

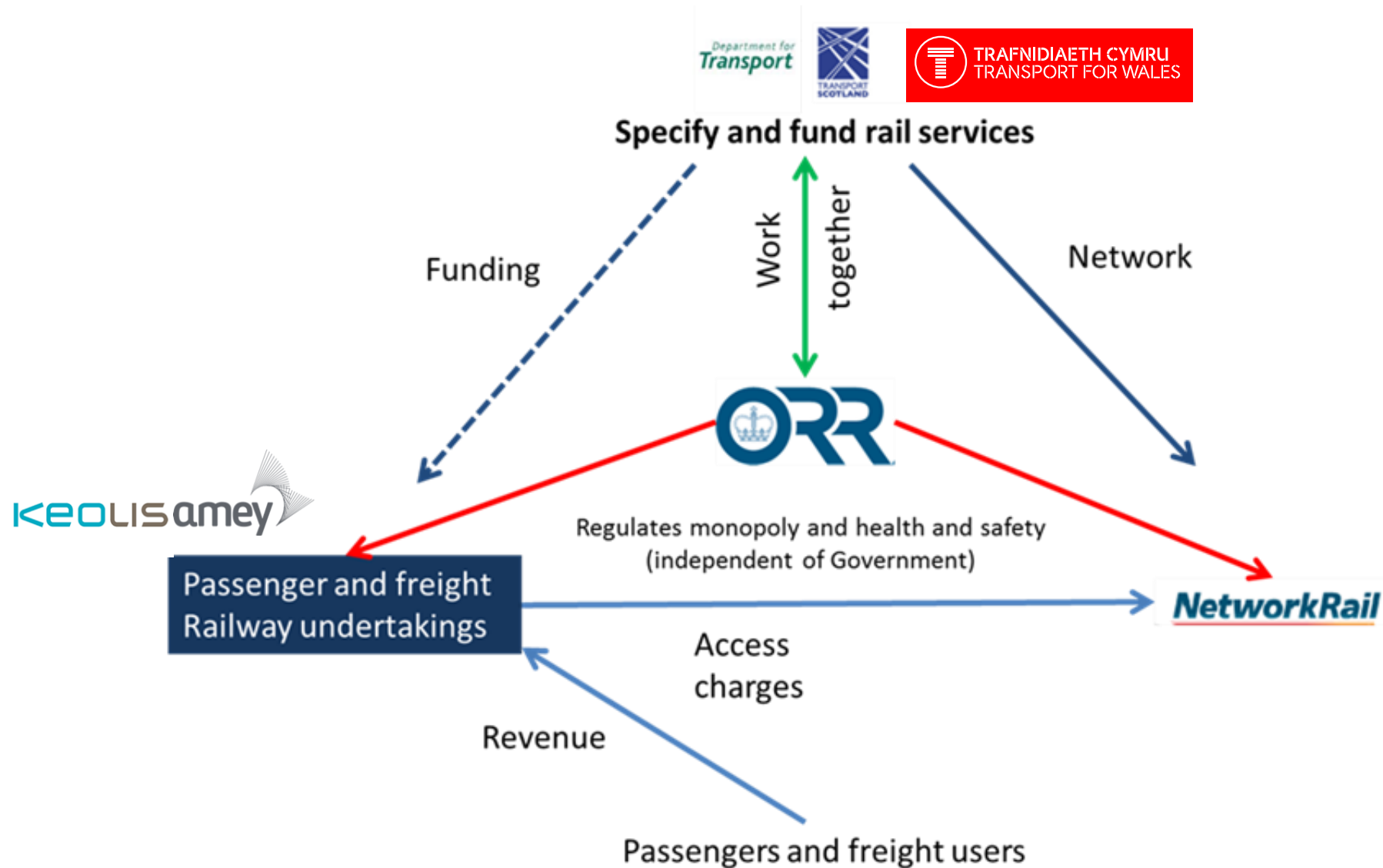
Croeso Welcome

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GB Rail Industry Structure



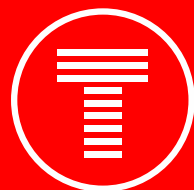
Wales & Borders Rail Industry



Our structure



Llywodraeth Cymru
Welsh Government



TRAFNIDIAETH CYMRU
TRANSPORT FOR WALES



TRAFNIDIAETH CYMRU
TRANSPORT FOR WALES

Gwasanaethau Rheilffyrdd
Rail Services

Who is KeolisAmey?



