides intensive, one-to-one support to social businesses which have ambitions to grow and a viable business proposal.
- Our Financial Inclusion Champions project works strategically with local authorities and third sector partners to embed financial inclusion into their everyday work, and provide training to frontline staff. This year the focus will be on further developing the [Moneymadeclearwales.org](https://moneymadeclearwales.org) website.
- Our Your Money Your Home project aims to help tackle financial exclusion of Private Rented Sector (PRS) tenants in Wales, and to prepare people for the introduction of Universal Credit.
- The Digital Communities Wales project helps to tackle digital exclusion by providing training, support and encouragement to organisations to help them support digitally excluded people.
- Our Co-operative Housing project offers business support and advice to new and existing organisations looking to develop housing co-operative schemes. The goal of the project is to develop and stimulate demand for the co-operative housing approach throughout Wales.
- Our Community Shares Wales project helps community groups raise funds from within their local communities to fund the running of community projects and assets.
- Our Care to Co-operate project offers support and advice to groups who want to set up and run care and support organisations in a co-operative way.

- **The effectiveness of the Welsh Government’s approach to the development, procurement and delivery of the rail franchise and South Wales Metro, including key risks and how they can be mitigated.**

1. Our main points with regard to the procurement processes Welsh Government are undertaking focus on the Metro, and opportunities for the social business sector down the line. To this end we have already made contact with Transport for Wales (TfW), and would like to highlight their proactive engagement with both ourselves and the social business sector in discussing the types of opportunities that the sector is best placed to deliver.
2. Social businesses offer a way of doing business that delivers sustainable economic growth while fostering positive social change and innovation. Our research has shown that the social business sector adds around £2.4 billion of value to the Welsh economy and supports in the region of 38,500 jobs in Wales. They are anchored in their communities, with profits and investment staying within the community, recycled for wider economic and social benefits.
3. Social businesses are more active in deprived areas than SME businesses and tend to employ locally, suggesting that they make an important economic contribution in some of the poorest parts of the country. They play a particular role in creating jobs for, and developing the skills of, people who are outside the labour market. Large public infrastructure projects such as the Metro development offer opportunities for Government to ensure that money spent in those areas can have a direct impact where it is spent; in the case of the Metro developments this will be in some of the areas most affected by deprivation and poverty.
4. Due to the nature of the project, we are aware that the sector cannot make a big impact at the first tier. It is further down the supply chain that we wish to see proactive efforts made to provide opportunities for social businesses. This fits in with the Welsh Government’s policy on using procurement processes to utilise community benefits. The two main types of community benefit as identified by the policy, workforce initiatives and supply chain initiatives, are both relevant to the Metro project. Social Businesses could play a role in direct delivery of community benefits, working with suppliers to support workforce initiatives and as integral elements of the supply chain.
5. Helping social businesses to do this could be achieved in a number of ways, including:
 - Directly engaging with social businesses to deliver products and services
 - Identifying reserved procurement opportunities for supported businesses

- Putting in place a programme of market builder support to encourage social businesses to work together to deliver parts of the project.
6. Directly engaging with social businesses to deliver products and services – Continued engagement with social businesses throughout the procurement phases and ongoing lifetime of the Metro project will be essential if they are to take up any potential opportunities to deliver products and services. As referred to above, Transport for Wales have already undertaken engagement with the sector, attending a round of our Social Business Wales Network meetings in December 2016 to outline the Metro project and identify the potential opportunities within that for social businesses. We welcome this proactive engagement and will work closely with TfW to continue dialogue in future. Support bodies such as ourselves that work with social businesses should also be made aware of any Meet the Buyer/Contractor or other type of information events, so that we can disseminate this amongst our contact network. Although social businesses will not be able to directly deliver on Tier 1 contracts there will be potential opportunities for social businesses to deliver at every stage below that in areas such as catering, facilities management, and signage, so engagement throughout this process, throughout the supply chain, from a very early stage is essential.
7. Identifying reserved procurement opportunities for supported businesses – Public contractors may reserve certain contract opportunities for supported businesses under Article 20 of the Public Contracts Regulations 2015, and for employee-owned businesses under Article 77 of the regulations. As both these types of businesses are social businesses, identifying any potential reserved opportunities for them within the supply chain will help open up markets for them that could otherwise be dominated by private companies.
8. Putting in place a programme of market builder support – Ensuring that market builder support is in place will help social businesses work. This could include publishing an advanced programme of works and procurement stages, skills needed and business support that encompasses issues like tendering, getting tender ready, and consortia approaches.
9. We would also like to see commitments made by Welsh Government and Transport for Wales that:
- Consortia arrangements will be accepted throughout the procurement process at each tier.
 - Contract and payment terms for supply chain providers will be friendly for small businesses

- Skill gaps that may arise during the lifetime of the project will be identified as early as possible in order to give social businesses the opportunity to upskill workers in advance
10. Consortia arrangements – Many social businesses are either micro or small to medium sized enterprises: our research shows that only 2% of social businesses in Wales qualify as large organisations. With this in mind, guaranteeing that consortia arrangements will be accepted throughout each stage of the procurement process will go towards ensuring many SMEs and social businesses have a chance of competing for larger contracts through collaborative working. There are also opportunities through this to create partnerships between the social business sector and private sector SMEs.
 11. Contract terms – For the same reasons as the previous point, we would also like to see a commitment that contract terms for supply chain providers are small business friendly.
 12. Skill gaps – A point that several social businesses have raised with us in discussions on this topic is the need for potential skill gaps to be identified as early as possible to allow for the upskilling/training of workers as early as possible. For a large number of social businesses in Wales, training workers is at the core of their social mission. Three examples are EBO Signs, PS Facilities Management and Vision 21. EBO Signs, a road traffic and commercial signage company, provide training and employment opportunities to disabled and disadvantaged people. PS Facilities Management provides cleaning, building and maintenance services across south Wales, reinvesting it's profits into its parent arm Gofal Enterprises, who provide training opportunities for those furthest from the labour market. Vision 21 offer training in catering for people with learning needs through their Full Circle programme in Caerphilly and Nantyglo. The programme provides catering services to residential Housing with Care schemes in both locations, as well as an external buffet service for external organisations. Having a thorough audit of what skills will be needed and any potential gaps available from the outset will enable social businesses to make quicker decisions about bidding for work in the supply chain process, as well as potentially put themselves in a position to run training programmes.
 - **Priorities for the franchise specification and Metro delivery to ensure rail services meet the needs of current and future travellers throughout the franchise area, and deliver value for money for both passengers and the taxpayer.**
 13. We do not have any comments on this section.

For further information on this response, please contact:

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1. Ynni Glan welcomes the opportunity to submit a response to the Economy, Infrastructure & Skills Committee's Rail Franchise & The Metro Consultation. These comments address how investment in zero emission hydrogen trains and complementary integrated transport infrastructure can mitigate against conventional infrastructure costs; deliver a clean, modern and resilient rail and integrated transport service; provide Wales-wide economic opportunities as well as delivering value for money; and address urgent social, economic and environmental needs while ensuring the well-being of future generations.
2. Ynni Glan is a clean energy consultancy based in Cardiff which specialises in fuel cells and hydrogen (FCH) technologies. Ynni Glan's main focus is business development in Wales and the UK on behalf of international FCH companies including Doosan, www.doosanfuelcell.com, and SolidPOWER, www.solidpower.com, whose commercial products and services are well-established in other markets. Ynni Glan also generates opportunities for Welsh businesses in the rapidly growing FCH sector.
3. FCH technologies can be applied in the electricity, heat and transport sectors for decarbonisation and clean air goals; extending to integration between all three sectors.
4. Fuel cells are an ultra-clean and efficient form of electricity and heat generation involving the safe, electrochemical reaction between hydrogen and oxygen.
5. Hydrogen is a very versatile clean energy fuel which has global applications. Hydrogen can be sourced from natural gas and other fossil fuels (for a low carbon solution) or from water via electrolysis using renewables as primary energy (for a zero carbon solution). Hydrogen can be both *produced* and *used* locally to keep value in the local economy. Hydrogen can be stored at very large scales and seasonally.

6. In transport, hydrogen is a proven fuel for use in cars, vans, buses, lorries, trams and trains. All the transport modes have hydrogen tanks which supply an on-board fuel cell to generate electricity to drive an electric motor. The only emission is water vapour. Batteries are included to boost torque and performance, especially when accelerating from standstill. Such quick response will suit lines which require a high frequency service to effectively meet growing passenger numbers.
7. Fuel cells involve no combustion and therefore emit near-zero air pollution which is a critical public health issue especially in urban areas and which disproportionately affects poorer communities.
8. Fuel cells are also typically twice as efficient as engines at the scale used in transport. Unlike engines, fuel cells are also very quiet in operation which is a further benefit for deployment in urban areas.
9. Hydrogen infrastructure is modular and, as there is only one “grade” of hydrogen, can serve different transport applications. Strategically sited hydrogen filling stations could serve different transport modes and help achieve the required economies of scale to support investment. Hydrogen infrastructure developments are gaining widespread application in many countries, for example:

Scotland - Aberdeen City Council has a fleet of 10 hydrogen buses together with hydrogen infrastructure

<http://www.aberdeeninvestlivevisit.co.uk/home/H2-Aberdeen-Summit.aspx>

Germany - By 2023, Germany aims to have 400 hydrogen filling stations.

<https://cleanenergypartnership.de/en/home/>

Scandinavia - Developing a multitude of pathways for hydrogen supply using local resources.

<http://www.scandinavianhydrogen.org>

California - Growing hydrogen infrastructure network including a 2.5MW wind turbine to produce 1,000kg of hydrogen per day for cars and buses.

<https://www.gasworld.com/north-americas-largest-100-renewable-hydrogen-plant-ahead/2011670.article>.

10. Germany is introducing a fleet of hydrogen trains to its regional rail network over the next few years. Letters-of-Intent were signed in 2014 between manufacturer Alstom and the German Landers of Lower Saxony, North

Rhine-Westphalia, Baden-Württemberg, and the Public Transportation Authorities of Hesse for the development of a new generation of emission-free trains equipped with fuel cells. Alstom's hydrogen train can reach 140 kmh, with a range of 600 to 800 km and accommodate up to 300 passengers.

<http://www.alstom.com/products-services/product-catalogue/rail-systems/trains/products/coradia-ilint-regional-train/>

11. China is introducing hydrogen trams to combat air pollution. Initial details have been published by fuel cell developer Ballard and the first trams are expected to go into service during 2017.

<http://ballard.com/about-ballard/newsroom/news-releases/news04071501.aspx>

12. The electrification costs of the GWR line from London to Cardiff (and on to Swansea at a yet-to-be-determined date) have ballooned from the original 2013 estimate of £874m to over £2.8bn,

<http://www.bbc.co.uk/news/uk-england-oxfordshire-37908735>. Hydrogen trains can avoid the need for expensive, conventional electrification infrastructure (overhead and unsightly catenary, bridge & tunnel upheavals, new power supplies etc). The runaway GWR costs should serve as a caution to the electrification aims of the Rail Franchise and the Metro; especially given the many tunnel, bridge and topography challenges of laying-down electrification infrastructure within Wales' towns and cities, in rural areas and in the Valleys. Lines on the rail and Metro network may be better suited to hydrogen trains than conventional electrification on the grounds of infrastructure costs, civil engineering upheavals, appearance and power-supply constraints.

13. Hydrogen trains may have a cost premium when compared with conventional electric trains but these costs could be more than compensated for by avoiding expensive electrification infrastructure. i.e taking a whole-systems look at costs. Additionally, social, health and environmental costs should be factored-in to the Rail Franchise & The Metro to include air pollution, carbon emissions and noise pollution; all of which can be alleviated by hydrogen trains in common with conventional electrification.
14. Economic opportunities will result from the local production of hydrogen for transport applications, either from water via renewables or from natural gas (both technologies are feasible although renewables are the greenest and possibly highest value route). The cost of the fuel (i.e. hydrogen) would be largely sunk into capital assets for production, storage and transportation, delivering a payback and an economic opportunity; as opposed to paying for external electricity/diesel over which there is less or no control and which may also be less resilient due to power supply issues or weather-related incidents.
15. Such economic opportunities can help spread the wealth of the Rail Franchise and Metro by sourcing hydrogen from e.g. rural areas which have plentiful wind or solar resource, especially when involving community energy enterprises. Wind and solar developments currently face severe electricity grid constraints which can be by-passed by the production of hydrogen, so releasing the full potential of renewables in Wales and as a model which can be replicated elsewhere.
16. Ynni Glan calculates that should the entire Wales rail network be converted to hydrogen trains, the demand for renewably-sourced hydrogen could be met by the output equivalent to a total installed wind capacity of between 100 - 150MW.
17. To put this figure in context, this total wind capacity is approximately 50% of the Pen y Cymoedd wind farm along the Heads of the Valleys. And the capacity could be distributed around Wales in appropriate clusters to spread the wealth of producing hydrogen; also extending to solar and/or other forms of primary renewable generation.

18. Alternatively, stationary fuel cells such as Doosan's can be configured to produce a slipstream of hydrogen for the trains from their input fuel of natural gas or biogas. The fuel cells can therefore be considered as flexible multi-generators - of power, heat/cooling and hydrogen - at the point of need with very low impact; and be suitable for supplying distributed energy for new low carbon developments adjacent to the Metro and also traction power for conventional electrified rail networks as appropriate.
19. The local production of hydrogen could extend to other applications including: injection into and decarbonisation of the gas grid; dedicated hydrogen grids for communities; electricity grid-balancing services; the sustainable production of ammonia (NH₃) for agriculture; and for use in industry (chemicals, refineries, steel etc). The Rail Franchise & Metro opportunity could provide the kick-start and at the scale which is required to propel such complementary hydrogen-based innovations to sustainably



grow Welsh the economy.

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Llyfr newydd ar William Grove, y Cymro a ddyfeisiodd y cell tanwydd.
 New book on Welsh fuel cell inventor, William Grove.
uwp.co.uk/editions/9781786830043

Alstom's zero emission hydrogen train.



Age Cymru is the leading national charity working to improve the lives of all older people in Wales. We believe older people should be able to lead healthy and fulfilled lives, have adequate income, access to high quality services and the opportunity to shape their own future. We seek to provide a strong voice for all older people in Wales and to raise awareness of the issues of importance to them.

We are pleased to respond to The Economy, Infrastructure and Skills Committee's inquiry into the Welsh Government's plans for the next Wales and Borders Rail Franchise and the next stage in development of the South Wales Metro.

1. The effectiveness of the Welsh Government's approach to the development, procurement and delivery of the rail franchise and South Wales Metro, including key risks and how they can be mitigated; and
2. Priorities for the franchise specification and Metro delivery to ensure rail services meet the needs of current and future travellers throughout the franchise area, and deliver value for money for both passengers and the taxpayer.

2.1 Integrated transport network and access to services

Public and community transport are vitally important in helping older people to maintain independence and well-being. Such transport networks can ensure communities are well-connected and that services, facilities and amenities are accessible to older people. Without these, there is an increased risk that isolation and loneliness will impact upon people's well-being.

2.2 We believe a fully integrated sustainable transport network, with trains and buses linked to other forms of transport including pedestrian and cycle routes should be developed, with better integration between transport and key services. The needs of those individuals without access to a car should be addressed by transport providers.

2.3 Demographic factors

We believe that it is important to take into account demographic factors and the likely impact of an ageing population in the design of rail services and facilities, and we have highlighted some issues below.

2.4 Accessibility

Improvements in accessibility in getting to/from railway stations, being able to move from one platform to another (without barriers such as stairs) and getting on and off the train should be a high priority. Accessibility problems at some railway stations include physical barriers such as stairs to platforms, a lack of lifts, and difficulties in negotiating the gap between the train and the platform edge. Such barriers in the built environment may prevent some older people from being able

to use rail services. We believe that wherever feasible, lifts should be available at all stations to enable passengers to cross from one platform to another.

2.5 Infrastructure at stations

Older people who can and want to use trains require reliable rail travel supported by station facilities and infrastructure that enable passengers to be able to wait in comfort, such as seating and shelter on platforms and accessible toilet facilities in stations.

2.6 Reliable rail travel is very important. However, in the event of service disruption passengers should be kept informed and updated. The impact of service disruption would be made worse by poor facilities for those waiting (e.g. no accessible toilets, not enough seating and shelter) and a lack of accessible and updated service information.

2.7 Priority seating on train services

Some older people are unable to stand unaided or for long periods, hence standing on train journeys would not be an acceptable way to travel. It is important that sufficient priority seating is available on all trains so that people who are unable to stand on journeys can be seated at all times during their journey.

2.8 Toilet facilities on-board trains

In addition to the provision of toilet facilities at stations, we believe it is important that toilet facilities are provided on-board all train services.

We believe that the provision of toilets for public use is vital to enable older people to maintain their dignity and to be able to participate fully in public life.

2.9 Provision of information

Many older people are not able to access online information, so it is essential that information about public transport services is accessible in various formats, including printed timetable information in a sufficiently large font size. Services provided online need to be high quality and easy to use, whilst offline services should be of equal quality and fully accessible. Service providers must ensure that the provision of online information is not to the detriment of the provision of information in other formats.

2.10 Staff training

It is important that staff at railway stations and on-board trains understand the needs of older passengers, and we would wish to see training in equalities incorporated into staff training.

1. Introduction

The current franchise tendering process offers real opportunities to develop the current rail network in a sustainable and resilient way. This paper considers two important issues, firstly developing the rail service to be a clean, modern and forward thinking business and a beacon of travel for its local consumers and Wales visitors, especially in regard to future travellers; Secondly to look at ways in which the service providers can work with and benefit its community.

2. Use of Alternative low carbon fuel sources

The Wales rail network needs to address current Wales, UK and International legislation and policies by addressing the use of polluting fossil fuels, particularly important as large sections are not electrified so rely solely on polluting diesel engines for the rail stock. Whilst this poses problems it also provides an opportunity to develop a sustainable service fuelled by alternative methods/fuels.

There are major changes in other modes of transport, road vehicles and boats/ferries with the adoption of low carbon alternatives mainly hydrogen and fuel cell technology. Whilst it will take time for these to become mainstream use the gap in the rail network will become more apparent over the next 5 to 10 years, and realistically without plans in place within this tendering process it will take a long period of time for it to catch up, or become obsolete as a mode of transport with huge investments costs required to address this i.e. to look for the readily available options in regard to rolling stock now will bring huge barriers to investment over the franchise period.

There are many examples of the adoption of alternative fuels:

2.1 Aberdeen and London hydrogen powered bus services:

<http://www.aberdeeninvestlivevisit.co.uk/Invest/Aberdeens-Economy/City-Projects/H2-Aberdeen/Hydrogen-Bus/Hydrogen-Bus-Project.aspx>

<http://www.cnn.com/2016/11/30/hydrogen-powered-double-decker-buses-are-coming-to-london.html>

2.2 Examples of battery powered electric cars are vast and they are now accepted modes of transport with charging points being installed across the UK. More recently dual fuel, hydrogen,/fuel cell cars, and hydrogen powered vehicles are being introduced:

<https://www.theguardian.com/environment/2015/nov/04/the-future-is-here-mass-market-hydrogen-cars-take-to-britains-roads>

2.3 In Scotland the ferry services are looking to provide a hydrogen/fuel cell island ferry service, please see the Ferry services plan, 2013 to 2022:

http://www.transport.gov.scot/sites/default/files/documents/rrd_reports/uploaded_reports/j254579/j254579.pdf

2.4 There are also developments were the introduction of alternatively fuelled trains is within the near future not outside of the scope of the franchise operating period.

Alstom is a major developer in this field and presented its zero-emission train at InnoTrans, the railway industry's largest trade fair, which took place in Berlin from 20 to 23 September 2016



Coradia iLint Train

Despite numerous electrification projects in several countries, a significant part of Europe's rail network will remain non-electrified in the long term. In many countries, the number of diesel trains in circulation is still high – more than 4,000 cars in Germany, for instance.

Coradia iLint is a new CO2-emission-free regional train and alternative to diesel power. It is powered by a hydrogen fuel cell, its only emission being steam and condensed water while operating with a low level of noise. Alstom is among the first railway manufacturers in the world to develop a passenger train based on such a technology. To make the deployment of the Coradia iLint as simple as possible for operators, Alstom offers a complete package, consisting of the train and maintenance, as well as also the whole hydrogen infrastructure out of one hand thanks to help from partners.

