



# Thredbo 12

International Conference  
Series on Competition  
and Ownership in Land  
Passenger Transport

## CONFERENCE PROGRAMME

11-15 September 2011  
Southern Sun Elangeni  
Durban  
South Africa

**Deloitte.**



Trucks  
Buses



SAHA



transport  
Department  
of Transport  
REPUBLIC OF SOUTH AFRICA



UNIVERSITY  
OF  
JOHANNESBURG

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# WELCOME

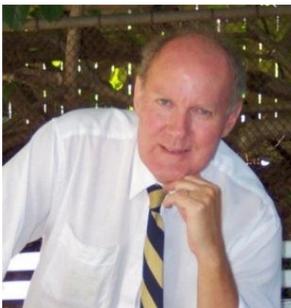
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Dear Delegate,

It gives me great pleasure to welcome you to the 12th International Conference on Competition and Ownership in Land Passenger Transport (Thredbo 12) in Durban, South Africa. This conference is proudly hosted by The Department of Transport and Supply Chain Management at the University of Johannesburg, and the South African Department of Transport. The sponsors are Deloitte, Golden Arrow, MAN Volkswagen Trucks and Buses, Namela, Putco and SAHA.

Since its inception this conference series has established itself as the premier international forum dedicated to the analysis and debate of competition and ownership issues in land passenger transport. It has attracted high quality participation and delivered a large portfolio of impressive material synthesising developments not only from developed nations but increasingly from developing nations. The 2011 conference maintains the currency of the series with a greater emphasis on governance, the public policy agenda, network planning and Bus Rapid Transit, without losing the importance of theme continuity in areas such as contract design and growing patronage.

I would like to express my gratitude for the generous support of our sponsors and for the efforts of the local organising committee, especially Professor Jackie Walters, Fareea Dangor and the International Steering Committee. These people have greatly helped in making this conference, what we hope will be, the most successful in the series so far. I have every confidence you will be stimulated by the activities and discussions at this influential forum over the next few days. I particularly look forward to learning of the outcomes of the workshops. Enjoy the culture and heritage of South Africa and the excellent company!



Professor David Hensher Executive Chair  
and Co-founder of the Thredbo Series

Director, Institute of Transport and Logistics Studies,  
The Business School, The University of Sydney,  
Australia

# WELCOME AGAIN.....

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Dear Delegate,

On behalf of the Thredbo12 Local Organising Committee at the University of Johannesburg and the South African Department of Transport with whom we are co-hosting the conference, we welcome you to Durban for the 12<sup>th</sup> conference in the Thredbo series of conferences. We are delighted that you have enrolled for the conference and trust that you will enjoy our South African hospitality.

In an ever changing world, where public transport is often not appreciated, this conference will be debating many issues of concern to public transport worldwide. With the high price of oil, ever increasing congestion and pollution and rising car dependence, public transport today is even more important than in the past, but needs to be made more attractive, responsive and relevant to attract today's demanding commuters. In this regard, operators, society and authorities need to work together to deliver optimum transportation services. This conference will debate many of these issues and will hopefully provide insight into the many challenges that need to be resolved to improve public transport.

The themes for the respective workshops emanated from the Delft Conference in 2009 and the issues identified in the respective workshop reports. These themes are important in the debate about the future of public transport all around the world. The fact that the conference has attracted a record number of papers is indicative of the importance with which operators, consultants, academics, authorities and other stakeholders view public transport. We appreciate and thank all presenters and authors for the valuable time that they have set aside to develop these papers and their willingness to share their experiences with all of us.

We wish you a productive and exciting conference and trust that you will enjoy your stay in South Africa.



Professor Jackie Walters

Chair of the Local Organising  
Committee

# WELCOME YET AGAIN.....

Dear Delegate

The University of Johannesburg's Faculty of Management welcomes you to the 12<sup>th</sup> Thredbo Conference hosted in Durban, South Africa. We are confident that debate among eminent public transport leaders will lead to the sustainable improvement of our quality of life.

