The Australian Bus Industry – What is its future

John King
BusNSW

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John King
BusNSW President

17 June 2017

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Overview

- NSW Industry Metrics
- TfNSW Contracts – O/SMBSC & RRBSC
- School Student Transport Scheme
- Long Distance, Tourist and Charter
- Suppliers
- Accreditation & Bus Safety
- TfNSW Bus Projects
- What's around the corner?

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NSW Metrics

- Accredited Operators = 1,415
- Authorised Drivers = 28,100
- Registered Buses = 13,650
- Metro Contracts = 14
- Outer-metro Contracts = 10
- Metro & Outer-metro Contract Fleet = 4,900
- Rural & Regional Contracts = 656
- Rural & Regional Contract Fleet = 3,000
- School Students using bus = 600,000

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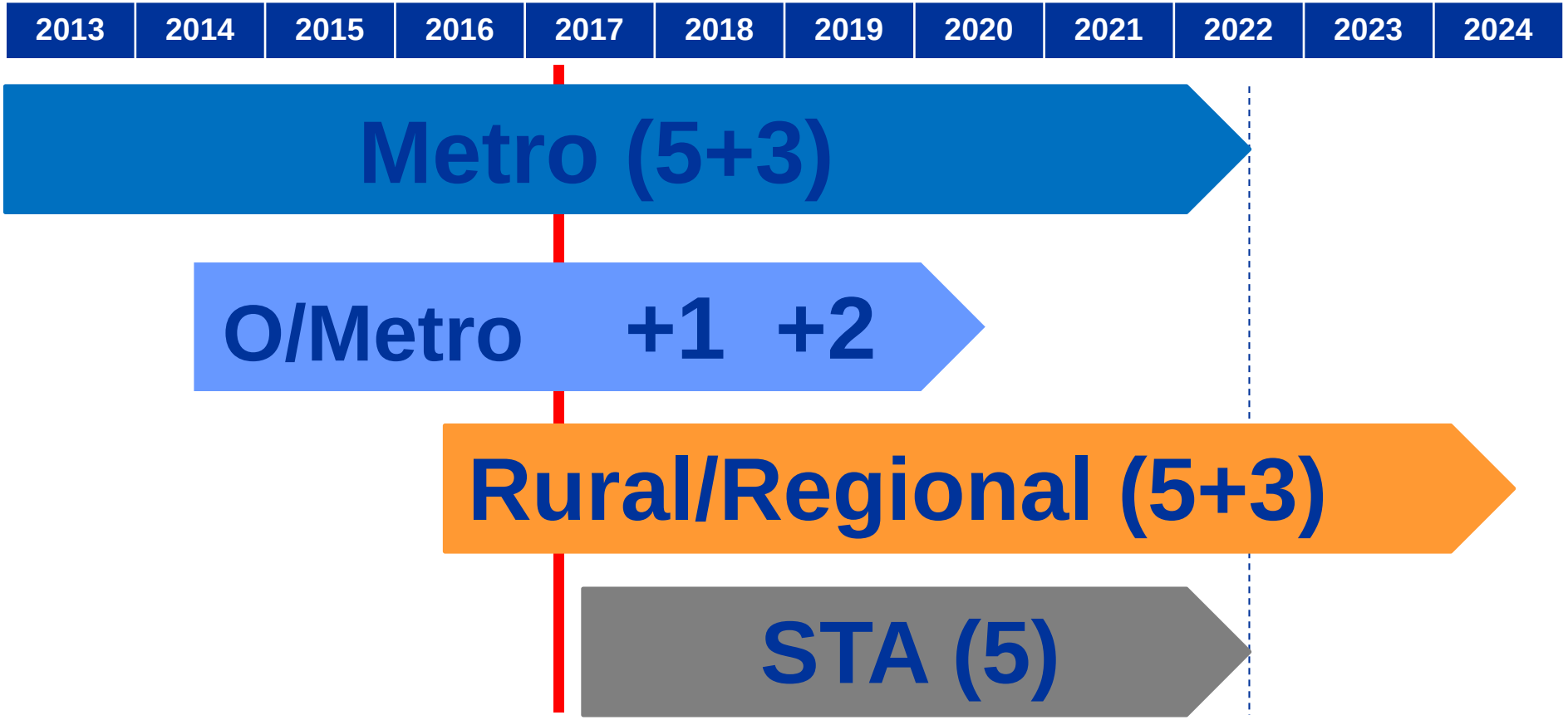
TfNSW Contracts



