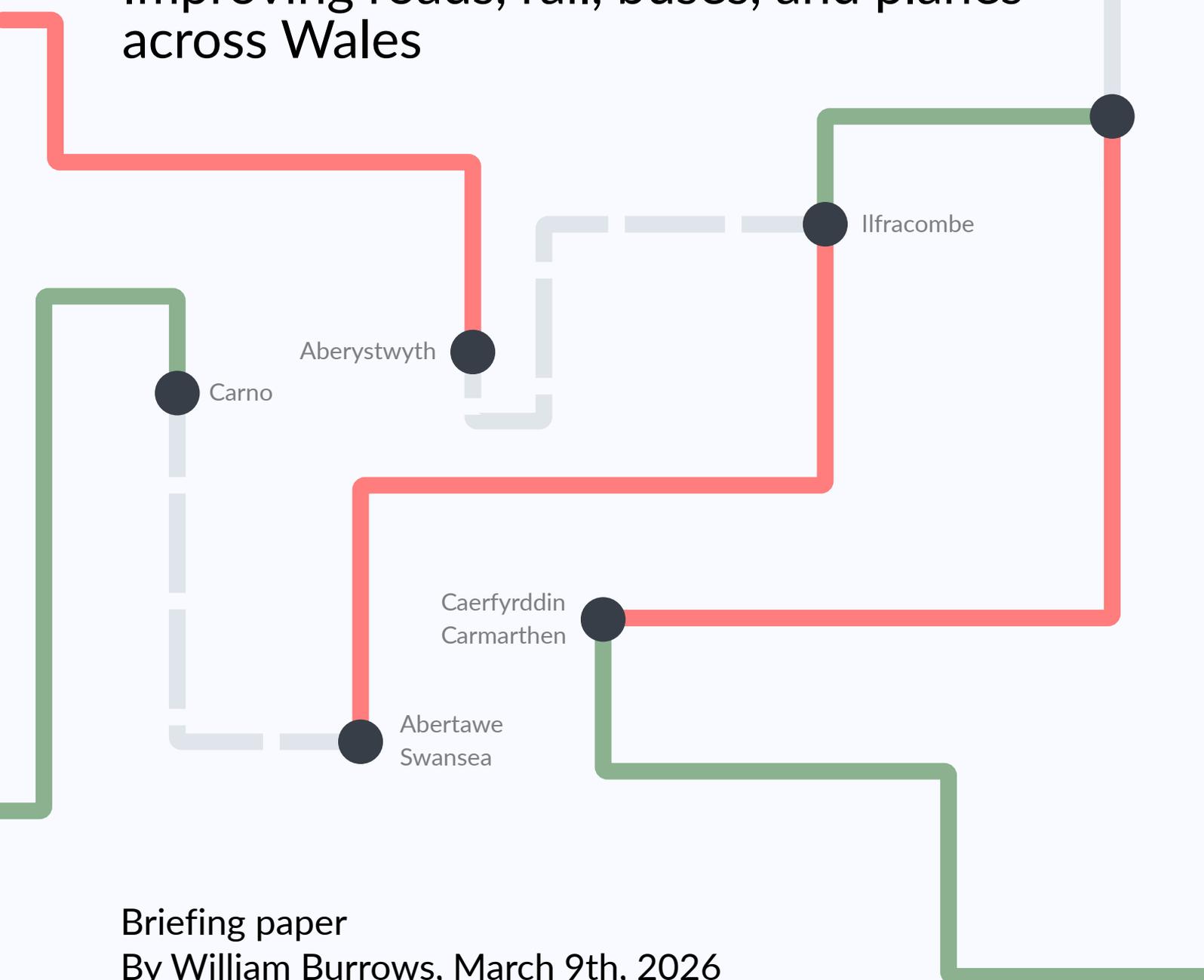


# Getting Wales back on track

Improving roads, rail, buses, and planes across Wales



Briefing paper

By William Burrows, March 9th, 2026

# Contents

■ Cover page	01
■ Contents	02
■ Writers	03
■ About Centre	04
■ Foreword	05
■ Summary	06
■ Introduction	07
■ Roads and bridges	08
■ Bus services	13
■ Ferry routes	22
■ Funding	24
■ Recommendations	26
■ Conclusion	29
■ Bibliography	30
■ Company details	33
■ Back cover	35

## Author



### **William Burrows**

*Economy Spokesperson*

William is studying for a PhD at Leeds University within the School of Earth and Environment, with the Institute for Transport Studies and the Infuze Project. He also holds a master's in Economics from Swansea University and a degree in Economics from Aberystwyth University.

## Editor



### **Madeline Thorp**

*Deputy Director (Internal)*

Madeline was previously a Political Researcher at the Animal Think Tank, and she has a degree in Economics, Politics, and International Relations from Lancaster University.

## About Centre

We are an independent non-profit foundation and cross-party think tank. Our mission is to rebuild the centre ground and to create a more centrist and moderate politics. We support better public services and a strong economy inspired by policies from the Nordic countries.

To achieve these goals, we work with people from across the UK and party politics. This includes engaging with politicians and our networks, which include academia, politics, and law.

Our work includes creating new conversations by hosting events and conducting interviews. We also produce new policy ideas to better inform debate, publish papers, and release articles. We aim to build consensus, shape public opinion, and work with policymakers to change policy.

Published by

**Centre**

## Foreword from Lord Jones of Penybont

In the pre-devolution years, investment in transport in Wales consisted mainly of road-building schemes. Apart from the reopening of the Llynfi Valley and City Lines in the 1980s, rail closures saw the loss of important lines such as Aberystwyth-Carmarthen and Ruabon-Barmouth. Communities continued to lose bus services as the impact of privatisation was felt.

During my time in the Welsh Government, we reopened the Vale of Glamorgan and Ebbw Valley lines and purchased Cardiff Airport. Work is also ongoing, through the Bus Bill, to introduce a far more integrated and sustainable service across the country.

There is always more to do, however, and that is why this paper is so important. It identifies further investment in the road network and makes suggestions as to how public transport could be improved. Alone among the UK nations, Wales has no power to direct Network Rail, and this has led to historically low investment in the Welsh rail network. The development of the South Wales Metro offers one way around that obstacle and can be a model for the rest of Wales. The holistic approach it takes towards public transport means that it also offers suggestions for bus and air transport across Wales.

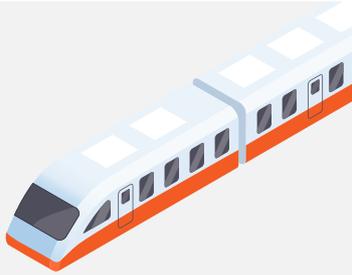
The paper makes a timely contribution to the debate around the future of transport in Wales, and I have no doubt it will influence decision-makers as we look at better ways to connect Wales internally and to the rest of Britain.



