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CHANGE YOU CAN BOARD

DELIVERING BETTER, GREENER BUSES

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ABOUT THIS PAPER

The purpose of this paper is to outline learnings from our ongoing research exploring the governance and funding reforms needed to revive England's bus networks and accelerate decarbonisation with a focus on learning from Greater Manchester's experience.

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1.
WHY BACK BUSES NOW?

The bus services bill is an opportunity

The government's bus services bill focusses on a five-point plan:

1. extending bus franchising powers beyond metro mayors to all places
2. accelerating the franchising process
3. removing the ban on publicly owned bus companies
4. safeguarding bus networks with accountability and higher standards
5. empowering local transport authorities (LTAs) and reforming funding.

It acknowledges the value of buses in kickstarting growth, connecting communities to opportunities and services, and reducing emissions and pollution, while recognising today's system is not working for passengers (Prime Minister's Office 2024).

Prioritising buses early this parliament is welcome. It underpins the government's primary economic growth mission, and offers quick impact given lower costs of buses in public transport expansion over interventions like light rail.

This is an opportunity to ensure reform really means better buses, considering what more is needed for thriving, green 21st century local bus networks in England. Not only for passengers who take 3 billion journeys annually (see appendix) but for everyone who could use better buses too even if they currently cannot. This paper seeks to seize this opportunity, looking at how both the government and other parts of England can learn from Greater Manchester's bus reform journey.

The autumn budget 2024 was a step along the road to better buses

Bus funding is critical, and the budget prevented immediate decline for bus networks, providing a £1 billion funding package. This package extended Bus Service Improvement Plan (BSIP), Bus Service Operator Grant (BSOG), and national fare cap funding stream. While the government extended the fare cap for another year, it was increased from £2 to £3. The budget also provided £850 million for LTAs through City Region Sustainable Transport Settlements (CRSTS) and Local Transport Funds.

This meant the budget provided breathing space for longer-term reforms (Johns 2024), including ending the last government's uncertain and short-term funding model. A more stable settlement is expected at the spending review.

The devolution of funding also advanced, giving local leaders more freedom over spending including public transport. Integrated funding for mayoral combined authorities (MCAs), so-called ‘single pot funding’, begins in 2025/26 for Greater Manchester and the West Midlands — to be followed by other MCAs later.

Buses are a vital public service for economic growth, people’s lives, and the environment, with strong public support

Good public transport is foundational for good lives, and buses are:

- driving our economy, contributing £25.1 billion to the economy in 2023 (see appendix). But we estimate the economy is around £2.6 billion smaller in GVA because of declining local buses since 2011 than would otherwise be the case

- enhancing social inclusion with higher use by young people, women, disabled people, lower income groups, and people without cars (Frost et al 2023). But cuts to bus provision have been 10 times higher in the most deprived areas of England than the least deprived areas (see appendix)

- supporting the net zero transition and clean air, providing a sustainable alternative to cars, reducing congestion, and through fleet decarbonisation. But we estimate bus cuts since 2011 have led to 292 million kg CO2e higher emissions than would be the case without such cuts and on a decarbonised bus network (see appendix)

- popular, and the public see improving public transport as integral to better living standards, a fair net zero transition, and reduced regional divides (Frost et al 2023), while investing in buses is more popular than roadbuilding (Allen et al 2024).

Despite this, England’s bus networks are in a perilous state, having declined over 70 years across services and patronage. This decline accelerated during the austerity and then the pandemic periods. For instance, 3,300 bus routes were lost since 2020/21 (see appendix) while bus provision declined 28 per cent since 2011 (Flynn 2024). Reversing this decline is the task at hand.

Better, greener buses are possible

IPPR North is exploring governance and funding reforms for better, greener buses by rebuilding local bus networks and accelerating decarbonisation to achieve our net zero goals. This paper explores learning from Greater Manchester’s franchising journey to date.

We interviewed LTAs like Transport for Greater Manchester (TfGM) and wider stakeholders, alongside reviewing literature, data, and policy. Our programme will further develop our interim findings here.

Since de-regulation in 1986, Greater Manchester has been the first place to re-regulate buses, creating the multi-modal Bee Network. TfGM — the passenger transport executive belonging to the Greater Manchester Combined Authority (GMCA) — manages the network as the local transport authority (LTA). From 5th January 2025, all Greater Manchester's buses will be franchised within the Bee Network.