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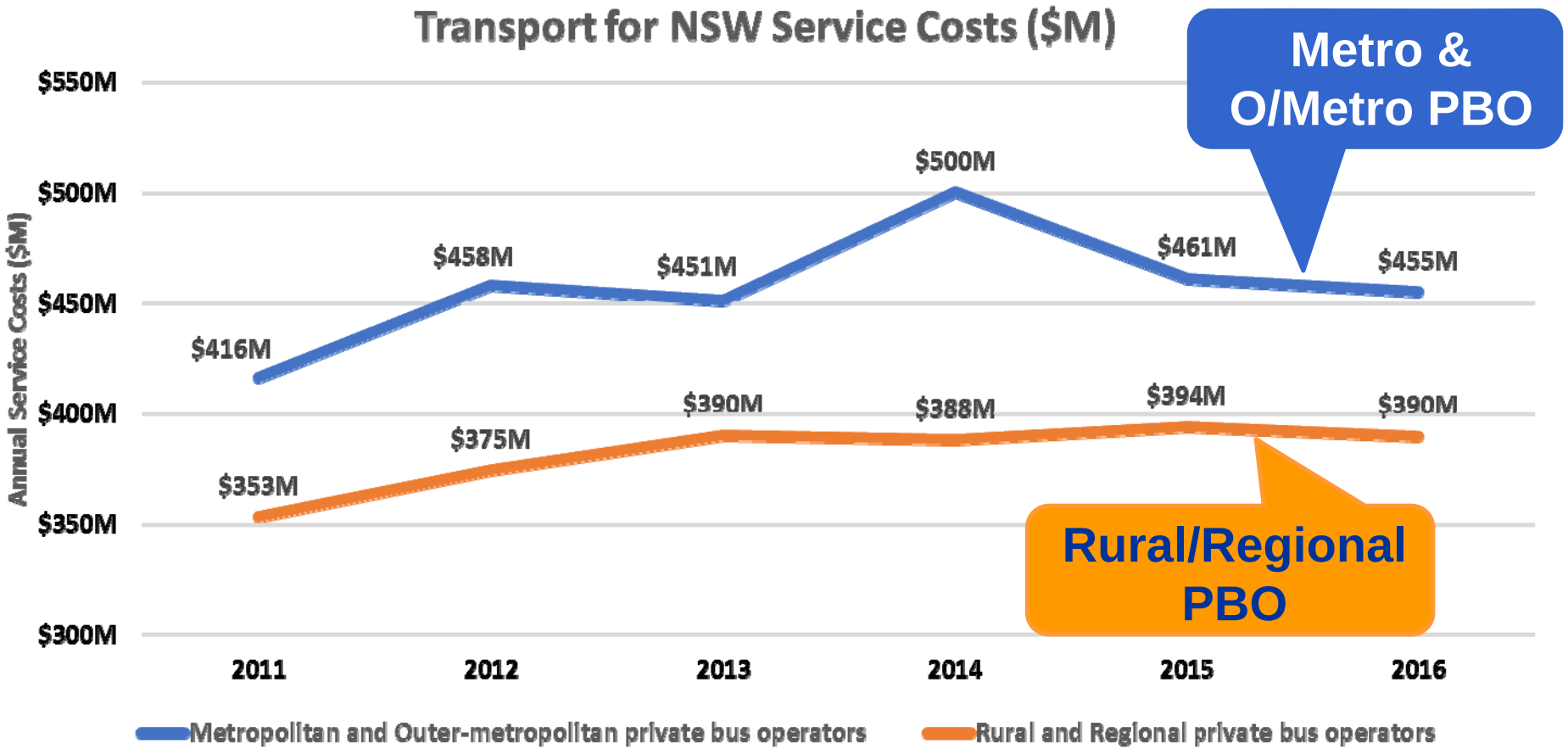

Source: Transport for NSW Annual Reports

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Rural & Regional

- New contracts (approx. 660) commenced April and June 2016
- Taskforce process - contracts tailored to RR environment & operator size
- Payment for agreed services based on industry benchmarks + performance = VFM
- Change from “eligible students” to “actual patronage”
- Fleet replacement & Bus Procurement Panel

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Rural & Regional

- Reporting based on O/SMBSC foundation and size of RR contract (Operational, KPI, Performance)
- Governance Meetings to monitor performance
- Service Planning for regular passenger services – based on needs analysis
  - Social/Economic/Environmental benefits need to be considered

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RR Contracts

Contract Types and Number and Percentage of Operators

Contract type	Number of buses in contracted fleet	Number of contracts by contract type	% of contracts by contract type
Large	More than 40	7	1%
Medium	16 to 40	33	5%
Small	6 to 15	83	13%
Very Small	5 or less	533	81%
Total	**-**	**656**	**100%**

Source: TfNSW.

