TPT/S7/26/3/1

Transport Committee
Wednesday 2 September 2026
3rd Meeting, 2026 (Session 7)

Scotland's bus services

Background

1. At its meeting on 17 June, the Committee agreed to hold a series of introductory evidence sessions to inform its future work programme and develop Members' understanding of its remit.

2. This week, the Committee will hear from four stakeholder groups on Scotland's bus services. The attached briefing paper outlines some of the specific issues the Committee intends to explore.

3. In subsequent weeks, the Committee will hold similar sessions on rail travel, Regional Transport Partnerships, and public sector procurement, as well as an introductory meeting with the Cabinet Secretary for Economy, Tourism and Transport.

4. Prior to the recess, the Committee held an evidence session on regional air travel.

5. The findings from these sessions will help to inform the Committee's wider work programme.

Evidence session

6. The Committee will hear from—

   - Chris Day, Secretary, Edinburgh Bus Users Group;
   - Ellie Harrison, Co-founder and Chair, Get Glasgow Moving;
   - Colin Howden, Director, Transform Scotland; and
   - Greig Mackay, Director for Scotland, Bus Users UK.

7. Written submissions were received from the Edinburgh Bus Users Group, Get Glasgow Moving, and Transform Scotland. These can be found at **Annexe A**.

Clerks to the Committee
August 2026

Written submission from the Edinburgh Bus Users Group

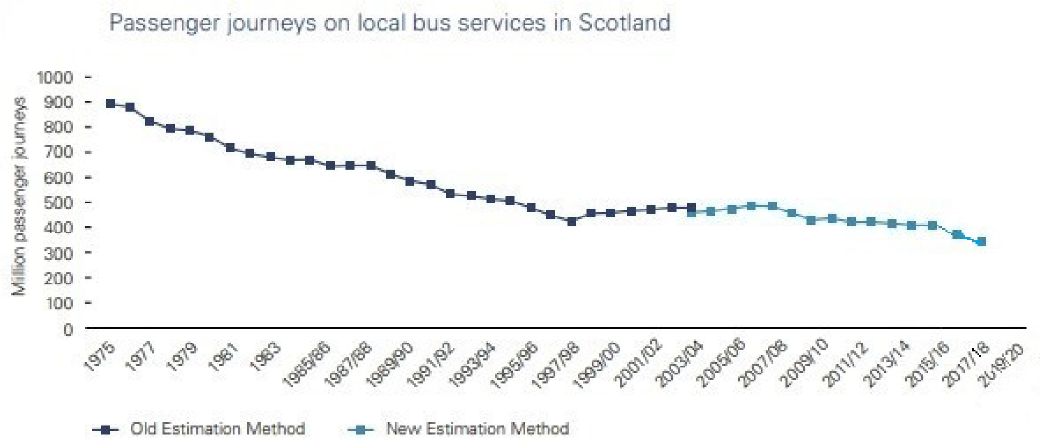
Edinburgh Bus Users' Group (EBUG) is a campaign providing a voice for bus users. It is committed to protecting and improving Edinburgh's bus network for bus users and potential users. We focus on bus services operating within the City of Edinburgh Council area and those crossing its boundary.

EBUG is user/supporter led, independent of any operator, local or national authority, political party or trade union.

Context

If all else was equal, a rise in Scotland's population should result in higher bus use. From 1951 to 2022, Scotland's population rose from 5 to 5.5 million.

In 1960, there were almost 1,700 million bus trips; in 1975 about 900 million; in 2019, 360 million. The steep decline began to level out in the late 1990s.



Sources: Transport Statistics Great Britain 2016, Scottish Transport Statistics 2022-23

Rail journeys originating in Scotland also declined before increasing, since c.1994-95, to 97 million in 2018-19 (Transport Scotland data). Calmac ferries carried over 4.7 million passengers in 2006 and nearly 5.6 million in 2019.

Commercial bus mileage in Scotland since 2016-17 has dropped 7%, while mileage on services subsidised by Councils dropped 34%.