**Former First Minister of Wales  
and Leader of Welsh Labour**  
from 2009 to 2018, Member of  
the House of Lords and  
Professor of Law at Aberystwyth  
University



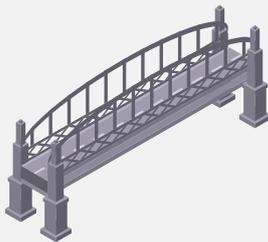
## Summary



The transport system within Wales needs modernisation to better connect different areas of Wales. There is also a large opportunity to connect Wales with Ireland, providing a gateway to other European countries.



Land, sea, and air transport will need to improve with changes to the rail system, bus services, ferry ports, and Cardiff Airport. Together, these changes will improve the flow of traffic across the entire transport network and better connect Wales.



Some changes include building a third Menai Bridge to better link Wales to Ireland, a new rail line to link north and south Wales, a full feasibility plan for the proposed Devon to Abertawe (Swansea) ferry and bus network integration, improvements to the 20 mph speed limit, and improved planning for Maes Awyr Caerdydd (Cardiff Airport).



This is alongside projects with a significant impact. These include a relief road to combat the bottleneck at the Twnelau Bryn-glas (Brynglas tunnels), road-building criteria to take into account congestion, protection of rural bus routes, reopening a station in Carno, and electrification of train lines to Caergybi (Holyhead).



The main challenge faced by so many transport projects would be financing them. Here, we propose UK-wide changes to the formula and the money Wales deserves from HS2 funding.

## Introduction

The Welsh transport system is a collection of Victorian and modern infrastructure. In order of significance, the main modes of transport are roads, trains, and ferries. This paper aims suggest future improvements. The paper splits Wales into three distinct regions: South Wales, Mid Wales, and North Wales. Each of these areas differs greatly in the needs and requirements of the distinctive transport networks. This includes different geographical requirements such as a large range of population densities, with higher density in South Wales and lower density in North Wales.

The major challenge faced by the Welsh transport system is the lack of connectivity between the regions by public transport. The Welsh Affairs Select Committee published a report on tourism and found that Welsh tourism was hampered by poor transport links in combination with other factors<sup>1</sup>. Improving transport links would not only increase tourism but also positively affect other sectors of the economy. Travelling from the capital, Caerdydd (Cardiff), to Mid or North Wales involves several changes of trains, buses, and travelling through England. For economic and cultural reasons, this is not ideal or beneficial for Wales.

Our recent paper, Devolution Revolution<sup>2</sup>, set out the current devolution settlement for Wales on transport issues and found a patchwork of devolution. For instance, within the rail network, the train franchises are decided by the Welsh government, but most of the infrastructure, including railway tracks, is owned by Network Rail<sup>3</sup>. Wales also has some powers over areas such as airports, marine transport, waterway transport, roads, footways, and bridges.

The paper proposed devolution over numerous areas of transport policy:

- The UK Government should hand over full ownership of the rail infrastructure and management of infrastructure to Wales and Scotland.
- Wales should be offered powers over shipping services and roads which begin and end in their nations.
- Westminster should ensure that bus franchising, subsidies, timetabling, and adjacent areas of policy are all devolved to Wales where they do not currently hold these powers.
- Devolution of the Air Passenger Duty to Wales.

Chapter one

# Roads and bridges



The Welsh road network is fairly limited in terms of motorways and has a clear split between the north and south. It only has one major motorway, the M4, with two minor motorways leading from it<sup>4</sup>. This worsens the disparity between North and South Wales as road infrastructure is better in the South, with the North having no motorways.

Meanwhile, the North does have an expressway which links Chester to Holyhead. This is a dual-carriageway but suffers from capacity issues, especially in the summer. For example, the congestion has previously reached a point where the Twnnel Conwy (Conwy tunnel)<sup>5</sup> has to close periodically to stop cars from queuing inside the tunnel. Mid-Wales does not have any major roads due to the mountainous geography, which creates problems when transporting goods, such as timber from the local industry.

## **A more flexible 20 mph speed limit**

The current strategy of the Welsh Government is to reduce car use and encourage the use of other forms of transport. This is to decrease congestion, improve air quality, and reduce pollution created by car usage.

One of the major schemes to achieve this is the reduction of the national speed limit from 30 mph to 20 mph. The 20 mph default speed limit is not a blanket policy for all areas of Wales. In some areas of Wales, such as Ynys Môn (the Isle of Anglesey), Sir y Fflint (Flintshire), Conwy, and Sir Ddinbych (Denbighshire), less than 1% of roads use the 20 mph limit. Sixty per cent of speed limits in Wales are also still 40 mph or above<sup>6</sup>.

This is a controversial scheme, with over 400,000 people signing a petition against it<sup>7</sup>. A major criticism of the scheme is the default 20 mph limit instead of only applying to roads outside of schools, hospitals, and similar areas deemed necessary.

However, there are also safety and environmental reasons which should be taken into account. The safety benefits include the reduced risk of crashing, reduced severity of crashes, a reduction in noise pollution, and lower fuel consumption, all of which were highlighted by Dr Sarah J Jones of Public Health Wales<sup>8</sup>. The scheme also creates a safer environment for both pedestrians and cyclists when they are near or using roads. Overall, the 20 mph limit is a good step, but some elements need to be considered in areas where the scheme has been enforced.

Local councils have the authority to overturn the speed limit if they deem it necessary. However, the Welsh Government can also veto these council decisions if they disagree. For example, during the trial period, the town of Bwcle (Buckley), Sir y Fflint (Flintshire), was one of the areas selected. The local town council and Flintshire County Council did not want certain roads included for various reasons. However, the Welsh Government vetoed their concerns, and only one road was exempted: the A549, which is a dual carriageway and a diversion route for any hold-ups on the A55<sup>9</sup>.

Another consideration is enforcement. Without clear signage<sup>10</sup>, motorists may discard the speed limit or alternatively may mistake a higher speed limit road for a lower speed limit road. The direct result of this is congestion and safety risks created when motorists are driving at varied speeds and overtaking as a result of these speed differences.

In a survey conducted by Beaufort Research for the Welsh Government, only 16% of people had concerns about speeding traffic in their area. This is less than the 35% who had concerns about the poor state of repair of the roads. There appears to be greater support for roads to be repaired than for the speed limit to be lowered<sup>11</sup>.