Our Faculty's drive to develop future-fit leadership is realised through partnering as demonstrated by the University of Johannesburg's Institute of Transport and Logistics Studies (ITLS Africa) and the University of Sydney's ITLS. The two institutes have maintained an excellent working relationship over the years with Thredbo 12 one of the milestones. Thredbo 12 indeed strengthens our Faculty's future-fit identity and exemplifies how the University of Johannesburg wishes to realise its vision towards 2020.

ITLS (Africa) resides within the Department of Transport and Supply Chain Management led by Prof Jackie Walters. Their focus areas include commissioned and own research, publications, industry-customised training courses, Master's and Doctoral research and conferencing. The Department houses about 5300 students in flagship under and post graduate programmes in Logistics Management and Transport Economics. Relevance is demonstrated through the 3500 students enrolled in major industry-based training programmes and specialised training for Transnet Freight Rail (TFR), the national rail freight operator. An extension of this programme is currently being negotiated between TFR, Glasgow Caledonian University in Scotland and the Institution of Railway Operators in Britain. In promoting credible research, the Department established the accredited Journal of Transport and Supply Chain Management and also presents a new course-work based Master's degree in Supply Chain Management developed in conjunction with the University of Michigan. In addition, the Department's presence is felt in major aviation research projects. South Africa's public transport industry is a major point of debate in economic development as much-needed investment into this sector competes with other national priorities such as housing, education and health services. I trust that Thredbo 12 will help to contribute to a holistic understanding of how to improve public transport to the benefit of the broader South African society.



Professor Daneel van Lill

Executive Dean: Faculty of  
Management

# GENERAL INFORMATION

## Venue

Southern Sun Elangeni Hotel Durban

## Plenaries & Workshops

First floor Southern Sun Elangeni Hotel

## Conference Registration and Information Desk (1<sup>st</sup> Floor, Southern Sun Elangeni Hotel)

Saturday 10 September

16:00 to 18:00

Sunday 11 September

14:00 to 18:00

Monday 12 September

07:00 to 08:30

(Late registrations)

## Scheduled Bus Service

As a courtesy to delegates and spouses we have arranged a scheduled bus service to the Gateway Shopping Centre, one of the largest of its kind in South Africa. This is a free service and delegates are encouraged to make use of this service for their shopping and leisure purposes. The schedule is as follows:

### Daytime shuttle buses to Gateway Shopping Centre:

Depart Elangeni Hotel .....	09:00
Arrive Gateway Shopping Centre.....	09:30
Depart Gateway Shopping Centre .....	09:45
Arrive Elangeni Hotel .....	10:15
Depart Elangeni Hotel .....	11:00
Arrive Gateway Shopping Centre.....	11:30
Depart Gateway Shopping Centre .....	11:45
Arrive Elangeni Hotel .....	12:15
Depart Elangeni Hotel .....	14:00
Arrive Gateway Shopping Centre.....	14:30
Depart Gateway Shopping Centre .....	16:30
Arrive Elangeni Hotel .....	17:00

## **Evening shuttle bus service to Gateway Shopping Centre and Ushaka Marine World (Tuesday and Wednesday evenings)**

Depart Elangeni Hotel to Ushaka Marine World .....	19:00
Depart Elangeni Hotel to Gateway Shopping Centre .....	19:00
Depart Elangeni Hotel to Ushaka Marine World .....	19:30
Depart Elangeni Hotel to Gateway Shopping Centre .....	19:30

Depart Ushaka Marine World to Elangeni Hotel .....	22:00
Depart Gateway Shopping Centre to Elangeni Hotel .....	22:00
Depart Ushaka Marine World to Elangeni Hotel .....	22:30
Depart Gateway Shopping Centre to Elangeni Hotel .....	22:30

## **Airport Transfers**

Between the King Shaka International Airport and the Southern Sun Elangeni Hotel. Transfers can be booked at the Concierge Desk of the hotel.

1 Person	R375 per transfer
2-5 Persons	R175 per person per transfer
6 + Persons	R110 per person per transfer

## **Lanyards**

All participants will receive a personal identification badge on a lanyard upon registration. Please be so kind as to wear your badge during all conference sessions and social events. A copy of the conference programme is included in the pouch attached to the lanyard. Copies of papers to be presented at the conference (received by the Organising Committee by 16 August 2011) are included on the memory stick attached to the lanyard.