Here, we explore Greater Manchester's journey franchising local buses and their performance to-date in this process of bus reform. This includes progress decarbonising the local bus fleet, which is crucial to reducing both transport emissions and local air pollution. From this we find that wider bus reform can offer better buses by devolving, supporting, investing in, and decarbonising local buses.

2.

WHAT WAS GREATER MANCHESTER'S STORY?

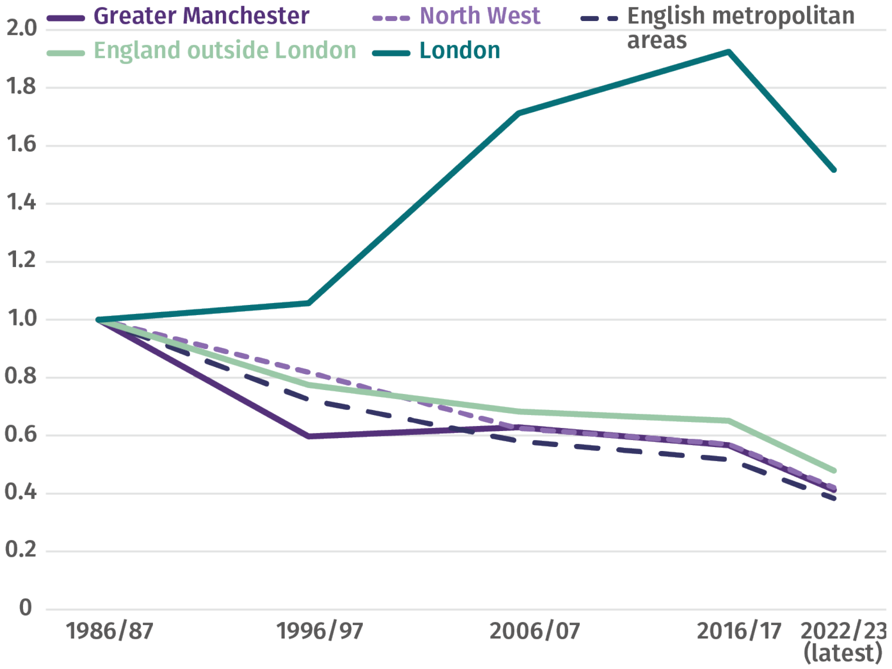
Bad buses were a barrier to Greater Manchester's success

Greater Manchester, home to 2.9 million people (ONS 2022) and 1.57 million jobs (ONS 2024), is a growing city region. It is one of the UK's fastest growing economies.

Despite this growth, declining bus services long frustrated Greater Manchester. On the eve of de-regulation in 1986, there were 355 million bus journeys. By re-regulation in 2022/23, this had fallen 59 per cent to 147 million. De-regulation was a direct factor in this, including by driving up fares and driving down services, accelerated during austerity (Rowney and Straw 2014).

FIGURE 2.1: BUS JOURNEYS HAVE DECLINED IN GREATER MANCHESTER WHILE GROWING IN LONDON

Passenger bus journeys (millions) 1986/87–2022/23 indexed to 1986/87



Source: Authors' analysis of DfT 2005, 2012, 2024a, GMCA 2024
Note: methods varied over the period.

London is an exception, with strong passenger growth throughout the 1990s and stability in the 2000s (Frost et al 2023). London's buses were excluded from de-regulation in 1986, meaning that they stayed under public control while they were privatised elsewhere. There, mayoral devolution drove further improvement of buses and public transport in London. Devolution to London created the Mayor of London role and placed a statutory duty upon them to promote transport, while creating Transport for London to manage it. Since the 1990s, London's bus ridership has grown— with significant recent investment in an expanded and increasingly decarbonised bus fleet.

In Greater Manchester, TfGM intervened to increase patronage with investment, subsidy, and bus priority measures. Absorbing increasing subsidy with little local control over the network, falling patronage, lower revenues, and service reductions reinforced a spiral of decline (GMCA 2019). Unable to reverse the consequences of de-regulation while under it, TfGM turned to franchising and a new vision (TfGM 2021).

Franchising had a strong case for change

Re-regulation was seen as a tool to allow Greater Manchester to rebuild its bus network. Indeed, it is considered the most important reason Greater Manchester sought devolution in the 2010s (Timan 2023).