The overall decline masks substantial variation. Between 2006-16, the Highlands and Islands saw growth of almost 30%, southeast Scotland modest growth, southwest and Strathclyde a decline of 20%+. Northeast, Tayside and central Scotland are slightly below the national trend.

Annexe A

Edinburgh is often called an exemplar of public ownership. But bus and tram ridership fell from nearly 290 million in 1950 (when its population was about 100,000 lower) to just over 80 million in 1996-8. Then **rose** to about 120 million in 2019. Post-Covid, Edinburgh and Lothians bus trips are back to nearly 120 million in 2025.

Remedies

In 2017 and 2024 KPMG[1] showed the most important factors determining bus ridership are car ownership (by far), working patterns, and more (or less in many cases) reliable and faster journey times.

David Begg as Edinburgh Transport Convenor oversaw the reversal of falling Lothian Buses patronage from 1997 onwards. In 2024, he argued:[2]

- From 1986-1996 Edinburgh was one of the few UK cities to buck the slower bus trend; scheduled speeds increased 5% due to better bus priority.

- Greenways initially operated all day, 6 days/week. Bus lane offenders were 15 times more likely to be penalised than today.

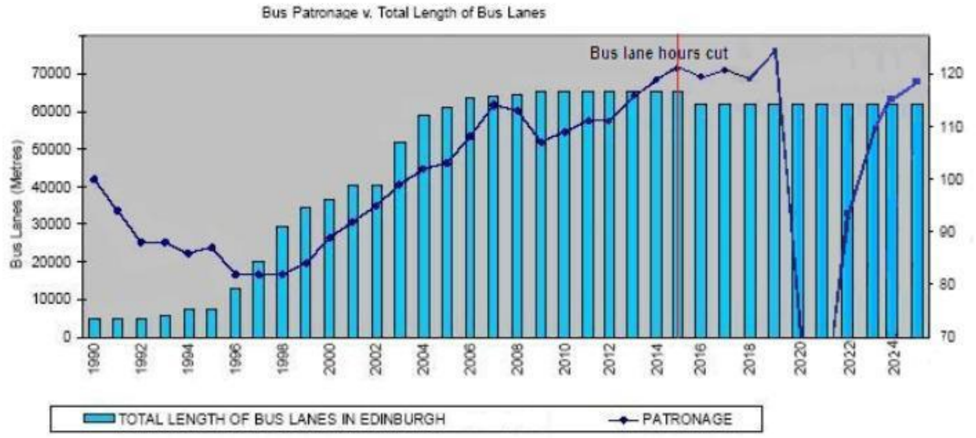
- Bus journey times are increasing again; nearly 20% in 10 years on some corridors, with weaker enforcement and removal of off-peak bus priority. A 10% decrease in speeds reduces patronage up to 10%+.

- Contactless ticketing cuts boarding time to 1.5 seconds/passenger; (exact fare cash payments take 6 seconds).

- Edinburgh Council's case for funding from the Scottish Government's former Bus Partnership Fund showed bus priority improvements on eight corridors cutting journey time by 10% and variability by 25%, with a 13:1 benefit:cost ratio.

[1] trends-in-bus-use-in-scotland-final-20240904.pdf
[2] Begg – Edinburgh must future-proof its buses – Edinburgh Bus Users Group

Annexe A



The Scottish Government 2026/27 budget allocated £60m to bus priority and allied measures. This is a fraction of the 2024/25 £500 million Bus Partnership Fund, which was axed in 2024. With the Bus Infrastructure Fund, it's now up to:

- Councils to start implementing schemes they have in the pipeline.

- Transport Scotland to reduce hurdles Councils face in using the funds…the delays and further information requests that Councils faced.