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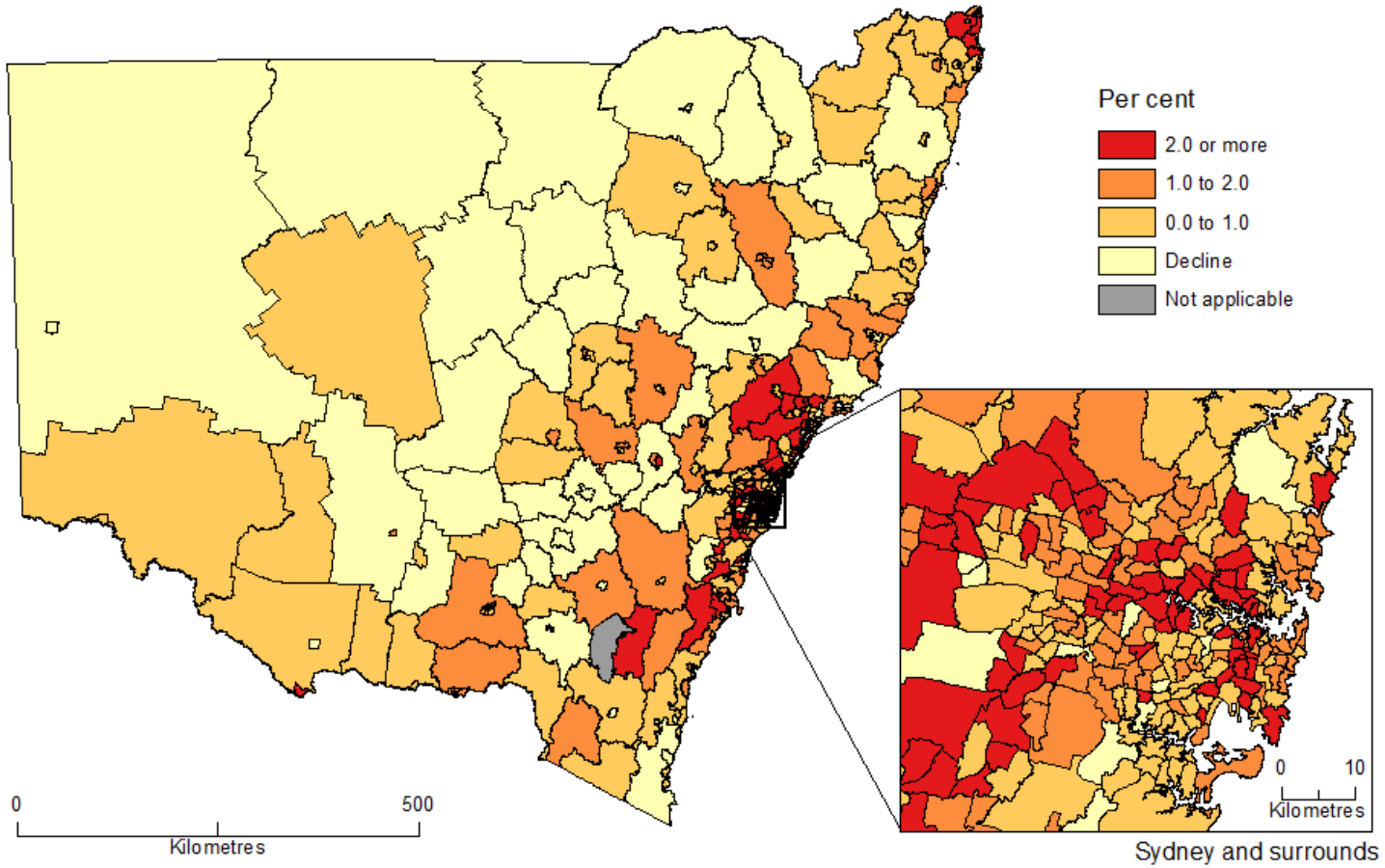
NSW Population Change 2014-15