TfGM estimated strong economic benefits of franchising Greater Manchester's buses. TfGM estimated core transport impacts valued at £368 million and wider impacts on the UK economy of another £208 million over 30 years. Those wider impacts captured how better buses can drive economic growth, including how better connecting jobs and potential workers strengthens the labour market. An additional wider impact is increased productivity through agglomeration benefits, meaning the productivity gains driven by boosted connectivity which effectively bring the economic activity of people and firms closer together.

Those core impacts and wider benefits were £203 million and £130 million more, respectively, than the estimated economic benefits of choosing an 'ambitious partnership model' with bus operators instead of franchising (GMCA 2019).[1]

The benefits of bus franchising outweighed drawbacks like future revenue risk and the £145 million net funding requirement (in today's prices, £135 million in 2019/20), alongside £80 million for depot acquisition and investment (GMCA 2019, today's prices) — around £78.40 per resident. A significant component was raised from the mayoral precept on local council tax, alongside prudential borrowing for depots.

[1] Net present value benefits presented in 2010 prices and values for a 30-year period, rounded to the nearest £ million.

De-regulation permits focus on key barriers to bus travel for Greater Manchester's residents and funding an overall viable network, beyond route-by-route profitability under de-regulation. Better network planning and integration, crafted to grow patronage, are anticipated to lead to such benefits and increase revenues (GMCA 2024e). This cohesive, place-based public transport network model has two key features — modal and strategic integration. Modal integration means unifying transport modes like Metrolink trams across fares, timetables or branding. Strategic integration means aligning with city-regional objectives, such as:

- enabling economic and population growth, targeting inclusive growth by addressing spatial disparities and linking franchising contracts to the city-region's Good Employment Charter
- supporting the local 2038 net zero carbon goal and reducing air pollution through fleet decarbonisation and modal shift to buses from cars
- better accountability over transport through local government.

These converge in TfGM's vision for "world-class connections" to support economic growth, better opportunity, environmental protection, and better quality of life (TfGM 2023a), backed by a transport network that is:

- integrated
- inclusive
- healthy
- environmentally responsible
- reliable
- safe and secure
- well-maintained and resilient.

While passengers can expect:

- safety
- accessibility
- affordability
- reliability
- sustainability
- accountability.

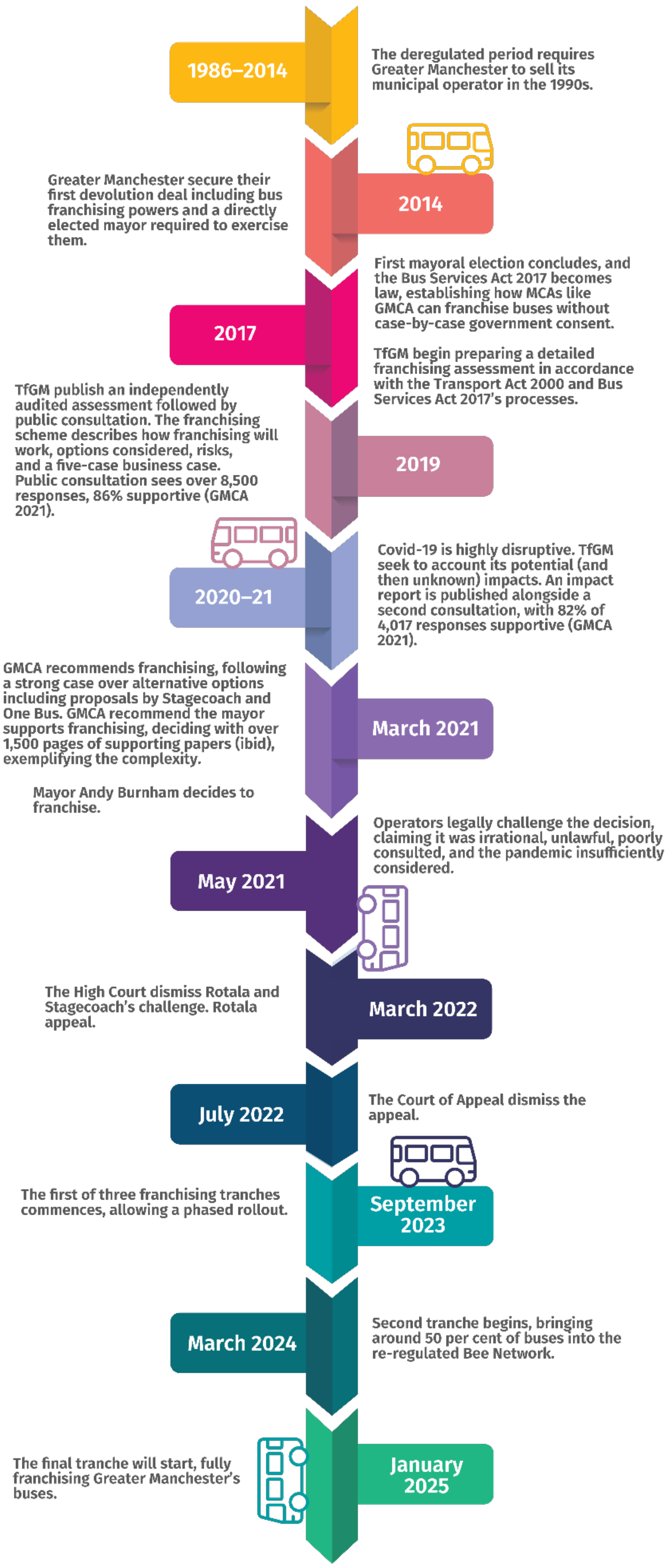
Greater Manchester's ambition does not end in 2025, when the re-regulated Bee Network includes all buses, but extends to:

- an all zero-emission bus (ZEB) fleet, and local trains integrated, by 2030
- 50 per cent of Greater Manchester journeys to use sustainable modes with no net growth in motor vehicle traffic by 2040.

This compelling case and high ambition drove franchising forward.

The franchising process was extensive, difficult, and costly

Despite momentum, re-regulating buses took time and significant resource.


1986–2014
The deregulated period requires Greater Manchester to sell its municipal operator in the 1990s.
2014
Greater Manchester secure their first devolution deal including bus franchising powers and a directly elected mayor required to exercise them.
2017
First mayoral election concludes, and the Bus Services Act 2017 becomes law, establishing how MCAs like GMCA can franchise buses without case-by-case government consent.
TfGM begin preparing a detailed franchising assessment in accordance with the Transport Act 2000 and Bus Services Act 2017's processes.
2019
TfGM publish an independently audited assessment followed by public consultation. The franchising scheme describes how franchising will work, options considered, risks, and a five-case business case. Public consultation sees over 8,500 responses, 86% supportive (GMCA 2021).
2020–21
Covid-19 is highly disruptive. TfGM seek to account its potential (and then unknown) impacts. An impact report is published alongside a second consultation, with 82% of 4,017 responses supportive (GMCA 2021).
March 2021
GMCA recommends franchising, following a strong case over alternative options including proposals by Stagecoach and One Bus. GMCA recommend the mayor supports franchising, deciding with over 1,500 pages of supporting papers (ibid), exemplifying the complexity.
Mayor Andy Burnham decides to franchise.
May 2021
Operators legally challenge the decision, claiming it was irrational, unlawful, poorly consulted, and the pandemic insufficiently considered.
March 2022
The High Court dismiss Rotala and Stagecoach's challenge. Rotala appeal.
July 2022
The Court of Appeal dismiss the appeal.
September 2023
The first of three franchising tranches commences, allowing a phased rollout.
March 2024
Second tranche begins, bringing around 50 per cent of buses into the re-regulated Bee Network.
January 2025
The final tranche will start, fully franchising Greater Manchester's buses.

This journey highlights the complexity, legal vulnerability, and resource intensiveness of the process across funding and capacity. Legal challenges and pandemic disruptions may be less likely now, partly thanks to Greater Manchester having navigated them, however the process remains burdensome which Government is currently exploring (DfT 2024b).

The operational transition presented challenges too, including technical issues, staff shortages, and poorer-than-expected bus and depot conditions left by demobilising operators. These issues impacted services, driving cancellations. TfGM was responsive, mitigating problems like reliance on agency staff for later tranches. This proactive approach compares favourably to the previous de-regulated period, and has helped drive increasing customer satisfaction under franchising (GMCA 2024b).

3.

WHAT DOES FRANCHISING LOOK LIKE IN GREATER MANCHESTER?