At a Foundation for Integrated Transport webinar *Secrets of a Successful Bus Operation*,[3] Roger French, Managing Director Brighton & Hove Buses in some of its most successful years, highlighted key issues:

Reliability of bus journeys should be a given; five other key areas are:

- Frequency, consistency
- Price, value, simplicity
- Legendary customer service
- Information, promotion, publicity
- Regular investment in new buses

And five key areas for roads authorities to focus attention and resources:

- Roadside furniture
- Parking policies
- Land use policies
- Controlling roadworks
- Bus priority

[3] https://integratedtransport.org.uk/secrets-of-a-successful-bus-operation-webinar

Annexe A

A note on Concessionary fares

The Scottish Government 2026/27 budget includes £528.3m for Concessionary Fares and Bus Services. Free bus travel is a personal benefit, not an investment in buses. Operators are reimbursed at an annually adjusted rate, currently some 55p in the £ (over-60s passes). The legislation requires they be neither better nor worse off for participating in the scheme. While free fares increase patronage, they do not provide an incentive to increase services.

Bus services are often low in the political pecking order; other services take priority. The less bus services cost the public purse, the less vulnerable they are. Buses are a service, but they broadly need to make an overall financial return to survive.

We doubt the state, in whatever form, will continue indefinitely to subsidise services, as opposed to their users. ***And subsidised travel is no use if there's no service.***

Some final points

Our invitation to this session indicated the Committee's interest in issues such as franchising, fares, service availability, accessibility, and connectivity with other transport. EBUG is happy to answer any questions on these. We also suggest the Committee consider the vital role of **bus stops** and the long-delayed introduction of in-bus enforcement cameras.

Further Reading

- EBUG suggestions for 2026 Holyrood election manifestos – Edinburgh Bus Users Group
- Scottish Budget 2026; what's in it for buses? – Edinburgh Bus Users Group
- The decline in bus routes in Scotland – Edinburgh Bus Users Group
- 'Secrets of a Successful Bus Operation': recommended viewing – Edinburgh Bus Users Group
- Blog post: The ever-decreasing speed of London's buses - London TravelWatch

Edinburgh Bus Users Group
13 August 2026

Written submission from Get Glasgow Moving

Thank you for the opportunity to join your panel for those campaigning for improvements to bus services across Scotland on Wednesday 2 September.

In advance of the session, I'm writing to introduce myself and to provide some background information about the public transport campaigns that I have been involved in – in a voluntary capacity – over the last 10 years.

I am one of the co-founders and the current Chair of the Get Glasgow Moving public transport campaign. We are a volunteer-run group established in 2016 to campaign for fully-integrated, affordable and accessible public transport for our region. We now have more than 500 members and affiliates and more than 11,000 supporters across the region. We want to see a system where the buses, trains, subway and active travel are planned and coordinated to work together as one network, with one simple ticket for use across all transport modes, with a daily/weekly price cap – making it easy and affordable for everyone to get around without needing to own a car.

Public transport systems like this are the norm in most other European city regions. And the key reason why we do not have this in Glasgow and in most other parts of the UK is because of the disastrous policy of bus deregulation – implemented in 1986 – which is still in place everywhere across England, Scotland and Wales, except London and Greater Manchester. This policy took power over bus routes away from democratically-accountable local transport authorities and handed it to private companies to run buses wherever and whenever they could make the most profit.

In his 2021 report, Professor Philip Alston, former UN Special Rapporteur for Extreme Poverty & Human Rights, identified this policy as "an extreme form of privatisation and deregulation" – not tried anywhere else in the world – which has "provided a 35-year master class in how not to run an essential public service".[1]

This is why Get Glasgow Moving has been consistently campaigning for the re-regulation and public ownership of bus services since we were established. First, by supporting Unite Scotland's petition for the "Regulation of Bus Services" at the Scottish Parliament in 2017. This heard compelling evidence from Dr Ian Taylor, Director of Transport for Quality of Life, whose 2016 report made clear that:

> "there is a fundamental conflict between deregulation and a world-class bus system. Deregulation makes it impossible for bus services to work together as a unified network. It also prevents cost-effective use of public money to provide the best bus service for the available resource".[2]

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[1] July 2021, Public Transport, Private Profit: The Human Cost of Privatising Buses in the United Kingdom, Centre for Human Rights & Global Justice, New York University School of Law
[2] February 2016, Building a World-Class Bus System for Britain, Transport for Quality of Life

This petition was eventually referred to the Rural Economy & Connectivity (REC) Committee which was scrutinising the new Transport (Scotland) Bill in 2018 and 2019. We continued to work with Unite Scotland to campaign for amendments to the Bill which would enable new publicly-owned bus companies to be established in Scotland for the first time since 1986 – and we were delighted to see them passed by REC Committee on 12 June 2019. The amended Bill passed its final stage that October and was given Royal Assent to become the Transport (Scotland) Act 2019 on 15 November 2019.