Source: ABS

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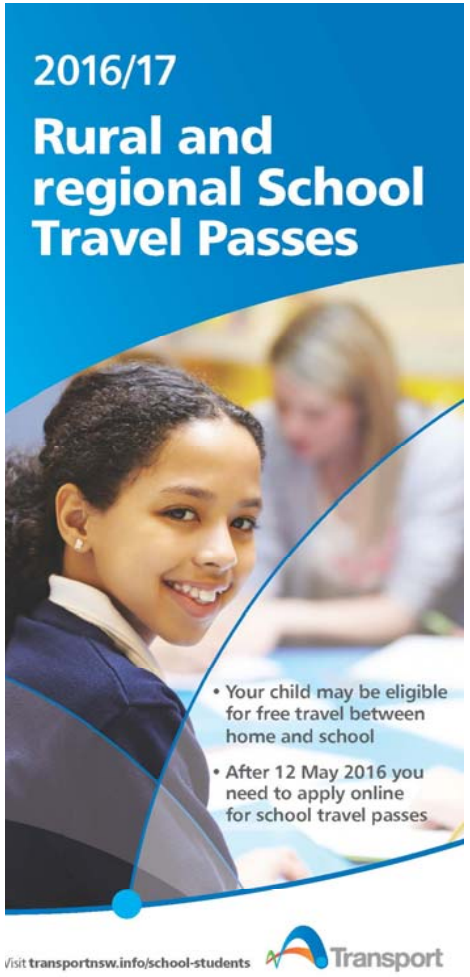
School Student Transport

- Major reform - Online System
- History of operator control over student records
- New customer centric system
- Success requires schools to play their part
- Further development required
- Rural/Regional v Metro



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Long Distance, Tourist & Charter

- Competition and Cost Pressure
- Coach Access and Parking
  - CBD, ICC, Opera House, Lime St
  - Sydney Airport
- Reimagining Central Station
- Tourism
- Regional Destination Networks
- Mass Limits (3 axle)

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Suppliers

- TfNSW Bus Procurement Panel
- TfNSW Initiatives –
  - Fire Suppression & Tyre monitoring
  - RR Seat Belts in School Buses
- Changes to NSW Technical Spec's
- Technology – Safety & New Energy
- Products influenced by O/S markets

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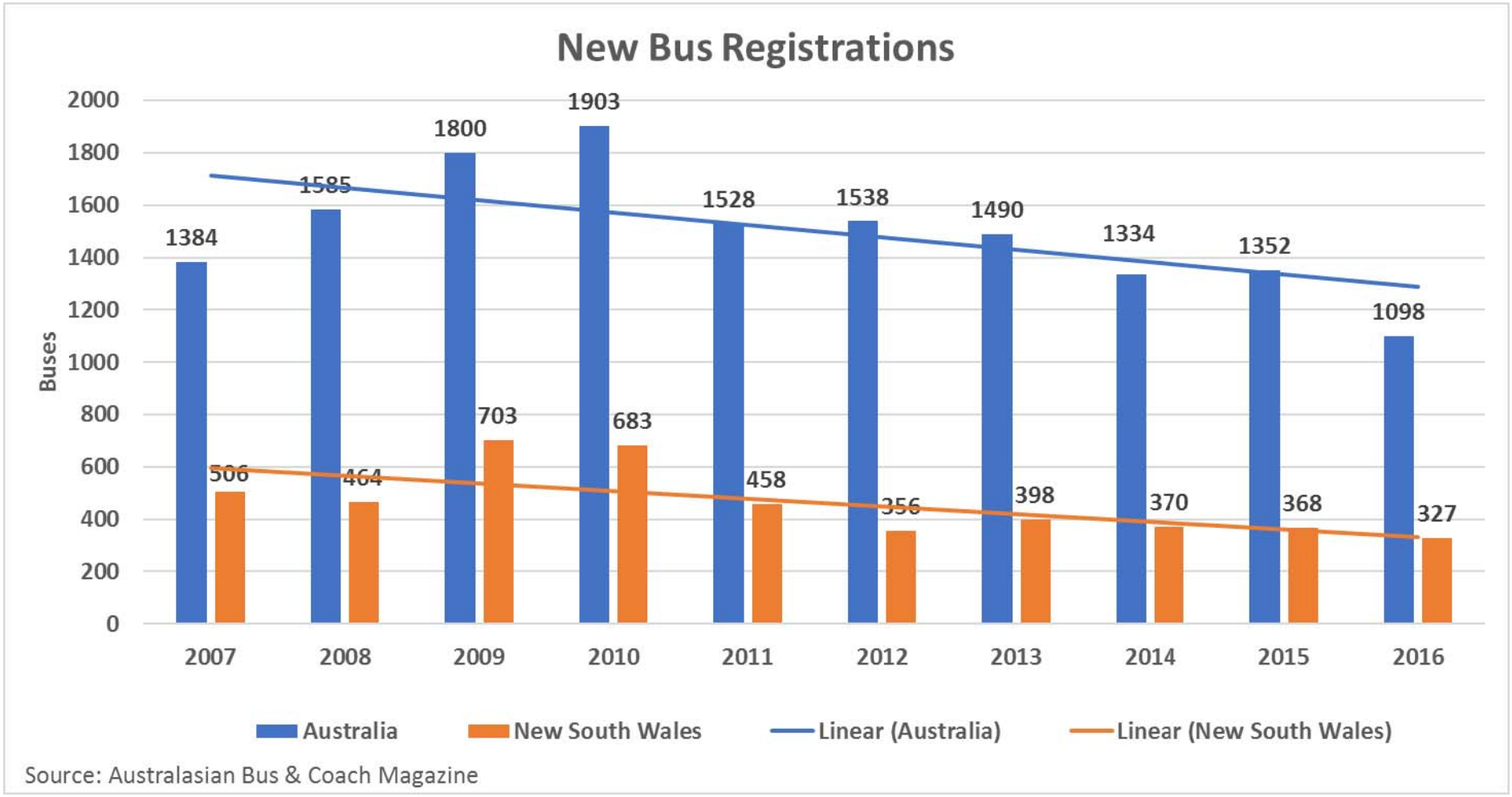