Extensive transport networks in 16 countries

Rail in the UK, US, Netherlands and Germany
World's leading light rail operator
World's largest tram network in Melbourne



Extensive UK infrastructure management experience

Railways, roads, utilities, airports and transport hubs
Already employ 500 people in Wales
Contracts with Welsh Government, Dŵr Cymru, Isle of Anglesey, Wrexham and Network Rail

Our Proposal

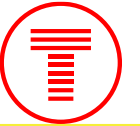


Headlines

- Every train in Wales will be replaced, through an £800m investment
- **95% of journeys will be made on brand new trains**
- More than 50% of those to be **assembled in Wales**
- We will **increase capacity by 65%**
- **£194m on Station Improvements**
- **Investing £738m to electrify the Central Metro network**
- We will establish the railway as a **true 7-day service**. **New Sunday services** will begin in 2019 with an immediate a 22% increase in Sunday mileage



Alignment to the Well-Being of Future Generations Act



A globally responsible Wales

- Energy for stations and the overhead wires will come from 100% zero carbon energy, with at least 50% sourced in Wales
- Supporting sustainable, socio-economic development through our procurement approach
- Develop 1500 additional park and ride spaces across Wales to encourage rail travel
- Investing £738m to electrify the Central Metro network

A prosperous Wales

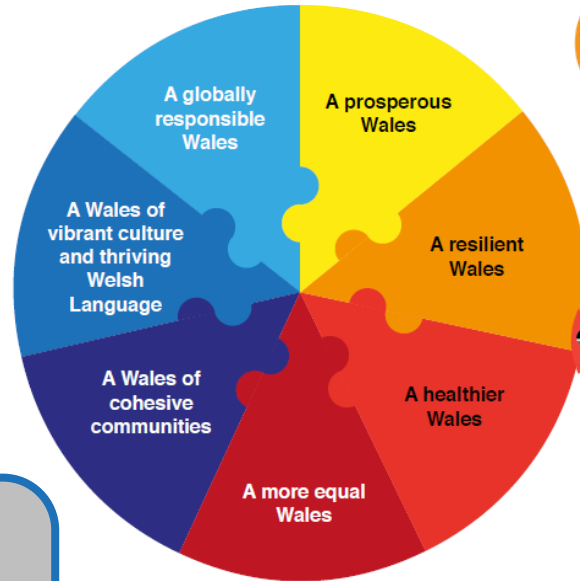
- Create 600 new jobs, investing in 30 apprenticeships every year
- Moving the Keolis UK headquarters and Global Rail Division to Wales
- Building a new Amey design office in Wales
- 95% of journeys will be made on brand new trains
- We will increase capacity by 65%
- We will create a true 7-day railway with new Sunday and Bank Holiday services

A Wales of vibrant culture and thriving Welsh language

- Promoting the continued revival of the Welsh language through bilingual customer information, a contact centre and supporting the National Eisteddfod
- Fund all staff who want to learn Welsh and support them to learn
- Providing access to Wales' vibrant culture and natural heritage working with Visit Wales to develop a new rail and tourism strategy

A Wales of cohesive communities

- Employing Customer and Community Ambassadors to encourage a greater sense of community around the rail network
- Improve business opportunities for local SME's/TSE's based in Wales
- Doubling the number of Community Rail Partnerships, with 90% of stations to be adopted



A resilient Wales

- Encouraging use of public transport e.g. via integrated journey planning tools promoting onward travel and off-peak/advanced fares
- More than 50% of new trains will be assembled in Wales
- Investing £194m in building new and upgrading existing stations