Bus franchising offers considerable control to TfGM alongside risks

Greater Manchester's three transition tranches are subdivided into variously sized three-to-five-year local service contracts, with options to extend to seven years, where operators bid to run groups of routes.

Franchising has several models, including different financial arrangements with varying levels of public control. Greater Manchester chose a gross-cost model. Broadly this means that TfGM pays operators fixed fees to run contracted services, alongside adding bonuses or subtracting penalties according to performance against set indicators like punctuality, while TfGM receives the revenues from passengers paying fares. Operators pay most operational costs, assuming associated cost risks. Meanwhile TfGM assumes revenue rewards and risks, such as if passenger numbers rise or fall.

Beyond fares, funding comes from state sources. For 2024/25, the franchised network in Greater Manchester is being supported with £152 million in addition to the farebox and other sources of income[2] alongside £24.5 million transition costs to complete the franchising process in Greater Manchester. GMCA funds TfGM for this, combining revenues from local sources like the mayoral council tax precept or levies on GMCA's constituent local authorities, and central ones including BSIP grant, CRSTS, and recovery funding (BSOG+). Several are non-recurring funds, and TfGM is discussing a more sustainable funding model for transport with government (GMCA 2024e).

Under the de-regulated model or Enhanced Partnership (EP) models as elsewhere, passengers pay fares, operators cover costs, and the state provide additional funding including concessions and BSOG. This was the case prior to re-regulation in Greater Manchester. Then, TfGM funded infrastructure like bus stations and bus priority measures, investing £250 million since 2014. Buses also received significant public sector revenue funding, in 2018/19 alone worth £89 million including £27 million on tendered services, which are socially necessary but unprofitable routes (GMCA 2019).[3]

[2] This is a transition year with tranches one and two active and the third beginning during this financial year.
[3] 2018/19 prices

TABLE 3.1: TFGM's FRANCHISING MODEL OFFERS SIGNIFICANT LOCAL CONTROL

The roles and responsibilities in Greater Manchester's franchising model versus de-regulation

Deregulated (1986-2025)		Franchised (2023-25 onwards)	
TfGM/GMCA	**Bus operators**	**TfGM/GMCA**	**Bus operators**
Bus stops Interchanges Information (shared) Cost risk (limited) Local concessions Support and specifications for tendered and supported services	Service delivery Fares/ticketing Service frequency Information (shared) Revenue/patronage risk Cost risk Performance monitoring Branding and marketing Network design Customer relations Employment of staff Maintenance, specification, and deployment of fleet Depot ownership Onboard technology	Bus stops Interchanges Information Fares/ticketing Local concessions Service frequency Revenue/patronage risk Inflation risk for operating costs Performance monitoring Branding and marketing Network design Customer relations Fleet specification & deployment, including decarbonisation. Some ownership. Depot ownership Onboard technology	Service delivery Operational costs (some shared risk) Performance risk Employment of staff Maintenance of fleet and some ownership.

Source: GMCA 2023

Early performance for the Bee Network is positive for passengers

The Bee Network has seen several significant successes in rolling out franchising so far.

Patronage is increasing, with a 5 per cent annual increase on the franchised network, 7 million more journeys (GMCA 2024c), towards TfGM's target to increase patronage 30 per cent by 2030.

The Bee Network is exceeding revenue forecasts, and costs supported by public funding are lower than under the deregulated governance model (ibid).

Affordability is prioritised, including maintaining the £2 bus fare cap, funded by Greater Manchester's share of BSIP funding and abovementioned revenue performance from re-regulation. Additionally, Greater Manchester locally funds the 'Our Pass' free travel for 16–18-year-olds and is partnering with Credit Unions to make annual tickets more accessible.

Punctuality and reliability is better than the non-franchised network and historic performance. The franchised network achieved 86.5 per cent over summer 2024 versus an 80 per cent punctuality target and 70.5 per cent for the pre-franchising period (ibid).

Accessibility standards are improving (beyond minimum legal standards), including auditory stop announcements, better signage, and a new app designed to meet consistent accessibility standards.

Night buses are being piloted, using TfGM control over network design, routes, and frequencies to pilot 24/7 services on some routes.

Bee Network buses are joining-up travel like integrating bus and tram into single journeys. Integrated service design is reducing passenger wait times between modes and TfGM is expanding touch-and-go payments across them, ultimately to include rail. Introducing hopper fares, like London, allows passengers to catch multiple buses within an hour for a single fare.