## **Mobile phones**

As a courtesy to our speakers, we kindly request that you switch off your mobile phones before entering conference sessions.

## **Dress code**

Smart casual, no suits or ties are required, even for the social functions.

## **Breakfast**

The cost of breakfast is included in your registration fee. Breakfast is served in the restaurant on the ground floor of the hotel.

## **Lunches, morning and afternoon teas/coffees**

The cost of lunches, morning and afternoon teas/coffees is included in the registration fee. Accompanying persons are not permitted to attend the lunches unless they fund the lunch themselves.

## **Official Dinners**

There are two official dinners, a Gala dinner on Monday evening 12 September and a closing dinner on Thursday 15 September. Accompanying persons are welcome to join the official conference dinners provided they have registered as accompanying persons when delegate registration was undertaken.

## **Free afternoon (Wednesday 14 September)**

No formal conference activities are scheduled for the Wednesday afternoon; delegates have the afternoon at leisure. In addition to the normal tours and scheduled buses to the Gateway Shopping Centre, delegates can also book the following two tours from Ushaka Tours in the hotel:

### **Durban Harbour Cruise**

Price per Person: R295.00

Includes: Transport, Tour guide and Harbour Cruise

Participants depart from the Southern Sun Elangeni at 13:30 and travel to Wilson's Wharf to board the Isle of Capri where we follow the shipping route into the port, observing how big liners navigate the corridor that leads them through the sand banks. We also see the different docking points, cargo loading areas and Durban's famous North Pier, where large cargo vessels exit the harbour through, what with respect to shipping, is a very narrow channel. Return to your hotel at approximately 16:00.

**Should the weather not permit the Harbour cruise, delegates will automatically be transferred to the city tour.**

### **Durban City Tour**

Afternoon: 13:30

Price: R330 per person

Duration: 3 Hours

Participants depart from the Southern Sun Elangeni Hotel at 13:30 and travel along Durban's Golden Mile onto the entrance of Africa's largest working harbour. We then head along the Victoria Embankment to the Victoria Street Market where you can do some shopping for fantastic curios and continue to the Botanical Gardens which are known to have one of the finest orchid houses in the world. A stop at the Moses Mabhida Stadium (excludes funicular) before heading to the Southern Sun Elangeni Hotel where your tour will terminate at about 16:30.

## **Restaurants**

A number of restaurants can be booked/visited on the two free evenings of the conference (Tuesday and Wednesday evenings). Shuttle buses will depart from the hotel to Ushaka Marine World and Gateway Shopping Centre respectively on each evening. Information regarding these shuttle buses can be found under the relevant heading of this programme.

It is important that you indicate which of the two destinations (Ushaka Marine World or Gateway Shopping Centre) you would like to visit. This must be done at the hotel's Concierge desk by 14:00 on the relevant day.

### **Southern Sun Elangeni Hotel Restaurants:**

Lingela Restaurant  
The Jewel of India  
Daruma

### **Ushaka Marine World:**

Upper Deck	031 328 8067
Cargo Hold	031 328 8065
Moyo's	031 332 0606

### **Gateway Shopping Centre:**

Adega	031 566 2757
Dros	031 566 4111
Gateway to India	031 566 5711
Cuba Lounge	083 733 2845

## **First aid/Medical**

**Hospital:**                   **City Hospital**  
Tel: 031 309 4646

**Med Centre:**               **North Beach Emergency Medical Centre**  
Tel: 031 332 6060

**Police:**                      Tel: 10111

***Or Dial 9 within the hotel to be routed to emergency services***

## **General security in the Durban area**

The City of Durban goes to extreme lengths to ensure the safety of its citizens and visitors, especially at the tourist attractions and along the beaches. Visible policing is a feature and crime is discouraged in this way.

Delegates are however advised to take normal security precautions when walking outside the hotel or along the beach front. It is not advisable to walk in these areas after sunset. Where possible walk in groups and do not display expensive jewellery.