## A third Menai Bridge

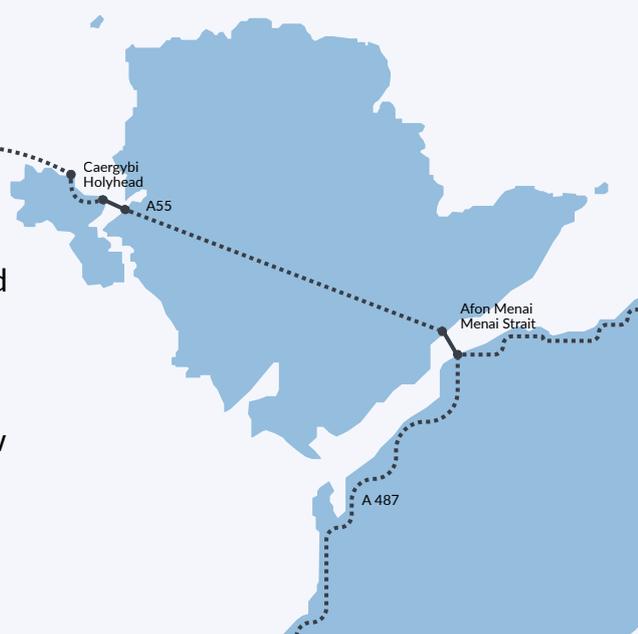
An important scheme is the 3rd bridge over the Menai since the increase in traffic coming to and from Caerdybi (Holyhead) reaches the choke point at the Afon Menai (Menai Strait). Currently, it is crossed by two bridges, one being the Menai Suspension Bridge, which opened in 1826 and is unsuitable for HGVs. The other is the Britannia Bridge, which currently carries the A55 but, at times, needs to be closed due to high winds. This results in large delays on the single-carriage Menai Bridge and leaves no route for some HGVs.

To preserve the 200-year-old Menai Bridge, a 7-tonne weight limit is imposed. This means that in situations of high winds, the island of Ynys Môn (Anglesey) is cut off from the mainland for high-sided vehicles. This situation reached a potentially dangerous point when faults were found on the Menai Bridge, which necessitated the full closure of the bridge to everyone except pedestrians and dismounted cyclists. The bridge was closed from October 2022 to February 2023 during emergency strengthening work<sup>12</sup>.

This resulted in only one of the bridges being operational and the very real risk of trucks being stuck on Anglesey in the case of high winds or thousands of people being stuck in the event of a full closure of the Britannia Bridge<sup>13</sup>. Whilst the bridge has reopened, the 7-tonne limit remains, and the problem of delays is still ongoing.

### Figure 01: The Wales-Ireland Gateway Project

The Wales-Ireland Gateway Project would consist of a third Menai Bridge and improvements to the A55. This would create a link that runs through north Wales, the island of Ynys Môn (Anglesey), the ferry terminal, and onto Ireland. This simplified map includes the Afon Menai (Menai Strait), where the new bridge would be constructed, the A55 crossing, and the ferry terminal at Caerdybi (Holyhead), which links Ynys Môn (Anglesey) to Ireland.



A new bridge would have a large impact on trade, with the wider importance of the bridge as a link between Wales and Ireland. For instance, "...while at first sight this crossing only serves a population of approximately 70,000 residents, it is a critically important link to Ireland from Northern Ireland from the British mainland"<sup>14</sup>. The trade between Wales and Ireland is facilitated through the links between mainland Wales and Anglesey.

It would also create savings for the taxpayer as the port at Caergybi (Holyhead) will be less impacted by delays. It would also improve connectivity from Ynys Môn (Anglesey) to the mainland while preserving the Grade 1 listed Porthaethwy (Menai Bridge). Due to better building standards, the new bridge would be more resilient to higher winds. For example, the Second Severn Bridge has a wind limit of 80 mph<sup>15</sup>.

The Welsh Government's advice paper titled 'Future Road Investment'<sup>16</sup> sets out criteria that all new roads must pass for the Welsh Government to consider their implementation. These criteria are:

- Will the scheme be good for people and communities?
- Will the scheme be good for culture and the Welsh language?
- Will the scheme be good for the environment?
- Is the scheme robust to different futures?

At present, 50 road projects have been cancelled due to these new criteria. This includes the previously mentioned 3rd Porthaethwy (Menai Bridge). This is despite the report acknowledging that in this case, congestion and delays made Ynys Môn (Anglesey) less attractive to investors<sup>17</sup>. The criteria should be updated to account more for projects that reduce congestion and delays for those travelling, particularly for local bypasses.

## **Creating a Brynglas Tunnels relief road**

In South Wales, the M4 Motorway is the vital link between the cities of Abertawe (Swansea), Caerdydd (Cardiff), and Casnewydd (Newport) to South-West England and London. One major choke point is the M4 Twnelau Bryn-glas (Brynglas tunnels). Whilst the opening of the Pont ar Ddyfi (Dyfi Bridge) in Powys has solved one bottleneck for trucks in Wales<sup>18</sup>, the bottleneck at the Twnelau Bryn-glas (Brynglas tunnels) remains.

This kind of bottleneck can cause large levels of disruption. It is estimated that 79,000 cars go through these tunnels every day, which makes them the busiest section of road in Wales and the busiest in the UK outside of the M25<sup>19</sup>. As the M4 is reduced from 3 lanes to 2 lanes for the tunnel section, the traffic that was in these 3 lanes has to filter into 2, which results in this bottleneck.

Plans for a relief road to combat this were cancelled by the Welsh Government due to the climate emergency<sup>20</sup>. The planned cost of this project would have been £1.6 billion, but the CBI estimated that it would provide benefits of £2-3 billion from increased business<sup>21</sup>.