TfGM is improving and decarbonising depots, aligning them strategically with service areas and rolling out electric charging. Taking ownership through the franchising process, TfGM can optimise land use, key in a dense urban area. TfGM aims to own 10 strategic depots, and currently two are partially electrified[4] with work on three more imminent.

Ongoing network reviews, shaped by evidence and public feedback, aim to improve services by 2027. TfGM wants 90 per cent of residents to live within 400 metres of 30-minute frequency bus or tram weekday services, and to increase key orbital and radial routes' service frequency to 12 minutes. Replacing route-based profitability with system-level viability incentivises prioritising local need and feedback in service design.

Steps are being taken to improve safety on public transport, expanding the multi-agency GM Travel Safe Partnership tackling anti-social behaviour and crime like gender-based violence and harassment.

Recent challenges provide new learning

Beyond the abovementioned challenges during transition moments, TfGM faced several other challenges (GMCA 2024c).

- Patronage is growing, approaching (though below) pre-pandemic levels.
- Some costs are higher than expected, including electricity, fuel, and labour costs driven by inflation, part mitigated by strong performance from the franchised network (GMCA 2024e).

[4] Meaning they can charge and maintain electric buses.

- An ageing fleet and depots with limited recent maintenance ahead of re-regulation drives delays to upgrades and urgent need for renewal.
- Nationwide delays in zero-emission bus (ZEB) deliveries have slowed TfGM's fleet renewal. Despite 50 ZEBs expected in January 2024, just 26 arrived by March, necessitating the procurement of additional diesel vehicles to cover shortfall.
- Network improvements and expansions are constrained by the short-term national funding environment, limiting investment to maintain the network rather than grow it—as seen with BSIP funding deployed elsewhere.
- Data-sharing from demobilising private operators contributed to issues around poor punctuality when new tranches began.

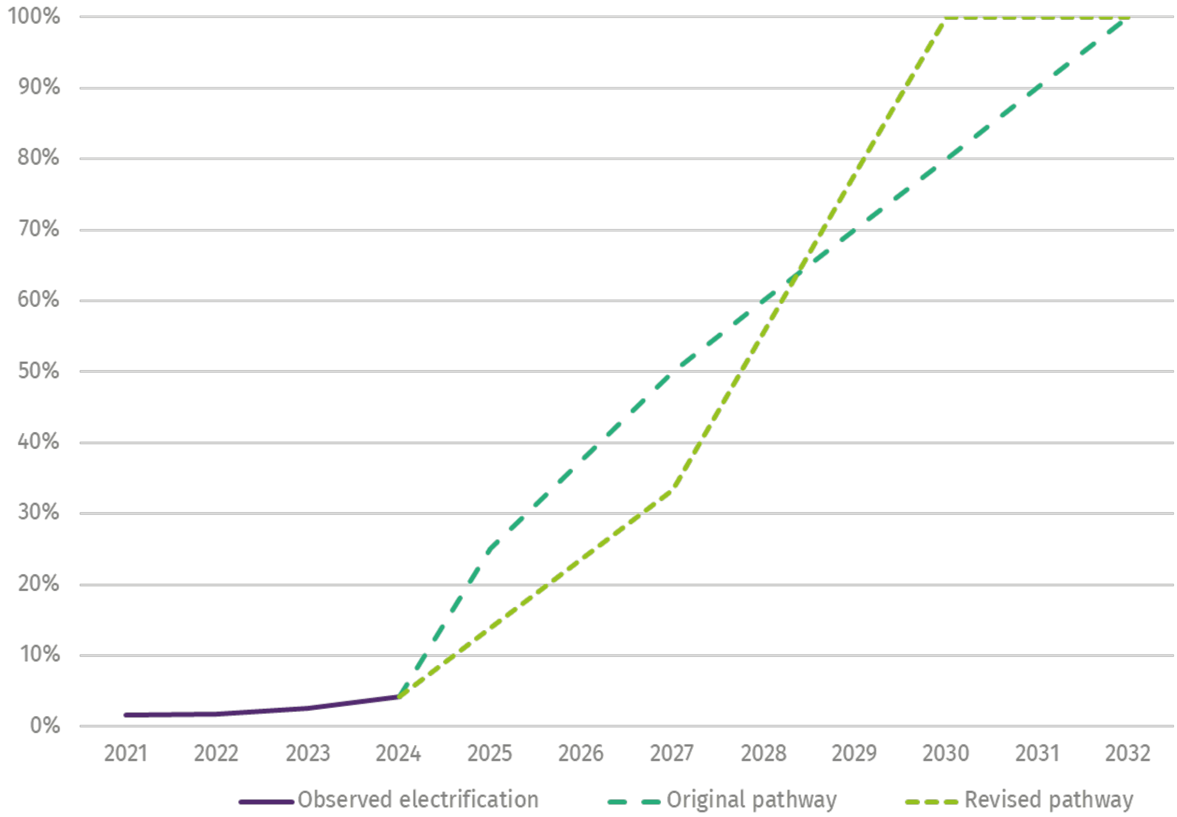
4.