When bathing in the sea, do not leave valuables on the beach as this may attract unwanted attention.

We would also not advise you to visit the downtown area of Durban (unless as part of the organised city tour). For this purpose we have arranged shuttle buses throughout the day and evenings to the Gateway Shopping Centre where you can shop in some of the best shops SA has to offer.

## **Malaria Information**

Durban is not located in a malaria area and anti-malaria precautions need not be taken. The game reserve chosen for the one day and post conference safari is also not in a high risk malaria area but delegates that intend to visit the game reserve should take basic precautions by covering arms and legs by the early evenings and by using a suitable anti-mosquito spray/lotion to limit mosquito bites.

Should delegates however want to take malaria precautions, advice can be obtained from any chemist or medical doctor in Durban.

## **Lost and found**

Lost and found items should be handed in at the Thredbo Conference registration desk on the first floor of the Southern Sun Elangeni Hotel, where it will be kept until claimed by the owners.

## **Liability**

The Local Organising Committee cannot accept any responsibility for personal accidents or loss / damage of private property of the participants. Participants are advised to take out insurance as they consider necessary and make use of the hotel safe deposit boxes for valuables.

# BIOGRAPHIES

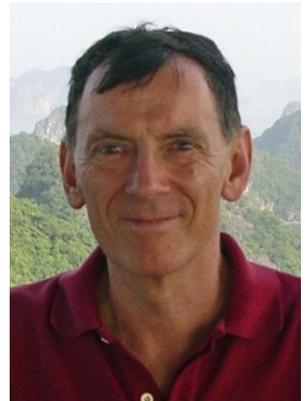
## Professor Sergio R. Jara-Diaz

Sergio R. Jara-Diaz is Professor of Transport Economics at the Civil Engineering Department of Universidad de Chile. He holds Ph.D. and MSc degrees from MIT, where he has taught during various terms. He has contributed extensively in many research areas as transport demand (income effect, value of time, users' benefits), multi output transport cost functions (scale and scope in transport industries), public transport (modelling and pricing) and time allocation. He is the Associate Editor of Transportation Science and teaches frequently in Spain. A recent double grandfather, he resides in Santiago with his wife and runs a weekly radio show.



## Dr David Bray

Dr David Bray has almost forty years of professional experience, most of it as a self-employed consultant. He has worked widely in Australia and in twenty-three other countries. He is currently the Surface Transport Policy Consultant for the Abu Dhabi Department of Transport and maintains an association with the University of South Australia. His work experience has spanned transport policy, planning, operations, finance and institutions, covering both urban and national transport. He has been involved in planning, operation and review of private sector involvement in urban bus and rail systems.



## **Professor Didier van de Velde**

Based at the Delft University of Technology, Didier is expert on institutional reforms in the public transport sector. He published on the various forms of competition and likes to bring structure in these issues. He developed the S-T-O (Strategic-Tactical-Operational) framework for the analysis of public transport organizational forms, which is now widely used in the Thredbo community. He organized the 11<sup>th</sup> Thredbo conference in Delft in 2009. His research interests focus on institutional evolutions and competitive tendering versus the free market. Didier provides advice to transport authorities as part of its consulting activities at inno-V consultancy (Amsterdam). He was involved in the reform of the European legislation pertaining to public service obligations and advised the European Commission.



## **Professor John Nelson**

Professor John Nelson holds the Sixth Century Chair of Transport Studies at the University of Aberdeen in Scotland and is Director of the Centre for Transport Research (CTR). John is particularly interested in the application and evaluation of new technologies to improve public transport as well as the policy frameworks and regulatory regimes necessary to achieve sustainable transport systems. His current projects cover many aspects of mobility management including investigations of internet-based journey planners, flexible transport systems and Bus Rapid Transit. John is the theme leader for Accessibility and Mobility's in the RCUK-funded dot.rural Digital Economy Hub at Aberdeen University.