A healthier Wales

- Promoting active travel, new cycle storage and safe, well-lit walking routes to encourage people to make healthier choices
- Community Ambassadors working with local communities, encouraging and training people to use the rail network
- Mental health awareness training for all staff

A more equal Wales

- Developing a new fares structure to ensure price is not a barrier to using the network
- Become an accredited Living Wage employer by 2021 to be cascaded through our supply chain
- During off-peak, cheaper fares will be introduced including, under 16s being able to travel free with a paying adult, and the age limit for half fares will be increased from 16 to 18 across Wales
- Close working with Disability groups to improve accessibility and set up a new accessibility panel for ongoing input

So what does this mean for us...

For people?

For places?

For you?



For people



For people

A NETWORK AT THE HEART OF COMMUNITIES

Accessible to all, 7 days a week

600 new jobs to deliver the contract as well as 30 new apprenticeships every year

Continuous improvement through data insights lab

More convenient ticketing including Pay as You Go

Better value for money offers



For places



For places

£200m investment in improvement works across all Rail Services stations, in addition to the CVL Transformation programme, including

£40m to upgrade and enhance station facilities

£20m to improve the station catering and retail offer

£15m to improve accessibility and provide step free access

£15m to provide 1,500 new parking spaces

£10m fund to provide community space at stations

£15m for new ticket machines, Smart Ticketing equipment and new gatelines

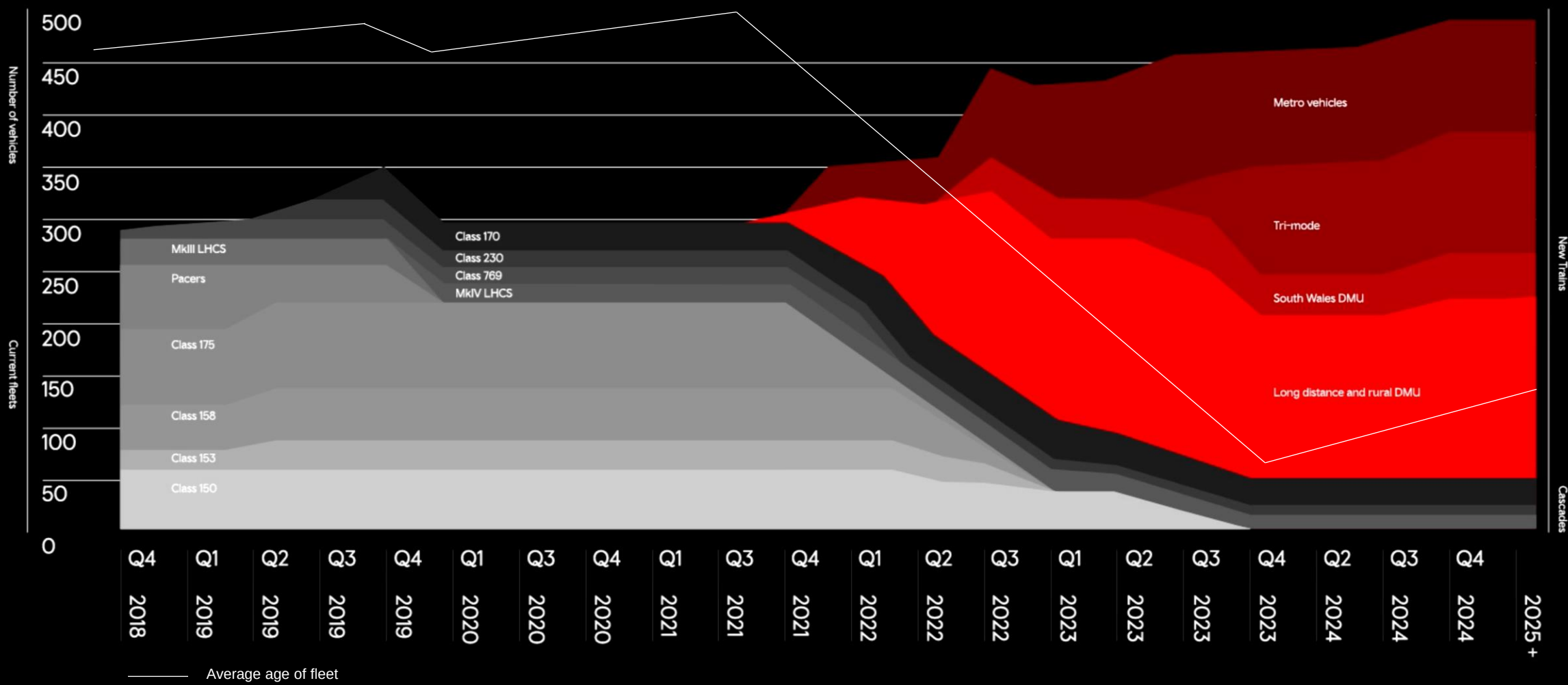
£10m to provide free wi-fi at all stations