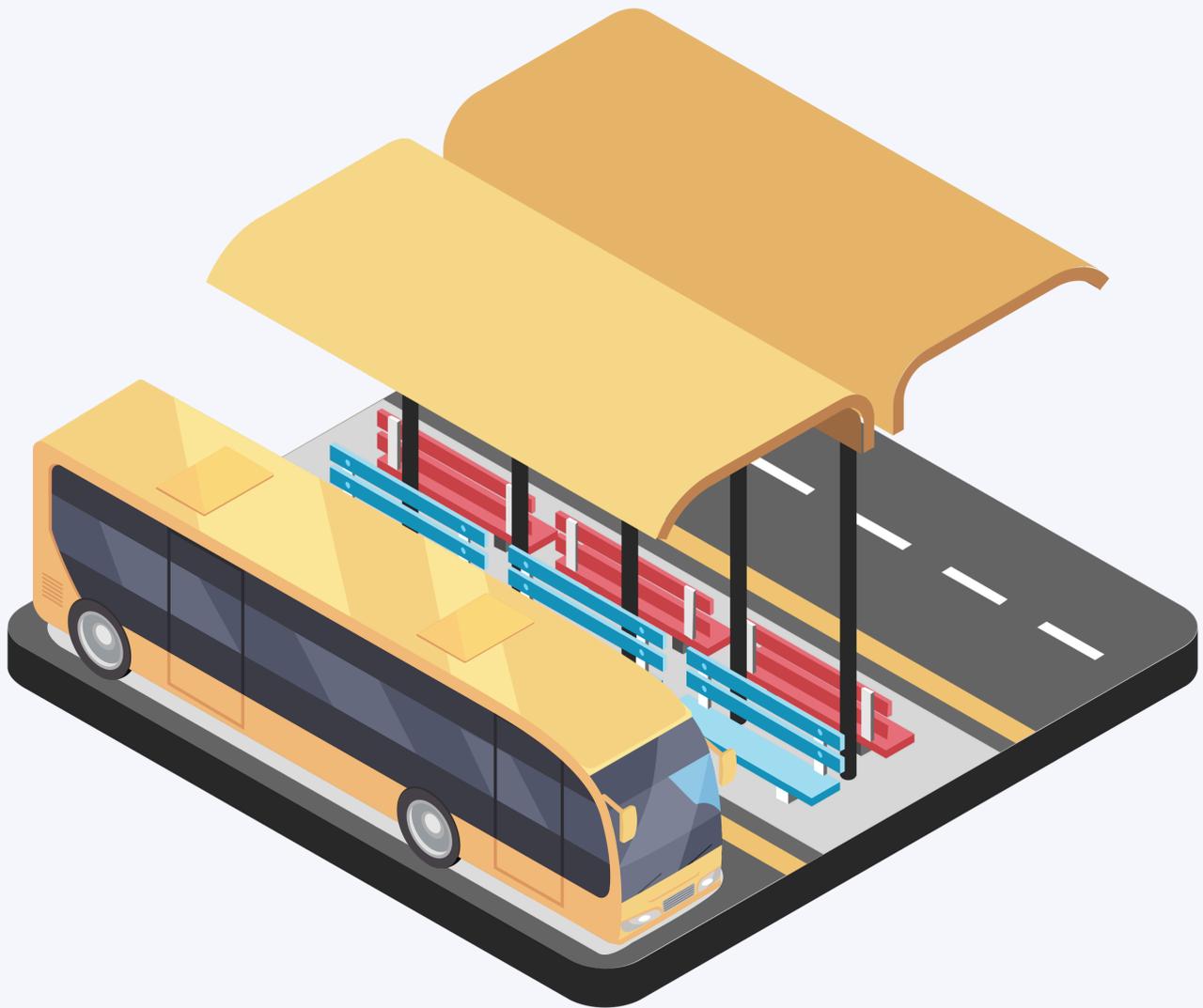
This shows how much of an impact the congestion of the tunnels has on the Welsh economy. The building of this relief road will result in a positive impact on the economy within Wales.

## Policy proposals

- The veto power held by the Welsh Government for councils which do not wish to use the 20 mph speed limit should be limited. Whilst there may be times when the government should be able to veto local councils, this should be limited to situations where safety is a high priority, for example, around schools, hospitals, and playgrounds. There should, however, also be more careful consideration when a veto is used, as councils are often more suited to judge the needs and suitability of the local roads better than the national government.
- Ensuring clear signage for the 20 mph speed limit in all areas where the system is introduced.
- Building a new bridge across the Afon Menai (Menai Strait). Alongside this, improvements should be made to the A55 to provide adequate road access to and from the expansion of the port at Caergybi (Holyhead).
- A new relief road to combat the bottleneck at the Twnelau Bryn-glas (Brynglas tunnels).
- The road-building criteria within Wales need to take greater account of issues such as congestion, where a lack of action will also cause disruption.

Chapter two

# Bus services



To counter the loss of the rail network, which is explored within the next section, Wales has an extensive bus network following the routes of the disused railways. Cross-country services operated by Traws Cymru on behalf of the Welsh Government are cheap and reliable. They link Mid Wales with the North and South and provide a link between North and South Wales as their services are timetabled to connect, making longer journeys possible.

The availability of day passes makes those journeys cheaper in comparison to the train, and for those who qualify for bus passes, these journeys are free. However, this is hindered by road quality<sup>22</sup>, which leads to longer journeys compared to travelling by car and longer indirect journeys to connect with other services.

The bus network in Wales can be split up into local and nationwide systems. The local systems are too numerous to be listed in this paper, whilst the nationwide network is run by Traws Cymru and is numbered T1-T19. These provide valuable routes connecting places where the rail network is missing. They also provide cheap or free routes, as a day ticket costs less than £10 and provides access to unlimited travel in a certain location. On certain routes, the bus connection is also included in the price of a rail journey. This includes the T1 service between Aberystwyth and Caerfyrddin (Carmarthen)<sup>23</sup>.

## **Bus integration**

Due to the climate emergency, the Welsh Government has pushed forward plans to fully integrate the Welsh bus network. This will have several benefits, especially as the buses will be run for the needs of the population, with profit being a secondary objective<sup>24</sup>. The bus service is also of vital importance to Wales. As 80% of Welsh bus users cannot drive<sup>25</sup>, without another form of public transport, they will be cut off unless they use taxis.

Currently, bus companies cannot cross-subsidise bus routes. This means they cannot charge high prices for popular routes to counter the losses they may make on rural or less popular routes. Without regulation, these rural routes may instead be cut.

Local government can currently use the Bus Services Support Grant or their funds to subsidise these services for the benefit of their residents. This usually happens in rural areas and provides villages with links to their local areas. The money provides a lifeline for people who cannot drive<sup>26</sup>. These should be protected, especially when local authorities are losing government funding.