## Professor John Stanley

John Stanley is an Adjunct Professor at the Institute of Transport and Logistics Studies, University of Sydney. Prior to taking this role, he spent nine years as Executive Director of Bus Association Victoria, after eight years as Deputy Chair of Australia's National Road Transport Commission. He is a Board member of VicUrban, the Victorian Government's urban development authority, and of Victoria's Alpine Resorts Co-ordinating Council. He has been an active participant and workshop chair in many Thredbo conferences and was recently the principal author of the national report, *Moving People: Solutions for a growing Australia*, prepared for Australia's peak public transport organisations. His current research interests include the contribution of transport to reducing social exclusion, transport and climate change and sustainable urban settlement policy. John has been awarded an Australian Centenary Medal for services to public transport and conservation.



## Dr. Janet Stanley

Janet Stanley: Janet is Chief Research Officer, Monash Sustainability Institute, Monash University. Janet presently facilitates research to promote social sustainability in the areas of climate change, water, energy, biodiversity and transport. Janet's current research interests are in relation to social policy, transport, equity and policy on climate change, bushfire arson, social exclusion, social capital and community development, and project evaluation. She was on the Ministerial Advisory Council for Minister Gavin Jennings (past Minister for the Environment, Climate Change and Innovation) in Victoria. Janet has published in many academically reviewed publications as well as speaking widely in Australia and internationally. Books include: Currie, G., Stanley, J., Stanley, J., (eds) (2007) *No Way to Go: Transport and Social Disadvantage in Australian Communities*, Monash e-Press and a forthcoming book, *Social Policy as if the Environment Mattered: The Interface between Social and Environmental Policies*.





## **Professor Juan Carlos Muñoz Abogabir**

Associate Professor at Universidad Católica de Chile, and Director of the Across Latitudes and Cultures Bus Rapid Transit Centre of Excellence ([www.brt.cl](http://www.brt.cl)). Acted as adviser to the Chilean Minister of Transportation, Public Works and Telecommunications on transit issues (2003-2004). Member of the Board of Metro de Valparaíso and adviser of Metro de Santiago's Board President from 2007 to 2010. He was a member of the 12 transit experts group nominated by the Chilean Transport and Telecommunications Minister in 2008 to provide guidelines that could improve Santiago's transit system (Transantiago). He is currently organizing the 12<sup>th</sup> Conference of Advanced Systems for Public Transport ([www.caspt.org](http://www.caspt.org)).



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# COMMITTEES

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## **South African Local Organising Committee:**

### **Professor Jackie Walters (Chair)**

Director, ITLS-Africa and Head, Department of Transport and Supply Chain Management, University of Johannesburg

### **Professor Gerrie Prinsloo**

Deputy Head, Department of Transport and Supply Chain Management, University of Johannesburg

### **Jan-David de Villiers**

Manager, Rail Transport Operations and Chief Director, Public Transport Subsidy Management, Department of Transport

### **Lesiba Manamela**

Director of Bus Operations, Public Transport, Department of Transport

### **Tatenda Mbara**

Department of Transport and Supply Chain Management Department, University of Johannesburg

### **Rose Luke**

ITLS-Africa and Department of Transport and Supply Chain Management, University of Johannesburg

### **Peter Kilbourn**

Department of Transport and Supply Chain Management, University of Johannesburg

### **Gert Heyns**

Department of Transport and Supply Chain Management, University of Johannesburg

### **Fareea Dangor (Secretariat)**

Department of Transport and Supply Chain Management, University of Johannesburg

### **Odette le Roux**

Department of Transport and Supply Chain Management, University of Johannesburg

## **Members of the International Steering Committee**

### **Professor David Hensher**

(Chair) Institute of Transport and Logistics Studies, Sydney, Australia

### **Professor Joaquim de Aragão**

University of Brasília, Brazil

### **Professor Jan Owen Jansson**

Linköping University, Sweden

### **Professor Rosário Macário**

Instituto Superior Técnico, Portugal

### **Professor Juan Carlos Muñoz**

Pontificia Universidad Católica de Chile, Chile

### **Professor Chris Nash**

Institute of Transport Studies, Leeds, UK

### **Professor John Preston**

University of Southampton, UK

### **Professor John Stanley**

Institute of Transport and Logistics Studies, Sydney (ITLS-Sydney), Australia

### **Professor Didier Van de Velde**

Delft University of Technology, The Netherlands

### **Professor Jackie Walters**

Institute of Transport and Logistics Studies, Africa (ITLS-Africa), South Africa



# WORKSHOP PROGRAMME

## DELEGATE REGISTRATION

Southern Sun Elangeni Hotel  
First floor

Saturday 10 September  
16:00 to 18:00

Sunday 11 September  
14:00 to 18:00

Monday 12 September  
07:00 to 08:30  
(Late registrations)