This launch follows the Letters-of-Intent signed in 2014 with the German Landers of Lower Saxony, North Rhine-Westphalia, Baden-Württemberg, and the Public Transportation Authorities of Hesse for the use of a new generation of emission-free train equipped with fuel cell drive.

“Alstom is proud to launch a breakthrough innovation in the field of clean transportation which will complete its Coradia range of regional trains. It shows our ability to work in close collaboration with our customers and develop a train in only two years,” declared Henri Poupart-Lafarge, Alstom Chairman and CEO.

Alstom’s Coradia range of modular regional trains has a proven service track record spanning more than 16 years. Over 2,400 trains have been sold around the world and demonstrate a high availability rate. Coradia iLint is based on the service-proven diesel train Coradia Lint 54. It will be manufactured in Salzgitter, Alstom’s largest site

<http://www.alstom.com/innotrans2016/>

These trains could be adapted to Wales lines, such as change in door siting, platform height etc., an order for these trains would provide the resources to carry these out.

3. Context of this paper

Transition Bro Gwaun (TBG) a local community group based in the Fishguard and Goodwick area, engaged with franchisees for the Wales train service and they were invited to a launch of their Tidal Flow project in November, 2016, the reason being that they need to look to demand for their renewable technology supplies in the future. The local grid network is limited and therefore need to plan for energy storage and supply in the future. Stenaline who operates the Ferry service from Fishguard are partners of the project.

<http://transitionbrogwaun.org.uk/>

As well as franchisees attending the meeting, others have been in touch via emails and also meetings have been held to discuss issues. The meetings were attended by RENEW Wales (All Wales community project), Local Energy,(Energy Saving Trust, WG community renewable programme), and Community Energy Wales (membership organisation representing community groups) to discuss issues around supply and also opportunities to

involve communities in the rail network services. All have been consulted during the production of this evidence.

It was clearly acknowledged at the meetings and discussions that the rolling stock for the majority of the network is old and requires imminent replacement, however caution about the proven performance of alternative fuels was obvious and that opinions mainly were that it was not ready for the current replacement needs. Although as shown there are examples of developments currently being demonstrated on other networks.

3.1 What the tendering needs to address: Based on the conclusions above the most important issue around any replacement rolling stock should be how adaptable it would be to alternative fuels in the future i.e. whichever units are procured they will be a huge investment for the service whatever model is selected, and if they are not adaptable to alternative fuels will set the development of the service back offering only polluting diesel as the option for the foreseeable future. If units are not procured but are hired in then again the length of time this agreement is held if they are not adaptable should be considered.

The tendering offers an opportunity to heavily weight points for franchisees who plan for alternative fuels especially on the non electrified rails.

3.1.1 Recommend that the committee refers to experts within field of hydrogen trains to determine a time frame for introduction of alternative fuels, this again should be stipulated within the tendering process. A link to an upcoming hydrail conference and to contacts for this is below:

<https://hydrail.appstate.edu/>

4. Resilient and Cohesive Communities

The Well Being of Future Generations Act, 2015 determines that communities should plan and be supported to become more resilient and cohesive. An efficient , clean and sustainable rail service is an important part of the transport system for communities across Wales. Additionally as communities look for more secure and sustainable energy sources it is clear that a partnership approach for viable local energy systems is required, i.e. with the removal of feed in tariffs the economic viability of renewable technologies has been drastically affected, furthermore the grid system especially in rural areas is insufficient to support local energy supplies; this scenario requires a change in approach looking at partnerships to ensure the future of alternative energy sources and the benefits they bring to local communities, alongside the mitigation of climate change impacts. This is reflected in TBG's approach to the rail franchisees.

4.1 During meetings and other discussions with Franchisees there has been a very positive response to seeking community partnerships across the rail network. Ideas have been proffered on both sides and have included:

- *Provision of rail buildings and land for community renewable technologies, both parties would benefit from lower electricity costs, security of supply and an income for the local community
- Partnership approach to rail services, for example the community providing local food for cafe's and trains OR a franchise for ticket sales OR growing produce on land or stations

4.1.1 Recommend that the tendering reflects a partnership approach with local communities across the rail network opening many opportunities for community benefit beyond the rail service, additionally offering a link to rail users and non users across Wales.

* It is important that the tendering papers take account of the longer term requirements for renewable technology installations, i.e. the tendering is for 15 years whereas the renewable technologies would be installed for up to 25 years, so would be required to be adopted by future service providers.

1 INTRODUCTION

1.1 The North Pembrokeshire Transport Forum (NPTF) is an independent voluntary group, supported by its Individual, Family and Corporate Members. Its key aims and objectives are:

1.1.1 To work for the provision of effective, integrated transport services to, from and within North Pembrokeshire.

1.1.2 To promote the benefits of public transport.

1.1.3 To provide an advice and assistance service to the travelling public.

1.2 NPTF welcomes the opportunity to contribute to the National Assembly's Economy, Infrastructure and Skills Committee's Inquiry into the Welsh Government's (WG) plans for the next Wales and Borders Rail Franchise and the next stage in development of the South Wales Metro.

1.3 As NPTF's work is focused on transport associated with the North Pembrokeshire region, our response will be based on the state of transport in this region - in particular with the provision of rail services and their integration with other transport modes. We also acknowledge and value the importance of our transport connections within the broader South West Wales region.

1.4 NPTF was set up in 2000 and immediately took an active interest in the process of setting up the current Wales and Borders rail franchise by the Strategic Rail Authority (SRA), and then by the Department of Transport (DfT). We watched that process with growing dismay: (a) Beginning with the complete lack of any involvement with stakeholders; (b) Followed by the abandonment of the initial relatively ambitious franchise specification; and (c) the subsequent implementation of the current franchise specification, with all of its acknowledged failings.

2 THE WELSH GOVERNMENT APPROACH

2.1 NPTF is paying close attention to the developments connected to the preparation for the next Wales and Borders rail franchise. From the start we have been very favourably impressed by the WG's approach, as it is in such complete contrast to the approach that was taken by the SRA and the DfT.

2.2 *In particular, NPTF welcomes the following actions in the WG's approach:*

2.2.1 The establishment of Transport for Wales (TfW) in 2015 as a wholly owned, not-for-profit company, to design and undertake the procurement process for the next Wales and Border Rail Service and Metro on its behalf.

2.2.2 Wide-ranging TfW objectives that include: (a) The delivery of the franchise competition and future management of the franchise; (b) The design of rail services that

support the Welsh Government's economic and social ambitions; and (c) Advising on investment options in terms of broader transport integration.

2.2.3 TfW is to inform the WG on the progress against each of the KPIs (Key Performance Indicators) on a quarterly basis.

2.2.4 An impressive set of Key Outputs (for 2016/17) with regard to the award of the next franchise and delivery of the Metro programme.

2.2.5 Project procurement priorities that include: (a) New services and increased capacity on existing congested services; (b) Modern rolling stock, complying with modern standards; (c) Improved efficiency realising savings which can extend the service further; (d) Co-operation with other transport providers to provide an integrated public transport service; and (e) A commercial structure which incentivises the right behaviours with fair commercial returns.

2.3 The TfW franchise procurement process Indicative Timetable.

2.3.1 NPTF welcomes the fact that, to date, the following timetable 'elements' have met their target dates: (a) OJEU contract notice - July 2016; (b) Invitation to participate in dialogue - October 2016; (c) Bidders respond with outline solutions - November 2016; (d) Dialogue with the bidders - January 2017.

2.3.2 The Final Tender will be between July to September 2017 and the Contract Award will be made in December 2017.

2.4 TfW arrangements for stakeholder engagement

2.4.1 NPTF welcomed the fact that the four short-listed bidders were expected to engage with stakeholders and that NPTF was on the list of stakeholders that the bidders were provided with. NPTF representatives have held useful and informative meetings with representatives from three of the bidders

2.4.2 NPTF also welcomes the fact that TfW will be holding regional stakeholder meetings at the end of March and beginning of April. NPTF will be represented at the meeting scheduled for 29th March in Carmarthen, and we have begun to circulate information about the meetings to the interested parties on our mailing lists.

3 FRANCHISE SPECIFICATION PRIORITIES

3.1 NPTF's response will be based on the fact that almost all passengers travelling to or from North Pembrokeshire will be making long-distance journeys of over an hour; many of which will include making connections with other transport services.

3.2 Passengers from the area make use of the two Fishguard stations (Fishguard Harbour and Fishguard and Goodwick), as well as the request stops at Clarboston Road and Clunderwen. Ferry passengers travelling to or from Rosslare connect with rail services at the Fishguard Harbour station.

3.3 Rolling stock priorities

3.3.1 Overcrowding has a much greater impact on passengers who are making long journeys, than on those making shorter/commuter type journeys. Consequently, it is vitally important that efforts be made to improve current rolling stock capacity on long-journey services; thereby removing possible disincentives towards travelling by train. All passengers (not just the disabled or elderly) should be able to get a seat on long-journey services, and in seats that are aligned with windows.

3.3.2 Bearing in mind the long journeys referred to above, all carriages should provide sufficient space for a considerable amount of luggage, as well as for prams/strollers and bikes. This space should be over and above the spaces that are reserved for wheel-chair users.

3.3.3 There should be a sufficient number of toilets on long trains, including more than one accessible toilet. All toilets should provide baby changing facilities. There should be well maintained, clean toilet facilities on every train.

3.3.3 Free to use mobile connectivity (including Wi-Fi), as well as at-seat mobile device charging points should be provided on all trains.

3.3.4 On board catering services should be appropriate for longer journeys. If not provided by an at-seat trolley service, catering services for longer journeys should be easily accessible for disabled and elderly passengers and for those travelling with children; and should include a reasonable choice of food and drink that is suitable for those on special diets.

3.4 Information provision on trains, platforms and in station buildings

3.4.1 Information about existing, delayed and/or amended services should be accurate and up-to-date and available on all information modes.

3.4.2 Communication about planned service disruptions should be provided in sufficient time to enable people to make alternative travel plans. Alternative arrangements should be made available for passengers so that they can continue their journeys. If this is not possible there should be an explanation of the rights passengers have to complain or claim compensation.

3.4.3 There should be a commitment to provide national GPS based train location systems, to improve train running real time information, particularly away from multiple aspect signalling areas, and an automatic system to link such real time running information into CIS at stations.

3.5 Service connectivity - Provision of integrated transport services

3.5.1 The importance of effective service connectivity in both urban and rural areas cannot be overemphasised. Current timetables, as well as many of the seasonal timetable changes, do not always provide seamless journeys for travellers.

3.5.1.1 One to three minute connection times are extremely worrying for all types of passengers, and this is compounded when services are running late.

3.5.1.2 Problems occur when tight connections are provided at stations where there are a large number of platforms or where there are significant distances between stations and bus stops.

3.5.1.3 Missed connections are even more worrying for those who are travelling to or from remote rural stations/bus stops with infrequent services and/or inadequate station facilities, as well as for passengers who are travelling late in the evening.

3.5.2 Transport operators should not assume that once a passenger gets off a train or a bus this is the end of their journey; railway stations and bus stops should be regarded and treated as potential transport hubs.

3.6 Service frequency changes

3.6.1 NPTF recommends the following service changes:

3.6.1.1 Additional Sunday services to Fishguard. The current Sunday service frequency for the stations at Fishguard Harbour and Fishguard and Goodwick is 2 per 24 hourly. 'Would-be' rail passengers continue to tell NPTF that this is one of the reasons why they do not travel to/from Fishguard by train. The limited Sunday service is also a major issue for tourism providers in the area.

3.6.1.2 An additional Monday-Saturday mid-afternoon service to Fishguard. This would fill the long afternoon gap in services and provide a later departure to London than is currently provided by the 13:35 boat train service.

3.7 Request stop changes

3.7.1 A review of stations categorised as request stops needs to be undertaken.

3.7.2 Certain request stops have seen large increases in passenger numbers in the last 17 years, and the majority of trains now make regular stops at these stations.

3.7.3 Request stops impact on timekeeping and cause problems with onboard electronic information which often lists only full station stops. This causes occasional passengers to de-train at unstaffed stations prior to the stop they required.

3.7.4 In West Wales, Narberth, Clunderwen, Kidwelly and Johnson would justify having the request stop categorisation removed, while for consistency Ferryside and Clarboston Road should be similarly considered.

3.8 Station facilities

3.8.1 The NPTF considers the following station facilities are in need of improvement at Fishguard and Goodwick station and at the Clarboston Road and Clunderwen request stops:

3.8.1.1 Waiting spaces, as there are only a few, and all are provided in open platform shelters.

3.8.1.2 CIS information screens. There is not enough space on the very small screens to provide real time running information.

3.8.2 NPTF would support efforts by WG to encourage:

3.8.2.1 A continuing programme to improve step-free access across stations.

3.8.2.2 Improvements to facilitate interchange with bus services.

3.8.2.3 Provision of sufficient cycling and parking spaces.

3.8.2.4 Ensuring that pedestrian access to stations is of a high quality.

4 CONCLUDING REMARKS – RISK MITIGATION AND VALUE FOR MONEY

4.1 The processes involved in risk assessment and mitigation, as well as in the calculation of value for money, are exceedingly complex, and require access to (and comprehension of) a vast amount of equally complex data, if the results of these exercises are to be credible.

4.2 As NPTF does not have the required expertise to undertake the above-mentioned tasks, we feel it would be best if comments about these matters came from those with the most appropriate expertise.

Submitted on 23rd February 2017



Arbenigwyr mewn Busnes
Experts in Business

Cynulliad Cenedlaethol Cymru / National Assembly for Wales
Pwyllgor yr Economi, Seilwaith a Sgiliau/ Economy, Infrastructure and Skills Committee
Masnachfrait Rheilffyrdd a chyflwyno Metro / Rail Franchise and the Metro
Ymateb gan Ffederasiwn Busnesau Bach /
Evidence from Federation of Small Businesses

23rd February 2017

Russell George AM
Economy, Infrastructure and Skills Committee
National Assembly for Wales
Pierhead Street
Cardiff
CF99 1NA

Dear Russell

RE: Rail Franchise & the Metro

FSB Wales welcomes the opportunity to contribute to the Economy, Infrastructure and Skills Committee inquiry into the future of the Wales and Borders Rail franchise and the South East Wales Metro.

FSB Wales is the authoritative voice of 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 business at a grassroots level. It undertakes regular online surveys of its members as well as a biennial membership survey on a wide range of issues and concerns facing small business.

In order to inform the 2016 National Assembly elections, FSB Wales commissioned a number of work-streams to build an evidence-base around the needs of Wales' smaller business. One of the areas of focus was transport and infrastructure. Professor Stuart Cole produced a report into the needs of smaller firms in relation to transport entitled *Moving Wales Forward*. A copy of the report is attached for the Committee's reference.

The following key themes were highlighted in the report:

- The majority of FSB Wales members surveyed judged their car/van as being the most important mode of transport. However, around 10 per cent said that trains were an important mode of transport for their business.
- For business users to make greater use of trains, four priorities areas were identified. They were; lower fares, increased network coverage, increased service frequencies and better integration of public transport services and ticketing. This was seen as key to model shift.
- Issues of quality were of significant importance to many business users. For instance, many business users would like to see their journey (particularly longer journeys) as taking place in something more similar to a mobile office environment. However, due to issues such as overcrowding and lack of services such as on-board Wi-Fi, this is presently unattainable across much of the network.
- Pursuing greater integration of public transport with services and the economic environment is crucial. The concept used in our research was *Information + Interchange + Investment + Imagination = Integration*.

FSB Wales would like to see the next Wales and Borders franchise focus on the themes highlighted above. This is also relevant to the discussion around the Metro, specifically about integrating the various modes of transport. In particular, the next franchisee should set out the level of investment needed to reduce overcrowding, improve the current rolling stock used in Wales and increasing the frequency of services.



Arbenigwyr mewn Busnes
Experts in Business

Furthermore, the use of the transport estate should become a part of wider town centre regeneration discussions. For instance, many train stations in Wales have excess capacity in terms of building that could be used innovatively as business incubation space or retail space for new independent businesses.

This could also be applied to the supplier opportunities the Wales and Borders franchise offers. For instance, the next franchisee could examine increasing the proportion of Welsh products offered to customers, or ensure that local businesses are able to occupy retail space in stations as opposed to larger chains.

I hope you find the comments above of interest to your inquiry. Please do not hesitate to contact FSB Wales should you require any further information.

Yours sincerely

Janet Jones
Wales Policy Chair
Federation of Small Businesses Wales



MOVING WALES FORWARD

Published: May 2016
Professor Stuart Cole
fsb.wales

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fsb 
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Experts in Business

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FOREWORD

Transport is a key issue facing FSB members across the length and breadth of Wales.

Whether they are based in Cardiff, Cardigan or Conwy, businesses often rely on getting people or goods to the right place at the right time.

But for businesses in many parts of Wales, achieving that can be a real challenge, with the limitations of current transport provision all too apparent. It is with that in mind that we asked Wales' foremost transport expert Professor Stuart Cole to undertake this report for us.

As part of the work he has undertaken we gathered the views of our members from across Wales, getting them to share their experiences of Wales' transport system.

And while it comes as no surprise to us that we have many members whose business means that they need to use road transport, there are many who would make greater use of public transport if it better met the needs of their business.

This report looks at what measures can be put in place if we are to move towards a better and more integrated transport system that better meet the needs of all types of businesses in every part of Wales.

I very much hope that it will lead to a more considered discussion of transport policy here; one which will encourage policymakers to think beyond any one part of Wales.

From my many discussions with our members I know that transport is an issue for businesses across the whole of Wales, and it is essential that we develop a transport system that better supports local economies in every part of our nation.

Janet Jones
FSB Wales Policy Chair



About the author:

Professor Stuart Cole BA, MSc, FCILT, FICE, FRSA is one of Wales' foremost experts in transport and economic policy, with almost 40 years of experience spanning government, local government, private sector, and academic roles. He has served as an advisor to the Welsh Government's Minister for Economy, Science and Transport on active travel and public transport, is a member of the Great Western Railway Advisory Board, and is Emeritus Professor of Transport at the University of South Wales. He was awarded a CBE in 2012.

PART 1 : THE CHALLENGE OF ROAD TRANSPORT

This report presents current trends in transport infrastructure and usage in Wales and critically examines current government policy.

The complaint most often heard from businesses, small and large, is that the roads are getting worse and congestion is having an adverse effect on business efficiency. This report asks whether that is really the issue? If so, then could we reduce congestion by making part, or all, of our passenger journeys by means other than the car - by bus, train, taxi, walking, or cycling or some combination (called integrated travel) of them all?

There is insufficient space in urban areas to create large-scale road infrastructure other than at high-cost levels in terms of land purchase and construction. Until the 1990s, motorway construction frequently involved physically dividing communities and demolishing existing homes – a good example of this being Port Talbot. More recently, the adverse environmental consequences of large-scale road construction have become unacceptable to many.

Clearly, a policy of road building to tackle perceived problems of congestion has to be rethought. Instead, policy options involving public transport investment, investment in active travel and the integration of people movement

within and between modes should be pursued.

The most relevant argument which suggests major road building may be the wrong approach is evidence from the Department for Transport's (DfT) traffic forecast scenarios. Welsh traffic flow data and speed maps show average speeds on most roads at a level just below the legal limit. Lower speeds are found on single carriageway roads compared with dual carriageway roads or motorways as would be expected. Evidence in this report suggests that if equivalent levels of comfort to the car could be provided via other forms of transport – bus, rail, cycling, walking – travellers could be persuaded to change mode.

Modal Split

The 2014 modal split (**Figure 1.1**) for travellers taken from the Office of National Statistics (ONS) data for Wales and from the FSB Wales member survey (FSB 2014) showed the car / light van as by far the predominant mode of travel (74.2% and 81.0% respectively). Allowing for sample error these two figures may be regarded as similar. Complaints about the road system may be a result of it being used the most and its problems being most familiar to those travellers in the survey.

All freight and goods traffic was excluded from the survey as the network at present does not provide for much of that to be moved other than by road freight transport.

Small businesses in Wales use the car more than any other mode of transport (FSB, Wales 2014) and their views of Welsh Government transport policies and expenditure reflect this.

When small businesses were asked what the Welsh Government's top priority should be, most called for investment in road infrastructure, better traffic management and improved rural transport.