Source: Australasian Bus & Coach Magazine

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Operator Accreditation

- Operators providing public passenger services in NSW must be accredited
- RMS - *responsible for the regulation of passenger bus services in NSW (Accrediting Authority)*
  - Bus Operator Accreditation Scheme (BOAS)
- Also, Heavy Vehicle Inspection Scheme (HVIS)
- Government/Industry Partnership Approach
- Monitor Operator Performance – Education/Training

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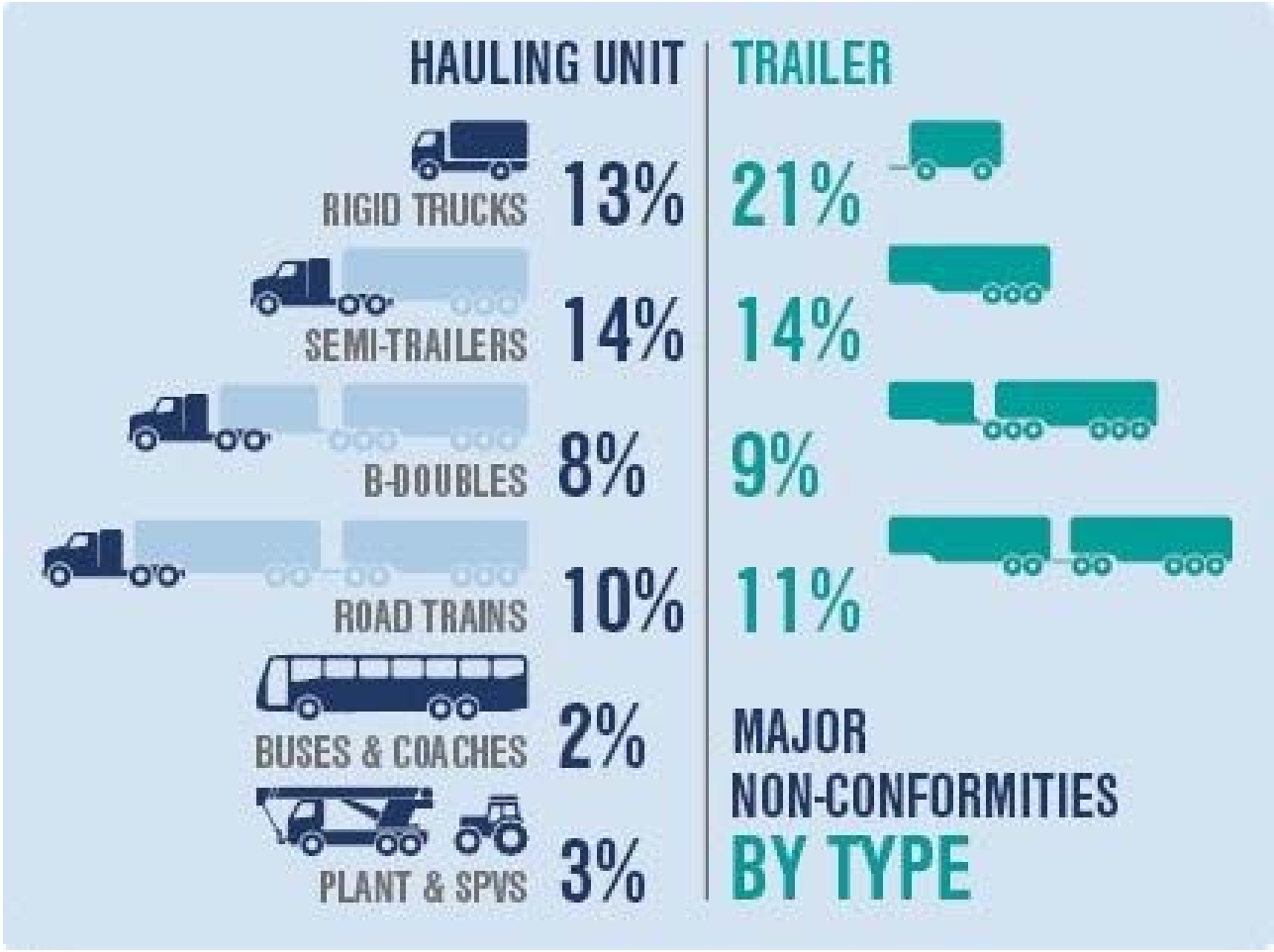
NHVR
Roadworthiness Survey



