Public Mobility Working Group

Building integrated, sustainable public mobility systems

Thu 7 May 2026 | 10.00 - 12.30 | Online

Register Now

Zemo Partnership

Accelerating Transport to Zero Emissions



Agenda

10.00 – Start

- Welcome & Apologies
- Guidance on Competition Law
- Minutes & Matters Arising

10.10 – Government Policy Update

- OZEV – Aidan Jennings

Guest Presentations

- **10.25** – Developing integrated, zero-emission urban mobility systems – **Naomi Baster, C40 Cities**

10.55 – Break

Guest Presentations

- **11.00** – Practical lessons from bus franchising and multimodal integration – **Daniel Fisher, Transport for Greater Manchester**
- **11.30** – The role of community transport in integrated public mobility systems – **Caroline Whitney, Community Transport Association**

11.50 – Zemo Public Affairs Update

- Neil Stockley, Zemo Partnership

12.05 – Member's Roundtable

12.15 - Close

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Competition Law Statement

Commercial decisions must be taken independently by individual companies.

All participants must be aware that exchange of commercially sensitive information or intimation of intended commercial decisions, directly or indirectly, can result in competition law infringement.

Member conduct at meetings and teleconferences:

There must be no communication of the following information:

- Individual company or industry prices, including differentials, discounts, rebates, allowances, price levels or changes, mark-ups, terms of sale and credit terms.
- Company plans as regards development, design, production, distribution or marketing of products/services, divestments, closures or expansion.
- Rates for production or transportation of products.
- Bids for contracts or procedures for responding to bid invitations.
- Matters relating to individual suppliers and customers/potential customers, progress on negotiations or content of negotiations.

If at any point during a meeting discussion appears to be breaching policy guidelines, the Chair or a participant should immediately raise their concern and close the discussion.

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Minutes and Matters Arising

May 2025 Actions	Response	Status
Zemo to review and clarify Terms of Reference for the Public Mobility Working Group, including scope beyond buses (e.g. shared mobility).		On-going
Zemo to explore options for national approach to Zero Emission Zones	Zemo developing project proposal and in discussion with key stakeholders.	On-going
Net Zero Council – Transport Sector Transition Plan	Zemo looking for clarity on role from DESNZ & DfT.	On Hold
Zemo to seek to build engagement with BCoE	See update from DfT	Complete

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Government Policy Update

Aidan Jennings

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Department for Transport

DfT ZEB update

DfT Zero Emission Buses team

May 2026

OFFICIAL/FINAL

Bus Services Act 2025 update

To help accelerate the roll out of ZEBs, we legislated in the Bus Services Act 2025 to end the use of new, non-ZEBs on English bus services.

When will the date be from which new non ZEBs cannot be used?

- We will set this out in secondary legislation, after engagement with bus stakeholders.
- This engagement process has been ongoing over several months.
- We will provide an update on a date in due course.
- However, ending the use of new non-zero emission buses will not take effect any earlier than 2030.

Scotland

- The Bus Services Act 2025 also included a measure to end the use of new, non-ZEBs on Scottish local bus services from no earlier than 2030.
- This measure is being managed fully by the Scottish Government.

ZEB Funding Update

The Department has supported the bus sector with an estimated £500m in direct funding support for ZEBs in recent years.

Future funding

- In terms of future funding, we also continue to support the sector.
- In March we announced up to £73.2m in additional funding to support the delivery of approximately 484 ZEBs across 10 projects in England.
- This is additional to the £37.8m announced in April 2025, which will deliver an extra 319 electric buses and supporting infrastructure.
- The recent announcement of £15.6 billion over five years, to improve local transport in some of the largest city regions, allows local leaders to play a more active role in the delivery of local bus services and allocate some funding toward decarbonising their local fleets.
- Smaller cities, towns and rural areas will also receive £2.3 billion from the Local Transport Grant.

ZEB Manufacturing Expert Panel

On 18th March, the Minister for Buses and Roads chaired the final meeting of the UK Bus Manufacturing Expert Panel, which had brought together industry experts and local leaders to ensure the UK remains a leader in bus manufacturing.

The Panel was a forum to enable collaboration between Government, manufacturers, and the wider industry to achieve three main objectives:

- Support growth of UK bus manufacturing
- Develop a pipeline of future bus orders to give better planning certainty to the sector
- Prioritise passenger-centric bus design

Outcomes of the Panel

- In the meeting, Mayoral Combined Authorities agreed a set of commitments:
    1. A 10% minimum application of social value in all future bus procurement exercises
    2. The zero-emission bus order pipeline to be updated annually
    3. To follow recommendations made in an accessibility compendium
    4. To follow recommendations made in a safety compendium
    5. To explore collective procurement options across MCAs
    6. To continue to share lessons learned on grid connectivity

Any questions?