The impact of congestion

There is a general lack of reliable financial data on the impact of an inefficient transport network on business success and on costs. Both the FSB and the CBI have surveyed members and found that an evaluation of financial consequences can be extrapolated from survey data. But it was also found that an accurate figure of the degree by which costs increased as a result of poor infrastructure or road delays is difficult to calculate in terms of individual companies.

A leading Welsh road haulage company (Owens 2014) put the costs it faced into separate categories:

- Congestion with more wear and tear on mechanical items on their lorries (e.g. gearbox from different speeds and changing gear);
- Increased drivers' hours and the consequent costs of additional drivers or delays on statutory rest and off road stops. This was not a criticism of the regulations per se but their consequence on costs from increased driver journey time resulting from poor infrastructure;
- Extra vehicles required to maintain a schedule and meet demand thus incurring extra costs;
- Contracts turned down because of additional vehicles required thus losing turnover.

Businesses were asked (FSB Wales survey 2014) how transport problems affect them. The biggest impacts were financial with reduced turnover (35%), reduced profits (43%), and fewer customers (35%), factors which reflect one another but might also be a part of the overall reduction in the purchase of goods and services resulting from the general economic downturn since 2008. Increased costs affected 52% of businesses, and this partially reflects comments made in respect of the road infrastructure with factors such as increased journey times and increased vehicle maintenance costs.

For a small number of respondents it led to the closure of the business or branch (4%), reduction in the number of business vehicles (7%), and a reduction in the range of goods / services (9%).

The crucial issue is the ability to trade effectively in the marketplace.

Figure 1.1 Modal Split Work Travel
Total number of employed persons: 1,363,615

Mode	% ONS	FSB
Home workers	5.4	
Train	2.1	9.8
Bus	4.6	9.8
Taxi	0.5	
M/cycle	0.6	
Car / van	74.2	81.0
Cycle	1.4	
Walk	10.6	4.1
Other	0.6	

Sources: **ONS**: National Transport Plan (2014) / Census 2011 Office of National Statistics – Primary mode of travel to work). **FSB**: Federation of Small Business Wales Survey (2014). Based on Q2 How important is each of the following methods of transport your business operations?

The FSB Wales 2014 survey findings and comments highlight issues such as where business takes place, the impact on cost base, and transport as a factor in the decisions about business / site closures and staff layoffs. However, there is a limit which has to be placed on the causal link between transport network quality or capacity and business success or failure. The evidence is not conclusive.

As the car is seen as the 'crucial' mode (81%) and the Census / National Transport Plan (NTP, 2014) shows it to represent 74% of commuting trips it can be assumed that it is this mode which is most criticised. But the traffic speed maps do not support this argument except in peak periods.

Criticisms of the road network

From the 2014 FSB Wales survey, the business view of the road network was a negative one. The poor state of repair, traffic congestion and delays resulting from road works were the most cited factors.

Much of the criticism (FSB Wales survey, 2014) of the transport network in Wales relates to traffic congestion resulting in lower speeds and longer journey times on major roads. However the Welsh Government road maps (**Figures 1.2, 1.3, 1.4**) show major routes such as the A55, M4 / A48 / A40 with average speeds over an 18 – hour day of 60 – 70 mph. The maximum national speed limit is 70 mph.

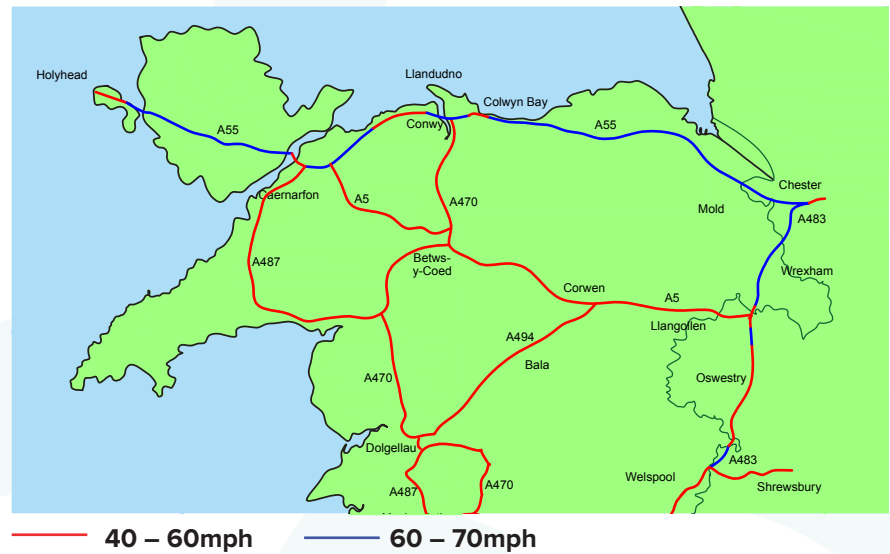
On single carriageway roads the average speeds will be lower at 40 – 60 mph, but there the national speed limit is 60 mph. The road network is therefore performing very efficiently in terms of speed and journey time on inter-urban and rural routes. Of course there will be peak time pinch points in the morning (07.30 – 09.00) and evening (16.30 – 18.00) when capacity is insufficient for the traffic flows.

These arise frequently on the A55 at the Britannia bridge over the Menai Straits, at Llanfairfechan and at the Ewloe (A494) and Post House / Wrexham bypass junction (A483). On the South Wales primary route the intensity of the morning peak causes heavy traffic congestion between the J24 (M4 / A449) and J26, partly but not entirely caused by the capacity constraints at Brynglas Tunnel; J32 (A470) primary route into the capital; J33 on the M4 and the A4232 (the Cardiff Southern Distributor Road (SDR)); at J40 – J42 (Baglan / Port Talbot) and at J46 – J47 (Llangyfelach and Penllergaer).

To a lesser extent slow-moving traffic occurs on the westbound A48 at Carmarthen; Oystermouth Road, Swansea; at Penglais Hill into Aberystwyth and at several other local locations.

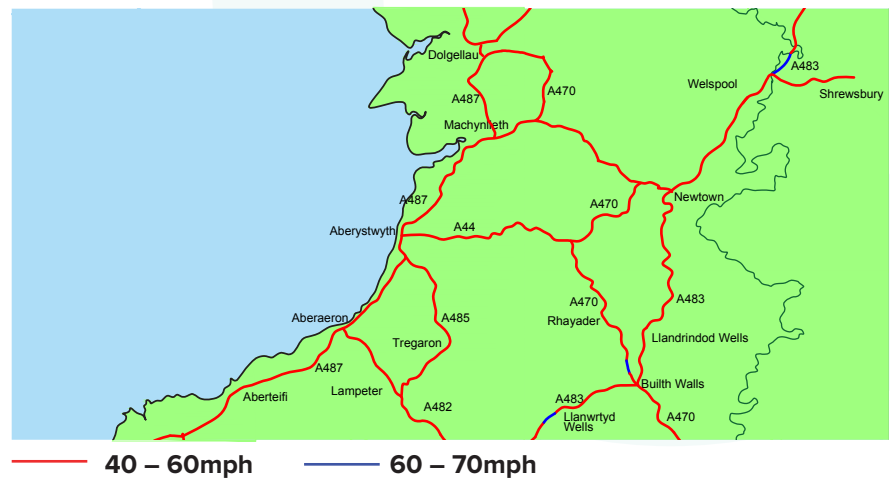
However, the speed maps suggest that average speeds on primary routes in Wales (and those most complained about) are generally at an acceptable level.

Figure 1.2: Map showing journey speeds on main roads – North Wales



Source: Derived from National Transport Plan 2015, Consultation Document, Welsh Government

Figure 1.3: Map showing journey speeds on main roads – Mid Wales



Source: Derived from National Transport Plan 2015, Consultation Document, Welsh Government

There is also a belief that the trend of road traffic in Wales (Figure 1.5) is one of growth: historically from around 22bn kilometres in 1993 to a peak in 2007 of around 27 bn kilometres. However, since then the figure has plateaued mirroring the trends in car ownership (Figure 1.7).

This trend is not peculiar to Wales. A similar pattern has taken place in many other major advanced economy countries where car usage has plateaued or declined - Germany, Australia, France, UK, United States and Japan (Figure 1.6).

The conclusion which can be drawn from the evidence presented above is that while car usage may not have peaked, the rate of growth has slowed down considerably and to an extent where major new roads (and in particular motorways) cease to be justified on current traffic forecasting grounds. The issue of traffic forecasts is covered later in this report.

The evidence above indicates that impact of road infrastructure on business may not be as great suggested by many. This raises several questions.

- To what extent should the Welsh Government build more road capacity to solve peak time congestion problems when over the whole day capacity is clearly adequate?
- Are there other solutions to the movement of people by car? How can active travel and public transport help?
- Will these problems worsen as some forecasts have suggested or do the forecasts overstate rates of growth?
- For how long has a possible flattening of demand or lower rates of growth in demand been occurring?

Figure 1.4: Map showing journey speeds on main roads – South Wales



Current transport methodologies

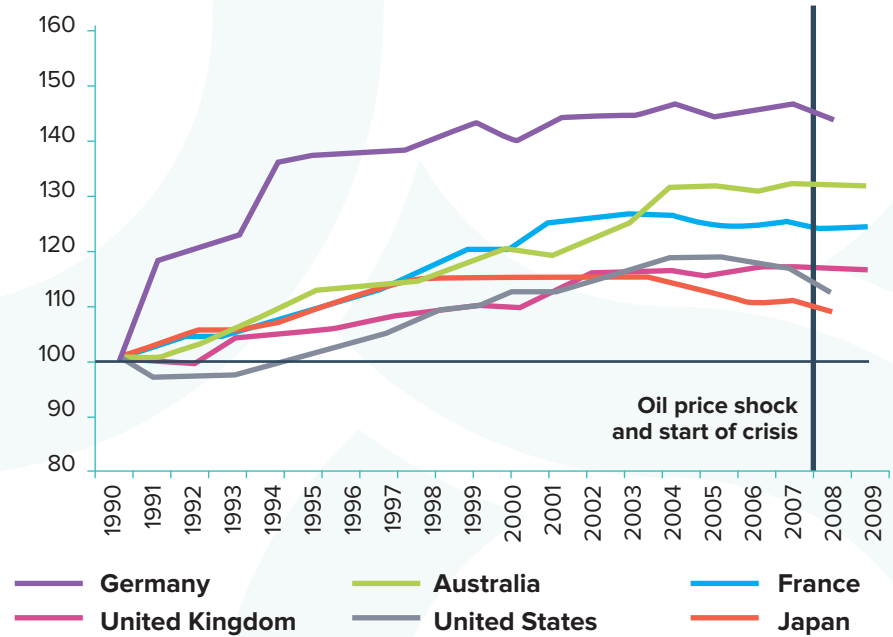
The evaluation techniques used by governments in Wales are:

- WeITAG (Welsh Transport Planning and Appraisal Guidance 2009). This is the Welsh equivalent of Scotland's Scottish STAG and NATA in England. All are similar, but WG is updating WeITAG at present.
- Sewta scoring framework for initial sieve of schemes and for small schemes (Sewta 2014).
- HM Treasury Five Case Model (HM Treasury 2012).

These methods only cover costs and benefits in resource cost terms to the Welsh economy as a whole or to the local economy. There are two key elements derived from the old Department for Transport CoBA model which cover journey time savings and fuel cost reductions resulting from a road scheme. The evaluation models need to be extended to include an assessment of commercial impacts – whether positive from new investment, or negative from lack of infrastructure investment. According to these models, the impact of traffic congestion on businesses resulted in lost time, less efficient business operations and therefore increased costs. Tackling road congestion hotspots is then seen as the highest priority.

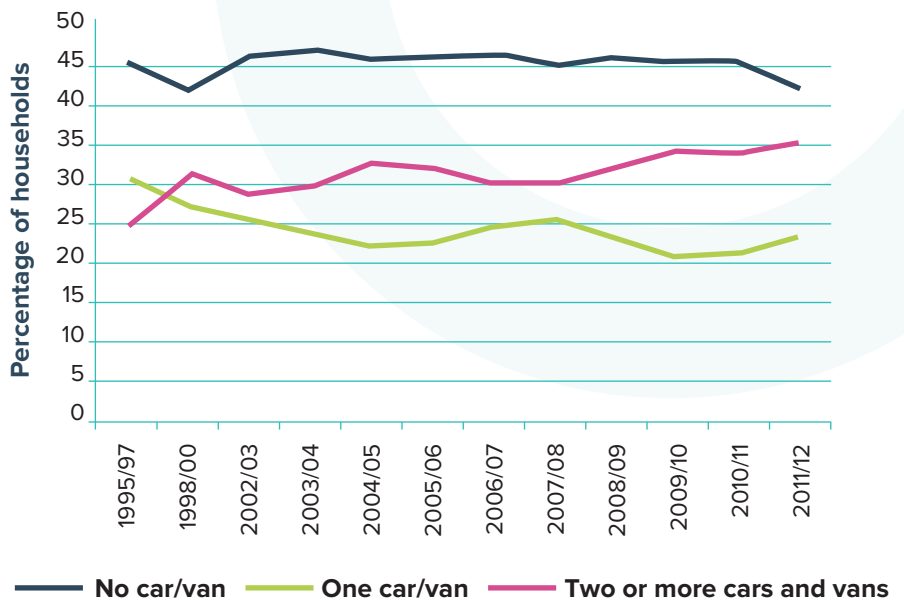
The DfT's transport appraisal procedures have also been criticised by several city regions in a recent report (Investing in city regions – the case for long term investment in transport (Volterra, 2014)). It sums up the current appraisal process as fundamentally aligned to measuring transport benefits in time savings with the same value everywhere to

Figure 1.6: Car usage plateau / decline – international comparison



Source: International Transport Forum statistics

Figure 1.7: Current trends in car ownership 1995 – 2010



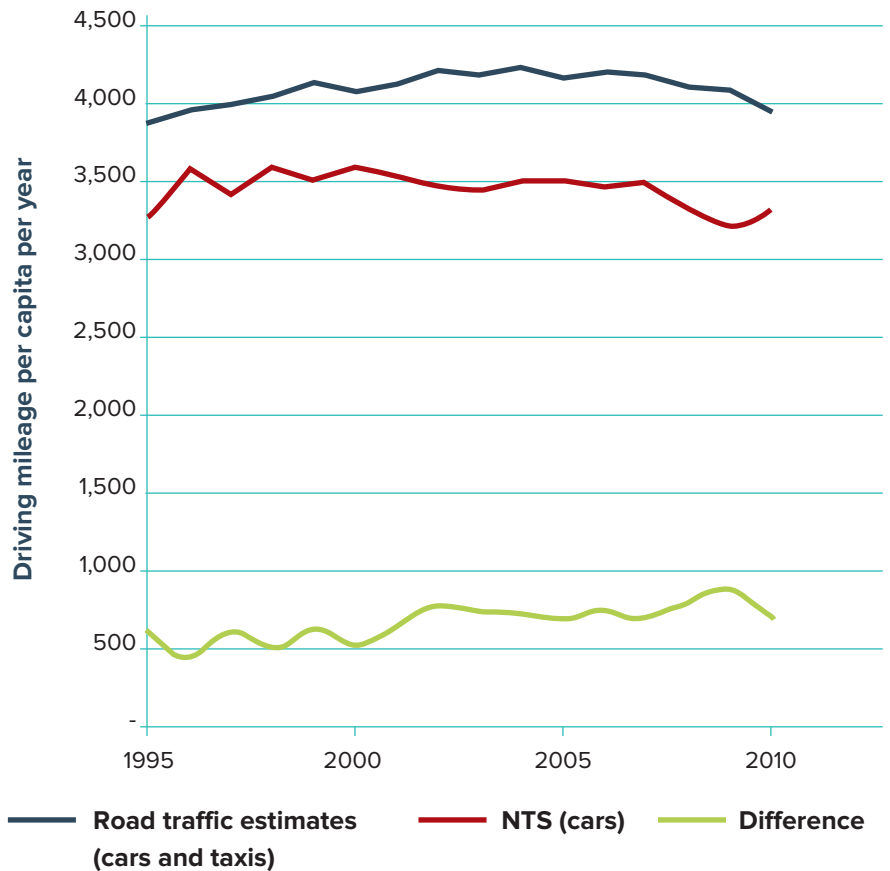
Source: Household car ownership for Wales, National Travel Survey, Department for Transport, London, 2013

ensure equity in investment. The underlying assumption means that transport investments are there to generate welfare improvements (based on generalised cost) and not to generate economic output and therefore aid business expansion and increased employment.

The report refers to projects such as Canary Wharf, originally intended to take light industrial premises, and for which the Docklands Light Railway would have been adequate. However, property developers saw an opportunity for higher footprint buildings employing and housing more than 100,000 people. For this an extension to the Underground (Jubilee Line) was built. The justification was not resource cost savings or welfare benefits criteria but the potential direct and indirect contributions to economic prosperity. The report says growth “can be created by access and consideration of what might happen in the absence of such investments” (Volterra, 2014). The return on such an investment should include fares, taxation on land value uplift, increased tax revenue from additional employment and profits. At present only revenue is considered as a net cost reduction in the appraisal.

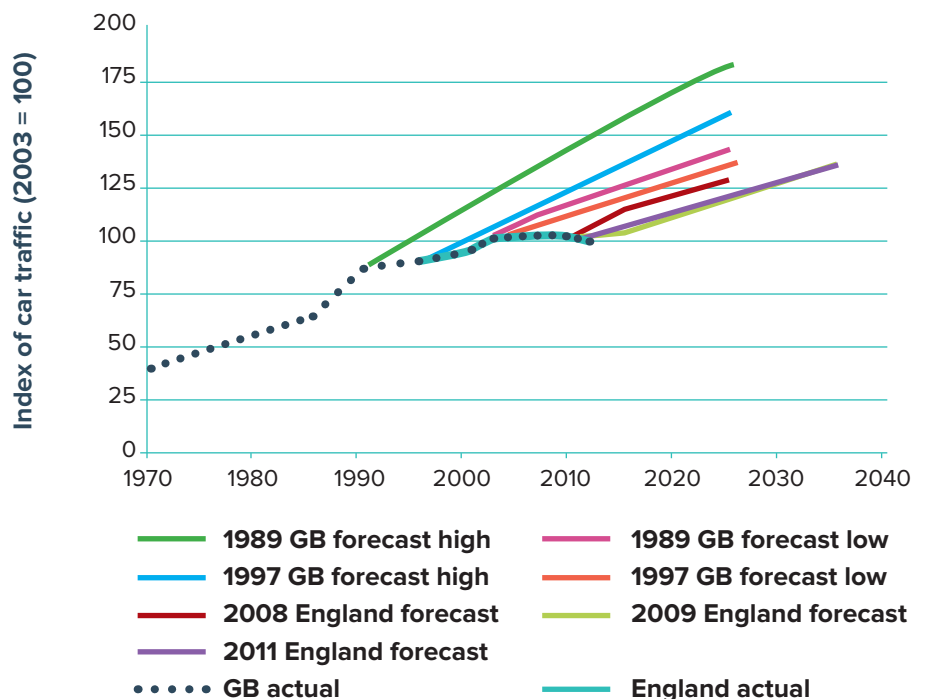
Given the shortcomings in the current methodology employed by Welsh Government and others, it is clear that we need to develop a new and improved methodology for assessing transport investment in Wales. Current evaluation approaches to transport projects are fragmented and do not take full account of the wider impact on communities.

Figure 1.8: Discrepancies between NTS Traffic Count Data (PJ1) and Road Traffic Estimates (forecasts)



Source: LeVine, S & Jones, P (2013), On the Move, Technical Compendium, RAC Foundation, ORR, Scottish Government, Independent Transport Commission, Edinburgh and London

Figure 1.9: DfT Forecasts and actual car traffic growth



Traffic forecasts

Government policy at DfT and Welsh Government was for many years based on predict and provide – predict traffic demand and then provide the required capacity according to the forecast demand.

It is these forecasts that are now being called into question. There has been a consistent difference between the forecast road traffic estimates for cars and taxis and the National Transport Survey for cars over the period between 1995 and 2010. This has varied between 12% and 15% with the discrepancy getting wider in more recent years (**Figure 1.8**).