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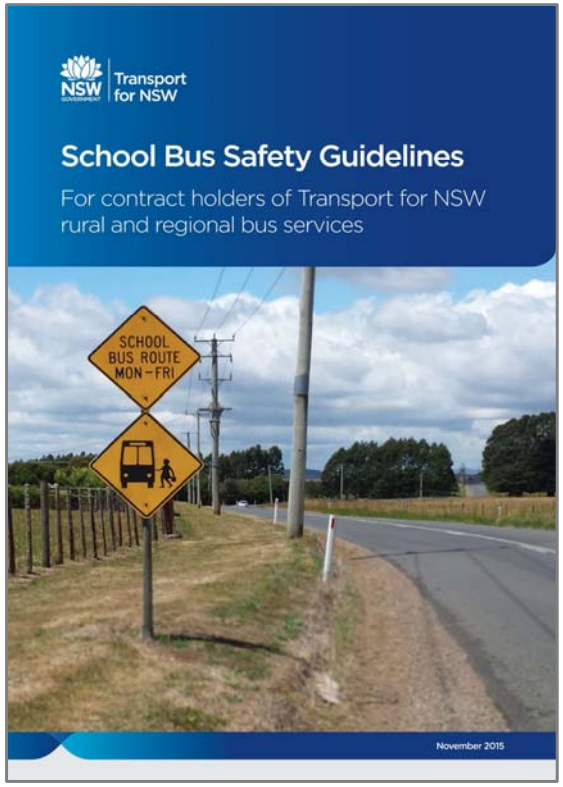
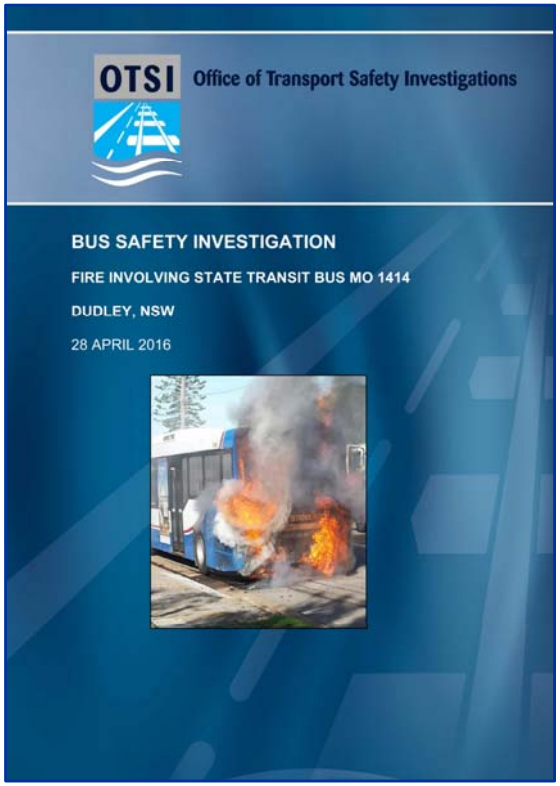
Bus Safety