**Thredbo**



## Sunday 11th September

18:00-20:00 Welcome Cocktails  
Pool Deck, Southern Sun Elangeni Hotel

Welcome: Professor Jackie Walters (Conference Director), and Professor David Hensher (Executive Chair of the Conference Series)

## Monday 12th September

\*\*All plenary and workshop sessions will be held on the first floor of the Southern Sun Elangeni Hotel\*\*

### Plenary session

#### Plenary session chair: Professor David Hensher

Co-founder and International Chair of the Thredbo Conference Series, Institute of Transport and Logistics Studies, The University of Sydney Business School, Australia

08:30-08:45 Welcome: Professor David Hensher and Professor Daneel van Lill, Executive Dean, Faculty of Management, University of Johannesburg, South Africa

08:45-09:00 *Opening address:* Jeremy Cronin MP, Deputy Minister of Transport, South Africa

09:00-09:30 *Overview of public transport developments in South Africa.* Professor Jackie Walters, University of Johannesburg, South Africa

09:30-10:00 *Be shrewd as serpents and innocent as doves advice to participants in competitive tenders.* Neil Smith, Transit Systems Australia

10:00-10:30 Question time

10:30-11:00 Morning tea

11:00-11:30 *An overview of passenger transport contracting in Australia and New Zealand.* Robin Barlow, Deloitte Touche Tohmatsu Ltd, Australia (co-author Tim Arbuckle, Deloitte Touche Tohmatsu Ltd, Australia)

11:30-12:00 *Regulated deregulation of local bus services - An appraisal of international developments* Professor Didier van de Velde, Delft University of Technology, The Netherlands (co-author Ian Wallis)

12:00-12:30 Question time

12:30-13:30 Lunch

13:30-14:00 *Evaluating the long term impacts of transport policy: the case of passenger rail privatisation.* Professor John Preston, Transportation Group, University of Southampton (co-author Dawn Robins)

14:00-14:30 *Bus Rapid Transit around the world: Explosive growth, large positive impacts and many issues outstanding.* Dr Dario Hidalgo, EMBARQ: The WRI Center for Sustainable Transport, Washington, USA (co-author Luis Gutierrez)

14:30-15:00 Question time

15:00-15:30      **Workshop rules** Professor David Hensher, Institute of Transport and Logistics Studies, The University of Sydney Business School, Australia

15:30-16:00      Afternoon tea

### **Workshop sessions**

16:00-18:00      Workshop session 1

### **Evening**

19:00-20:00      Pre-dinner drinks

20:00-23:00      Gala Dinner

## **Tuesday 13th September**

### **Workshop sessions**

08:00-10:00      Workshop session 2

10:00-10:30      Morning tea

10:30-12:30      Workshop session 3

12:30-13:30      Lunch

13:30-15:30      Workshop session 4

15:30-16:00      Afternoon tea

16:00-18:00      Workshop session 5

### **Evening free**

## **Wednesday 14th September**

### **Workshop sessions**

08:00-10:00      Workshop session 6

10:00-10:30      Morning tea

10:30-12:30      Workshop session 7

12:30-13:30      Lunch

Afternoon and evening free for delegates (workshop rooms available for workshop chair and rapporteur use).