WHAT IS GREATER MANCHESTER'S APPROACH TO DECARBONISING BUSES?

The Bee Network aims for full decarbonisation by 2030, with an all-electric bus fleet while simultaneously driving modal shift to buses, contributing to GMCA's 2038 net-zero target.

FIGURE 4.1 TFGM PLANS TO ELECTRIFY THE BUS FLEET BY 2030 BUT HAVE FACED DELAYS

Share of total bus fleet that are electric buses in Greater Manchester 2021-2032



Source: Authors' analysis of TfGM 2023b, 2024, GMCA 2024d

TfGM is ambitiously decarbonising buses, heading for 25 per cent fleet decarbonisation by the end of 2025 and 100 per cent by 2030. TfGM's original ambition for an all-ZEB fleet by 2032 (TfGM 2024) was accelerated to 2030 by the Mayor (Burnham 2024).

Franchising is helping accelerate fleet decarbonisation, permitting requirements for vehicle types, like ZEBs, and which routes have them such as around air quality priorities. Additional stipulations like maximum fleet age also allow TfGM to take advantage of natural fleet replacement towards ZEBs over time.

TfGM faces delays in decarbonisation, as discussed, impacting the pathway, shown above. Reasons include delays receiving ZEBs from manufacturers, delays repairing and electrifying depots, and delays building a new all-electric depot (GMCA 2024d).

Greater Manchester are investing significantly in this pathway, spending nearly £40 million on ZEBs in 2024/25 by combining £35.7 million of Zero Emission Bus Regional Areas (ZEBRA) funding and prudential borrowing (GMCA 2024a). ZEBs have higher up-front costs, but lower whole-life costs, than diesel buses, permitting prudential local borrowing to support the pathway. Over the long run, GMCA are pooling funding across grants and local contributions both to fully purchase some ZEBs and fund incremental zero-emission costs — meaning paying the difference between ZEBs and diesel buses (GMCA 2024d).

5.

WHAT CAN BE LEARNT FROM GREATER MANCHESTER'S EXPERIENCE TO ACCELERATE BETTER, GREENER BUSES?

Learning from Greater Manchester's bus reform experience franchising their local buses, bus reform could kickstart a strong renewal of local buses in England if well designed, well-funded, and interlaced with bus decarbonisation.

Greater Manchester's multi-modal Bee Network demonstrates the power of local control to improve service design, integration, and delivery. This approach can revitalise bus networks, and underscores the importance of empowering LTAs. And bus franchising is stimulating ambitious public transport goals, as evidenced by Greater Manchester's future vision of stretching modal shift targets and rapid decarbonisation.

The de-regulation, or privatisation, of England's buses is a failed experiment (Rowney and Straw 2014). The ongoing performance of re-regulation in Greater Manchester is further evidence of this, showing what can be achieved instead. Since the 2021 National Bus Strategy, LTAs are required to either form EPs or begin the franchising process to secure Department for Transport (DfT) funding.

> This step change away from de-regulation should be preserved, and all transport authorities should be required to adopt a form of regulated bus governance.

Devolution, which provided bus franchising powers to Greater Manchester alongside wider powers and funding, is central to Greater Manchester's success.

> Extending franchising powers should align with overall devolution reform. Bus franchising should be available at the lowest tier of the devolution framework, when updated in the forthcoming English devolution bill.

Rationalising transport powers could help unlock benefits and capacity, such as permitting mayoral council tax precepts to fund better buses.