- #1 Priority





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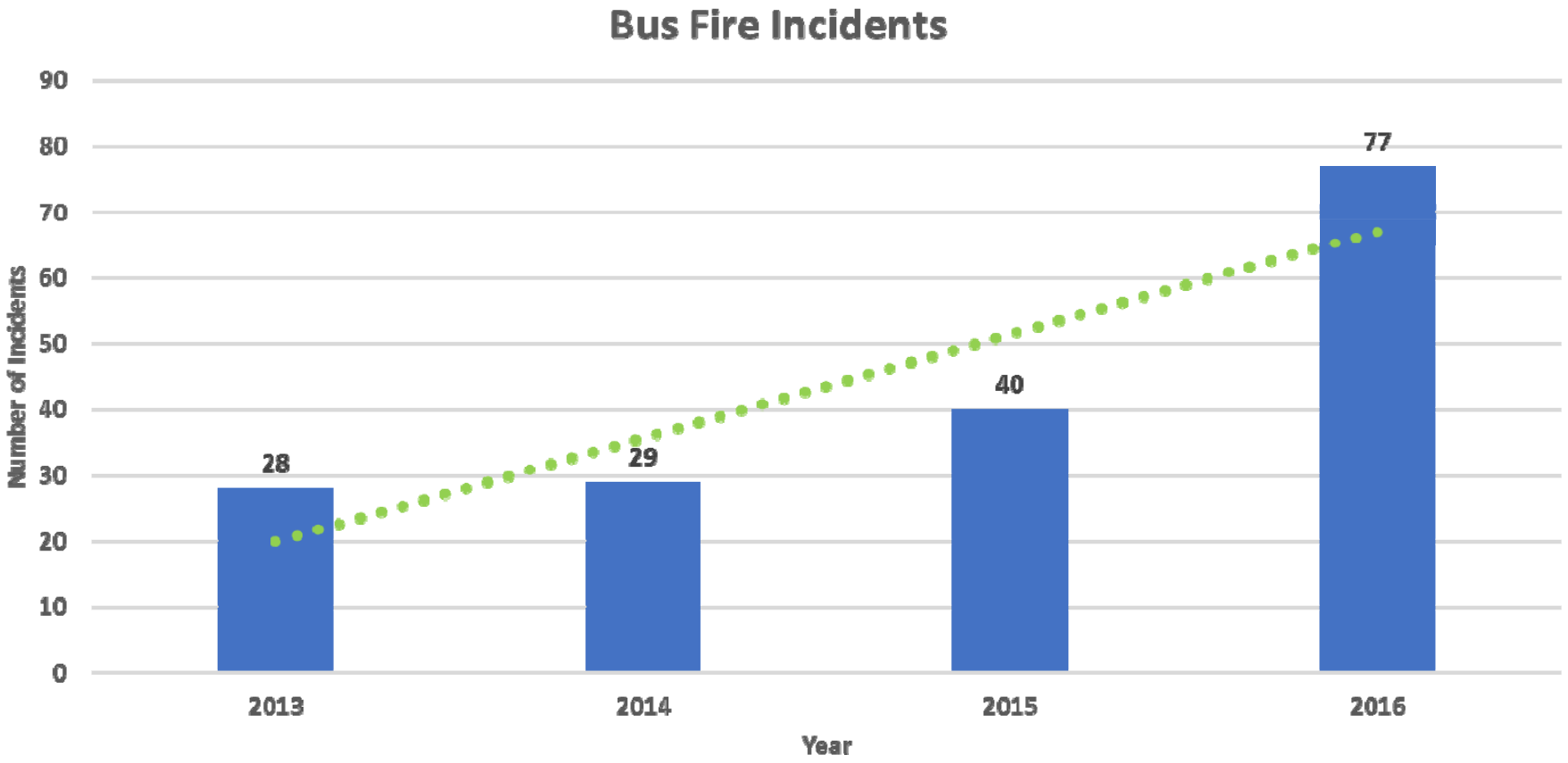
Bus Fires



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TfNSW Bus Projects

- STA Region 6
- Flexible/On-Demand Services
- Northern Beaches B-Line
- Metro: Chatswood – Epping
- Transport for Newcastle
- Point to Point

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Point to Point (PtP)

- 12 Seats or less including driver
- Overlap between the proposed scope of new PtP Regs and current PT Act/Regs
- The nature of industry - buses undertake regular route and tourist/charter work
- BOAS is a more detailed and stringent administration
- Exempt tourist/charter services under BOAS from requiring PtP authorisation

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What's around the corner?