Guest Presentations

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Developing integrated, zero-emission urban mobility systems

Naomi Baster, C40 Cities

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Coffee Break

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Practical lessons from bus franchising and multimodal integration

Daniel Fisher, Transport for Greater Manchester

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Generalised Costs 101 – Use in Establishing Behaviour Change
+
Oldham Rd Summary

UNIVERSITY OF LEEDS

Department for Transport

BEE NETWORK

Transport for Greater Manchester

The Topic

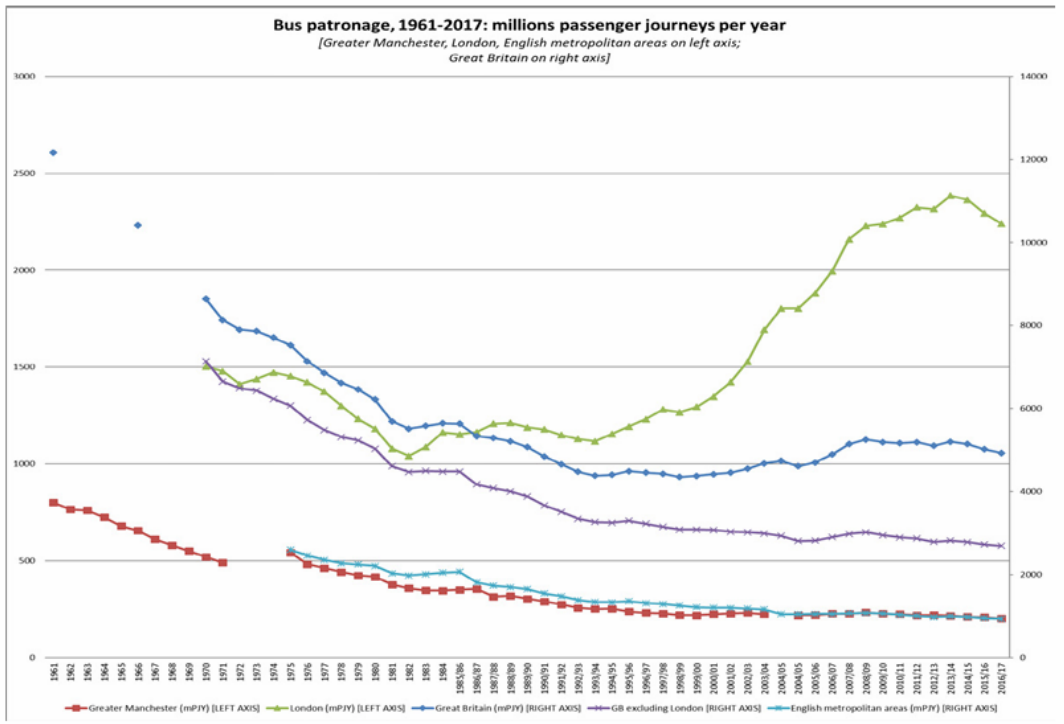
Given the work being undertaken by **Transport for Greater Manchester**, particularly through the Bee Network and the introduction of bus franchising, we would be delighted if you could deliver a **20–25 minute presentation (with slides)**, followed by approximately **5 minutes of Q&A**, focusing on Greater Manchester's experience of implementing bus franchising and building a more integrated public transport system.

In particular, we would be very interested in hearing about the practical lessons learned from Greater Manchester's experience of moving towards a more integrated and publicly coordinated transport system, including:

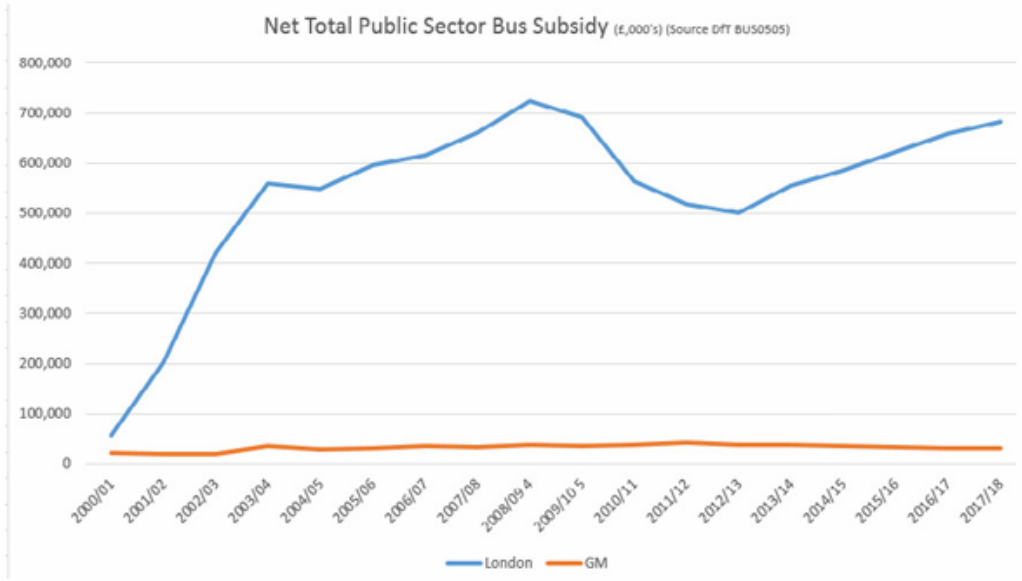
- Lessons learned from the transition to franchising
- The role of buses and other modes of active travel within the Bee Network and wider multimodal integration
- Delivering zero-emission bus fleets within a franchised system
- Key governance, funding and operational challenges encountered so far

Context 1 – Long Term Market Decline pre C19; (except London) …….