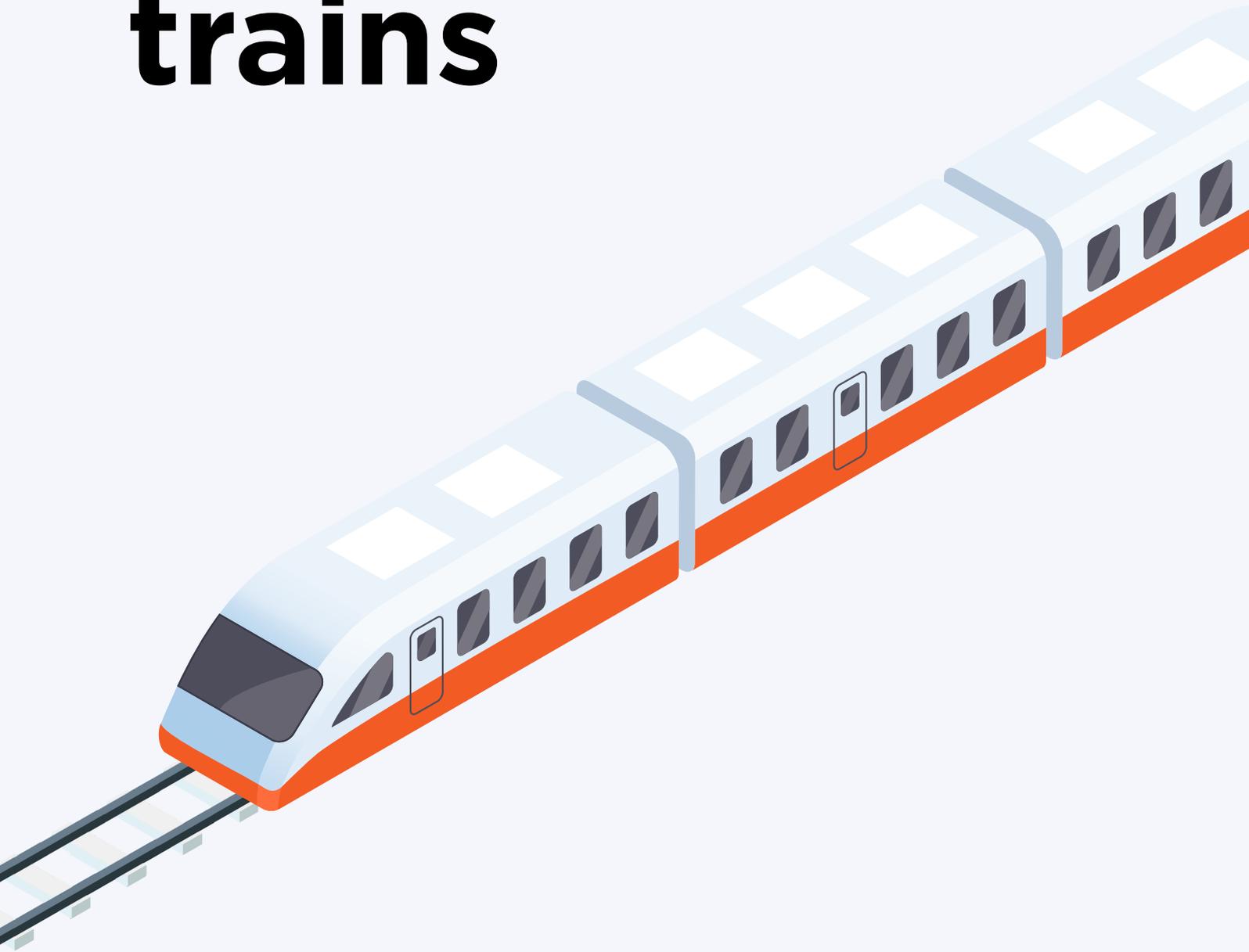
Bus companies should also ensure, where possible, that their services meet up with each other and other modes of public transport. This will result in the plans for a more integrated public transport system being met, as passengers will then be able to make more complicated journeys, which will decrease the use of cars, increase the profitability of bus routes, and therefore avoid cuts to services.

## **Policy proposals**

- Ensure that rural or less profitable bus routes are protected using the Bus Services Support Grant, especially where there is a local need for services.
- Move forward with the plans to fully integrate the Welsh bus network, ensuring the bus system links to other transport systems. Also, move forward with plans to modernise the bus system, including funding the move to zero-emission buses by 2035.

Chapter three

# Railways and trains



Wales used to have a vast network of railways until the 1960s, when the Beeching Axe closed 189 stations<sup>27</sup>. North Wales is now only served by the North Wales Coast Main Line to Caergybi (Holyhead) to link with the ferries. This is alongside the Llinell Dyffryn Conwy (Conwy Valley Line) and the Llinell y Gororau (Borderlands line), which are branch lines from the main line. Mid Wales is only served by the Prif Linell y Cambrian (Cambrian Coast Line) and the Llinell Calon Cymru (Heart of Wales Line).

South Wales has kept a greater proportion of the rail network compared with the rest of Wales, but has also suffered heavily. In recent years, the Welsh Government has tried to counter this decline with the reopening of the Rheilffordd Cwm Ebwy (Ebbw Vale Line) and Gorsaf Bow Street (Bow Street Station). The government has also invested heavily in the South Wales Metro, which is a train and bus network centred around Cardiff and the Valleys. This scheme includes Wales's first tram train between Cardiff Central Station and Cardiff Bay<sup>28</sup>.

## Reopening the Aberystwyth to Carmarthen Line

Some solutions to this loss of vast sections of the Welsh rail network involve reinstating previously closed lines and stations. One of the lines that has recently been proposed for reinstatement is the Aberystwyth to Caerfyrddin (Carmarthen) Railway. As well as linking the aforementioned towns, this would also link Mid and South Wales together.

### Figure 02: A north-south rail line

The new rail line would link north and south Wales. It would consist of a new line between Aberystwyth and Caerfyrddin (Carmarthen) stations and a line linking the north Wales hamlet of Afon-Wen Station and the city of Bangor. The new lines are shown on this simplified map of the proposed lines and stations, with the existing rail line shown in light blue.



This line would travel through the small towns and villages of Sir Aberteifi (Ceredigion) and Northern Sir Gaerfyrddin (Carmarthenshire) and, if built, would provide a quick and easy method of transportation into Cardiff (Caerdydd) and on to London. It would also reduce reliance on car and bus transportation, which is costly and impacts the environment negatively.

The Welsh Government has conducted a feasibility study on this reinstatement, which found that it is not economically viable but would be socially viable<sup>29</sup>. Therefore, the social impact would outweigh the negative economic impacts of the project. The government also built in a £200 million optimism bias, which has increased the cost.

Another report entitled 'A Strategic Rail Corridor for West Wales' came two years after the Welsh Government published a feasibility study. This report cited no major obstacles to reopening and stated that the new railway would cost approximately £775 million. The report also analysed the Welsh Government's report and found that the population figures upon which the report was based were conservative and that the number of potential rail users is likely to be considerably higher, according to the West Wales Rail Campaign<sup>30</sup>. This results in the economic case for the line being better than originally estimated. This, alongside connecting with bus routes, such as Aberaeron to Llanbedr Pont Steffan (Lampeter), would allow the wider populations of Sir Aberteifi (Ceredigion) and Sir Gaerfyrddin (Carmarthenshire) to access the new railway and, as such, would create more demand.

## **Reopening Carno Station**

A smaller project that could be achieved in a shorter timescale is Carno Station. Carno is a small town in Powys, which is on the Cambrian Line. It used to have a station that was closed in the 1960s, and the site is relatively free for reinstatement.

Not only would a reinstatement allow for Carno to have a rail link to Birmingham and Shrewsbury, but it would also be a passing place for the whole of Llinell y Cambrian or Lein y Cambrian (the Cambrian Line). This would reduce delays for the entire line and allow for another place for trains to pass. It would mean that trains do not need to stop at Talerddig, which is two miles west of Carno, where the current passing place depends on train location.