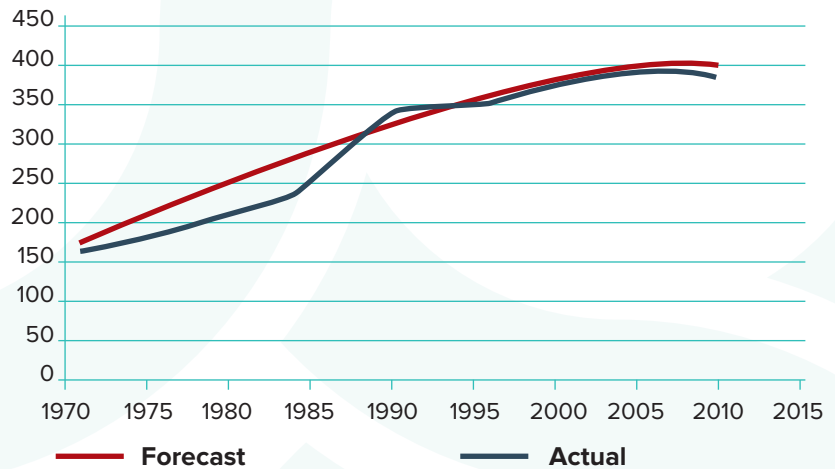
The forecasts are based on assumptions covering changes in:

- GDP;
- Population;
- Car ownership;
- Personal earnings.

The output figures are dependent on the assumed changes in these causal variables over the period of the forecast. As **Figure 1.9** shows, the forecasts relating to current flows made between 1989 and 2011, on which the recent road programme depended, consistently overestimate traffic levels. Traffic has grown but in some cases imperceptibly.

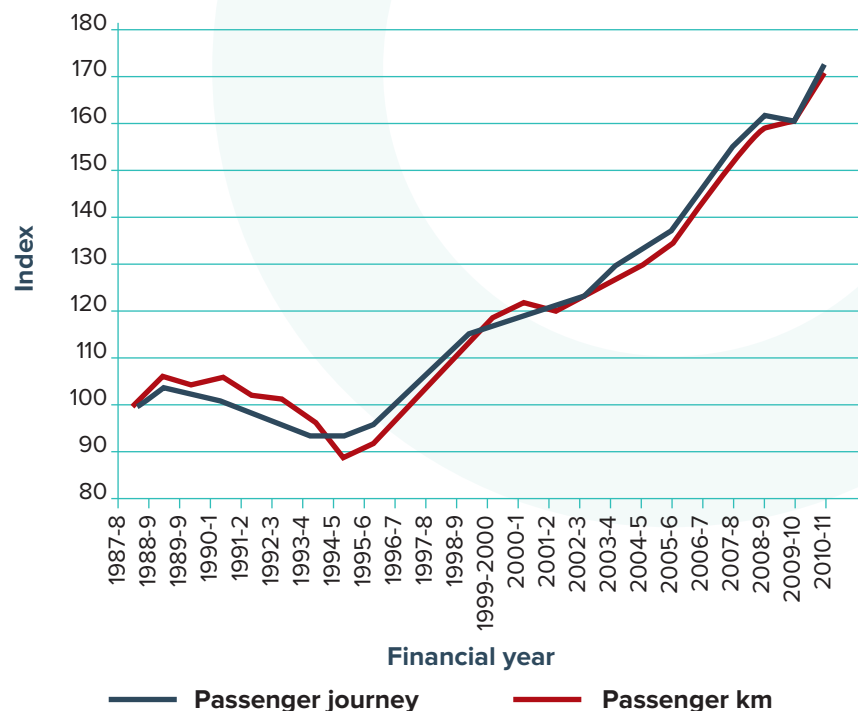
In Wales the Government’s own figures show that car flows are in some cases falling. The predictions made more recently by the DfT continue to be overestimates. The consistent overestimation of traffic levels raises a serious question over the causal variables being used in the forecasts and their estimated values.

Figure 1.10: Car usage saturation forecasts (1973)



Source: Tulpule AH (1972), Forecasts of vehicles and traffic in Great Britain Report LR543, Transport & Road Research Laboratory; Mitchell K (2013) analysis.

Fig 1.11: Trends in GB Rail Passenger Traffic 1987 – 2011



Source: Office of Rail Regulation, London (2013)

The DfT traffic figures show a similar trend with a levelling out of traffic flows to 2014 (reflecting for example the Welsh Government's figures for the M4 J26 – J 27 flows) (WG, 2013; Cole, 2014). The forecasts then become inconsistent with trends in recent years, suggesting that growth will return resulting in an increase in traffic levels of 20% by 2030 (Figure 1.9), despite the lower levels of traffic flow seen in more recent years.

The current forecasting model (TEMPRO) uses assumptions on projections for the following variables:

- Population;
- Household income;
- Workforce;
- Employment.

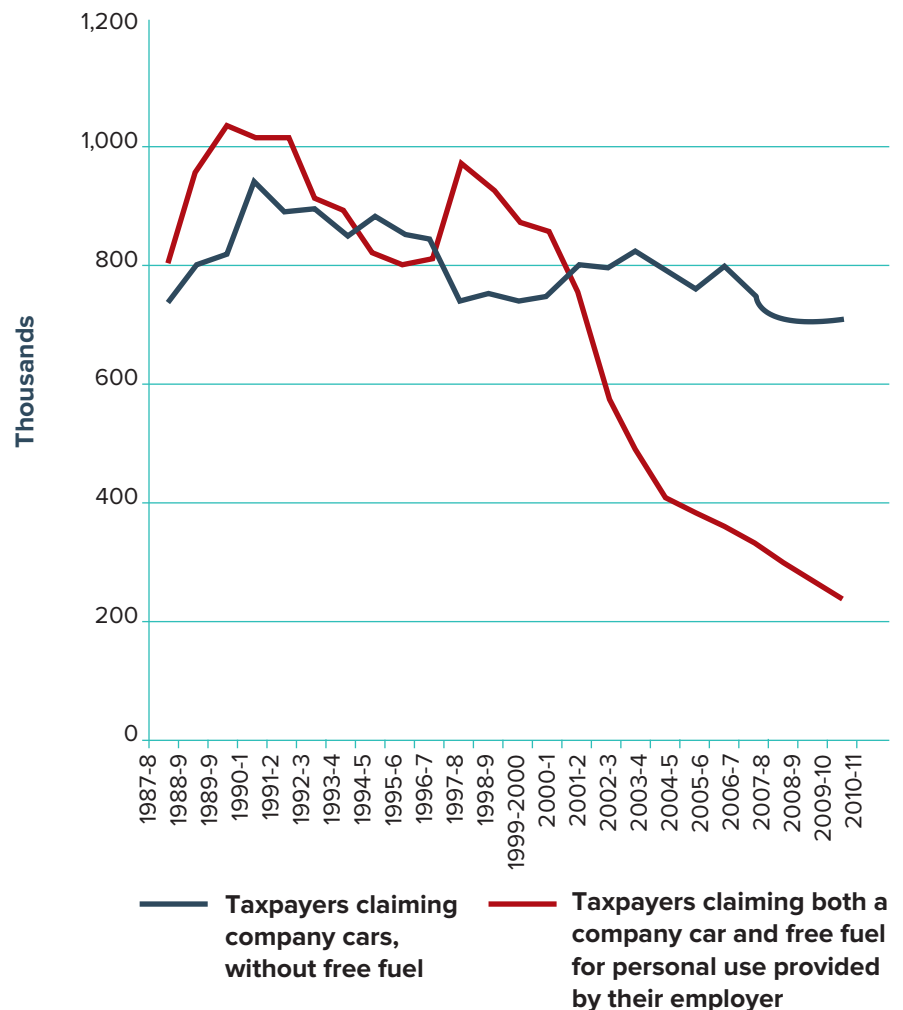
Crucially, TEMPRO excludes public transport proposals and their possible impact on traffic flows.

There was substantial traffic growth in the late 1990s, but a levelling off from 2001 with a slight fall to 2012. There is therefore limited traffic evidence to suggest any change from the traffic flow plateau which has been in evidence since 2001 and a falling mean line from 2005.

The underlying trends for traffic over the last eight years have been affected by:

- The economic downturn with wages falling in real terms or unemployment reducing work journeys;
- Traffic congestion on strategic routes resulting in a transfer to train;
- Improvements in rail service capacity and reliability following investment by the Welsh Government in rail services since the new franchise took effect in 2004 / 05;

Figure 1.12: Company car tax regime UK – impact on usage



Source: On the Move Figure 5.3 RAC Foundation et al (op cit)

- The increase in petrol costs compared with rail fares has resulted in a cross price elasticity effect with a modal shift from car to rail.

The traffic forecast and the actual position saw a levelling off by 2007. However in the late 1980s, the forecasts had consistently overestimated traffic flows. Incorrect assumptions on the underlying variables overestimated actual car traffic growth.

If there is a basic change in the relationships between demand and the variables used to predict

demand then those changes have to be reflected in forecasting models.

This does not always happen and often assumptions about growth in modal demand do not even reflect the actual over several years. Therefore the forecasts are wrong not because the wrong variables are used but more that the values and relationships attached to the causal variables are over or under estimated.

Traffic forecasts in past years, for example Tulpule (1972), expected saturation in car usage to occur in

about 2010. That meant that anyone aspiring to own a car had one and from then on only replacement vehicles would be bought. The traffic forecasts were very accurate but Professor Phil Goodwin suggests possibly for the wrong reasons. It may have been a coincidence of counteracting assumptions.

A major report on traffic forecasts suggests causal factors are missing from the DfT model: The 'On the Move' (RAC 2013) report suggests possible causal factors for the flattening of car usage:

- Increases in car costs;
- Income and GDP effects;
- Deterioration in road conditions;
- Improvements to the rail network (and in South Wales these will be significant in terms of track capacity, train capacity especially in peak commuter periods, and reduced journey times following electrification and development of the Capital Region Metro);
- Spatial planning policies such as integrated plans for housing shopping and leisure on major housing development sites;
- Smarter choices;
- Improved mobile and internet communications reducing the need to physically transfer documents and the need to physically be at the same location to facilitate a meeting;
- Company car ownership and free fuel taxation regulations relating to payment in kind, have cut the number (in Great Britain) of taxpayers claiming both car and free fuel for personal use provided by employers from over 1m in 1989/90 to 220,000 in 2010/11.

Professor Phil Goodwin (Goodwin, 2012) also suggested non – transport trends as causal variables in the plateauing of car use.

Figure 1.13: Income and car usage – no longer linked

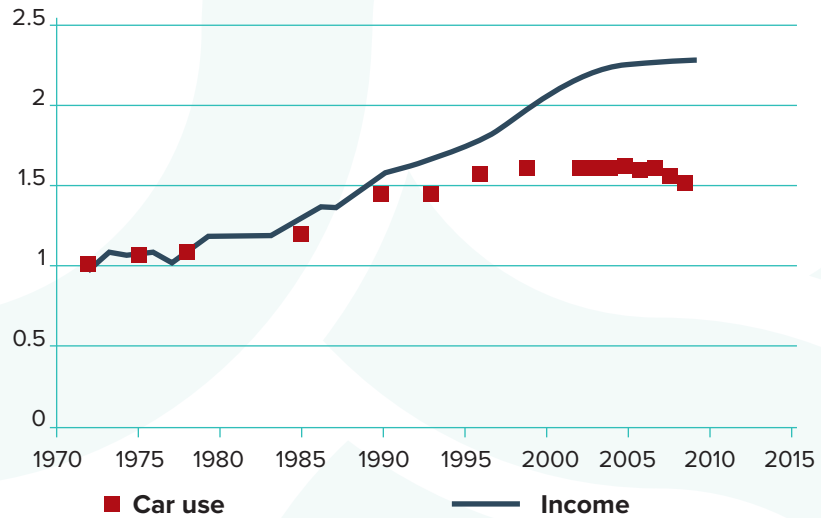
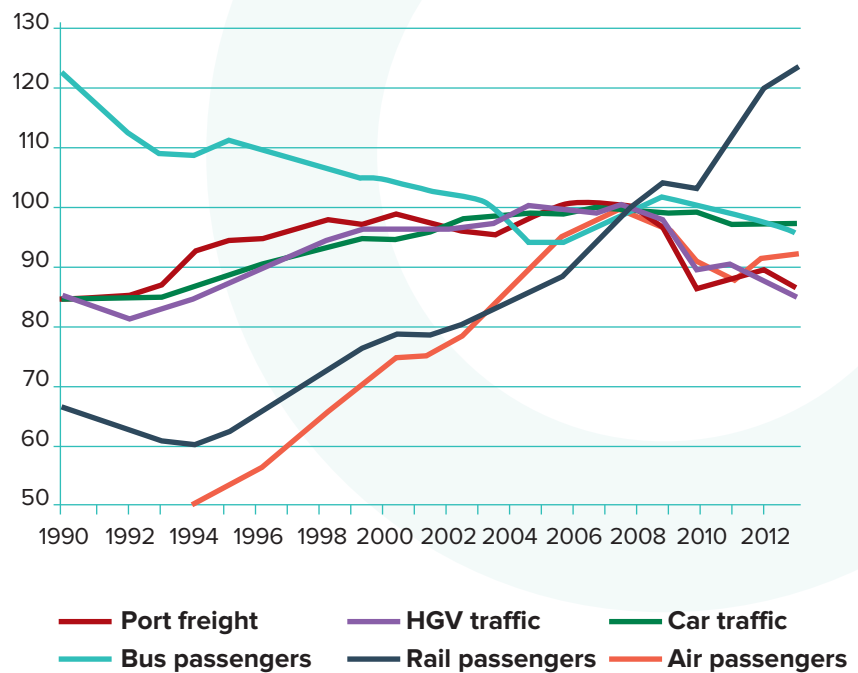


Figure 1.14 Changes in transport demand



DfT (2014) Moving Britain Ahead: Transport analysis developments and challenges, Department for Transport, London

- Cultural and attitudinal changes;
- Health, and environment as motivational factors to cut down on car use;
- Demographic changes – ageing population; more single person households; women having children at a later age; young people and ‘empty nesters’ going back to live in city centre locations;
- Changing images of contemporary life and work/life balance;
- An increase in online shopping;
- The growth in internet access, e-mails etc. from mobile phones.

Rail usage impacts

Rail usage continues to rise from 1994 – 95 (index 90) to 2010 – 11 (index 172). This almost doubling of passengers does not however provide the only factor in the fall or flattening of car usage.

Any continuation of the trends seen in the recent recession, or cross price / service elasticity factor creating more modal shift to rail could result in even greater increases in rail travel.

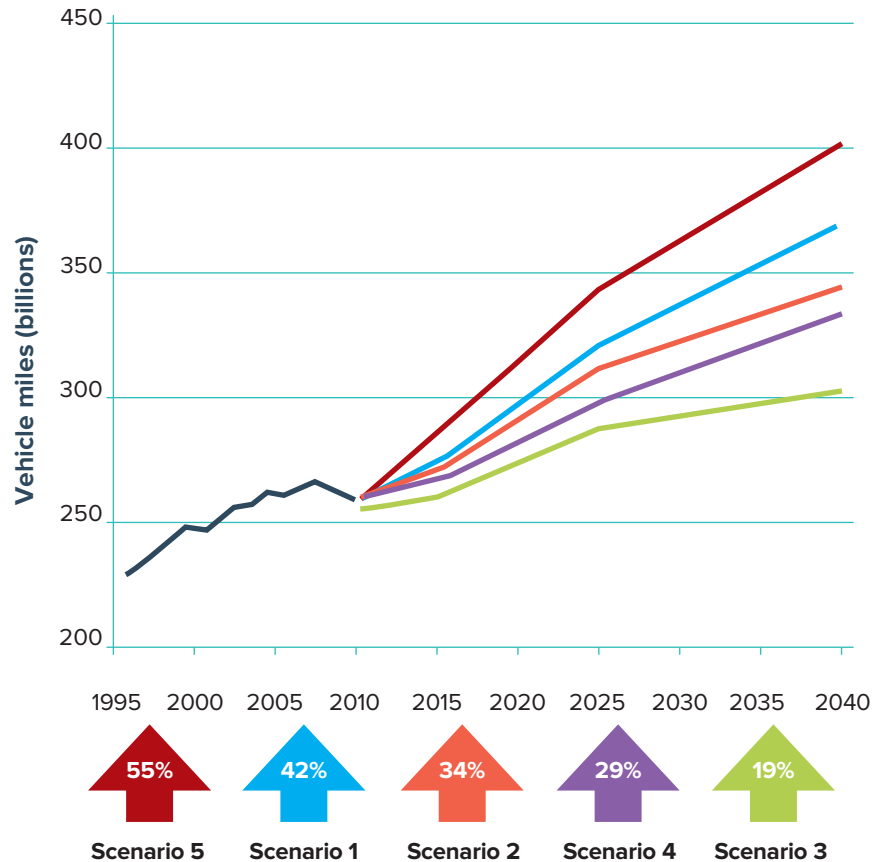
Fuel price impacts

Fuel prices are a short term influence on car use – the price elasticity of car travel is such that if the real price of fuel rises by 10% and remains at that level for a time then traffic volume falls by about 1% per annum and by 3% over five years or more. Despite short term ‘price wars’ by major supermarket, the long term change in real fuel prices is the key determinant. The real pump price of petrol and diesel in pence per litre increased from either side of 80p over the period 2000 to 2007 to either side of 100p per litre by November 2012. The impact of the recent drop in fuel prices remains to be seen.

Company car taxation impacts

The report (RAC, 2014) suggests that the company car reduction may be a one off movement but gives no evidence for this. As **Figure 1.12** shows, changes to company car taxation policy can have a marked impact on company car usage.

Fig 1.15 Forecasting demand for future travel



DfT (2014) Road Investment Strategy - Strategic Road Network, Department for Transport, London

Population impacts

In the longer term two other factors have an effect on car usage in a direct relationship. Firstly, if the population rises then car usage will generally rise as car usage is similar per average car user. In Wales the population projections from the 30 – 69 age group is fairly constant from 2010 to 2034. The under-29 age group is fairly constant while the over-70s group shows a gradual increase (RAC, 2014). It is this latter group which shows (in the case of males) an increase in usage but that would be expected to be largely in the off – peak times of day.

Secondly, in terms of car ownership, the number of cars per household is important. Car ownership amongst households with one car has remained fairly constant (**Figure 1.7**). The percentage of households with more than one car has increased while there are fewer households in 2009/10 with no car than there was in 1995/97.

However new car/all vehicle registrations in Wales have fallen consistently between 2004 and 2011. In 2004 over 120k vehicles/100k cars were registered; by 2011 the ‘all vehicles’ figure was at 80k and car registrations at around 70k. The slight recovery to about 85K vehicles (of which about 72K were cars) can hardly reflect Society of Motor Manufacturers

and Traders's view of new car sales being "particularly healthy" (SMMT, 2015).

Impact of personal income

Many researchers suggested (1974 (Zahavi), 2000 (Schaeffer and Victor) and 2010 (Metz)) that if time availability for travel is reached then there will be a peak in car use. The saturation level has been reached for the desire, need and freedom (of time) to travel. Consequently car usage has peaks. Indeed in the case of some higher paid people the amount of car travel falls. This may be because they have considerably less in-work travel.

Income elasticity of car travel (**Figure 1.13**) indicates that if real income rises by 10% then traffic volume rises by about 2% in a year increasing to 5% or more over 5 years. The impact on vehicle numbers rises by 4% in the short term and 10% in the longer term. In Wales and in the south east in particular, since 2006, real earnings have fallen.

Schaffer and Victor suggested that income elasticity in relation to distance is strong but travel time is fixed or at a maximum. Thus those on higher incomes move to fast modes. Total distance goes on increasing but slow modes such as the car are replaced by air or high speed train. They suggested that car use in the United States had reached its maximum by 2010 and declined in OECD countries.

Metz suggested that if distance (increasing with speed) has diminishing marginal utility and total travel time is fixed then total travel time (including car time) is

saturated. We have reached that point in the mid 2000s and that plateau now continues. If there is a decline, that is due to an economic recession.

The fall in car usage has also affected all income groups other than those earning under £10,000 per annum, with the biggest fall being among those earning more than £30,000 per annum. The peak car effect has been more marked for those men aged 16-29 where there has been a fall in usage. For those aged over 29 the pattern for personal car use has been a slight rise to 2003 and a flattening out of demand since then to 2010.

Changes in DfT transport forecasting scenarios

The DfT has changed its approach to road traffic forecasting since the current methodology was introduced, although that older process is still in use, for example in the M4 relief road options (Black, Purple and Red) around Newport. In the Blue Route proposal (Cole, 2014) the new approach was recommended.