Chart 2: Greater Manchester and UK Bus Patronage (1961–2017)



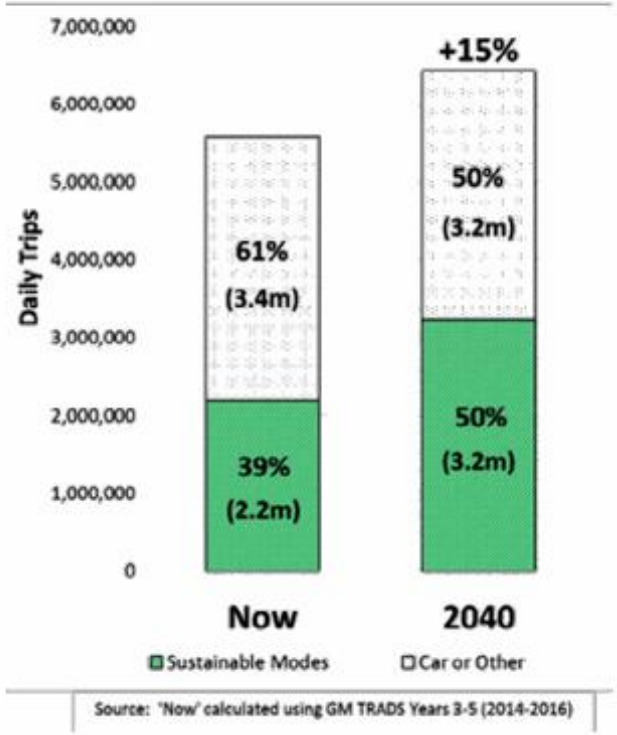
Source: DfT Transport Statistics, SELNEC PTE, GMPTE Trends and Statistics, GMPTE Continuous Passenger Sampling (CPS) survey data



Source: *BUS0505: Estimated net support paid by central and local government (at current prices) for local bus services: England by local authority.* (DfT, 2019)

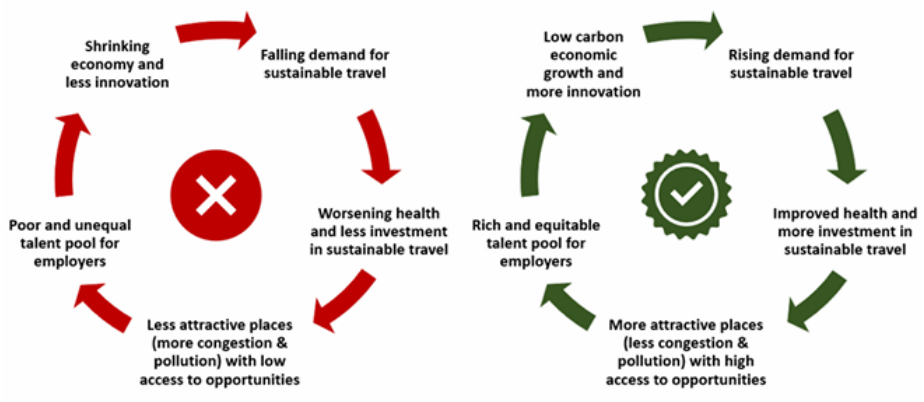
Context 2 – …but GM has a Vision, Ambition and Focus

Chart 16: GM Transport Strategy Right Mix Targets



Source: 'Now' calculated using GM TRADS Years 3-5 (2014-2016)

Figure 1: How high demand for active travel and public transport is needed for sustainable economic growth - illustrative vicious and virtuous cycles



By 2030, we want our buses to carry over **200 million** journeys per year.



Context 3 – Whilst Market Reform Doesn't alter External Market Drivers …….