With new powers secured in the 2019 Act for the re-regulation of bus services (through 'franchising') and to enable new publicly-owned bus companies to be established – we had hoped that positive change on our streets would be imminent. What has followed, instead, has been **a further six-year struggle** – firstly to get the Scottish Government to enact these powers and publish the statutory guidance required by local transport authorities to be able to use them (the guidance for bus franchising was not published until 17 March 2026!). And secondly, to get our transport authority – Strathclyde Partnership for Transport (SPT) – to commit to using them.

Better Buses for Strathclyde

In September 2023, we helped to establish the new Better Buses for Strathclyde coalition, to put pressure on SPT to commit to using these powers as central to the new Strathclyde Regional Bus Strategy (SRBS), which they had just begun to develop. This coalition is now supported by more than 13,000 people and 60 organisations across Strathclyde including trade unions, environmental and anti-poverty campaigns, parents', students' and pensioners' associations, community councils and many more. Together – over the course of two years – and following two public consultations showing overwhelming public support for bus franchising and public ownership,[3] we were able to push SPT to agree ambitious plans to take forward bus franchising in the final SRBS, which was approved by the SPT Board in September 2025.

Whilst this was another big win for our campaign, what has emerged during this process is the complexity and complete unworkability of the Scottish bus franchising legislation created in the 2019 Act, compared to that in place in England and Wales. Specifically, because it includes an additional, completely unnecessary, step of requiring franchising proposals to be approved by a so-called 'independent panel' convened by the Traffic Commissioner, who is an unelected official appointed by the UK Government. This means that, even though the SRBS has now been approved –

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[3] SPT's 2024 consultation showed 86% support for establishing a publicly-owned bus company, and 76% support for taking forward bus franchising
SPT's 2025 consultation showed 83% support for taking forward bus franchising. This survey did not include a direct question on establishing a publicly-owned bus company, however the final SRBS does commit SPT to "Consider development of business case for small-scale municipal bus operation, alongside identification of any area-based supply side challenges identified in the process to develop franchising" (p.77)

Annexe A

SPT's latest projections show that it will take a further 5 years, until at least 2031, before the first franchised buses actually hit the streets.

This is why Better Buses for Strathclyde also began a parallel campaign at the Scottish Parliament to get the 2019 Act amended – launching our new petition to "Accelerate the implementation of bus franchising powers" in August 2024. This petition was considered by the Citizen Participation & Public Petitions (CPPP) Committee on 27 November 2024 and 24 September 2025. It was only closed by the CPPP Committee because of a lack of "capacity and time to further pursue the complex question of funding in this parliamentary session" and because of the unwillingness of the then Transport Minister Jim Fairlie MSP "to modify the current franchising process".

Now with the new Transport Secretary Stephen Flynn MSP in post – and his announcement on 17 June 2026 of new 'Better Buses legislation' within this parliamentary session – we hope that there will be an appetite to re-consider the demands of our petition and to take appropriate action. To that end, we are organising a Scotland Demands Better Buses Rally outside the Parliament on **Wednesday 2 September 2026, 1pm**, followed by a Better Buses Briefing for MSPs from 1:30-2:30pm in Room TG.24 and the Garden Lobby. We invite you and all members of the Transport Committee to attend. We have also just updated and re-opened our petition on behalf of the new Better Buses National Coalition, which brings together national organisations and regional groups from Strathclyde, Grampian and Fife. We hope that this will be considered by the Scottish Parliament's new Public Petitions Committee this autumn.