Road traffic flows in England are predicted to grow by between 19% and 55% between 2010 and 2040 in the DfT's latest traffic forecast published in May 2015. This is despite a flattened trend and reduced car traffic demand since 2004.

The only increasing trends were air traffic which fell sharply from 2007, and rail passenger traffic which looks to continue its upward trend on a consistent basis since 1994. This has generally avoided any "recession" effect. It may

have resulted from factors such as congestion, environmental concern and a change in lifestyle especially in urban areas and amongst young males (Goodwin, 2013).

The increasing criticism of the current methodology from transport planning and economics professionals was based on the continuing significant differential between forecast and actual traffic flows. **Figure 1.14** shows this was marked in recent years with actual flows hardly changing since 2006 yet with predictions continuing to show a rise. The National Transport Model (NTM) relates to the English road network but is essentially the same model as that used in Wales.

From 2015, the DfT has employed a scenario based approach (**Figure 1.15**):

- Scenario 1 assumptions are as in the 2013 forecast with a base line affected by increases in incomes and costs (e.g. fuel) as the causal variable for travel choices and trips;
- Scenarios 4 and 5 are a variant of Scenario 1 with higher and lower oil price increases respectively;
- Scenario 2 removes the income elasticity element in the forecast so that income is no longer a causal variable because DfT reckons the strength and nature of that relationship may be changing;
- Scenario 3 takes into account the decline in trip rates over the last 10 years (**Figure 1.15**) and extrapolates that rate to 2040. DfT give the view that the recession is a part of the cause. However, levelling off of trip numbers began around 2004 (**Figure 1.15**).

The National Transport Model (a variation of which specifically for Wales is used by the WG) according to the DfT has a “good track record” when inputs for GDP growth, fuel costs and population are correct. However, with such a range of growth assumptions a cynic might say at some point it is bound to be correct. English regions such as the North East / North West with similar economic characteristics to Wales have the lowest rate of traffic growth.

“There will also be other factors such as congestion constraining traffic and greater choice of other modes” – DfT. However, traffic planners argue that the other causal factors suggested by Professors Jones (RAC 2013) and Goodwin (2013) have still not been included.

Stephen Joseph of the Campaign for Better Transport says that the DfT “have at last accepted major traffic growth is not happening but that forecasts still include questionable assumptions that car ownership will continue to climb and motoring costs will continue to fall” (LTT, 2015).

DfT position on new methodology

Dr Amanda Rowlatt, DfT Chief Economist (2015a) in her presentation at the Transport Economists Group (Rowlatt, 2015b), set out the DfT position. In January 2015, DfT published its report ‘Understanding the Drivers of Road Travel’. This reported on a varied range of new evidence-based analysis including statistics, social research, modelling and appraisal using tools developed with leading transport experts. A key objective was to understand why the growth

in national traffic has slowed down over the last 20 years and in particular in the last ten. Reference was made by Dr Rowlatt to the suggestion that car travel had reached a peak (Jones & Levine, RAC, 2013).

However DfT disagreed with this conclusion and argued that aggregate trends are masked by changing behaviours with young men driving less while women and older people are driving more; some temporary factors such as company car taxation rules and some longer term – economic and demographic (Jones, Goodwin, Blue Route Report op cit). The DfT has also produced a further report providing a detailed discussion of the factors underlying the Road Transport Forecasts 2013. This considers factors DfT now know (but presumably did not before) which influence travel decisions - not just income and costs but changes in car ownership, demographics, planning data and congestion levels. This last element may well cause an increase in, for example, rail travel, home-working and/or changes in times of day for journeys.

DfT continues to assert it has correctly accounted for changes in population levels, GDP and fuel costs and it has tracked travel trends closely. This is not entirely the case. The DfT also say they “know commentators and academics doubt our forecasts and question whether these forecasts give sufficient consideration to other factors at play” (LTT, 2015). DfT suggest that a contributor to this scepticism has been the lack of transparency around the forecasting approach and the assumptions underlying them.

DfT, and therefore the Welsh Government Transport Division, conclude that traffic volumes continue to grow. This conclusion reflects factors such as income increases and population levels, reductions in fuel costs derived from increased fuel efficient vehicle engines. The DfT review (DfT, 2015) found the other variables (above) - demographic change and congestion-related capacity constraints are important. However there is much work to be done on the impact which technological change, changing social attitudes or lifestyles have on traffic flows.

DfT will produce a new version of demand assumptions for schemes in 2016 following this current review of causal variables.

Urban policy and transition

Economically wealthy cities with high incomes and growing populations show the greatest reduction in car use. Such a trend exists in London, Munich and Paris and in smaller cities such as Strasbourg.

Cardiff has those same characteristics. It is:

- Economically buoyant with increasing employment opportunities, many at higher income levels;
- Home to a large student population who choose entertainment and lifestyle spending before car ownership and usage;
- A young city with a significant proportion of people under 30 years, who are more likely to be city centre dwellers, and/or non-car owners who prefer to walk or cycle.

There have been reductions in car use in medium-sized towns and in 'sustainable travel towns' (2004 - 08) and lower car use in high density new urban developments. This is the case in Cardiff and Newport. Thus policy impacts and lifestyle change have also reduced car usage, lower levels of car usage are not restricted to an economic downturn.

Travel behaviour will continue to evolve. The real issue then is by how much will car use grow and will it be anywhere near the previous forecast? The scenarios suggest it could be as low as 19% (Scenario 3) over the period 2010 to 2040. Wales would be expected to have one of the lowest growth rates in Great Britain and at present has a negative growth (i.e. reduction) in traffic flow.

Transport forecasts – conclusions

There was substantial growth in traffic in the late 1990s but a levelling off from 2001 with a slight fall to 2012. There is therefore limited traffic evidence to suggest any change from the traffic flow plateau which has been in evidence since 2001 and a falling mean line from 2005.

The conclusions to be drawn on future trends applicable to most British and European Union road projects are:

- The presumption that car mileage has peaked arises from contrasting trends of reduced car usage in London, accompanied by increases in rural areas. It might be suggested therefore that areas such as Cardiff, Newport (and Valleys / Vale) and Bristol could be in between those two extremes.

- The forecast outcome (WG 2013) does not reflect the recent trend and shows a sharp uplift from 2012 to 2030 of 20%: an average growth of just over 1%;
- The assumptions are based on economic activity and car ownership rather than projected changes in modal split with no interpretation of the impact of major rail investment;
- The main drivers of the growth in car use – income, prices (e.g. fuel, competing public transport), population size and projections have not changed in any major way;
- Car usage is likely to grow following economic recovery or increased consumer confidence, at a declining rate but in proportion to population change through the 30 – year forecasting period;
- We can expect less driving by men (the higher in numerical terms and therefore a higher base figure), more by women;
- The biggest reduction in male mileage (30 – 60) was due to a reduction in company car use following higher taxation and so has this run its course?

“But the future depends on which trends win out e.g. will women’s mileage continue to increase and will those in their 20s keep low mileage in the future?”.

– Professor Peter Jones

PART 2 : BEYOND THE CAR

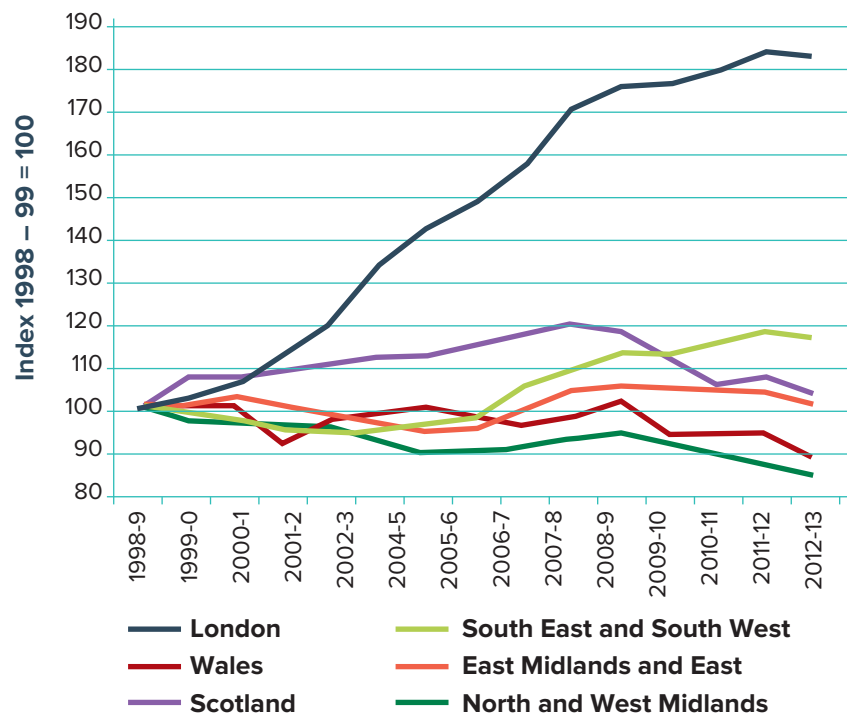
Bus services

Buses are often seen as a form of public transport unsuitable for business travel particularly outside London. A variety of factors account for this in a central London context. The use of buses for very short journeys in place of more expensive taxis combined with their frequency and modern fleet makes them “acceptable” to business users. Taxis are also available for specific business trips and the Underground for longer central trips or long suburban journeys and commuting. London also has a central transport body, Transport for London, with control over all aspects of transport either directly or indirectly. It has full control over all bus services in London which were never deregulated.

Figure 2.1 shows how factors such as convenience, frequency, comfort pricing structure and multi-ride ticketing has led to growth where elsewhere demand has fallen or stayed level. This chapter will show how if some of the London characteristics are adopted, passenger growth can be achieved (e.g. TrawsCymru and Bwcabus).

Analysis of comments in the FSB Wales survey (2014 Q9) on public transport highlighted the following priorities for business travellers if they were to be persuaded to transfer from car usage to bus/train:

Figure 2.1: Bus passengers: Trends in passenger numbers 1998 – 99 to 2012 – 13, Wales, Scotland and English regions



Source: On the Move Figure 5.3 RAC Foundation et al (op cit)

- Lower rail and bus fares;
- Increased public transport coverage;
- Increased service frequencies;
- Better integration of bus/train services and provision of multi-ride ticketing.

These were the top four measures that would encourage companies and employees to use the public transport network more often for business. The following analysis shows how this is also seen as the way to increase public transport patronage and shift modal split away from the car.

It also identifies the delivery issues in operational and public finance terms and points out that most congestion is in urban areas. These same areas are more likely to have the critical mass of travellers who could justify the investment level involved. Two cases of rail investment in rural areas have recently been reconsidered.

Discussions with leading bus/coach/rail operators and local authorities gave a collective picture of how they saw demand causes and the development of the business.

Companies who discussed the market were:

- TrawsCymru and Bwcabus directly from Professor Stuart Cole who created and set up both operations for the Welsh Government and is now advisor to the operations and has been advising the Minister on the next stage in the development of the business as an integrated whole over the next three years;
- NAT Group;
- Cardiff City Transport;
- Stagecoach;
- First Cymru;
- Edwards Coaches;
- Brodyr Richards;
- Arriva Buses Cymru;
- Lloyds Machynlleth;
- Express Motors;
- Trenau Arriva Cymru/Arriva Trains Wales;
- First Great Western;
- National Express – Coach.

Price elasticity of demand

The lower the price the more likely people are to use the transport service offered. This is a basic principle of economics and is generally true of passenger transport as it is of most other services with the exception of luxury non-essential services such as the cruise, Venice Simplon Orient Express or luxury chauffeur-driven car markets.

Price reductions might in themselves attract new passengers to the services; these are often travellers who did not use that service or used it less frequently. This is a form of dormant demand held down by the price level. In a competitive market there will be a variety of prices and the movement of one or other

can determine which particular transport service is purchased. The rise in petrol prices in Great Britain to 134.9p per litre led to a reduction in non-essential journeys by car.

There are three determinants of such journeys (Cole, 2005). Demand elasticity will be low (i.e. little change from a price rise / fall) if:

- The journey is essential;
- There is no practical alternative mode (in journey time, route availability);
- The cost of the journey forms a very small percentage of the traveller's income.

The most recent high point for petrol prices was accompanied by a shift to public transport, but this was not as great as might have been possible. This may be because there was often no practical alternative.

The decision by the traveller as to which mode to use will determine demand and a cross-price elasticity effect can result in passengers looking at the competitive costs on offer from car, coach, bus and train.

Quality factors

Speed of Service

For many commuters the journey time from home to work is a key criterion in modal choice. Journey time will be affected by both the quality of the infrastructure (which will increase productivity and reduce costs), and the consequent or possible speed of the vehicle.

In international travel between London and Paris the arrival of Eurostar with relatively modest fares (advanced purchase) competitive with those of British

Airways and Air France attracted most of the airline passengers onto the railway. The journey time of 2h15m (city centre to city centre) has also been a factor for the major part of the market.

Journey time and price are considerations for those travellers between Swansea and Cardiff where competition exists between Great Western Railway/Arriva Trains Wales, the First Cymru Greyhound and National Express Coach services. From Bangor to Carmarthen the public transport options are TrawsCymru (T1/T2) via Aberystwyth and the Arriva Trains Wales service via Cardiff. Often the route mileage for the journey by rail may be greater than the equivalent journey by car / bus / coach. However the journey time may be similar.

Frequency / Times of operation

The service times must be those which suit travellers' needs. Many people wish to arrive at work by 08.00 – 09.00 and leave between 16.00 and 17.30. This is the most used operating period for bus companies and includes the retail market and much of the travel market.

What it does not do is serve the evening market or those working shifts. These are often subsidised services tendered by local authorities. It also means that with reduced expenditure levels these evening services are being reduced and companies may not be prepared to take the financial risks that come from their development. Thus while a journey into a central business district may be possible by bus the return journey may not. On the railway network the timetables and subsidy is

determined within the franchise agreement with both legs of the journey in and out being provided. The financial risk can be partly with the Government and partly with the train company (Arriva Trains Wales).

Frequency is an important factor in attracting passengers and seen as a quality element. For urban travellers the high frequency bus / train are more likely to occur either commercially in densely-populated areas or tendered at certain times of day. But reliable bus services in rural areas have been shown to be a reason for success in growing passenger numbers and perception of public transport as an option, even though the frequency may only be hourly.

The competition legislation originates from the British bus deregulation and EU competition rules. It has had positive benefits where two or more companies compete for a route, usually in urban areas such as Cardiff or Newport. However, the pattern is more likely to be one of no interchange of tickets particularly between different companies' commercial operations, and subsidised services (e.g. evening) and commercial (usually daytime) services operating the same route. There are also patterns of operation where one company operates more or less exclusively in one area of a city and another in the remainder.

Standard of Service

Public transport users set the standard of service by:

1. Reliability and timekeeping of the bus or train
2. The quality and cleanliness of the vehicles
3. Easy and comfortable interchange between services

4. Helpful and polite staff and customer care Information which is easy to obtain, easily understood and up to date / real time
5. Clean, as new as possible vehicles or trains
6. Comfortable, secure waiting areas or railway stations
7. Ease of purchase of the correct ticket
8. Convenient park and ride for cars, cycles and well lit safe walking routes to the boarding point.

Comfort

Many users of public transport make a comparison with their car and the bus / train in terms of the travel experience. While there is the advantage of being driven in public transport, the accommodation can be crowded or overcrowded. Train advertisements have sold the train as a mobile office (particularly for long journeys) and this remains true as a comfort element. But narrow seat pitches and inadequate seat back flat surfaces lose that advantage over the car.

Reliability

A frequent reason for loss of patronage is the failure to get passengers to their destination or to a connecting service at the scheduled time. Passengers have an expectation that their train will arrive at or close to the time set out in the timetable.

Safety

This is always a concern for all travellers, government and operators. However, public transport compares well to the private car in terms of safety.

Case Study – Quality

Based on Welsh Government and Carmarthenshire County Council survey results the area of north Carmarthenshire and Ceredigion served by the Bwcabus and TrawsCymru integrated bus operation and linked to the train services at Aberystwyth and Carmarthen have attracted passengers with growth rates of up to 40% per annum.

The market research carried out for these services has shown an increase in demand resulting from high level of reliability and timekeeping, high quality interiors on the TrawsCymru services with high brand values such as leather seats, on board free Wi-Fi, clean vehicles inside and out provided with a 95% consistency of provision, integrated into other services such as the Bwcabus and feeder bus services.

An integrated transport policy

There is a generally accepted view that the long term (30 – 40 year time span) solution to the energy and pollution consequences of the motor car in Europe and the other oil-using areas of the world must be the delivery of an integrated transport policy. Wales is in this regard representative of the EU as a whole.

As a relatively small country with an established pattern of spatial development, Wales has clearly definable areas, namely:

- Major urban areas;
- Valleys communities;
- Affluent rural areas (often referred to as “urban shadow”);
- Rural market towns
- Remote (often called “deep rural”) areas.

Each of these area types has particular transport needs. Future aspirations for transport service provision in each area type need to be explicitly stated so that a blueprint can be developed with appropriate targets for service provision by each transport mode.

The Welsh Government, both directly and by commissioning studies and reviews, has moved towards the recognition of transport problems and has identified some possible solutions. These include the extension of transport concessions, extension of Transport Grant allocation to cover a three-year period, and increased use of transport telematics.

There is a clear recognition that the urban journey-to-work movement is where the most dramatic changes must occur. This does not mean that other aspects of policy, such as greater inclusivity (with a focus on accessibility rather than simply mobility) should not be vigorously pursued, in parallel. However, without addressing the journey-to-work problem, it is unlikely that other aspects will achieve or deliver overall aspirations.

Changes in the powers of the Welsh Government and the National Assembly for Wales should be sought on the basis of a clear rationale. In the case of transport much of the responsibility already lies with national or local government institutions. There are some developments for which powers already exist (e.g. the Joint Transport Authorities provided for in the 2006 Transport (Wales) Act) but which have not yet been implemented.

Logistics and supply chain management facilitate operational freight integration to achieve commercial objectives and the most efficient means of moving goods. There is no similar framework on the passenger side where there are four policy and operational aspects to integrate.

Integrated Transport Policy – definition

Considerable discussion has surrounded this policy but what does it mean?

An Integrated Transport Policy examines four relationships:

- **Integration within and between different types of transport** – better and easier interchange between car/bus/rail etc. with better information on services and availability of integrated tickets. The same applies between public and private transport, between motorised and non-motorised (walking, cycling) transport and within public transport;
- **Integration with the environment** – considering the effect of transport policies on the environment and selecting the most environmentally-friendly solution whenever possible;
- **Integration with land use planning** – to reduce the need for motorised travel and to ensure new developments can be reached by public transport;
- **Integration with policies on social welfare, education, health and wealth-creation** so that cross-cutting policies on issues such as social inclusion, school travel, cycling and walking, and the profitability of business work together rather than against each other.

The preferred structure to achieve such integration nationally, regionally or locally has two prerequisites:-

- a. A single policy and budgetary authority at the strategic (geographic) level both national and regional. This would also be the co-ordinating body for all modes of public transport.
- b. Co-ordinating bodies at operational level to achieve seamless interchange between modes, within modes, and between modes and land uses/human activities. This relates to physical interface and the provision of through ticketing.

Experience in other European Union States

While services in (b) may be provided by contractors, provisions in (a) must involve a single body at the national and regional level carrying out both functions. This may be through a government department or an arm's-length corporate body or company.

The elements of such a system exist in other member states of the European Union where high investment levels, together with policies for the co-ordination of services, fares and infrastructure developments, may be found in major centres as well as in local areas.

The Regional Councils of France have transport as a major policy issue with their responsibility covering local railway services (along with Societe Nationale de Chemins de Fer – SNCF) and bus operations in the municipalities.

In Sweden regional public transport bodies run local bus and rail services in a country with extensive rural areas, a small population (8m) and a concentration of people in a small part of the total land area.

The Netherlands has a national ticketing system for local public transport (originally called the Nationale Strippenkaart) and a national railway service, but with provinces being responsible for stations and for all bus, rail and train-taxi services which may be directly operated by a government-owned body or by a private company franchised by the appropriate local or national authority. Track operations are retained by the state-owned Railned.

In Austria, the Land (equivalent to the consortia areas) has responsibility within its area for all local public transport and land use planning. This is linked into a national policy for rail services. Joint ticketing exists on all services within the Land. Austrian Railways (a public sector body) retain operational control and ownership of the track.