A **dedicated** Art and Green fund



For places – Rolling stock strategy

The fleet average age will drop from 25 years today, to 7 by 2023



For places



For you



For you

OUR JOURNEY TOGETHER STARTS HERE

We are about to embark on a **unique, historic, once in a lifetime** journey together

Change doesn't happen overnight but we're **excited** about the possibilities

To achieve great things for people and for places, **we need you**

You can be part of this by playing an active role in sharing your views and shaping our plans

What's happening in your area?

South West and Mid Wales



Service improvements

SWANSEA <> WEST WALES

- New DMU Vehicles introduced during 2022 – providing total capacity of 202 (2car) and 316 (3car)
 - Trains will feature air conditioning, electronic seat reservation and more space for bicycles
- Train frequency increase between Carmarthen <> Pembroke Dock:
 - From May 2023 increase in train frequency on Sundays from 5 to 6 trains per day between
- Train frequency increase between Carmarthen <> Fishguard Harbour:
 - Dec 2019 (Mon–Sat off-peak) from 6 to 7 trains per day
 - Dec 2019 on Sundays from 2 to 3 trains per day
 - May 2023 on Sundays from 3 to 4 trains per day



Rolling stock	Class 150	Class 153	Class 158	Class 170	Class 175	DMU
						
SWANSEA WEST WALES						
In use	Until 2019	Until 2022	Until 2022	From 2019	Until 2022	From 2022
Seating capacity	120	64	140	120 (2 car) 190 (3 car)	136 (2 car) 208 (3 car)	123 (2 car) 196 (3 car)
Total capacity	293	92	199	220 (2 car) 333 (3 car)	194 (2 car) 299 (3 car)	202 (2 car) 314 (3 car)
PRM compliant	Yes	Yes	Yes	Yes	Yes	Yes
Toilets	Yes	Yes	Yes	Yes	Yes	Yes
Onboard WI-FI	Yes	Yes	Yes	Yes	Yes	Yes
Power sockets	No	Yes* **from 2020	Yes	Yes	Yes	Yes
Bicycle spaces	2	4	2	2	2	3
Electronic passenger information	Yes	Yes** **from 2019	Yes	Yes	Yes	Yes
Air Conditioning	No	No	Yes*** ***by 2019	Yes	Yes	Yes

Service improvements

SWANSEA <> SHREWSBURY (Heart of Wales)

- Introduction of a fully refurbished Class 170 train in two car formation in 2022
- Increase in weekday frequency from 4 trains per day to 5 trains per day and a 10 minute reduction in journey time from Dec 2022
- Increasing seating capacity from 64 to 120 and featuring air conditioning



Rolling stock SWANSEA SHREWSBURY	Class 150	Class 153	Class 170
			
In use	Until 2022	Until 2022	From 2022
Seating capacity	120	64	120
Total capacity	293	92	220
PRM compliant	Yes	Yes	Yes
Toilets	Yes	Yes	Yes
Onboard WI-FI	Yes	Yes	Yes
Power sockets	Yes* *from 2020	Yes* *from 2020	Yes
Bicycle spaces	2	4	3
Electronic passenger information	Yes** **from 2019	Yes** **from 2019	Yes
Air Conditioning	No	No	Yes