In the case of delays, it would allow the train to be waiting at a station where passengers could disembark, which is something Talerddig does not allow. It is estimated to cost £7.53 million and would include a car park to enable mixed journeys<sup>31</sup>.

The Prif Linell Gogledd Cymru (North Wales Coast Line) is going to be electrified with the money saved from HS2 after elements of the line were cancelled<sup>32</sup>. This will improve journey times along the North Wales Coast Corridor. For the widest impact, the electrification needs to go all the way to Caergybi (Holyhead). This, combined with a freight terminal at Caergybi (Holyhead), will allow for the movement of freight from the railway to the port. These changes will reduce the number of trucks going to Caergybi (Holyhead), reducing congestion on the A55 and improving air quality. Due to the estimated £22bn in the UK's public finances, it is uncertain if this project will go ahead with the projected cost of £1bn to £1.5bn<sup>33</sup>. This project must go ahead due to both the efficiency savings and the environmental savings that come with electric trains compared to the current diesel trains. It would also promote the wider use of electric freight trains if coupled with the freight terminal at Caergybi (Holyhead).

## **Policy proposals**

- Move towards the reinstatement of the Aberystwyth to Caerfyrddin (Carmarthen) Railway line.
- Reopening the Carno Station to reduce congestion and delays.
- Move towards electrification of train lines across Wales, including on the line to Caergybi (Holyhead) and west of Caerdydd (Cardiff).
- The Prime Minister should also uphold the promise to electrify the North Wales mainline

## Chapter four

# Cardiff Airport



Maes Awyr Caerdydd (Cardiff Airport) is the only international airport in Wales. The airport is owned by the Welsh Government, which aims to grow the airport to increase profitability whilst also providing economic and social benefits to the rest of Wales<sup>34</sup>.

Contrary to the government's aims, the growth of Maes Awyr Caerdydd (Cardiff Airport) has been continuously declining, with Wizz Air being the latest airline to announce that it will end all flights from the airport. The withdrawal has resulted in Caerdydd (Cardiff Airport) losing eight services<sup>35</sup>. This has been a major contribution to the airport's passenger numbers being down 44% on pre-pandemic services. In comparison to only a 5% decline for rival Bristol Airport, this decline is a clear concern for the Welsh transport system.

The Welsh Government is directly responsible for the airport's success. As a solution, discussions may be needed on the future of the airport and whether a sale out of public hands would be beneficial.

According to the Public Accounts and Public Administration Committee meeting on 6th October, the Welsh Government announced that Maes Awyr Caerdydd (Cardiff Airport) should become profitable by March 2029. The Welsh Government will be taking on the losses until then<sup>36</sup>, with the airport losing £3.3 million last year<sup>37</sup>.

As the airport serves only British and European destinations<sup>38</sup>, long-haul destinations would provide an advantage over Bristol, especially if the Cardiff to Doha service resumes as planned.

## **Policy proposals**

- The Senedd should investigate the future of Maes Awyr Caerdydd (Cardiff Airport). The Government should develop a new plan to support the airport as it recovers from the pandemic and the cost-of-living crisis.
- The Welsh Government should create plans for the sale of the airport if the level of financial losses each year becomes unaffordable.

## Chapter five

# Ferry routes



There are several important ferry ports in Wales. These are Penfro (Pembroke) Dock and Abergwaun (Fishguard), which link South Wales with Calafort Ros Láir (Rosslare Harbour) in Ireland. Caergybi (Holyhead) also links North Wales with Baile Átha Cliath (Dublin) in Ireland. It is also the principal port linking North Wales as well as Northern England to Ireland<sup>39</sup>.

Wales is a coastal nation with a large potential for maritime transportation. However, the number of international ports limits this potential.

## Swansea to Devon ferry link

There are currently plans to link Devon with Abertawe (Swansea) by ferry<sup>40</sup>. This would drastically reduce the time it takes to travel from Wales to South-West England, with it being estimated to save three hours. It would further be effective by reducing traffic in the congested area around Bristol and the Casnewydd (Newport) Tunnels.

### Figure 03: Ferry ports

The ferry ports across Wales include the Caergybi (Holyhead) port, which links to Baile Átha Cliath (Dublin), and the Penfro (Pembroke) and Abergwaun (Fishguard) ports, which link to Calafort Ros Láir (Rosslare Harbour). This simplified map also shows the proposed ferry link between Abertawe (Swansea) and Ilfracombe in Devon.



A full business plan needs to be conducted to see if it would be economically viable. The plan involves a hydrogen ferry, which would mean it would fit into the Welsh Government's wider climate plan. As Abertawe (Swansea) has a mothballed Ro-Ro ferry dock in place, the financial outlay should also be minimal.

## Policy proposals

- A full feasibility plan for a new (Abertawe) Swansea to Devon ferry link using hydrogen-powered ferries.

Chapter six

# Funding



The first step to creating a better transport system within Wales is to fix the outdated and broken Barnett Formula. The Welsh Government receives funding through the Barnett Formula, which allocates funding based on the population of Wales and how far a specific area, such as transport, is devolved.

As a result, Wales receives 105% of the spending that England does. This means that for every £100 spent on transport in England, Wales is entitled to £105. The amount Wales receives will eventually rise to 115% to account for historical underfunding through the Barnett Formula<sup>41</sup>.

The move towards a needs-based system was set out within our paper Devolution Revolution<sup>42</sup>. Specifically, the rural nature of North Wales is not taken into account under the current system when the budget is allocated.

With the cancellation of the HS2 project, the Westminster Government has pledged that 'every penny' of the project will be spent on smaller transport projects. As HS2 is an England and Wales-funded project, Wales is entitled to a proportion of this funding.

The Welsh Government will receive funding as a result of this cancellation<sup>43</sup>, where new local projects in England are built. However, as the project is not classed as an England and Wales project, Wales will not receive the full amount it should, which could be up to £2 billion. This paper suggests that the Welsh Government should choose to dedicate a portion of this funding to the transport system for the reasons discussed.

## **Policy proposals**

- The Welsh Government should call on Westminster to fix the Barnett Formula. Any new formula needs to better reflect the needs and specific challenges faced by Wales.
- Using any money saved from HS2 towards Welsh transport projects.



## **Roads**

- The veto power held by the Welsh Government for councils which do not wish to use the 20 mph speed limit should be limited. Whilst there may be times when the government should be able to veto local councils, this should be limited to situations where safety is a high priority, for example, around schools, hospitals, and playgrounds. There should, however, also be more careful consideration when a veto is used, as councils are often more suited to judge the needs and suitability of the local roads better than the national government.
- Ensuring clear signage for the 20 mph speed limit in all areas where the system is introduced.
- Building a new bridge across the Afon Menai (Menai Strait). Alongside this, improvements should be made to the A55 to provide adequate road access to and from the expansion of the port at Caergybi (Holyhead).
- A new relief road to combat the bottleneck at the Twnelau Bryn-glas (Brynglas tunnels).
- The road-building criteria within Wales need to take greater account of issues such as congestion, where a lack of action will also cause disruption.