Alongside our demand that the Scottish Government commits to providing the necessary funding to help transport authorities develop and implement bus franchising (as the Governments in England and Wales have done), we have also developed a specific list of demands for the new 'Better Buses legislation':

New Better Buses legislation must:

- be **delivered in a timely fashion** – not the 6+ years it took to enact/publish statutory guidance for the bus franchising powers in the Transport (Scotland) Act 2019.
- remain **solely bus-focused** (i.e. be a 'Bus Services Bill' for Scotland) – so it is not subsumed into a much larger Transport Bill, as this was the key issue causing delays and mistakes with the 2019 Act.
- **correct all the mistakes** made in the 2019 Act – specifically removing the unnecessary 'independent panel' part of the bus franchising approval process, which hands undue power over Scotland's bus services to the Traffic Commissioner, who is an unelected official appointed by the UK Government. The Parliament's former NZET Committee received compelling evidence explaining why the panel must be removed in October 2024 (we have drafted the necessary amendments).

- empower all of Scotland's Regional Transport Partnerships to use the bus franchising powers – to remove inequalities and help deliver Better Buses across the country (currently only SPT, ZetTrans and SWestrans can).

Our demands largely align with those of SPT, which were set out in a letter from the SPT Chair to Stephen Flynn on 19 June 2026. Whilst we also welcome the Scottish Government's plans to implement a £2 bus fare cap across Strathclyde – which will address one of the key issues of bus deregulation (the complete lack of regulation over fare prices) – we share SPT's concerns about this.

Unlike the ambitious plans set out in SPT's Strathclyde Regional Bus Strategy, the £2 fare cap will do nothing to improve services or create new routes. If rolled-out under the current deregulated system, it could quickly prove completely financially unsustainable. Our Freedom of Information request to Transport Scotland on the formula used for the £2 fare cap pilot in Highlands & Islands revealed that: "Participating operators are reimbursed between 90% and 98% of the differential between the operator's usual adult single journey fare and £2 for each journey taken". Given that operators currently set their own "usual adult single journey fare", they can continue to game the system (as they currently do with the Concessionary Card Scheme) to extract maximum public subsidy.

As Transport for Quality of Life's excellent 2016 report clearly evidences – it is only regulation (through 'franchising') or the full public ownership of bus services which can guarantee the "cost-effective use of public money".

I hope that the Committee finds the information above useful. In order to ensure that we can have a fully-informed discussion at the meeting on 2nd September, I would be grateful if you could also take the time to read the four pieces of evidence which we wrote and submitted to the CPPP Committee to support our petition. These provide more detail and elaborate on many of the issues raised above. I've included the links and a summary of each of these below:

Better Buses for Strathclyde evidence to Parliament:

PE2116/B: Petitioner written submission, 11 October 2024 (90KB, pdf)

- Our first piece of evidence highlights the Scottish Government's complete lack of urgency in enacting the bus franchising powers in the 2019 Act. This has resulted in the abandonment of key climate targets and the fact that Scotland now lags years behind England and Wales in implementing bus franchising. It highlights the many issues with the panel approval process, and the additional costs and risks to transport authorities which will result from it. It also provides more detail on the inefficiencies of the current deregulated system, giving a clear example of how private operators "optimise [their] pricing to exploit" government subsidies. It shows how delivering franchising at a regional level provides a way of reviewing all current funding streams going into bus services and creating transparency and clear lines of accountability between the local transport authority and the services being provided within its area.

Since this evidence was published, the UK Government has passed its new Bus Services Act 2025 aimed at “making it easier for local leaders [in England] to take control of their buses… putting passengers first”. And the Welsh Government has also finally passed its Bus Services (Wales) Act 2026 which will enable nationwide franchising by 2030 through their “Roadmap to Bus Reform” (not 2028 as previously stated).