> A general transport duty should be extended to all metro mayors, and in doing so should rationalise decisions over bus governance/franchising so this is consistently a mayoral function across MCAs.

Ensuring LTAs have sensible economic geographies and integrating transport across local and central bodies, and modes, would enhance effectiveness. Such modal and strategic integration drives better transport outcomes and revenues in Greater Manchester.

> Transport devolution should align with updates to the devolution framework, and **all LTAs should then become Total Transport Authorities** (TTAs), integrating public transport across local and central public bodies within places, excluding highways governed by local councils. These TTAs should secure integrated funding streams across public transport, and the authority to manage them and related policies. By the end of the parliament, all LTAs could become TTAs as the English devolution bill extends devolution.

The franchising process can be improved alongside further devolution. Greater Manchester's experience was long, complex, extensive, and legally challenged.

> The franchising process should be streamlined within a supportive regulatory framework by simplifying the process, reducing its burden, and making it more accessible to other LTAs. This includes rebalancing assessments away from proving market failure towards standard local government practices and limiting options to two proposed governance models—franchising and EPs,[5] in line with the Government's proposals (DfT 2024b).

Supporting local transport authorities with capacity building, ensuring challenges translate into learning, and policy certainty will help LTAs. Many do not have TfGM's capacity. Decades of de-regulation and austerity has eroded capacity and expertise, especially for smaller LTAs (CBT 2023).

> The government should provide a central function offering **support, capacity building, and guidance** to LTAs. This could mean expanding the DfT-funded Bus Centre of Excellence (BCoE) towards being a body like Active Travel England. A level of independence from DfT is likely required, so it can offer support related to funding and interpreting guidance. Its support would include providing templates for the streamlined franchising process alongside sharing best practice.

In Greater Manchester, sound strategy is improving and growing public transport. Policy certainty and coherence, shaping funding and co-ordinating decision-making across tiers of governance could reduce uncertainty and give LTAs confidence.

> A **Bus Strategy for England** should be nested within the upcoming Integrated National Transport Strategy to deliver a shared vision, set clear goals, and shape the policy and funding environment coherently. This strategy should set principles for 21st-century local bus networks. For a better funding environment, DfT and HM Treasury could mutually agree its principles in consultation with LTAs.

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[5] For instance, instead of 'do nothing', 'do minimum', 'ambitious partnership' etc.

Investing in a stable and predictable funding environment is paramount to re-regulation's success, across transition and operation.

> Government should set **a five-year single-pot bus funding stream for transport authorities allocated fairly on a transparent, formulaic basis** embedding considerations like population, rurality, and need. This should consolidate existing revenue funding for buses into a simplified devolved settlement while updating reimbursement rates for statutory concessions (ie ENCTS) in each funding period.

De-regulation was centrally dictated. Undoing its damage is costly. So far Greater Manchester's re-regulation has necessitated significant local investment. On the process and depot acquisition alone Greater Manchester estimated costs of £78.40 per capita while West Yorkshire estimate franchising transition and management costs at £20 million with £84 million for depot acquisition and fit out (WYCA 2023) — around £44 per person. Liverpool City Region estimate franchising implementation costs at £31 million and depot acquisition and investment at £70 million (LCRCA 2023) — around £66 per person.[6]

> The government should **provide funding to support LTAs to undertake the franchising process** consistent with these costs, and reimburse prior undertakings. Given local authorities bore the cost of de-regulation, they should not also bear the cost of re-regulation.

Decarbonising buses alongside rebuilding bus networks reinforces buses' role in helping the UK meet emissions reduction goals. In Greater Manchester, franchising is accelerating decarbonisation, benefitting from policy certainty and investment.

> The government should seek to accelerate ZEB rollout, providing certainty with both a **zero-emission bus mandate** and technological priority in favour of electric buses, as IPPR previously recommended (Frost et al 2023).
>
> Decarbonisation requires **continued investment**, which should be devolved, resembling our proposed £2.5 billion extension of ZEBRA by 2030 (ibid).

A **devolving, supporting, investing, and decarbonising** approach offers government a robust framework for better, greener buses — driving economic growth, social inclusion, and environmental sustainability. Greater Manchester's case provides a blueprint for other regions to follow in rebuilding local bus networks.

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[6] All figures are presented in 2023/24 prices for comparison

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