- Opal – Credit/Debit Cards
- Open Data
- New Apps “real time” +++
- Performance data in PD – league tables
- Autonomous Vehicles
- Mobility-as-a-Service (MaaS)

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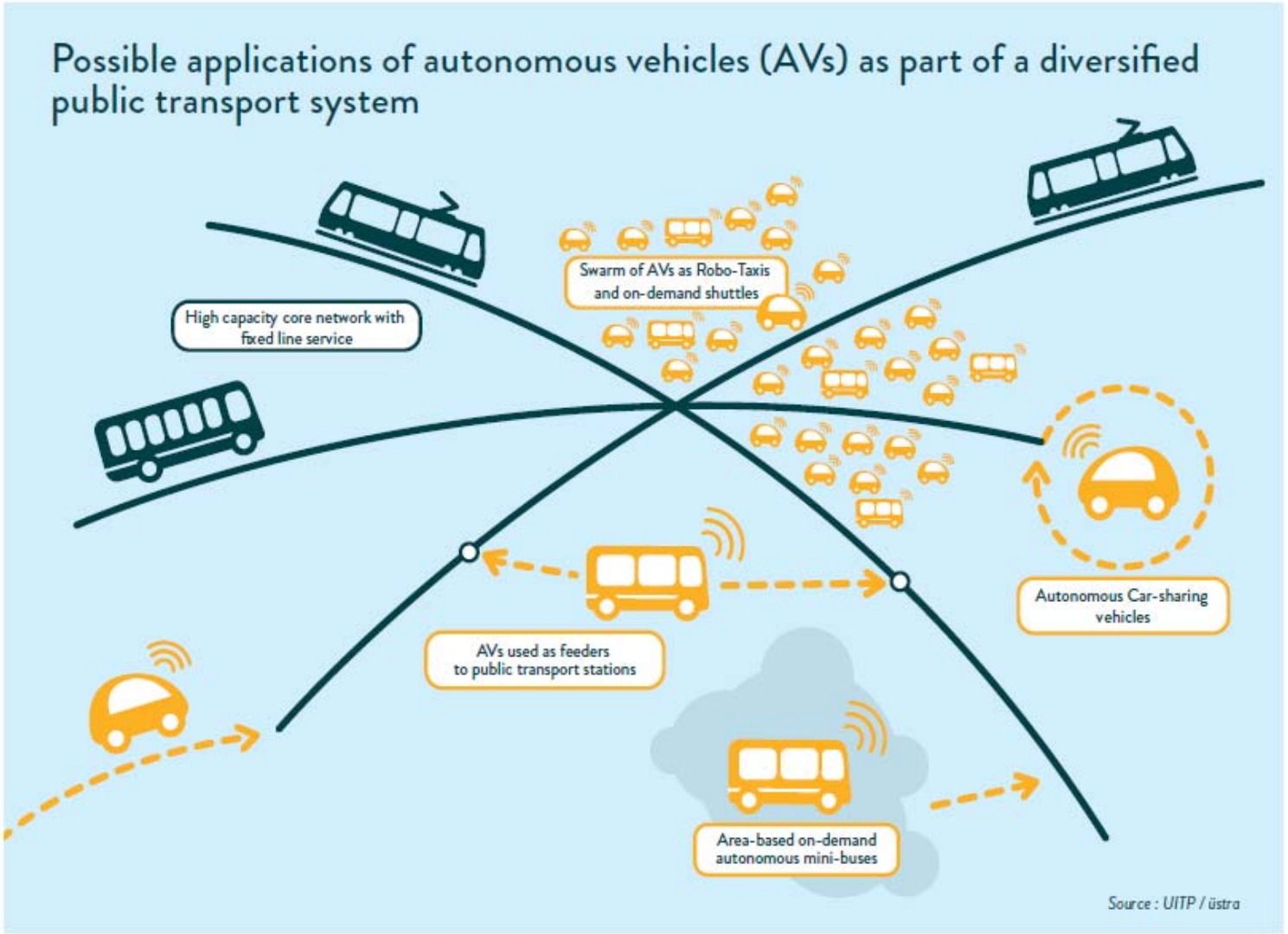
AVs & MaaS



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Autonomous Vehicles

Australia's first driverless shuttle bus is being trialled along the foreshore in South Perth

Northern Territory Government is running a trial of a driverless, electric vehicle at Darwin Waterfront

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Semi-Autonomous Vehicle

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Take Away

- Industry is performing well
- Government Contracts = reporting & performance assessment (Some results in public domain)
- Maintain safety as #1 priority
- Technology is moving fast
- Keep eye on main game – core Bus Networks
- LDTC opportunities - tourism & population growth
- Progress requires Government+Industry Partnership

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Thank You