## **Buses**

- Ensure that rural or less profitable bus routes are protected using the Bus Services Support Grant, especially where there is a local need for services.
- Move forward with the plans to fully integrate the Welsh bus network, ensuring the bus system links to other transport systems. Also, move forward with plans to modernise the bus system, including funding the move to zero-emission buses by 2035.

## **Railways**

- Move towards the reinstatement of the Aberystwyth to Caerfyrddin (Carmarthen) Railway line.
- Reopening the Carno Station to reduce congestion and delays.
- Move towards electrification of train lines across Wales, including on the line to Caergybi (Holyhead) and west of Caerdydd (Cardiff).
- The Prime Minister should also uphold the promise to electrify the North Wales mainline.

## **Airports**

- The Senedd should investigate the future of Maes Awyr Caerdydd (Cardiff Airport). The Government should develop a new plan to support the airport as it recovers from the pandemic and the cost-of-living crisis.
- The Welsh Government should create plans for the sale of the airport if the level of financial losses each year becomes unaffordable.

## **Ferries**

- A full feasibility plan for a new (Abertawe) Swansea to Devon ferry link using hydrogen-powered ferries.

**Funding**

- The Welsh Government should call on Westminster to fix the Barnett Formula. Any new formula needs to better reflect the needs and specific challenges faced by Wales.
- Using any money saved from HS2 towards Welsh transport projects.

## **Conclusion**

This paper has discussed some of the projects that the Welsh Government should prioritise in the next 10-20 years. It proposes a variety of solutions across trains, planes, cars, buses, ferries, and Maes Awyr Caerdydd (Cardiff Airport). The proposed projects are suggestions, and their variety stems from the varied issues of the Welsh transport system.

As has been clarified, there is no quick fix to the issues of the Welsh transport system, with a combination of several projects being necessary to improve the situation. Since the implementation of transport projects does involve trade-offs, it is not expected that the Welsh Government will implement every project.

## Bibliography

- <sup>1</sup> BBC News, Tourism: Wales failing to attract overseas visitors. Available at: <https://www.bbc.co.uk/news/uk-wales-66171190> [Accessed 30 Jun. 2024].
- <sup>2</sup> Centre Think Tank Foundation, Devolution Revolution. Available at: <https://centrethinktank.co.uk/2023/04/devolution-revolution/> [Accessed 30 June 2024].
- <sup>3</sup> Senedd Cymru, The rail system in Wales. Available at: <https://research.senedd.wales/research-articles/the-rail-system-in-wales> [Accessed 30 June 2024].
- <sup>4</sup> Traffic Wales, Road map | Traffic Wales. Available at: <https://traffic.wales/road-traffic-map> [Accessed 30 June 2024].
- <sup>5</sup> North Wales Live, LIVE: A55 closed in one direction after 'serious' crash and 'controls' in place at Conwy Tunnel - North Wales Live. Available at: <https://www.dailypost.co.uk/news/north-wales-news/live-a55-completely-closed-one-28000567> [Accessed 30 June 2024].
- <sup>6</sup> Senedd Cymru, 20mph in Wales: implementation and effectiveness. Available at: <https://research.senedd.wales/research-articles/20mph-in-wales-implementation-and-effectiveness/> [Accessed 30 June 2024].
- <sup>7</sup> BBC News, Wales 20mph limit: Cardiff protest march as petition tops 400k. Available at: <https://www.bbc.co.uk/news/uk-wales-66902150> [Accessed 30 June 2024].
- <sup>8</sup> Public Health Wales, Celebrating the health benefits of the new 20 mph speed limit. Available at: <https://phw.nhs.wales/news/celebrating-the-health-benefits-of-the-new-20-mph-speed-limit/> [Accessed 30 June 2024].
- <sup>9</sup> North Wales Live, Town's 20mph limits branded 'appalling' as Welsh Government defends scheme - North Wales Live. Available at: <https://www.dailypost.co.uk/news/north-wales-news/towns-20mph-limits-branded-appalling-25144074> [Accessed 30 June 2024].
- <sup>10</sup> BBC News, 20mph speed limit enforcement to start in Wales this month. Available at: <https://www.bbc.co.uk/news/uk-wales-67885118> [Accessed 20 February 2024].
- <sup>11</sup> Welsh Government, 20mph public attitudes research, Available at: <https://www.gov.wales/20mph-public-attitudes-research> [Accessed 30 June 2024].
- <sup>12</sup> Welsh Government, THE FUTURE OF ROAD INVESTMENT IN WALES. Available at: <https://www.gov.wales/sites/default/files/publications/2023-02/the-future-road-investment-wales.pdf> [Accessed 30 June 2024].
- <sup>13</sup> BBC News, Menai Bridge closure will have huge impact - MP. Available at: <https://www.bbc.co.uk/news/uk-wales-63370561.amp> [Accessed 30 June 2024].
- <sup>14</sup> BBC News, Menai Bridge closure will have huge impact - MP. Available at: <https://www.bbc.co.uk/news/uk-wales-63370561.amp> [Accessed 30 June 2024].
- <sup>15</sup> National Highways, The Severn Bridges - Highways England. Available at: <https://nationalhighways.co.uk/travel-updates/the-severn-bridges/> [Accessed 30 June 2024].
- <sup>16</sup> Welsh Government, THE FUTURE OF ROAD INVESTMENT IN WALES. Available at: <https://www.gov.wales/sites/default/files/publications/2023-02/the-future-road-investment-wales.pdf> [Accessed 30 June 2024].
- <sup>17</sup> BBC News, Anglesey: Plans to axe new bridge an 'insult' to locals. Available at: <https://www.bbc.co.uk/news/uk-wales-64641837> [Accessed 30 June 2024].