This report proposes that Wales would follow the above in many ways, but would be taken further to the point where management control, finance, policy and service provision (though not necessarily service operations) would be conducted by one national, and four associated regional, bodies (the Joint Transport Authorities proposed in the Transport (Wales) Act 2006) based on the geographical areas of the current transport consortia and county council groupings.

Elements

If the analysis is confined (for the moment) to passenger transport then the elements identified below can be integrated (with a trade-off in expenditure between them based on a single multi-modal evaluation technique).

The elements are:

- Road investment;
- Rail investment (infrastructure, rolling stock);
- Bus investment (terminals and vehicles);
- Public transport interchanges;
- Walking/cycling facilities investment;
- Traffic management (physical and fiscal);
- Public transport fare levels) and consequent;
- Public transport service level) contractual payments.

Rationale

The key objective of integrated transport for Wales would be to provide for a split between accessible and affordable modes of travel which are both sustainable and become the preferred modes of travel.

Wales, as indicated above, has a variety of spatial characteristics:

- Densely populated urban areas (e.g. Cardiff, Newport, Merthyr, Ebbw Vale, Swansea, Wrexham);
- Major towns (e.g. Neath, Port Talbot, Llanelli, Aberystwyth, Llandudno);
- Important rural centres (e.g. Carmarthen, Haverfordwest, Castell Newydd Emlyn, Llandeilo, Brecon, Newtown, Ruthin, Denbigh);
- Deep rural Wales (e.g. Ceredigion, Powys, Gwynedd).

The potential for journey modal transfer from car to public transport

therefore varies between urban and rural areas.

However this difference can be narrowed though a radical new approach to rural bus services. Regular-interval fixed-timetable operations suit urban areas with high patronage levels but have only limited value in rural areas. The Bwcabus computer/satellite/GPS and flexible scheduling bus system responds to demand and has enabled a radical and successful (in increased patronage terms) approach to rural public transport.

Generally there is a need for improvements in the public transport system before car users can be persuaded to change, and non-car owners are able, to make reasonably timed and priced journeys.

Its current powers provide the Welsh Government / National Assembly with an exclusive national role only in roads, with a further role in road/rail transport through its links with local authorities. Rail expenditure is split between the Welsh Government (train services funding), the Westminster Department for Transport (train services and track funding) and Network Rail (track investment and borrowing funds). This severely limits its ability to balance investment between the best solutions to transport problems.

4I's Concept

As outlined previously, the 4I's concept identified the following as the integration equation for passenger transport:

Information + Interchange + Investment + Imagination = Integration

The absence of any of these elements will hinder or even prevent the development of an integrated passenger transport system. A transport body for Wales could effectively manage each of these elements.

Active travel

The principles set down in the 2013 Active Travel (Wales) Act and the subsequent documents - Design Guidance; Action Plan; and Delivery Plan - form the first stages in the Welsh Government's move to encourage active purposeful travel to and from work.

But this starting point has to be taken further through the integration of walking and cycling with public transport. In addition to complete trips by bike or on foot, there is a large untapped market of current car commuters. They need clear route information, suitable waiting areas and secure cycle parking at railway and bus stations and at key bus stops to be persuaded over time to change to a multi-modal journey.

There is increasing evidence of the impact of creating high quality interchange facilities such as secure cycle storage at suburban railway stations (as suggested by Abellio Rail in their application of the Bike2Go scheme (Evans, 2014)) and at major bus stops serving a large population or several routes. This evidence is mounting as more locations are constructed and we learn more of the impact of longer term schemes like the Netherlands and Denmark. Many railway stations have cycle storage and this may need to be made secure or extended.

Waiting facilities at railway stations are generally adequate and in some cases good. At bus stops the quality varies between good and poor, with no shelter from the elements at all in too many locations.

Such a modal shift has benefits for small businesses in terms of reduced parking costs, increased sales and reduced road congestion. In Antwerp 'Sheffield' type cycle stands erected by retailers have improved sales for individual businesses and whole locations.

It is not easy to identify which type of infrastructure scheme provides the greatest benefit as it will often depend on where the scheme is located, the target audience for the intervention and the relative impact of the scheme. For example, upgrading a crossing from pedestrians-only to include cyclists along a key corridor may have more impact than a long section of new route between two small settlements. Experience indicates the greatest benefits are derived from schemes which have a clearly defined target audience and use a combination of infrastructure and promotional/behaviour change elements. (WLA, 2014)

There are several different benefits which could have different policy weightings depending on the priorities of the community or government.

These include:

- Health (Davies, A, 2014; MOL 2014);
- Numbers of people cycling or walking to work;
- An integrated approach to personal mobility, through modal change from motor car and its effects on:

- congestion from fewer motor cars
- CO² emissions
- other environmental factors
- car / person accident levels
- increased use of buses and trains leading to increased revenue; reduced public revenue support (subsidy); justification of further investment in public transport services and facilities (from bus shelters to rail / bus stations)
- increased public transport revenue/reduced subsidy
- Improved shopping environment leading to increased spend;
- Access to facilities improved;
- Convenience, accessibility, comfort for pedestrians and cyclists.

Benefits

'Encouraging cycling to work reduces traffic at peak times reducing pressure on other forms of road and public transport and travel times for other road users' (SQW 2007). This benefit has been achieved through improved walking and cycle paths, but has to be put into the context of 100,000 people commuting into and out of Cardiff every day (CCC, 2015). While some people living in the inner suburbs may be persuaded to travel to work by cycle or walking, for most a primary objective has to be a modal change to public transport, with part of the journey at both ends by foot or bicycle, and making increasing use of the south east Wales Metro investment over the next 20 years (Metro 2014). Investment in public transport must also keep in mind how people are to get to bus / tram stops and to railway stations. Varying levels of investment are to be encouraged in other towns and cities in Wales but should always be on an integrated basis.

Current Welsh, Scottish and English Benefit Cost Ratio (BCR) appraisal methodologies do not take anything approaching full account of the health benefits of walking and cycling. Health benefits were / are not included in Department for Transport CoBA, and New Approach to Transport Appraisal (NATA) techniques and the HM Treasury Transport Business Case. In consequence a cycle junction scheme to improve safety would:

- Have accident reduction values but these are a small proportion of the monetised values (ex CoBA);
- Have delays for the general motorised traffic which have a higher value for travel time than cyclists and pedestrians (ex CoBA);
- Have no monetised health benefits for either personal health or savings for the NHS. This applies in Wales also.

These values can be monetised however using the HEAT (2008) technique, as can monetised benefits from reduced sickness absenteeism and the costs to the business sector. Other factors which are not monetised and therefore largely ignored at present, are benefits of reduced illness, costs to the NHS, improved air quality and improved well-being.

Many of the discussions have revolved around the absolute cost of a particular scheme. However, of equal importance has been the opportunity cost of constructing one scheme rather than others; or the selection of a more expensive scheme in place of a lower cost option. In selecting a more expensive solution the Welsh Government may have other factors such as traffic / rail usage growth in mind and to build for growth may be the better option.

National Transport Plan

There is a need in the post consultation preparation of the National Transport Plan to ensure that active travel modes and their integration with one another is considered. There are particular types of scheme which can be more successful than others in terms of the elements outlined above. Such schemes might include:

- Provision of information on cycling and walking routes and facilities in particular network maps;
- Schemes with community involvement and which reduce community severance;
- Links between small rural settlements and a regional urban centre;
- Scoring highly on buildability, projected demand, community use and cost;
- Continuation or 'filling gaps' on existing routes;
- Hub and spoke routes into town centres and public transport hubs;
- High quality surfaces and lighting; feel secure routes;
- Segregated cycle paths and footpaths within the central business districts;
- Significant peak time public transport schemes reducing car flows and congestion costs;
- Schemes that increase public transport use thus contributing to subsidy reduction.

Achieving success

Delivery of active travel schemes should involve closer working between Welsh Government and local authorities throughout the feasibility / design and funding stages.

An arm's-length dedicated unit (covering walking, cycling and public transport interchange) for

feasibility, design and funding (or an alternative in-house unit with the technical experience) is also necessary. This is the format used in Scotland and by TfL.

Barriers exist to the success of walking and cycling schemes. These include:

- Funding levels in Wales (currently an estimated £5 per head (£15m)) are less than in Scotland – £10 per head – equivalent to £30m pa in Wales. Considerably more per head is spent in other EU states and if we aspire to a Netherlands level of active travel a catch up expenditure of £60m for several years would be required;
- Annual grant arrangements hampering deliverability of schemes – this could be solved by a more flexible 3-year rolling funding programme;
- Local authorities have no 'stock' of schemes with feasibility and design stages which can be completed in the one-year period;
- The lack of a route strategy - to be solved consequent on the Active Travel Act 2013 provisions;
- The lack of public transport integration to generate additional movements;
- Land purchase - timescale, cost - may put off WG / local authorities;
- Walking and cycling is not part of mainstream appraisal but road construction is included;
- WeITAG does not lend itself to many of the benefits (time savings not achieved; health benefits not included);
- Many benefits have no monetised values.

Walk, park and ride

Park and ride or walk and ride have emerged in the view of many (WLA, Sustrans, TfL) who responded to the discussions as probably the most effective way in the short-

to-medium term by which current travellers will be persuaded to make at least part of their trip on foot or bicycle. This was referred to by Sustrans as “the final mile”. The objective was also referred to as being to get motorists out of their cars rather than to have public transport users’ transfer to walking or cycling. Clearly the former would bring advantages in terms of healthy lifestyles but could also contribute to reduced congestion in urban areas.

Urban vs. rural

A distinction between urban and rural also becomes an issue in determining the most likely successful schemes if they were judged in terms of the numbers of people using active travel journeys rather than car or public transport. If total use was a primary criterion then the urban schemes would continuously be the more successful. A means of making a distinction between urban and rural areas in prioritising schemes is needed. But conversely this should be put into the context of the lower travel distance involved in urban areas giving a greater likelihood of success if demand levels, construction costs and distances are all considered.

Bus and train companies (with local authorities) already have, or could, encourage such integration. Through such integration those who currently drive to / from work or to the local railway station by car may be persuaded to begin a move to active travel thorough part of their journey.

Appraising schemes

Robust evidence on the performance and benefits of cycling and walking investment is required to compete effectively

with investment for other transport modes, especially roads. Until the benefits are taken into account there will be underinvestment at a national and local level. Active travel schemes should be compared with other local transport schemes so that these can demonstrate their value for money.

Cycling and walking are not catered for comprehensively in WeITAG or the HM Treasury Transport Business Case. They are catered for in the scoring system in some local authorities which should provide for health benefits and active travel within the mainstream appraisal process where Benefit Cost Ratio based investment conclusions are derived.

A Cycling Demand Forecasting Handbook to bring demand and appraisal together in parallel with rail and road demand analysis and to measure levels of walking and cycling for various categories of activities - work, education, health etc. together with the other benefits and outcomes for pedestrians, cyclists, economic impact, modal shift, risks to delivery and the delivery stages and potential delays / costs is necessary.

Measures of benefits

There are different methodologies for measuring success. In summary they are:

- Benefit Cost Ratio (BCR) a form of cost benefit analysis using monetary measures or established measures where this is not possible. This would fit into WeITAG (2008) and to the HM Treasury Transport Business Case (Decision, 2012; DfT 2011);
- HEAT (created by the World Health Organisation WHO) for monetising health benefits;

- number of users;
- scoring system (variations as used for Scottish Government / Sewta / SWWITCH / TfL / English Counties).

Demand-based schemes

Under the previous system used in Wales consultation could take place to assess demand. Latent demand is harder to assess than road traffic demand. In the latter, traffic congestion is a good indicator of excess of demand over supply. That was the format of ‘predict’ (traffic flow from current capacity under supply and forecast growth using established techniques) and ‘provide’ (additional road space).

The present integrated transport investment appraisal should be a ‘provide and promote’ approach. This uses new elements within the forecasting model and assigns more importance to active travel and public transport modes especially when compared to the current DfT traffic forecasting model (DfT, 2010; Goodwin, P 2013; Jones, P 2013; TfL 2015). However, that latent demand is not easily teased out and the transfers sought are also from the motor car to active travel and not from public transport. Research employing stated preference techniques (SQW 2007) could be used but further methodology is suggested in the Design Guidance. The analysis of potential demand is required at the feasibility stage as part of developing both local strategic routes and national routes.

Journey time (transport demand research suggests) is a primary factor in determining modal choice. Even for short journeys of less than one mile the motor car may be used rather than walking. Journey time

when coupled with convenience and weather may further influence modal choice. (TfL, 2009a, 2009b, 2011).

For longer journeys particularly to/from work, the disparity in journey time may be even greater - e.g. a journey of 10 minutes by car may take 30 minutes by bike, often determined by road quality and speeds.

In rural areas, this disparity may be greater where the distance from home to work may be many more miles (10, 20, or 30) and cycling/walking may not be a consideration.

In the view of some local authorities there is currently no provision for consultation / research or for a feasibility study. This would also include a cost analysis.

The feasibility stage would explore design in more depth (keeping in mind the Design Guidance) and more accurate costing.

This potential cost risk on local authorities is seen as one reason why only a small percentage of pre-delivery money was spent. (WLA 2014 a-d; 2015).

There are however many unknowns about the cycling market and what influences demand. TfL (2015) has suggested a Cycling Demand Forecasting Handbook along the same lines as the rail industry's Passenger Demand Forecasting Handbook. This has determined assumptions for demand input into market appraisal. Cycling modal split assignment (route choice) and the measurement of demand causal factors (below). WG should join with TfL in developing this valuable tool for implementing the Act.

Key characteristics of demand

- Journey time comparison between modes;
- Weather (SPA 2014a, b);
- Relative locations of work, school, health facilities, homes;
- Accessibility of walking and cycling facilities;
- Interchange at bus stops / bus stations and railway stations;
- Population density (current or potential from land use changes e.g. housing estates juxtaposed to city centres);
- Deliverability (land ownership);
- Community-backed schemes;
- Topography of, for example, valleys throughout Wales;
- To meet a socio-economic need.

It is often suggested that a 'shopping list' of schemes does not represent a plan. However it can do so if the objective is clear, for example to create a strategic cycling network within a local authority area, and if the WG funding criteria are used to determine inclusion. It is particularly so if community connectivity with central business hub is to be maximised.

A list of active travel schemes can represent a plan if together they complete a strategic cycle network within a local authority area and take account of the funding criteria e.g. transport grant funding which promoted access to town centres from residential areas.

Integrated Transport Schemes

The basis of the WG transport policy is to integrate different modes of transport with the intention of reducing car use.

New highway plans must be tested (as required by the Act) to see if provision is made for active (but also public transport) travel through the Welsh Government grant and funding processes. This applies also to any Welsh Government funded / part-funded bus or rail stations. New railway stations such as Energlyn, Ebbw Town or Pye Corner have cycle storage facilities. Information on all stations' cycle storage should appear on the new Wales and Borders network maps.

There are two separate cycling and walking markets (WLA (2014)); TfL (2008; 2009a, b, 2011; 2012a; 2014 b,c,d,g), Transport Scotland (2013), PJA (2015) to which any persuasive initiatives have to be aimed:

- Those who will cycle/walk at all times in all weathers to those who cycle/walk in relatively dry weather along the full route between home and work / shops / leisure facilities.
- Those who will, instead of car use, given the facility and information, cycle or walk to public transport interchange facilities at rail and bus stations or for relatively short distances and in dry weather. (SPA, 2014a, b).

Both have potential for growth and have similar market characteristics to the 'car all the way to work' modal shift to 'car to the railway station park-and-ride site' which has been a travel change characteristic on Valley Lines services over the last ten years for car users and walking passengers.

The 4I's approach has been a part of the attempts to move travellers from cars to public transport. The same approach could be used to achieve a modal shift (for all or part of the journey) from cars to walk or cycle.

**Information + Interchange +
Investment + Imagination =
Integration**

The Design Guidance (WG 2014b) Chapter 7 relates to integration of modes in particular in improving facilities for walking and cycling to / from public transport facilities (railway stations; bus stations; bus stops with several routes) and cycles on buses. However, the Design Guidance (sections 5 and 7) does recommend public transport interchanges should be given a high priority when routes are developed making it easier / shorter for walkers and cyclists. Bus and train stops should be well connected to the walking / cycling networks with well signed, high quality surface routes to work and residential areas. These have enabled penetration into the multimodal market.

There was also a shift from car travel for the entire journey to rail thus also potentially contributing to the financial position of the railway service and reduced subsidy or improved revenue and service quality.

In Scotland, Transform Scotland (TS 2014 a-d) makes the case 'for sustainable transport across all modes'. Their Interchange Audit Toolkit could usefully be applied to several existing and proposed bus stations in Wales to bring out all these benefits.

Examples are

- Already constructed - Swansea, Aberystwyth, Llanelli, Carmarthen, Caerphilly, Brecon, Haverfordwest, and Rhyl;
- Under construction so could be incorporated – Newport;

- Planned - Cardiff (the plans here could be tested against the Transform Scotland Audit Toolkit).

CONCLUSION AND RECOMMENDATIONS

This report provides the basis for much potential improvement in transport across Wales. Further research is needed into some of the specifics but the following conclusions can be drawn:

- Welsh Government should, working with DfT where necessary, change the methodology behind traffic forecasts to ensure that in future, forecasts better reflect actual traffic flows and road usage.
- Welsh Government should develop a new methodology for assessing the worth of transport projects which takes account of latent demand for active travel, rather than simply concentrating on the easier-to-assess road traffic demand. This methodology should include all forms of transport, and reflect the importance of rural as well as urban schemes.
- Longer-term and more flexible funding models should be adopted for the delivery of travel schemes with a move away from short-term annual grant arrangements, where these exist.
- Public transport timetables should better meet the needs of businesses and local economies.
- Affordable public transport options should be available to travellers, including business travellers, in every part of Wales.

The cost of travel, rather than just time taken, should be a key issue.

- Joint Transport Authorities should be established to oversee regional transport provision.
- A new arm's length body, Transport for Wales, should be set up to lead on integrated transport, transport policy and provision.
- Powers over bus regulation should be fully devolved to Wales at the earliest opportunity.

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Pwyllgor yr Economi, Seilwaith a Sgiliau/ Economy, Infrastructure and Skills Committee

Masnachfrait Rheilffyrdd a chyflwyno Metro / Rail Franchise and the Metro

Ymateb gan Growth Track 360, Tasglu Rheilffyrdd Gogledd Cymru a Merswy Dyfrdwy / Evidence from Growth Track 360, the North Wales and Mersey Dee Rail Task Force

Response to the National Assembly for Wales Economy, Infrastructure and Skills Committee Inquiry into Rail Franchise and Metro Delivery from Growth Track 360, the North Wales and Mersey Dee Rail Task Force.

The North Wales and Mersey Dee Rail Task Force (RTF) is a partnership of the North Wales Economic Ambition Board, the Cheshire and Warrington Local Enterprise Partnership, the Mersey Dee Alliance, Merseytravel, the North Wales Business Council and the Chester and North Wales Chamber of Commerce. The purpose of the RTF is to campaign for better rail services in the cross-border North Wales and Mersey Dee area and welcomes the opportunity to contribute to the inquiry.

Growth Track 360 sets out an ambitious programme that demonstrates how improved rail services can contribute to economic growth and job creation in the region. The prospectus sets out how improved network connectivity can help increase economic activity by £25bn and support the creation of up to 70,000 jobs.

www.growthtrack360.co.uk

It is noted that the Committee's inquiry is focused on the following issues:

- The effectiveness of the Welsh Government's approach to the development, procurement and delivery of the rail franchise and South Wales Metro, including key risks and how they can be mitigated; and
- Priorities for the franchise specification and Metro delivery to ensure rail services meet the needs of current and future passengers throughout the franchise area, and deliver value for money for both passengers and the taxpayer

The effectiveness of the Welsh Government's approach to the development, procurement and delivery of the rail franchise and South Wales Metro, including key risks and how they can be mitigated

The current rail franchise was let in 2003 on the basis of a zero growth in passenger numbers basis. This has left the area served by the franchise with inadequate rail services and in our view also suppressed passenger demand. The refranchising offers an opportunity for transformational change over the next franchise period. The new franchise must improve the frequency of rail services to key destinations, reduce key journey times and offer better quality services through improved rolling stock.