Chart 9: Market Forecasts

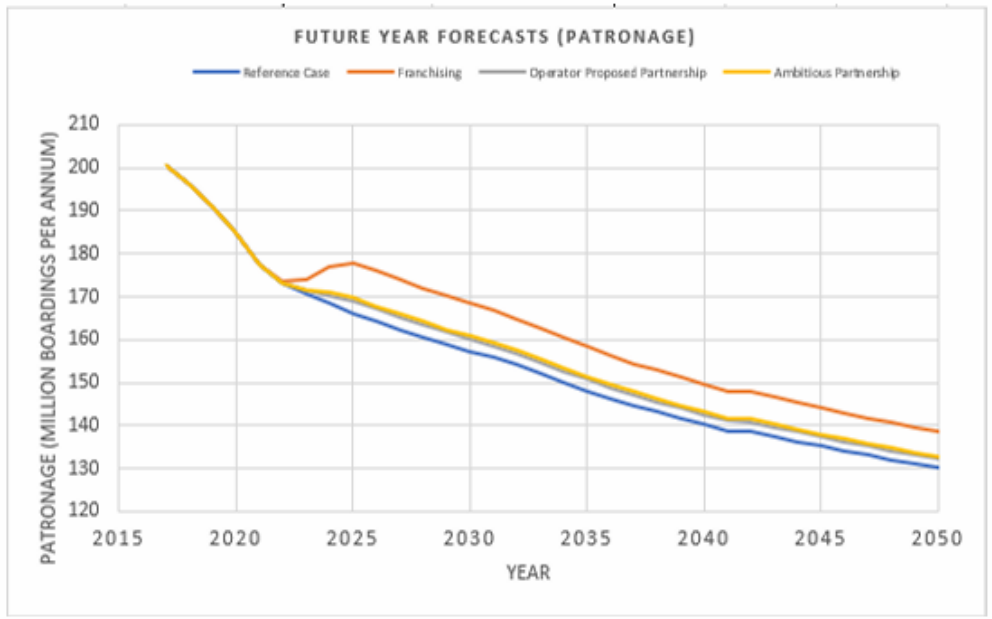
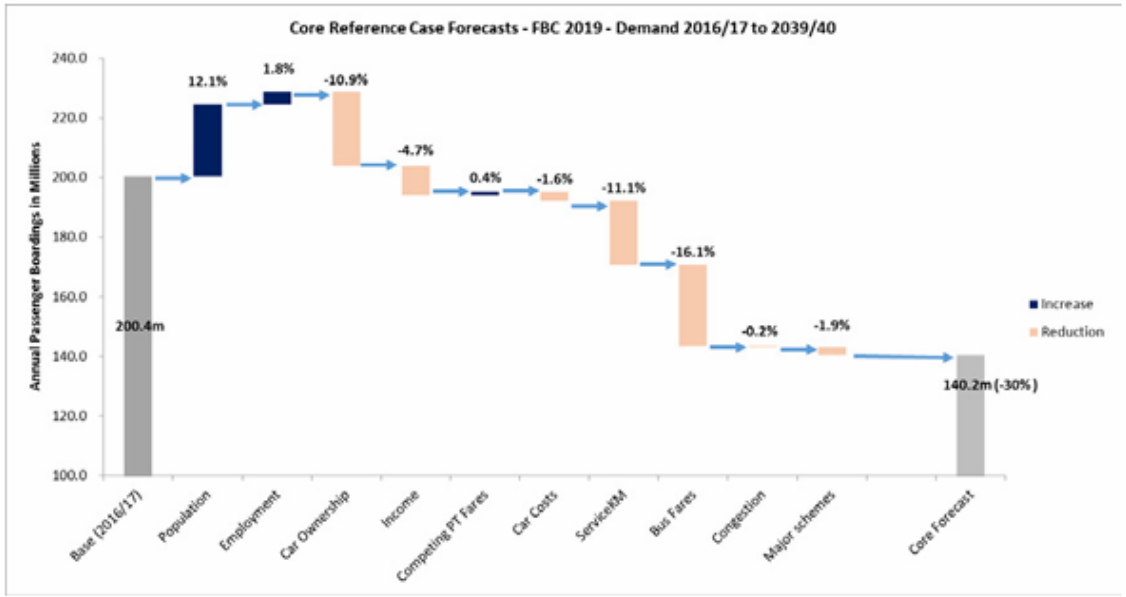
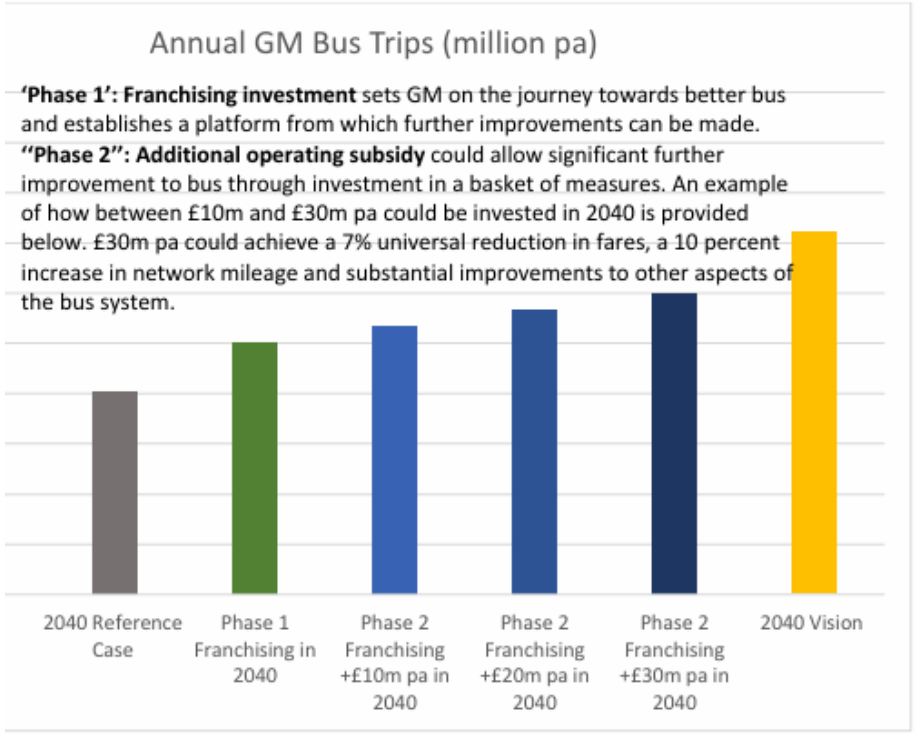