PE2116/C: Petitioner written submission, 12 November 2024 (116KB, pdf)

- Our second piece of evidence highlights all the debates at the Parliament which took place as the NZET Committee was considering the much-delayed SSI relating to the panel approval process. This includes quotes from the compelling evidence they received which led the Committee to vote in favour of annulling the SSI on 29 October 2024, triggering the knife-edge vote in Parliament the following day, which was tied 62-62. It then sets out a clear course of action the Scottish Government must take to make up for lost time and address the issues with the legislation.

  Since this evidence was published, we have more accurate projections from SPT on both the costs and timeframes for implementing bus franchising. They now require £6-6.5million to follow the complex processes set out in the 2019 Act and it will take until 2031, at the earliest, before the bus franchising roll-out begins (they had previously estimated it would cost £15million, but that implementation would begin in 2030).

PE2116/R: Petitioner written submission, 15 September 2025 (126KB, pdf)

- Our third piece of evidence highlights the mass public support for bus franchising evident the response to SPT’s two consultations, and the weight of support for our campaign. It also highlights the cross-party support from MSPs for seeing bus franchising implemented at pace as evidenced in the special hour-long debate on “The Future for Glasgow’s Bus Services” at the Parliament on 26 June 2025 – as well as the mounting frustration at continued delays from the Scottish Government in publishing the guidance required by local transport authorities.

  Since this evidence was published, we finally saw the publication of the statutory guidance for bus franchising on 17 March 2026, just before pre-election recess began – a shameful **6 years, 4 months and 2 days** after the 2019 Act was given Royal Assent. We still don’t know the outcome of the negotiations between the Scottish Government and the UK Government over who should foot the bill for the additional burdens placed on the Traffic Commissioner by the Scottish legislation. These were meant to result in a Memorandum of Understanding (MOU) being presented to the NZET Committee in 2025. There is still no sign of this.

PE2116/S: Petitioner written submission, 15 September 2025 (129KB, pdf)

- Our final piece of evidence reiterates the course of action which the Scottish Government must take to make up for all the lost time. This also includes estimates of the funding required to both develop and then implement bus franchising (between £100-200million over 5 years) – taken from the Centre for Cities' 2023 report,[4] and the figures provided in CPT's evidence to the CPPP Committee for the transition and depot acquisition/fit-out costs incurred in English city regions. It also outlines other more long-term legislative changes required to resolve Scotland's ongoing transport governance issues.

  SPT is now currently embarking on the first stage of the bus franchising process set out in the 2019 Act – that is the preparation of the Franchising Framework and Assessment (FFA), which is estimated to take until the end of 2028 to complete. This extensive piece of work will produce a detailed business case outlining the exact costs of implementing franchising across Strathclyde – including the upfront funding the Scottish Government must contribute alongside the contributions from the 12 local authorities in the SPT area.

Thanks for your time. I look forward to meeting you on 2nd September and to discussing these important issues further.

With best wishes,

Ellie Harrison
Chair, Get Glasgow Moving
25 August 2026

[4] October 2023, Miles Better: Improving Public Transport in the Glasgow City Region, Centre for Cities

Written submission from Transform Scotland

Making buses competitive: traffic reduction, bus reform and Scotland's next transport challenge

Scotland has spent years debating how to reverse the decline in bus use. That debate is increasingly framed around two explanations. One emphasises the structure of the bus industry and argues for greater public control. The other emphasises car dependence and congestion, arguing that traffic reduction is essential if buses are to become competitive. These explanations are not exclusive: they address different parts of the same problem.

There is a compelling body of evidence from public, private and third sector bodies that traffic levels and congestion are the principal reason why people don’t take the bus.

KPMG's research for CPT Scotland provides the clearest evidence on the structural determinants of Scottish bus patronage. Its 2024 analysis found that **competition from cars remains the primary negative influence on bus use**, with socio-demographic factors including car ownership accounting for 43% of the decline. Working from home and online shopping accounted for a further 38%. Most strikingly, KPMG estimated that congestion-related journey times are associated with around 20 million fewer bus trips each year.

This reinforces Transform Scotland's longstanding position that **reducing road traffic is the most important intervention for creating the conditions in which public transport can flourish**. More traffic degrades the bus product: buses become slower and less reliable, making them less competitive and hence encourage further car use. The result is a vicious circle of car dependence, congestion, declining bus attractiveness and waning patronage.