The Welsh Government (WG) must ensure that the next Wales and Borders (W&B) franchise will meet current and future passenger growth projections. Growthtrack 360 has stressed the importance of local authorities and the business sector using their local knowledge to help develop the prioritised outcomes for this franchise. This approach worked successfully with Rail North Ltd, making a transformational difference in the renewal of the Northern and Trans Pennine Express franchises from April 2016. It is

appreciated that the bidding process is different for this franchise, but nevertheless the level of stakeholder involvement to date has been disappointing.

It is essential in our view that cross-border arrangements for consultation and stakeholder representation are in place before the franchise is let and then subsequently. There should be cross border compliance and a strategic forum established, with appropriate representation from the Welsh Government, Department for Transport, the franchise operator, Network Rail and Transport Focus, lead officers and portfolio local transport authority Councillors throughout the franchise duration.

The RTF wishes to see a flexible approach to the new franchise that will allow improvements to services to be delivered in an incremental way that also allows for changing circumstances to be addressed. We would wish to see the franchise operator work closely with stakeholders so as to maximise the potential of our network and to be rewarded for initiatives that drive increased usage of the network. Because the bidding process has the outcomes identified some way into the process, it is not clear at this stage whether the outcomes sought by Growthtrack 360 will be incorporated in the franchise.

We have a positive working relationship with the Welsh Government and have been able to articulate our priorities clearly to key decision makers. It has been more difficult to engage with other key players involved in the franchise renewal.

Priorities for the franchise specification and Metro delivery to ensure rail services meet the needs of current and future passengers throughout the franchise area, and deliver value for money for both passengers and the taxpayer

The WG must ensure that the next Wales and Borders (W&B) franchise will meet current and future growth projections. Additional and more frequent services, better quality rolling stock and reduced journey times are at the core of our case. This will require funding for new services and also improvements to infrastructure. The WG and the Department for Transport (DfT) need to accelerate the implementation of a prioritised programme of critical infrastructure works.

Infrastructure Improvements

Wrexham General Station: Track and signalling improvements, creating a train turn back facility and provision of an additional platform.

Chester Station: One additional through platform with track and signalling improvements increasing the capacity for the number of trains to simultaneously approach or leave the station.

Crewe Station: Capacity, track and signalling layout to accommodate at least three trains per hour (in each direction) between Crewe and Chester, with a hub station to enable close proximity for transfer of passengers between HS2 and rail services to Chester, North Wales and Warrington.

Line speed and Signalling Improvements: especially along the North Wales Coast line

Service Improvements

Improved service frequencies and reduction of journey times. Having the ability to connect / split trains would maximise efficient use of capacity and improve connectivity. The current service provides poor peak time journeys for commuters to Chester. This needs to be addressed to serve unmet demand and investment being made within the city and surrounding areas.

The new committed service to Liverpool via Halton Curve must extend beyond Chester to Wrexham and along the North Wales coast.

Our work recommends that the following minimum connectivity requirements are needed, provided by a combination of connecting and through services:

GT360 has proposed a North Wales / Chester 4 or 5 per trains (including ICWC services to London) per hour minimum service providing connecting or through services to:

- Warrington and Manchester (some to airport) 2 trains per hour
- Crewe 3 trains per hour
- **Liverpool via Halton Curve 1 trains per hour**
- Birmingham International or Cardiff alternate hours

In addition improved services on the following routes are sought

- Wrexham – Bidston 2 trains per hour
- Llandudno – Blaenau Ffestiniog 2 trains per 3 hours

Importantly, links to the main airports serving the region at Manchester, Birmingham and Liverpool John Lennon need improving with regular through rail services. Improvements to services **on Sundays and Bank Holidays**, are needed, including Boxing day services, to service frequency and the times of first and last trains. TfW should work with other franchises to improve connectivity for example, by assessing extending the Arriva Northern Connect service (from Leeds) beyond Chester along the North Wales Coast, and considering options for extending the Crewe service to Stoke / Stafford.

The franchise operator must adopt a better approach to **holding connecting trains** when it is known that passengers will be transferring, particularly if late at night and without being penalised for late running.

The WG must ensure that **performance monitoring is enforced**, with punctuality performance measured at all stations as opposed to the final destination station. This should also include performance in providing the correct type of rolling stock (and seating capacity), timescales for repairing defects at stations, revenue protection and management of disruption.

Performance monitoring should include positive performance measures such as **commitments to increase passenger satisfaction** and evidence of how the franchise operator is actively engaging and supporting local communities and economies in each region.

The operator franchise must have minimum requirements to **manage planned and unplanned service disruption** including full use of technology, social media; availability of staff who are able to help; ensure that clear announcements at all stations and easy processing of compensation claims, including automation where possible.

The **fare structure** (and supporting technology) must always give the passenger the best value fare for their journey(s), including giving value for money to make travel by families or small groups by rail more viable. Fares to make rail travel by young adults and those on low income more affordable are required

The franchise operator needs to be committed **helping passengers to make increased use of technology for ticket payment**, particularly mobile devices. This provides scope to better understand passengers' travel patterns, direct and real time journey information and reduces cash handling. Commitments should also be made to introduce two way through ticketing with a prioritised network of bus services (and community transport) that are commonly used at either end of the rail journey.

Income generation (from fares or other sources) above a predetermined amount by region or line should be reinvested in to services or facilities.

Station facilities

All stations must meet requirements of the broadest range **of needs for people with mobility or sensory impairment**. Toilet provision must be fully accessible, and be cleaned and maintained on a regular basis and be available for use free of charge. Platform length and height need to provide easy access with trains.

Minimum criteria should be applied for all stations based on passenger number categories. This should include specifying minimum opening hours (and days of operation) of staffed ticket offices, directions to nearby bus stops, sheltered waiting accommodation, contact details for taxi operators, provision of CCTV, live journey information including audible messages to each platform and welcoming waiting facilities

The WG should make available to the franchise operator, a residual value funding mechanism to enable major station improvements schemes. This would allow payment of major schemes to be made beyond the franchise duration.

Growthtrack 360 also proposes that the franchise operator is committed to delivering **improvements to station car park facilities and capacity**.

Community rail and delivery models

The Welsh Government should encourage the franchise operator to make **community rail development** a strong feature of the franchise, improving financial security to existing community rail partnerships and enable expansion of the community partnership model. The franchise operator must collaborate with other franchise operators on overlapping schemes such as the emerging North Cheshire Community Rail Partnership with Arriva Northern.

Growthtrack 360 would like to work with the WG and DfT to broaden the community rail concept to include bus service operators and community transport, as well as strengthening engagement with small and medium enterprises to encourage more use station buildings, to **increase use of the public transport network** and to help prioritise investment.

A Growthtrack 360 working group has prepared a draft proposal of an **alternative management model for the Wrexham – Bidston route**, setting out the benefits of a dedicated customer focused team building interest and involvement from communities and businesses along this largely self-contained line.

Rolling stock

We are concerned that little progress is evident of WG addressing the urgency of **introducing new rolling stock**, bearing in mind potential delivery lead times. This investment is essential to respond to the continual passenger growth and must keep pace with the quality and capacity improvements being made in other franchises, notably the Northern and Trans Pennine Express. Other options for funding rolling stock investment in addition to the current practice should be considered.

New diesel powered rolling stock should be capable for **adaption for potential powering from overhead electrification and stored electrical power** as those options become available.

Comfortable seat availability with adequate leg and elbow room in a clean and well-ventilated environment accompanied by welcoming (and visible) staff, free Wi Fi availability and plug in sockets are basic expectations for passengers.

Rolling stock should be designed for the varying needs of passengers on individual routes. Examples include the demand for luggage accommodation, catering options, capacity for cycles and toilet provision.

Cynulliad Cenedlaethol Cymru / National Assembly for Wales
Pwyllgor yr Economi, Seilwaith a Sgiliau/ Economy,
Infrastructure and Skills Committee

Masnachfaint Rheilffyrdd a chyflwyno Metro / Rail Franchise
and the Metro

Ymateb gan RNIB Cymru / Evidence from RNIB Cymru

About RNIB Cymru

1. RNIB Cymru is Wales' largest sight loss charity. We provide support, advice and information to people living with sight loss across Wales, as well as campaigning for improvements to services and raising awareness of the issues facing blind and partially sighted people.
2. We welcome the opportunity to provide evidence to this inquiry into Welsh Governments plans for the railway network and will use this opportunity to highlight the needs of blind and partially sighted users of the Wales and Borders franchise and the South Wales Metro, to ensure that any potential or real barriers to the use of trains are addressed to help encourage vision impaired people to have the confidence to use the services.
3. Access problems on public transport are one of the most persistent topics raised by our members. Train travel can pose problems for people who have sight impairment and this can range from poor lighting and signage, to inaccessible ticket machines and poorly trained staff. We hope that the recommendations that emanate from this inquiry will help make rail travel a more pleasant experience for everyone.

About sight loss

4. There are currently 106,000 people in Wales living with sight loss. It is estimated that the number of people living with sight loss in Wales will double by 2050 (1). Blind and partially sighted people are often reliant on public transport for making essential journeys. Thus it is obvious that the need for an accessible, effective and integrated transport system is becoming even more critical.
5. Sight loss has a huge impact on individuals. For many people, loss of sight results in increased dependence on others. In a survey of blind and partially sighted people conducted by RNIB, 60 per cent of respondents stated that they needed help to get out of the house because of their sight loss (2). Nearly half of blind and partially sighted people report feeling 'moderately' or 'completely' cut off from people and things around them (3), with 43 per cent saying that they would like to leave their homes more often (4). This sense of isolation inevitably has an impact on people's mental and emotional wellbeing.
6. Blind and partially sighted people rely on public transport for most of their every day journeys. The ability to go shopping, get to work and keep medical appointments are all underpinned by both the availability and accessibility of a functioning public transport system.
7. Despite the importance of the public transport system, over a third of people with sight loss experience restrictions in accessing local train or bus or services (5). Thus we welcome this opportunity to highlight the importance of accessible infrastructure and services when considering the franchise specification and Metro delivery, to ensure rail services meet the needs of all current and future travellers.

Rail services and infrastructure

8. RNIB Cymru welcomes the Welsh Government's planned improvements to increase the accessibility of train stations. Our surveys show that 11 per cent of blind and partially sighted people frequently travel by train, and this is likely to rise as accessibility improves. Research also shows that 54 per cent of those who currently use trains (at least some of the time) experience some degree of difficulty in doing so (6).
9. Trains are an integral mode of transport for many blind and partially sighted people. Whilst we agree in principle with Welsh Government's high level outcomes for rail in the Wales and border area we believe that these high level outcomes should be set over and above legislative minimums so that compliance with the Equalities Act 2010 for example, is a requirement, not an aspiration.
10. For a sight impaired person, travelling in a busy train can be quite a traumatic experience particularly if they have to stand for any length of time. Most of the current rolling stock has few 'priority seats' for disabled customers and space for service dogs is also at a premium.
11. It is important to ensure that during peak times there are sufficient staff available and clear aural updates to help those who need it. Whilst we understand that there will inevitably be occasions where the number of passengers exceeds the number of seats available, it is important that the needs of blind or partially sighted people are considered in advance.
12. We believe that train companies should be required to provide high quality announcements on stations and trains and assistance must be available at all stations.
13. There are opportunities to improve the accessibility of train services for blind and partially sighted people via the next

Wales and Borders rail franchise. We would hope to see the franchise address the accessibility of vehicles; all rail vehicles, both heavy and light rail, must be accessible by no later than 1 January 2020.

14. All new rolling stock has to comply with the standards set by The Rail Vehicle Accessibility (Non Interoperable Rail System) Regulations 2010 (RVAR 2010) or the European technical specification for interoperability for persons with reduced mobility (PRM TSI), but it also has to be retrofitted to all rolling stock by 2020. We believe that these standards should be mandatory from the start of the next Wales and Borders franchise.
15. We firmly believe that all rolling stock, will need to meet RVAR2010 and PRMTSI standards as a minimum, we would also highlight the need for visual and audible passenger information systems which will help make trains more accessible for visually impaired people.
16. With regard to access to the train and to the facilities and services provided on the train, the key issues to be addressed are;
 - Boarding/alighting through the doorway and the interface between the platform and train floor;
 - Circulation within the train;
 - Seating and/or sleeping accommodation;
 - Access to the facilities and services on the train (toilets, catering etc.);
 - Provision of information (on board and outside the train) (7)
17. Consideration should also be given to the use of highly visible and tactile indications on or adjacent to all power operated

controls throughout the train. The height of tactile indications above floor level should also be consistent.

Station facilities

18. We recommend that the RNIB Good practice Guide for making train services accessible for blind and partially sighted people (8) provide the baseline for considering which facilities need the most improvement.
19. Disrupted train journeys are of intense frustration and concern to most people, no matter how caused, but can be of particular concern to blind or partially sighted passengers. We believe that an operator should be required to set out its expectations for customer service, including assistance for passengers with sight loss, if disruption is unavoidable. One of the issues often reported by our members is the lack of assistance available when there are unplanned route alterations or delays with trains.
20. Often, any arrangements for passenger assistance that have been made in advance then fall through, with no alternative available, leaving blind and partially sighted people to struggle alone.
21. Any systems put in place to keep passengers informed of delays or disruptions must be accessible to blind and visually impaired people and there must be clear protocols for ensuring that alternative arrangements are clearly communicated through a range of mediums and the relevant support and guidance are on hand to help people who may find themselves on an unfamiliar station for example, or not know how wide the gap is when alighting the train.
22. If Welsh Government wishes to deliver its vision of a truly integrated transport system in Wales, it is important to ensure that the new Wales and Border franchise operator takes a

proactive approach to engaging with a range of other rail franchises, local authorities and other transport providers.

23. We also believe that regular dialogue with community groups and the third sector should also be encouraged to ensure that the service is accessible and demand led in order to encourage patronage and increased usage.

Staff training

24. One of the priority areas for operators is ensuring that all staff are given interactive sight loss awareness training as a minimum. This is extremely important not only for frontline staff on trains or stations, but also for office staff to enable them to give considered advice and information to blind and partially sighted passengers when required.
25. The need for station and train staff to be adequately trained to identify people who are having problems is vital.

Note

We have included a copy of RNIB's 2014 Good Practice Guide on the Passenger Experience which we feel is imperative to providing an exemplary standard of service for blind and partially sighted people. Welsh Government should be keen to adopt these practices identified in the report will help to provide a good service to all customers.

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1. The Associated Society of Locomotive Engineers and Firemen (ASLEF) is the UK's largest train driver's union representing approximately 20,000 members in train operating companies and freight companies as well as London Underground and light rail systems. The union has just under 650 members in Wales.
2. There are many important network enhancements ahead for the Wales and Borders franchise. After years of debate between the Welsh and UK governments, ASLEF supported the deal which was reached to allow the electrification of the Great Western Mainline to Swansea and the Valley Lines. Electrification will bring numerous benefits and many long term savings.
3. ASLEF believes there is no case for private ownership of the railways anywhere in the UK based on the amount of money which leaks from the industry to the pockets of private shareholders on top of the enormous levels of subsidy from the taxpayer. In fact, the Welsh rail network is arguably better suited to public ownership than in any other part of Britain.
4. The union notes that taxpayer subsidy to the Wales & Borders network in 2014-15 was about £302 million with approximately £93 million of this in direct government receipts and around £209 million in network grants. Yet despite such levels of taxpayer support, the franchise

operator Arriva was able to record a surplus of £16 million and pay a dividend of £15 million.

5. Government subsidy therefore makes up nearly two thirds of Arriva Trains Wales total income. The Welsh people as passengers and taxpayers provide the majority of the funding for the rail network in Wales yet a private company extracts profit from this. ASLEF does not believe this is a fair or sensible system.
6. The Welsh rail network needs investment. There has been chronic underfunding of the rail network in Wales. Figures from the Treasury's Country and Regional Analysis document show that expenditure on transport in Wales was £320 per head in Wales in 2014-15. This compares with £514 in Scotland and £600 in London. It is clearly best for this money to come from the public purse. But it is wrong for this to happen whilst profit making companies continue to take money out of the industry. Whilst improved rail infrastructure benefits passengers and the Welsh economy, it also allows the private firms who do not invest into the network to increase their profits. This investment can therefore be seen as a further example of subsidy to the Train Operating Companies.
7. ASLEF welcomes the Welsh Government's plans to establish a "not-for-profit" Transport for Wales company to deliver services, however the union doesn't believe such a body is enough and regrets that that this will still involve tendering to the private sector for these services. ASLEF

regrets that the Welsh government has not asked for the powers to keep rail services in the public sector. Only by allowing the Wales and Borders franchise to be run by the public sector, without money leaving the industry, can we truly reap the full benefits of rail investment.

8. That said, ASLEF believes that the proposed model does move in the right direction compared to the old franchising system. The union welcomes the fact that car parks, shops, smart ticketing and ticket revenue will all come under the control of the not-for-profit Transport for Wales. The union also believes that whilst a management contract arrangement is not the public ownership ASLEF seeks, it is preferable to franchising which sees ticket revenue go to a private company. A capped fee for running services is therefore a way of restricting excessive profit and ensuring surplus cash can be reinvested, rather than leaving the industry in dividends.

9. ASLEF believes there is a strong case for the electrification of the network in north Wales. We support upgrade work to the Wrexham to Chester line, Wrexham-Bidston line and the lines between Holyhead and Crewe. This should be the first step in electrifying the Network in north Wales which connects to large cities in the north west of England. Furthermore the union strongly supports station upgrades and improved accessibility, as well as line extension and new stations such as at Ebbw Vale Town.

10. Whilst this enquiry is specifically concerned with the Welsh passenger franchise, ASLEF hopes that the Welsh government ensures that rail freight is a key consideration when looking at specification. Whilst we want to grow passenger capacity and promote the use of public transport, it is essential that this is balanced with the growth of rail freight in Wales. Each tonne transferred by rail rather than by road cuts CO2 emissions by 76%. More than 7.6 million road journeys are saved by transporting goods by rail. This is the equivalent of 7,000 HGVs driving from London to Edinburgh every day. Wales must ensure that its businesses and its people share in these benefits. ASLEF believes that infrastructure changes must include the opportunity for rail freight growth to support the Welsh economy and employment in all sectors.
11. ASLEF therefore cautiously welcomes the new structure proposed by the Welsh government for the running of services, yet feels that an opportunity has been missed to bring the service truly back into public ownership and stop money leaving our industry in profits. ASLEF looks forward to working with the newly formed "Transport for Wales" to ensure that the railway in Wales provides a quality service where people are put before profit.

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Cynulliad Cenedlaethol Cymru / National Assembly for Wales

Pwyllgor yr Economi, Seilwaith a Sgiliau/ Economy, Infrastructure and Skills Committee

Masnachfrait Rheilffyrdd a chyflwyno Metro / Rail Franchise and the Metro

Ymateb gan Associated Society of Locomotive Engineers and Firemen (ASLEF) / Evidence from Associated Society of Locomotive Engineers and Firemen (ASLEF)

1. Introduction

- 1.1 Angel Trains is the largest of the UK's Rolling Stock Owning Companies (ROSCOs). We own and maintain over 4,300 passenger vehicles, representing around 34% of the nation's rolling stock. We lease our trains to all 21 franchised and open access operators.
- 1.2 Angel Trains plays an integral role in the UK rail industry. We attract and secure the necessary private finance to procure, refurbish and enhance passenger rolling stock. Over the past 22 years we have invested over £4.7 billion in new rolling stock and refurbishment programmes. This makes Angel Trains one of the largest private investors in UK rail, as demonstrated by our new £900 million contract with the Derby train manufacturer Bombardier to procure 665 new Avenra vehicles for the East Anglia franchise.
- 1.3 Based in London and Derby, Angel Trains employs 120 professional, technical and administrative staff, graduates and apprentices who are specialists in many aspects of train leasing - from finance and engineering to commercial and customer service. In addition to our own resources, we have a network of suppliers and contractors, from large companies through to specialist SMEs, such as Pullman Rail based in Cardiff. Every year we channel over £60 million through our supply chain, supporting highly skilled jobs in depots across the UK and contributing to regional economic growth.
- 1.4 Angel Trains currently leases Class 142, 153, 158 and 175 units to Arriva Trains Wales (ATW). We are grateful for the opportunity to respond to the Committee's inquiry and intend to focus our comments on the rolling stock aspects of the next Wales and Borders franchise (including the Metro).