Chart 14: Reference Case – Relative Impact of Demand Drivers on Demand Forecasts

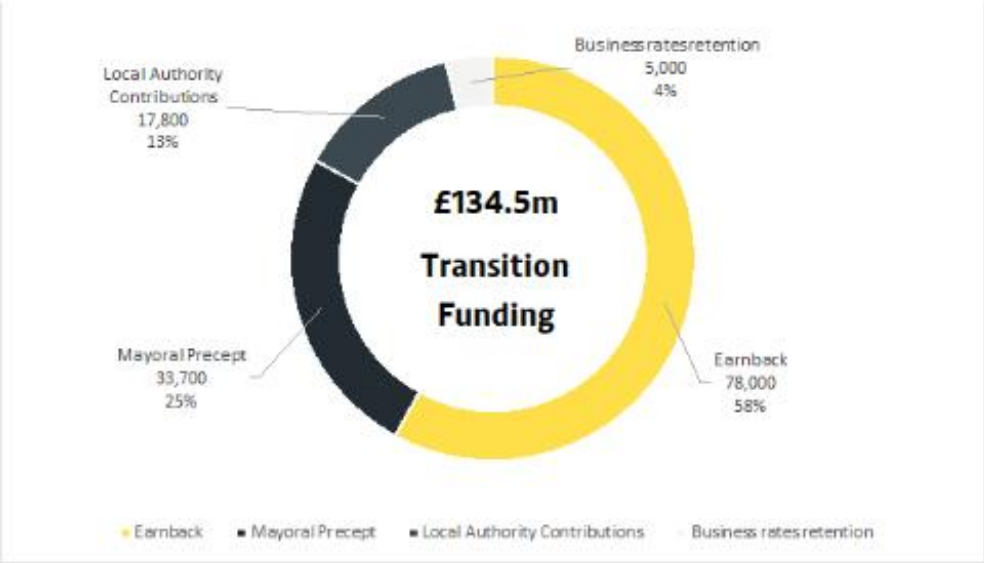


Context 4 - …… Franchising + Investment = Best Opportunity to Achieve GM Vision

Intervention Group	Intervention Details	Deliverability		
		Deregulation	EP/VP	Franchise
Network expansion	Additional links; routes or frequencies: currently limited under 1968 Act to where the commercial service doesn't run.	Mostly not possible	Mostly not possible	Deliverable
Fares	Phase 2 could include fare reductions across the board or freezes and greater integration across modes.	Mostly not possible	Mostly not possible	Deliverable
Quality of Service Provision	Operating resource to improve reliability (scheduled, standby, engineering).	Mostly not possible	Mostly not possible	Deliverable
	Investment in bus priority and wider infrastructure.	Possible but poorer vfm	Possible but poorer vfm	Deliverable
	Enforcement and monitoring measures: parking and bus lanes, roadworks.	Deliverable	Deliverable	Deliverable
	Fleet measures: for passengers or for environmental e.g. Euro VI or Electric.	Possible but poorer vfm	Possible but poorer vfm	Deliverable
	Information, customer service and marketing.	Possible but poorer vfm	Possible but poorer vfm	Deliverable
	Use of technology: e.g. 'mobility as a service' partnerships.	Possible but poorer vfm	Possible but poorer vfm	Deliverable
	Waiting environment: especially perception of safety.	Deliverable	Deliverable	Deliverable