Station improvements

- Flagship investment at **Llanelli and Carmarthen** stations

Investment and improvement at all Transport for Wales Rail Services operated stations, including:

- An **enhanced cleaning** programme by December 2019
- All stations **rebranded** to new Transport for Wales guidelines by December 2022
- **Secure Station Accreditation**
- **Monitored** CCTV systems and **expanded** cycle storage facilities by March 2023
- Programme of **additional** and replacement TVM's by 2023
- **Improved customer information** systems and screens where required
- **Free Wi-Fi to all** stations by 2020



Other improvements

- A **Social and Commercial Development Plan** in place for stations, supported by network wide investment fund to **support community projects** at stations
- New Community Rail Partnership (CRP) for West Wales
- **Additional financial and marketing support** for existing existing Heart of Wales CRP
- **Encouraging** further Station adoption



Rail & Tourism





Ffordd Cymru
The Wales Way

thewalesway.com

Target Markets

Cymru/In Wales

Shoulder season and day visitor spend

Adegau tawel a gwariant ymwelwyr dydd

Y DU/UK

Irwerddon/Ireland

Drive new, high yield and shoulder-season visitors

Denu ymwelwyr newydd sy'n gwario llawer yn ystod adegau tawel

Rhyngwladol/International

Emphasis on Germany, other European markets and North America

Pwyslais ar yr Almaen, marchnadoedd Ewropeaidd eraill a Gogledd America

Eraill/Other

Local tourism industry, international marketing partners and tour operators, the media and influencers

Diwydiant twristiaeth lleol, partneriaid marchnata a chwmnïau teithio rhyngwladol, y cyfryngau a dylanwadwyr

Market Segments

Fforwyr actif

Active explorers

Position Routes as 'outdoor playground'