Consumer research provides a similar explanation. Passenger watchdog Transport Focus found in 2023 that 70% of bus non-users preferred travelling by car, while inconvenience and journey time were major barriers. Factors most likely to encourage greater bus use included better-value fares, more frequent services and greater reliability. The Scottish Government’s Scottish Household Survey tells the same story. Its various reports have identified use of one's own car, having no need for the bus and excessive journey times among the leading reasons why people do not use buses more often.

But "I use my car" does not necessarily mean "I prefer cars." It can mean that the car currently provides the journey that people find most palatable. Bus policy must therefore change that calculation. This is where the argument for bus reform comes in. Passengers do not choose a bus because it is publicly or privately owned. They choose it because it offers a useful service. But the characteristics they value —

availability, frequency, reliability, journey times and integrated fares — are largely characteristics of a network, rather than an individual operator.

A deregulated market gives individual operators considerable control over routes, frequencies and fares. Partnerships, franchising or other forms of regulation can give a public authority greater ability to plan the network as a whole: coordinating routes and timetables, integrating fares, maintaining socially necessary services and specifying minimum standards.

Governance therefore matters. But the evidence does not justify the stronger claim that public ownership itself directly causes higher patronage. London demonstrates the potential of public control without public operation of every bus, while the Lothians demonstrates that municipal ownership can deliver successful operations – although neither provides a controlled experiment establishing that these models of ownership and control caused the outcome. Yet bus reform should be explored to determine whether public authorities can assist with delivering the characteristics passengers value.

Traffic reduction and bus reform are therefore complementary. Public control can help create a coherent, frequent, affordable and integrated network. But that network will struggle to compete with the car if its buses remain trapped in congestion. Conversely, reducing traffic and giving buses priority can make them faster and more reliable, but the benefits will be limited if the underlying network is fragmented or infrequent. Two current areas of Scottish policy illustrate this distinction.

Bus priority: make the existing network work better

Bus priority should be central to Scotland's bus policy. Congestion increases journey times, damages reliability and raises operating costs. Maintaining frequency on a slower route can require more vehicles and drivers, and long journey times are a major barrier to bus attractiveness. Bus lanes, bus gates, junction and signal priority, enforcement and well-designed interchange have been shown to improve services without requiring wholesale network reform.

However, the previous administration’s Bus Partnership Fund was a failure, with just under £27m of the promised £500m spent, and only 12 km of bus lanes delivered. We are now five months into the 2026/27 financial year, and yet, as far as we are aware, there have been no awards from the replacement £60m Bus Infrastructure Fund.

There is a significant pipeline of evidence-based bus priority schemes. The new Fund must quickly convert these into visible on-street improvements. **Hence we recommend that the Scottish Ministers publish a transparent bus-infrastructure delivery programme and require schemes to establish baselines and targets for journey time, reliability, patronage and passenger experience**.

Bus priority does not require wholesale restructuring of the bus market. It changes the competitive environment in which every bus operator operates. A faster bus is a more attractive product, regardless of who owns it.

£2 fares: national ambition, regional solutions

The rural and island £2 fare pilot provides an opportunity to test how lower fares affect patronage and travel behaviour where journeys are often longer and fares higher. But evaluation should examine who benefited, whether journeys shifted from car, rail, walking or cycling, and whether operator behaviour and service levels changed.

Increased bus use does not necessarily mean that modal shift from car to bus has been achieved. The young persons' concessionary travel scheme, for example, has attracted passengers from ScotRail, meaning the government is funding new bus journeys whilst also backfilling the ScotRail revenue loss through increased subsidy. The pilot should identify how many additional journeys represent modal shift from car and how many are abstracted from other public transport.