Lesson 1 – Market Reform is not Cheap

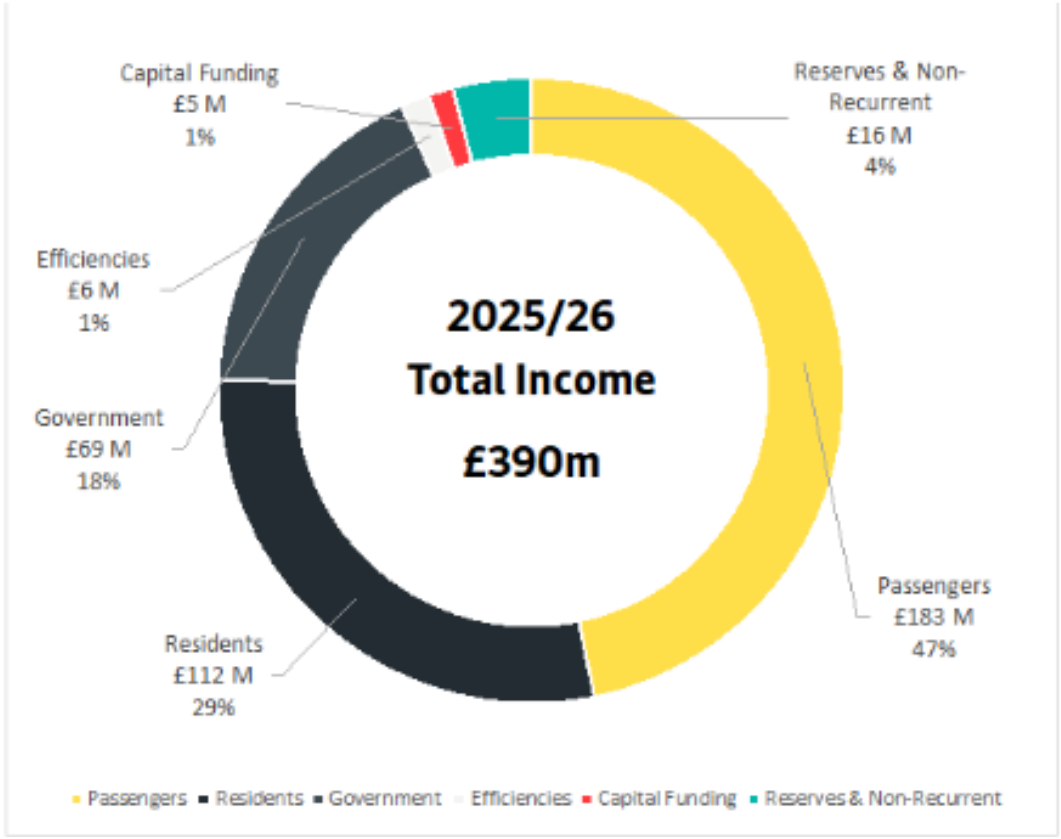


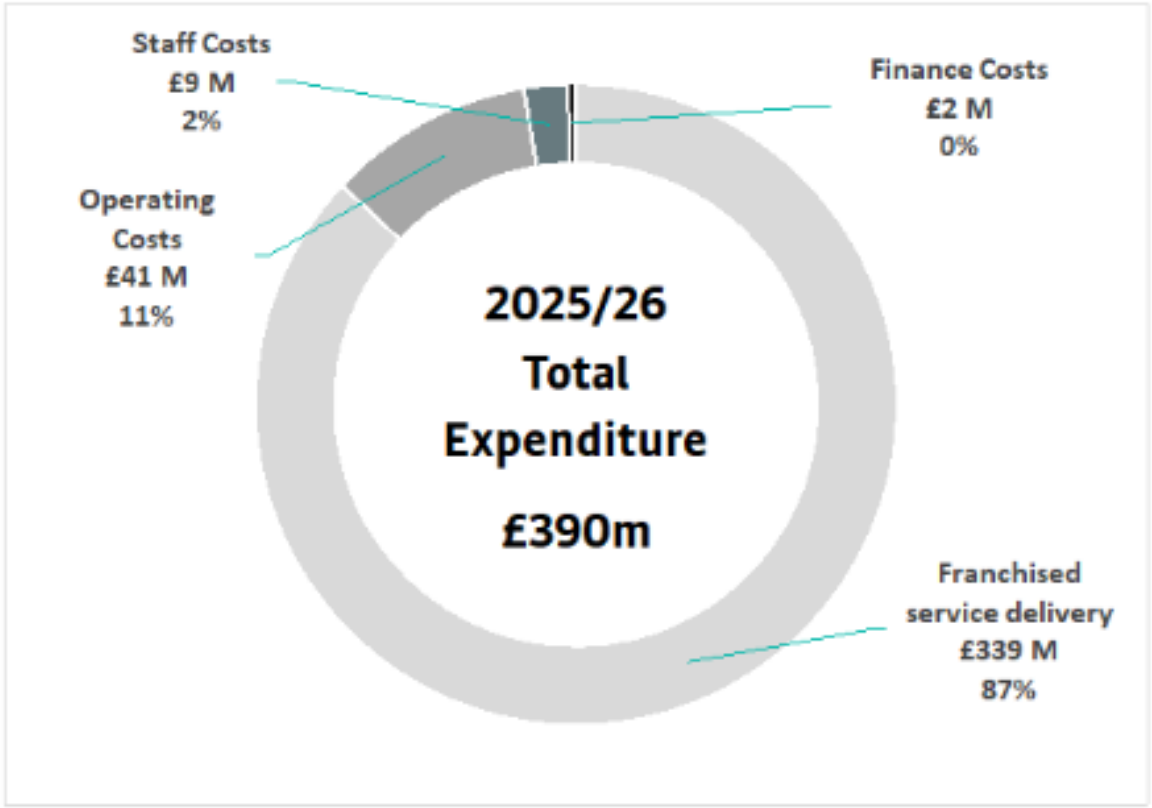
Bus franchising was delivered on time, in January 2025, and in line with the £134.5m transition funding budget. In fact, implementation costs (e.g. on-bus equipment and technology etc) were £18m below budget, which in turn allowed TfGM to provide further necessary support to stabilise the deregulated market whilst it was in transition to franchising and whilst the sector was still recovering from the pandemic.

Delivering Better Buses: Bus Network Delivery Report, June 2025 Page 21

[Delivering_Better_Bus_Services_for_Greater_Manchester_-_June_2025.docx]

Lesson 2- A Bus Network is not just for Christmas





Delivering_Better_Bus_Services_for_Greater_Manchester_-_June_2025.docx

Lesson 3 – A Lot of Work by a Lot of People!!



Lesson 4 – Has Market Reform Worked?

Highlights

Since the first phase of Bee Network buses went live in **September 2023**:

14%

The Bee Network has seen a **14% increase in bus journeys** year on year in its first two franchising areas.

More affordable fares

Single fares have been **£2**, and day tickets **£5** since September 2022. Annual bus tickets for **£800** are available with a credit union loan at no extra cost. Weekly and monthly tickets are available for **£20** and **£80** respectively.

Punctuality is improving!

We are regularly exceeding our target of **80%**, compared to approximately 66% pre-franchising, in the first franchising area.

Improved routes

Changes have already been made to around **75 routes** to provide earlier, later, more frequent and better connected services.

113

113 new TravelSafe Support & Enforcement Officers introduced, collectively providing a presence on board **60,000** buses.

Tap and go

Tickets are more convenient – customers can now **pay with just a tap** across both bus and tram services.

Better connected communities!

Approximately **84%** of residents are now within a five-minute walk of a half hourly service (Daytime, weekday bus or tram services, up from 78% in November 2022).

Without the changes we have made, our bus network would be smaller, less attractive and more expensive to run and use.

50%

Nearly half of franchise network costs are covered by fare-paying passengers, with this figure rising to nearly **75%** when local taxation is added (2025/26).