2. The next Wales and Borders Franchise & Metro

Development, Procurement & Delivery

- 2.1 Just like any modern service industry, we believe the Wales and Borders rail franchise should be focused firmly on customer satisfaction to deliver a passenger-led service. It is therefore welcome that the views of a wide range of stakeholders and passengers are being sought on future requirements for the franchise as part of this inquiry, and also by the Welsh Government.
- 2.2 ROSCOs take a long-term strategic view of the rail industry given the 30-35 year life-span of the trains we buy. Clearly defined outcomes and priorities from the Welsh Government and continued dialogue with the rail industry on their vision for Wales and Borders services is essential to ensure that the resulting franchise fulfils current and future projected needs, linked to economic development strategies and plans for future employment distribution in Wales. Long-term planning is needed to ensure ROSCOs are able to offer rolling stock solutions that meet the needs and expectations of all rail users under the new Wales and Borders franchise, and ensure value for money for passengers and taxpayers.
- 2.3 Only with policy certainty can ROSCOs assess and manage the optimum cascade options for their fleets and plan ahead to coordinate major upgrades to improve the passenger experience. These works include meeting the vehicle access requirements for passengers with reduced mobility (by 2020) and the fitment of the European Train Control System to support the future roll-out of the Digital Railway initiative.

- 2.4 With regard to the Metro, we welcome the clarity that will be brought by the forthcoming franchise submissions. Without this guidance we are unable to comment on the rolling stock options which would best deliver the Welsh Government's ambitions. However, we agree with industry colleagues that a mix of heavy and light rail running on the same lines presents a number of challenges which would need to be addressed in order to deliver an appropriate solution.

Priorities for franchise specification and Metro delivery (needs and value for money)

- 2.5 Careful consideration should be given in the next specification to the balance between affordability and the type and quality of service for the passenger, based on the Welsh Government's assessment of what the future of the service should look like. Rolling stock only accounts for a small proportion of whole industry costs. However, we would strongly emphasise the benefits of high quality refurbishment to meet the rolling stock quality characteristics outlined by the Welsh Government. Upgrading existing rolling stock can be delivered more quickly and can offer a passenger experience comparable with new rolling stock in terms of look, feel and performance for a fraction of the cost of procuring new vehicles. It could facilitate an earlier delivery of passenger benefits and allow time for Welsh Government to develop and evaluate its longer term policy and funding for rail. Refurbished and upgraded rolling stock can also complement new trains and can help to keep down the cost of leasing and the subsequent knock on cost to passengers. This offers greater value for money for fare payers and taxpayers whilst meeting passengers' expectations of modernised rolling stock. Notably, the upgrade of existing rolling stock also provides significant economic benefits for the domestic rail supply chain as the majority of this refurbishment work is carried out by UK-based suppliers.
- 2.6 As an example, in 2013 Angel Trains worked closely with ATW and rail maintenance specialist LNWR to complete a total overhaul and refurbishment of 24 ATW Class 158 trains running on the Cambrian line. The refurbishment of this rolling stock, funded by the Welsh Government, created a new carriage interior in addition to improvements such as the installation of power sockets for passengers and energy efficient lighting. Passengers have been so impressed with the work carried out that many thought that the trains were new.
- 2.7 High quality refurbishment still allows for trains to be specifically designed for each market need within Wales e.g. trains with metro-style interiors which include standing areas for shorter commutes, whilst more rural services and typically longer journeys would be served by trains with more seating. Variants of refurbished train interiors could be developed in response to clear output specifications from the Welsh Government based on passengers' needs and their vision for the future of the Welsh economy.

3. Further information

- 3.1 If the Committee would like further information relating to this written submission, please contact:

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Organisation: Rail Delivery Group

Type: Business representative organisation

- 1) The Rail Delivery Group (RDG) brings together Network Rail and passenger and freight train operating companies. The purpose of the RDG is to enable Network Rail and passenger and freight train operating companies to succeed by delivering better services for their customers. Ultimately this benefits taxpayers, passengers and the wider economy. We aim to meet the needs of:
 - a) our members, by enabling them to deliver better outcomes for customers and the country;
 - b) government and regulators, by developing strategy, informing policy and confronting difficult decisions on choices, and
 - c) rail and non-rail users, by improving customer experience and building public trust

Overview

- 2) RDG welcomes the opportunity to contribute to the Economy, Infrastructure and Skills Committee's inquiry into the Rail Franchise and the Metro inquiry. Since the commencement of the current Wales and Borders rail franchise it has delivered benefits for passengers and taxpayers:
 - a) Service provision is now 20% higher than the contracted service level;
 - b) passenger satisfaction has increased since the start of the franchise from 79% to 82% in the autumn 2016;
 - c) punctuality has improved with a current moving annual average of 92% PPM, which has increased from 79%, as measured by the public performance measure (PPM); and
 - d) the burden on the taxpayer has also reduced, with the annual subsidy declining by more than £40 million since the start of the franchise in 2003.
- 3) In reference to the next Wales and Borders rail franchise, the Welsh Government's approach to procurement has the potential to deliver further value, enable innovation, improve collaboration and align incentives between operators and infrastructure managers. The franchise also aims to meet local needs and improve local accountability. To do so the specification and delivery of the franchise should in our view:
 - a) Ensure effective cooperation between both the Welsh and UK Governments and close working between the Department for Transport, and Transport for Wales by all parties remaining actively involved in rail services;
 - b) enhance the customer experience further with particular focus on improving stations, ticketing, fares and rolling stock;
 - c) enable community stakeholders, such as community rail partnerships, to help shape and play an active role in the future of the franchise;

- d) facilitate passenger growth through incentivising the operator and providing additional capacity if required;
- e) support flexibility in the implementation of the franchise contract; and
- f) enable effective integration with the wider GB rail network to support one network, by maintaining seamless cross border passenger and market flows.

Procurement, development and delivery of the rail franchise and South Wales Metro

- 4) The Welsh Government is procuring an Operator and Development Partnership (ODP) for the provision of passenger services on the Wales and Border network. RDG supports the Welsh Government's policy of linking infrastructure development and management to train operations. We believe this represents a significant step forward in driving further value from the rail network and creates new opportunities for collaboration and further passenger benefits.
- 5) We strongly support collaboration through the alignment of incentives between infrastructure provider and operators. Further passenger benefits could be unlocked in Wales through aligning the outcomes of the infrastructure manager and the operator, for example performance targets and creating additional capacity through optimisation of the network.
- 6) The role played by Welsh Government in developing the franchise specification linking the specification to local and regional wider economic needs is welcomed. The benefit of devolved specification of rail services is that the service provision can meet the aspirations of the local passenger; this in turn can increase accountability and produce a closer relationship between those who deliver the railway the wider society, and the economies it enables.
- 7) The Welsh Government may wish to consider the use of balanced scorecard to be used throughout the life of the franchise to provide a transparent view of performance and demonstrate the economic benefit of this contract on the Welsh and wider GB economy, as well as the service level provided to customers.

Franchise Specification and South Metro Delivery

- 8) RDG would encourage the Welsh Government to consider the themes set out below as part of its specification process, to ensure the Wales and Borders franchise and South Wales Metro meet the needs of passengers, stakeholders and taxpayers, whilst delivering value for money.

Government collaboration

- 9) RDG strongly supports close working relationships between the Welsh and UK Governments to ensure that the services delivered by the Wales and Borders franchise remains part of an integrated GB network; providing the passenger with easy access to the rest of the rail network, as well as maintaining or enhancing the current level of cross-border services.

Stations

- 10) In 2015 the RDG produced its [Vision for Stations](#), which set out nine principles for

the design and development of Britain's future stations, one of which is to reflect local needs and opportunities. Stations are there to allow customers to get on and off trains, the key function needed by the rail industry, but equally they can create thriving spaces for local communities with retail, leisure and other amenities. The specification and delivery process presents the opportunity.

- 11) Later in 2017, the RDG will be publishing a research study on contribution of stations to thriving communities and economies. The study covers key learning for how this could be delivered, and may be of particular use to the committee and Transport for Wales.

Community

- 12) Facilitating more active engagement of the local community; Community Rail, which involves local people working in partnership with the rail industry, has proven a successful concept, with almost 50 Community Rail Partnerships (CRPs), and the generation of passenger demand growth that has exceeded the averages for the regional sector and the network as a whole. The RDG strongly supports community rail partnerships.

Retailing

- 13) The franchise specification should be aligned to the RDG retailing vision, which aims to provide customers with an easy-to-understand and convenient-to-use ticketing proposition. The RDG retailing vision is to enable passengers to have tickets linked to a range of devices, including their smartphones and bank cards, so that they can easily access their tickets and gain entry to trains, without the need to print out paper tickets if they wish. The future Wales and Borders franchise and South Wales Metro operator should be incentivised to drive forward digital ticketing innovation that improves the customer experience in line with the principles of the RDG retail vision; [a railway for the digital age](#).

Fares

- 14) We recognise that many customers find getting the best fare for their journey complicated, and the industry is working with governments to simplify this; so that customers can have confidence in buying the right ticket for them. The fares and ticketing policy for this franchise should align with the fares reform agenda the RDG has recently set out, which seeks to remove outdated fares regulation, and allow the franchisee sufficient freedom to innovate in meeting customer expectations in this area. The franchise specifiers need to provide sufficient space to the operator to facilitate changes to the current fares regulation, set out through the Ticketing and Settlement Agreement. By facilitating changes this can remove major obstacles in ensuring every customer finds the right fare for their journey. The benefits and challenges resulting from fares reform, as well as identifying the winners and losers need to be understood, before wholesale change is undertaken.

Rolling Stock

- 15) The current average age of rolling stock in the Wales and Borders franchise is more than 27 years, this is higher than the national average. The Welsh Government will need to work collaboratively with the operator, and the supply chain to ensure sufficient funding is available to meet the aspirations of

customers and stakeholders regarding rolling stock renewal. The Welsh Government will also need to work with the market to consider the vehicle accessibility standards applicable from 2020, these standards will impact the current rolling stock used by the Wales and Borders franchisee.

Integration of services

16) The current franchise was let and managed by DfT as part of a wider network covering the whole of Great Britain. With the specification and management of rail services being devolved to Cardiff, integration with the wider GB network needs to be maintained. This is particularly relevant for cross-border flows and the new interfaces created with the Metro.

Plan for growth

17) When the current franchise was originally let, the rate of passenger growth was not foreseen. We expect that passenger growth will continue to rise, particularly around the main conurbations, and as such believe that the future franchise should be let on a basis that can respond to increasing demand.

Balancing the level of financial risk transfer to the private sector

18) The Welsh Government will need to consider the level and nature of financial risk transfer to the private sector that it wishes to achieve through the franchising process. RDG would recommend that Welsh Government ensures that the risk transferred achieves value for money and is sustainable for all parties, including the taxpayer.

Flexibility in franchise management

19) During the current franchise term, operated by Arriva Trains Wales, there has been investment both by the Government and the operator, with approximately £35 million of investment from the operator. This level of investment was not foreseen at the start of the franchise. RDG would recommend that there is sufficient flexibility in the next contract to enable additional investment to be made to meet changing demands. A suitable benefit share mechanism can be used to ensure all contractual partners are incentivised to make additional investment.

Contract duration

20) We support the longer contract term put forward by the specifier, and are encouraged by the consideration given to encouraging the delivery of benefits in the latter part of the contract.

Summary

21) RDG has been encouraged by the progress made to date by the Welsh Government in the procurement of the next rail franchise for Wales. The plans for the a vertically integrated valleys network will provide the GB network with an interesting example of the benefits of greater collaboration between track and train.

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Cynulliad Cenedlaethol Cymru / National Assembly for Wales

Pwyllgor yr Economi, Seilwaith a Sgiliau/ Economy, Infrastructure and Skills Committee

Masnachfaint Rheilffyrdd a chyflwyno Metro / Rail Franchise and the Metro

Ymateb gan Cabinet Rhanbarthol Bargaen Ddinesig Prifddinas- Ranbarth Caerdydd ac Awdurdod Trafnidiaeth Prifddinas-Ranbarth Caerdydd / Evidence from Cardiff Capital Region City Deal Regional Cabinet and the Cardiff Capital Region Transport Authority (CCRTA)

The Cardiff Capital Region (CCR) City Deal is a £1.28 Billion programme which will achieve an uplift in the region's GVA by delivering a range of programmes which will increase connectivity; improve physical and digital infrastructure, as well as business governance. The Deal involves the ten local authorities of the region; Blaenau Gwent, Bridgend, Caerphilly, Cardiff, Merthyr Tydfil, Monmouthshire, Newport, Rhondda Cynon Taf, Torfaen and Vale of Glamorgan, together with the UK and Welsh Governments.

The Deal is expected to deliver 25,000 new jobs and leverage an additional £4Bn of private sector investment. Under the theme of *Connecting the Region*, the region has committed to establishing a regional transport authority to co-ordinate transport planning and investment, in partnership with the Welsh Government. Further information on the City Deal is available on our website; <http://www.cardiffcapitalregioncitydeal.wales/index.html>

The concept of the Metro for south east Wales envisages transformation and integration of the bus and rail network and has received universal support. It is included as one of the primary physical interventions supported by the City Deal, with approximately £734M ring fenced to Metro, including electrification of the core valley lines.

The funding is comprised of;

UK Government - £125M)

ERDF - £106M) - £325M Valley Lines electrification package

Welsh Gov - £94M)

Together with this funding, as their commitment to the City Deal, is an additional Welsh Government contribution of £400M towards wider Metro aspirations.

The case for supporting the Metro is compelling. The CCR established a Growth and Competitiveness Commission lead by Professor Greg Clarke CBE. The report notes that large scale infrastructure has played a transformative and integrative role in many regions that were previously quite fragmented. Specifically, Metro systems are noted to be powerful in their ability to;

- *Bring regional partners to the table and spur collaborative decision making and awareness that each part of the region will benefit in time*
- *Expand labour market access and reduce the mismatch between jobs and homes*
- *Provide visible benefits and create confidence in the possibilities of change*
- *Become a source of pride and shared regional identity*

- *Connect areas that are socially and politically disconnected*
- *Unlock new land for strategic densification*
- *Shape spatial development and the creation of complementary and secondary centres.*

Their evidence review notes that infrastructure investment across the region has lagged behind much of the rest of the UK. Their core findings on transport note;

Increased connectivity and multi-modality will create recognised benefits for productivity and employment. Aside from expanding opportunities to commute to Cardiff, it is also a priority to support other locations of economic activity, including Cardiff International Airport. Much is demanded of the South East Wales Metro and many hopes are attached to it. The Metro system should form the basis for the strategic plan for new investments in land and property development. Transport nodes should form the focus of investment in hubs to promote innovation, co-working spaces and the development of new enterprises and employment opportunities. Housing investments should be related to accessibility through the Metro system. Ensuring that investment is focussed on the Metro development will help to increase the overall investment rate, providing for a greater impact in terms of GVA.

Further information on the Growth Commission Report is available on the City Deal website at;

http://www.cardiffcapitalregioncitydeal.wales/report/growth_&_comp_com_process_web.pdf

Clearly, the region is placing huge reliance on Metro to; improve connectivity, enable polycentric growth across the region, provide a framework to align other initiatives, act as a focal point for land-use planning and a catalyst for economic development.

This evidence is not set out to focus on the shortcomings of the current franchise arrangements and the fragmented state of current transport provision, but it would be remiss not to highlight some key issues;

- The franchise has not promoted or facilitated growth in patronage and has not adapted to effectively meet current passenger demand. Consequently, peak hour services to and from the Cities are grossly overcrowded.
- The stations (Central and Queen Street) are no longer fit for purpose.
- The rolling stock is old, lacks capacity and resilience.
- The train and track operators are independent and do not co-operate effectively for the benefit of the customer.
- Rail and bus services are not integrated in terms of timetables, interchange, ticketing, information, service standards, etc and often compete for patronage.

The wider Metro concept offers the opportunity to resolve many of these issues noting that the cost of this wider vision may be anywhere between £4-5 Billion in capital costs and may involve substantial additional revenue commitments above and beyond those already committed.

The Regional Cabinet is fully committed to developing the Metro concept and to support the Welsh Government (WG) in this current round of procuring the Wales and Borders Franchise and Metro.

Our support includes the establishment of the CCRTA to coordinate transport planning and investment and to act as a focal point for liaison with WG in developing Metro and the rail franchise.

We support the innovative form of procurement “Competitive Dialogue,” whilst recognising that the process limits the level of ongoing engagement from partners and stakeholders due to commercial sensitivities and the need to maintain parity for tenderers throughout the process.

In liaison with WG, we have ensured that the CCR has a voice in the process, with the region funding the secondment of a senior regional transport officer into the Transport for Wales (TfW) procurement team. This officer has been working with WG since November 2016, representing the CCR in the procurement process and the competitive dialogue.

We have supported engagement events with the supply chain and established more focussed sessions to set out our aspirations to the bidders. In addition to representation on transport aspects, we have engaged on associated matters such as the skills agenda, supply chain development and innovation, and will support the focussed supplier sessions with the presence of an officer with specialist knowledge during dialogue on these topics over the coming months.

We note the complexities associated with the form of procurement and appreciate that not having a pre-determined set of fixed deliverables means that the process lacks certainty, but we are keen to be involved in influencing the mode of transport for the core valley lines (CVL) and the enhancement of wider Metro, beyond electrification of CVL.

We believe that the innovative approach, particularly on CVL where we anticipate responsibility for tracks and trains will come under one entity, will yield better value with investments considered on a whole-life basis, balancing capital and revenue implications, with all activity focussed on creating a better customer experience.

From a CCR perspective, the commercial sensitivities and necessary control over information means that we have challenges in maintaining buy-in from our partners within the region and feeding the growing appetite and enthusiasm for information and progress. The current uncertainty on mode and scope of deliverables also limits our ability to plan complementary programmes or identify additional interventions that will add value to what can be delivered from the £734M in pursuance of our aspirations for City Deal.

We have advocated the case for light-rail as a preferred mode to allow further extendibility of the network and will continue engagement with TfW to influence this. The open-ended nature of the dialogue means that there will need to be decisions made during the process on respective priorities and compromises on aspirations in one aspect in order to achieve benefits in others.

At the time of preparing this evidence, we are engaging with WG to develop questions for a further round of consultation to inform some of these issues. Our presence at the table will ensure we can influence the process and we envisage

backing up our liaison officer with a small advisory group to quickly consider and respond to specific issues as they emerge.

We recognise that the short-comings of the current franchise will not be resolved in the near future and we believe that there is a risk to the availability of the existing rolling stock until ongoing leases are secured at least for the initial period beyond the current franchise. Electrification of CVL is programmed to deliver outcomes in 2022. In the meantime, we have over-crowded trains and congested roads that constrain economic growth and depress productivity.

The levels of road congestion are so severe that they are challenging the viability of our bus services to the point where some peak-time regional services into Cardiff have been withdrawn.

We are therefore seeking in the short to medium term to enhance the viability of bus through partnership working with WG, TfW and bus and rail operators under the auspices of the CCRTA.

We have jointly established an Integration Alliance Board (IAB) to begin to develop an integration initiative that will lead to a Bus Partnership Agreement for the Metro Area.

The aim of the IAB is to grow passenger numbers and encourage modal shift to public transport. The IAB envisages that this aim will be delivered via a series of Bus Partnership Agreements, where all parties work in partnership to deliver improved and enhanced bus services. We believe that the Alliance will develop wider benefits, including;

- Economic growth; by improving connectivity and interchange, reducing congestion and providing fast and reliable journeys,
- Support Communities; by providing a well-connected, accessible and safe transport system that will improve the quality of life and health of our communities,
- Protect the Environment; increased use of active travel and sustainable transport will cut carbon emissions and improve air quality.

The key areas for intervention will be;

- Ticketing; real time information, developing integrated and alternative ticketing arrangements
- Customer Information; to allow passengers to make informed journey choices
- Bus Stations and Infrastructure; providing safe, clean and comfortable waiting facilities
- Highways; deal with issues that cause delays for buses
- Vehicles; investment in buses to improve customer satisfaction levels
- Customer satisfaction; developing service levels for customers
- Passenger Safety; dealing with anti-social behaviour
- Employees; encouraging high quality customer service
- Marketing and Branding; developing route branding to attract new customers
- Funding; requiring commitment to shared objectives.

This initiative will complement the Wales and Borders Franchise and provide a forum for aligning activities, developing joint initiatives and will facilitate development of the wider Metro concept, in parallel with procurement and delivery of the rail based initiatives.