A uniform national model before that evidence is available risks turning evaluation into implementation, rather than testing whether it is the best use of public funds. Our analysis of the under-22s travel scheme has identified that investment in the scheme purchases a much greater benefit for young people in Edinburgh, Aberdeen, Dundee, Midlothian and East Lothian than for those who live in South Lanarkshire, Aberdeenshire, Moray, Orkney and Comhairle nan Eilean Siar. The government's recent evaluation of the older and disabled persons scheme identified a similar lack of equity for this cohort. The central issue is that a national entitlement does not produce an equal transport benefit when the underlying network varies substantially. A free bus pass has limited value if there is no useful bus to use it on.

The same £2 fare does not solve the same problem everywhere. In a dense urban area with frequent services and relatively short journeys, additional subsidy may purchase relatively little improvement in accessibility. In a rural area with long journeys and high fares, affordability may be a more significant barrier. The balance between fare support, service provision and other improvements should reflect regional circumstances.

Perhaps most fundamentally, the Government has yet to demonstrate convincingly that its large investments in free and capped fares are reaching those that transport poverty hits the hardest. Free or affordable travel is of little use if the bus service doesn't run where or when you need it. And the Government should not be spending increasing sums subsidising bus fares while allowing buses to become slower and more expensive to operate on the road.

We recommend that the Scottish Ministers use the evidence from the £2 pilot to establish region-specific objectives and funding packages, rather than defaulting to a single national reimbursement formula. They should assess

impacts on other public transport modes and allow the treatment of longer-distance journeys to reflect the function of the service and regional need.

From bus policy to transport policy

The lesson is not that fares are unimportant or governance irrelevant. Different interventions address different parts of the problem. A £2 fare makes a bus cheaper; a good network makes it more convenient; public control may make it easier to coordinate. But if the bus remains stuck behind increasingly congested traffic, its fundamental competitive disadvantage remains.

Scotland therefore needs to move beyond thinking about bus policy as something that happens to buses and change the transport system in which they operate. The virtuous circle is straightforward: traffic reduction and bus priority make buses faster and more reliable; effective public governance translates those improvements into a coherent and attractive network; more people choose buses instead of cars; and reduced car dependence further reduces congestion.

Traffic reduction is therefore not an alternative to bus reform. It is what makes bus reform work. And bus reform is not an alternative to traffic reduction. It ensures that the benefits of a less congested transport system are captured by public transport rather than simply producing faster car journeys.

The question is not simply who operates buses or how much passengers pay. It is whether government will create conditions in which the bus is genuinely faster, more reliable, more convenient and more affordable than the car for many more journeys.

Improving the targeting of bus funding

Scotland's bus policies provide substantial support to passengers, operators, services, infrastructure and fleet transition. Scottish Government resource spending on bus services is now more than £500 million a year before additional capital support for infrastructure and zero-emission vehicles is considered.

Scotland does not lack bus initiatives. What it lacks is sufficient alignment, accountability and evidence that those initiatives are collectively delivering a better bus network. Each intervention may have a legitimate purpose. The problem is that they are not consistently integrated around local and regional network outcomes. The current system is set up to fail if its individual funding streams and responsibilities continue to operate without a mechanism that brings them together around better passenger outcomes.

The next phase of bus policy should connect fares, concessionary reimbursement, supported services, infrastructure, data and accountability around the passenger outcome that matters: affordable travel on a reliable service that exists when and where people need it.

That requires a better network, better value, faster and more reliable buses, smarter fares, better data and clear accountability. It also requires the government to be willing to ask harder questions on its existing and planned future investments — and to publish the evidence needed to answer them.

The better the bus service, the more people will use it and the more financially sustainable it becomes. This is not a theoretical proposition. It is demonstrated by the stronger-performing networks that already exist in Scotland, where a better service attracts more passengers and provides a stronger foundation for financial sustainability.

The policy question is therefore not simply whether Scotland spends enough on buses. It is whether the money already being spent is collectively achieving the best possible network and passenger outcomes. As such, we recommend that a fundamental – and honest – review of bus funding be carried out, and for this to be a major focus for whatever governance structure that the Scottish Ministers intend to put in place to replace Transport Scotland.

Transform Scotland
24 August 2026