24/7

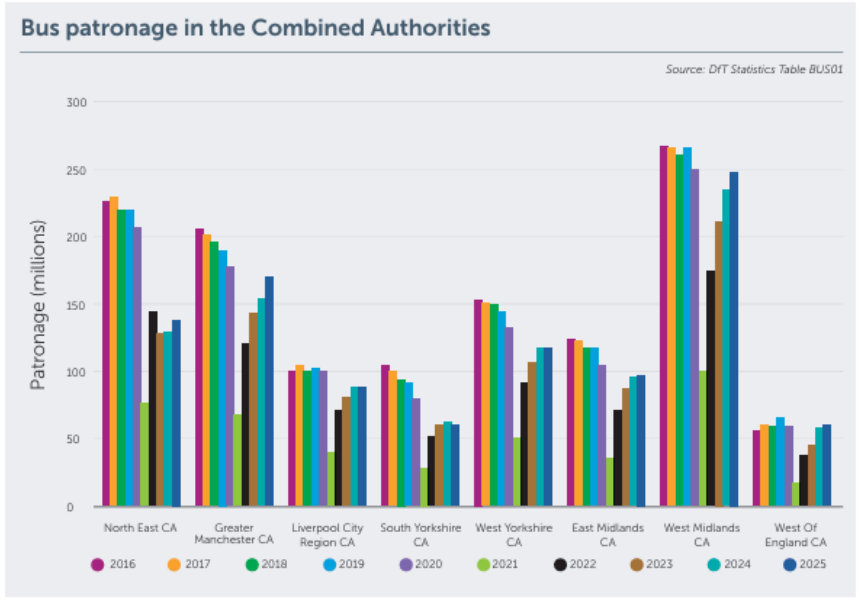
Pilot of **24/7 bus services** launched, reinstating night time connectivity to the north-west of Greater Manchester for the first time in over a decade.

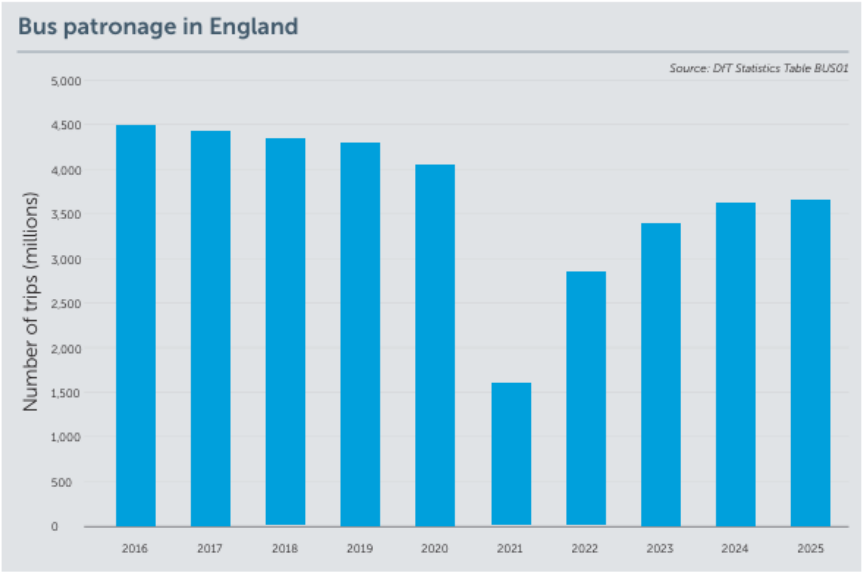
75%

75% of the Bee Network bus fleet is less than four years old (compared to an average fleet age of 9.5 years in 2019).

17%

of the fleet is **zero emission,** compared to below 2% pre-franchising.





Delivering_Better_Bus_Services_for_Greater_Manchester_-_June_2025.docx

UTG Report - Inside Track 2026 FINAL.pdf

Delivering Zero Emission Fleets

Pre-Franchising Progress





Progress During Transition to Franchising



Stagecoach

STOCKPORT
METROPOLITAN BOROUGH COUNCIL



Transport for Greater Manchester

Technical Note

CRSTS ZEB Programme: "First 50" Business Case Summary

Version 1
20th July 2022

TfGM Zero Emission Bus Programme Team

Version	Date	Draft	Rev	App	Notes
1	20 July 2022	DF			

Key Early Decisions

Deployment Plan – Programme Choices

Option Dimension			
Technology (Fuel)	Hydrogen	Electric	
Technology (Charging)	Depot	Opportunity	
Who takes incremental operating cost risk of Zero Emission technology?	TfGM	Operator	3rd Party
Who owns the fleet?	TfGM	Operator	3rd Party
Procurement/Mobilisation Route	Via Franchise	Other	

Post Transition Progress To Date

Current ZEBs at depots

Depot	ADL E400 BYD DD	Volvo BZL DD	Volvo BZL SD	Volvo BZL MIDI	ADL E400 EV DD	ADL E100 MIDI	WB Electroliner DD	WB Kite SD	WB Streetdeck Repower DD	Total
Hyde Road		21	13		24					58
Oldham	50				35					85
Middleton		45	4			4				53
Tameside		84								84
Bolton	50						19		1	70
Sharston	32									32
Queens Road				12						12
										394

Total Type	132	150	17	12	59	4	19

Post Transition Progress – Planned

Planned ZEBs at depots

Depot	ADL E400 BYD DD	Volvo BZL DD	Volvo BZL SD	Volvo BZL MIDI	ADL E400 EV DD	ADL E100 MIDI	WB Electroliner DD	WB Kite SD	WB Streetdeck Repower DD	Completion Timescale	Total
Hyde Road		25	13		24		100			Dec-26	162
Oldham	50				35		64	16		Sep-26	149
Middleton		45	4			4					53
Tameside		80		4							84
Bolton	50		3				95		1	Jul-26	149
Sharston	32										32
Queens Road				12							12
											641
Total Type	132	150	20	16	59	4	259	16	1		

Governance, Funding and Operational Challenges

1 – ULEB Stagecoach 32 (….. and the TfGM money that was not spent)

2 - ZEBRA 170

3 – CRSTS “First 100”

4 – CRSTS/JAQU “Next Wave to 40%”

5 – TCR “Target 100%”

Governance, Funding and Operational Challenges

Numerous and multiple!!