- <sup>18</sup> BBC News, Dyfi bridge: New road opens tackling long diversion. Available at: <https://www.bbc.co.uk/news/uk-wales-68166464> [Accessed 30 June 2024].
- <sup>19</sup> WalesOnline, The story of Newport's famous Brynglas Tunnels. Available at: <https://www.walesonline.co.uk/news/wales-news/brynglas-tunnels-newport-m4-cameras-20124650> [Accessed 30 June 2024].
- <sup>20</sup> BBC News, PM: 'We will unblock the Brynglas tunnels'. Available at: <https://www.bbc.co.uk/news/av/uk-wales-53341819> [Accessed 30 June 2024].
- <sup>21</sup> BBC News, M4 motorway's Brynglas Tunnels is 'foot on windpipe of Welsh economy'. Available at: <https://www.bbc.co.uk/news/uk-wales-south-east-wales-39351713> [Accessed 30 June 2024].
- <sup>22</sup> BBC News, Driving in Wales: Why the north-south road is so slow. Available at: <https://www.bbc.co.uk/news/uk-wales-50086660> [Accessed 30 June 2024].
- <sup>23</sup> Traws Cymru, Fares and Tickets. [online] Traws Cymru. Available at: <https://traws.cymru/en/fares-and-tickets> [Accessed 30 June 2024].
- <sup>24</sup> Welsh Government, One network, one timetable, one ticket, Welsh Government sets out plans to change the way we travel. <https://www.gov.wales/one-network-one-timetable-one-ticket-welsh-government-sets-out-plans-change-way-we-travel> [Accessed 30 June 2024].
- <sup>25</sup> BBC News, Bus shake-up could see one network across Wales. Available at: <https://www.bbc.co.uk/news/uk-wales-politics-60932127> [Accessed 30 June 2024].
- <sup>26</sup> Welsh Government, VOLUNTARY WELSH BUS QUALITY STANDARD. Available at: <https://gov.wales/sites/default/files/publications/2018-01/voluntary-welsh-bus-quality-standard.pdf> [Accessed 30 June 2024].
- <sup>27</sup> BBC News, Fifty years of Beeching's rail cuts. Available at: <https://www.bbc.co.uk/news/uk-wales-21947552> [Accessed 30 June 2024].
- <sup>28</sup> BBC News, Cardiff Bay tramline plan to create links between communities. <https://www.bbc.co.uk/news/uk-wales-57489941> [Accessed 30 June 2024].
- <sup>29</sup> Mott MacDonald, 'Aberystwyth to Carmarthen Rail Reinstatement Feasibility Study' (Pontypridd, Transport for Wales, 2018), p. 1.
- <sup>30</sup> West Wales Rail Campaign Ymgyrch Rheilffordd and Gorllewin Cymru, 'A NEW STRATEGIC RAIL CORRIDOR FOR WEST WALES' (Wales, Traws Link Cymru, 2020), p. 10.
- <sup>31</sup> Senedd Cymru, 'New Station Fund 3 – Decision Response – Technical Note on Carno and Ely Mill' (Cardiff, Senedd Cymru, 2021), p. 7.
- <sup>32</sup> BBC News, HS2 cash to be used to electrify the north Wales mainline. Available at: <https://www.bbc.co.uk/news/uk-wales-66994801> [Accessed 30 June 2024].
- <sup>33</sup> BBC News, Doubts over £1bn plan to electrify north Wales mainline. <https://www.bbc.co.uk/news/articles/c0xx3379dp7o> [Accessed 21 June 2024].
- <sup>34</sup> Welsh Government, Cardiff Airport: our role. Available at: <https://www.gov.wales/cardiff-airport-our-role> [Accessed 30 June 2024].
- <sup>35</sup> ITV News, Wizz Air withdraws all flights and operations from Cardiff Airport. Available at: <https://www.itv.com/news/wales/2023-01-10/wizz-air-withdraws-all-flights-and-operations-from-cardiff-airport> [Accessed 30 June 2024].
- <sup>36</sup> Senedd Cymru, Agenda for Public Accounts and Public Administration Committee on Thursday, 6 October 2022, 09.00. Available at: <https://business.senedd.wales/ielistDocuments.aspx?CId=735&MId=13015&Ver=4> [Accessed 30 June 2024].

<sup>37</sup> Company House, CARDIFF INTERNATIONAL AIRPORT LIMITED filing history - Find and update company information - GOV.UK. Available at: <https://find-and-update.company-information.service.gov.uk/company/02076096/filing-history> [Accessed 30 June 2024].

<sup>38</sup> Welsh Government, Air transport: 2023. Available at: <https://www.gov.wales/air-transport-2023-html> [Accessed 10 March 2025].

<sup>39</sup> Welsh Government, Supporting Welsh ferry ports (5 point plan). Available at: <https://www.gov.wales/supporting-welsh-ferry-ports-5-point-plan-html> [Accessed 30 June 2024].

<sup>40</sup> BBC News, Will there be a Wales-Devon ferry service? Available at: <https://www.bbc.co.uk/news/uk-wales-61435142> [Accessed 30 June 2024].

<sup>41</sup> Institute for Government, *Barnett formula*. Available at: <https://www.instituteforgovernment.org.uk/article/explainer/barnett-formula> [Accessed 30 June 2024].

<sup>42</sup> Centre Think Tank Foundation, Devolution Revolution. Available at: <https://centrethinktank.co.uk/2023/04/devolution-revolution/> [Accessed 30 June 2024].

<sup>43</sup> BBC News, HS2: No court action to seek cash for Wales. Available at: <https://www.bbc.co.uk/news/articles/cw4dglew33qo> [Accessed 30 June 2024].

## **Company details**

Centre is a registered company; our company number is 15477955, our D-U-N-S® Number is 231462215, and we are registered as CENTRE THINK TANK FOUNDATION LIMITED. Registered office address: 82 James Carter Road, Mildenhall, Bury St. Edmunds, Suffolk, England, IP28 7DE.

## **Serial title and volume number**

Centre Think Tank, Vol. 24.

## **Released**

March 9th, 2026

## **ISSN number**

Centre Think Tank ISSN 2634-4696

## **Acknowledgements**

By Prime Minister's Office - <https://www.gov.uk/government/news/pm-to-visit-wales-to-underline-her-strong-personal-support-for-the-union>, OGL 3, <https://commons.wikimedia.org/w/index.php?curid=83644787>

## **Disclaimers**

Any errors or omissions are the responsibility of the author alone.

## **Author Disclosure Statement**

Nothing to disclose.

## Reference this paper

Reference as a Non-Governmental Organisation (NGO):

Centre Think Tank, 'Getting Wales back on track' (Bury St Edmunds, Centre Think Tank, 2026)

Reference the website link: Centre Think Tank, Getting Wales back on track. Available at: <https://centrethinktank.co.uk/2026/03/getting-wales-back-on-track/> [Accessed 00/00/0000].

Reference as a journal article: Burrows, W. 'Getting Wales back on track', Centre Think Tank, 24 (2026) pp. 1-35.

If you indirectly reference or use the ideas from this paper, include a link to the paper and the name of our Think Tank.

## Attribution

This work is shared under Attribution-NonCommercial-NoDerivatives 4.0 International (CC BY-NC-ND 4.0). Whilst you can share this work or any part of it, it must be correctly attributed. Any remixed, transformed, or built-upon versions of this work may not be distributed. It may also not be used for commercial purposes if shared. A simplified version of this licence can be found here: <https://creativecommons.org/licenses/by-nc-nd/4.0/>.

**Centre**