Hyrwyddo Llwybrau fel 'man chwarae awyr agored

Fforwyr golygfeydd

Scenic explorers

Prefer to travel independently, key target group

Ffaffio teithio'n annibynnol, grŵp targed allweddol

Fforwyr teuluol

Family explorers

Ensure a diverse range of experiences and activities

Sicrhau amrywiaeth eang o brofiadau a gweithgareddau

Fforwyr diwylliannol

Cultural explorers

Build a story, develop historic trails

Adeiladu stori, datblygu llwybrau hanesyddol

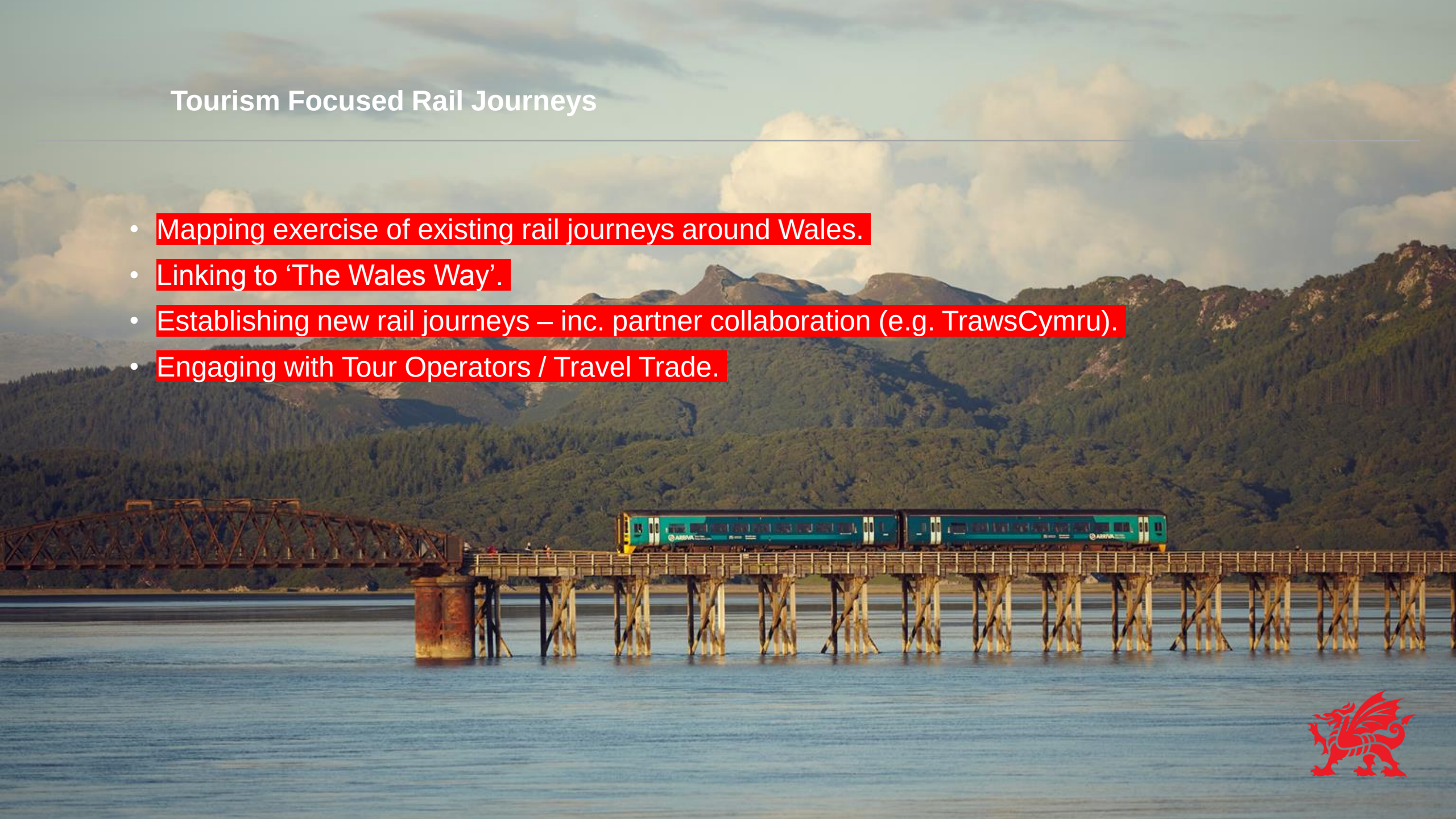
The Wales Way

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Tourism Focused Rail Journeys

- Mapping exercise of existing rail journeys around Wales.
- Linking to 'The Wales Way'.
- Establishing new rail journeys – inc. partner collaboration (e.g. TrawsCymru).
- Engaging with Tour Operators / Travel Trade.



Heart of Wales





The Heart of Wales Line

THE HEART OF WALES LINE

From transporting freight in the early days and soldiers in WW1, the Heart of Wales Line has stories to tell across generations.

The railway line was built to transport coal and other freight from the Welsh valleys up north to the burgeoning factories of the industrial revolution.

It was one of the few rural lines to survive Beeching's Axe and has gone on to become both tourist attraction and rural lifeline.

Also known as the Central Wales Line, a ride along the Heart of Wales Line is both spectacular journey and a chance for people to travel along one of the few authentic rural lines left in the UK.





Celebrating 150 Years The Heart of Wales Line

This year we took an exhibition about the Heart of Wales Line on tour



Celebrating 150 Years The Heart of Wales Line



We have built a transportable building at Llandeilo Station. The building is being used as a collection and distribution point for a local food hub run by Black Mountain Food.



And we have built a long distance walking trail.



The final section of our long distance walking trail opens in March next year

The trail is not just about being healthy

Its not just about active travel

Its not just about tourism

Its part of our vision for a rural railway



We want to actively link rail to local amenities, to encourage walkers to try local produce & stay at local B&Bs, to camp at local campsites and enjoy a local pint. We champion our region, our communities, our farmers and SMEs.





Find out more on our website

www.heart-of-wales.co.uk

So let our journey begin...