All either overcome or in the process of being overcome by our talented fleet and capital delivery teams + our bus operations, finance and commercial teams; …… and not without some help along the way from our operating partners, ENWL and the vehicle OEMs.

….. and with my admiration as “the strategic planning/investment case guy”!

Challenges/Opportunities Ahead - ZEBs

1 – The need to continue to deploy at pace whilst running out of depot capacity (….and that is before we consider the full implications of a patronage target of 250 million trips in 2040)

2 – The potential need to retire a relatively young diesel fleet early – but we are actively exploring the potential investment case for repowering mid-life diesels at the tail end of the ZEB program.

3 – As charging technology/batteries improve, fleet cascades to best match vehicles to routes should be possible and help improve financial efficiency. We also know far more now that we did at the start of this journey, further helping drive efficiency into the use of the ZEB assets.

4 – Might we start to assume for financial and asset planning purposes that (with suitable mid-life interior refurbishment), the underlying vehicle asset has a longer service life than a diesel equivalent; and will have a higher residual "scrap" value associated with the re-use of the battery for industrial use?

Challenges/Opportunities Ahead - General

1 – Rail integration – a great opportunity

2 – Improving bus speeds and reliability whilst balancing the needs of all highway users (eg the Bike Lanes versus Bus Lanes versus general traffic versus improved pedestrian facilities/safety versus improved streetscape dilemma!!!)

3 – Continuity of funding for capital investment and further operations improvements

4 – Ongoing battle to counter-act the structural headwinds within the economy that have historically pushed demand for bus travel down

5 – Ensuring we continue to improve our approach to commercial incentivisation (via the contractual regime) such that “Win/Win” opportunities can continue to be created between TfGM and our various suppliers and operators; for the ultimate benefit of the travelling public.

The role of community transport in integrated public mobility systems

Caroline Whitney, Community Transport Association

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Zemo Public Affairs Update

Neil Stockley, Zemo Partnership

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Zemo Public Affairs Programme 2026/27

Using the Map of Missing Policies to advocate change

Policy Development

- Update on Net Zero Council Road Transport Sector Transition Plan
- Further policy development – revised policy baseline document

Parliamentary Engagement

- Parliamentary roundtable planned for June

Coordinating Member and Industry Activities

- Private charger sharing
  - Multi-organisational awareness-raising effort under development
- Workshop on addressing EV misinformation - 20 May
  - Discuss options for industry and other activities

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Key Policy Themes: Public Mobility

Aim	Zemo Proposals
Increase uptake of ZEBs	
• Promote targeted air quality measures	• National approach to CAZs / ZEZs
• Remove incentives for diesel use	• Integrate BSOG within reformed fiscal regime for decarbonised transport
• Reduce TCO of ZEBs	• Extend ZEBRA, with consistent funding
• Enable buses to recharge/refuel at their depots at reasonable cost	• Five year capital funding framework, dedicated support for smaller operators • Mechanisms to reduce financing risk
Decarbonise existing / legacy buses	
• Support role of low carbon fuels	• Make RTFO target more ambitious and extend beyond 2032.
Encourage modal shift from cars to buses	
• Increase bus speeds / reliability	• Increase capital funding for bus priority measures, ringfenced if necessary

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Clean Air Zones (CAZs)

CAZs deliver both environmental and public health benefits

Background

- Aim to reduce urban air pollution (NO_2)
- Defra framework, implemented by local authorities
- Charge high-emission vehicles, with 4 classes (A–D)
- Based on Euro standards
- Revenue reinvested

Impact

- London NO_2 ↓ 27% (54% central)
- Birmingham ↓ 29%
- Bath ↓ 32%
- Bradford: 25% fewer respiratory GP visits

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Zero Emission Zones (ZEZs)

ZEZs can be the next step

- Only zero-emission vehicles allowed unrestricted access
- Oxford is the only city with a ZEZ (since 2022)
- Transport for London (TfL) has provided guidance for local ZEZs

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Challenges

Weaknesses in the current regime

Policy & momentum

- Some CAZs being scrapped/reviewed
- Reduced UK government priority on NO_2

Weak standards

- Based on outdated evidence
- NO_2 limits 4× higher than WHO 2921 guidelines
- PM2.5 up to 5× higher
- Compliance ≠ safe air

Fragmentation

- No national ZEZ framework
- Risk of patchwork local approaches
- Unclear transition post-CAZ

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What should Zemo recommend?

Options

Stronger standards

- Align with WHO guidelines
- Phased interim targets

Post-CAZ transition

- Invest in ZEBs, EV infrastructure, active travel (walking/cycling)
- Improve traffic management
- Maintain monitoring

National ZEZ strategy

- Consistent rollout framework
- Zero-emission vehicles free access
- Charging for others
- Support SMEs & give guidance to local authorities

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Members Roundtable

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Members Roundtable

Events:

- Workshop on sector-wide EV benefits messaging and address misinformation – 20 May (more details to follow)
- Working Groups
  - **Low Carbon Fuels – 21 May (postponed revised date tbc)**
  - **Moving Goods – 4 June**
    - *Financing the Future: Investment and Incentives for Low-Emission Fleets*
- Moving to Zero – Smart Depot Charging – 17 June (Bangor Wales)
- Public Announcements

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Accelerating Transport to Zero Emissions

Thank you

Any questions? Please get in touch

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