17:00-18:00      Meeting of the Michael Beesley Award Committee

18:00-19:00      Meeting of the International Steering Committee

19:00-21:00      International Steering Committee and Michael Beesley Award Committee Dinner

**Please note: All meetings from 17:00 to 21:00 will take place in Room 3, First floor of the Southern Sun Elangeni Hotel. Accompanying persons of the committee members are welcome to join the dinner from 19:00.**

**Thursday 15th September**

**Plenary session**

**Plenary session chair: Professor John Stanley**

Adjunct Professor and Bus Industry Confederation Senior Research Fellow in Sustainable Land Transport, Institute of Transport and Logistics Studies, The University of Sydney Business School, Australia

**Workshop 1: Performance measurement and compliance**

08:00-08:15 Report

08:15-08:30 Best paper

08:30-08:45 Question time

**Workshop 2: Bus Rapid Transit (as part of enhanced service provision)**

08:45-09:00 Report

09:00-09:15 Best paper

09:15-09:30 Question time

**Workshop 3A: Governance, contracting, ownership and competition issues in public transport: Lessons that can be learnt from developed and developing economies**

09:30-09:45 Report

09:45-10:00 Best paper

10:00-10:15 Question time

10:15-10:45 Morning tea

**Workshop 3B: Governance, ownership and competition issues in deregulated (free market) public transport: Lessons that can be learnt from developed and developing economies**

10:45-11:00 Report

11:00-11:15 Best paper

11:15-11:30 Question time

**Workshop 4: Designing contracts/concessions: What has worked and what has not and why?**

11:00-11:15 Report

11:15-11:30	Best paper
11:30-11:45	Question time
<b>Workshop 5:</b>	<b>Network and system planning: How best to deliver this under alternate contract regimes in order to grow patronage and service levels</b>
11:45-12:00	Report
12:00-12:15	Best paper
12:15-12:30	Question time
12:30-13:30	Lunch
<b>Workshop 6:</b>	<b>The Public Agenda: What is working and what is missing? (including social inclusion)</b>
13:30-13:45	Report
13:45-14:00	Best paper
14:00-14:15	Question time
14:15-14:45	<b>Plenary paper:</b> <i>Transit coordination in the U.S.: a recent survey of practice.</i> Charles Rivasplata Department of Urban and Regional Planning, San Jose State University, U.S.A. (co-authors: Hiroyuki Iseki, School of Architecture, University of Maryland, U.S.A. and Adam Smith, Department of Urban and Regional Planning, San Jose State University, U.S.A)
14:45-15:00	Question time
15:00-15:30	Afternoon tea
15:30-17:00	<b>Panel discussion:</b> Do we really know what performance means in performance-based contracts?

**Panel Chair: Professor David Hensher**

**Panellists:**

**Brendan Finn**, European Transport and Telematics Systems Ltd, Ireland

**Professor David Hensher**, Institute of Transport and Logistics Studies, The University of Sydney Business School, Australia

**Mathabatha Mokonyama**, Deputy Director General, Public Transport Branch, Department of Transport, South Africa

**Neil Smith**, Transit Systems Australia

17:00-17:15 Conference closure

**Evening**

19:00-20:00 Pre-dinner drinks

20:00-23:30 Closing dinner

Announcement of the Michael Beesley Award winners: Professor John Preston, University of Southampton, UK.

Vote of thanks and announcement of venues for next two conferences, Professor David Hensher, Institute of Transport and Logistics Studies, The University of Sydney Business School, Australia



## Workshop 1: Performance measurement and compliance

**Chair:** [Professor John D. Nelson](#)

Professor of Transport Studies, Director of the Centre for Transport Research, University of Aberdeen, UK

**Rapporteur:** [Dr Rico Merkert](#)

Lecturer in Air Transport Economics, Cranfield University, UK

### **What are the key challenges associated with public transport performance measurement and compliance with contractual conditions?**

One of the challenges of public transport is the measurement of public transport performance and compliance with contractual conditions. These challenges are the main focus of this workshop. The types of performance measures, incentive and penalty regimes, benchmarking and the associated risks in performance measurement form part of the discussion. Issues that are also to be discussed include items such as public transport sustainability, transparency in decision making, innovation e.g. engineering choices regarding technologies, and the overall benefit of public transport to society. What evidence exists about the wider impacts of transport interventions on macro policy goals? (e.g., the environment, reduction in accident rates, traffic volumes, mode switch etc.); the benefits of integration within the transport system and between transport and related economic sectors?

This leads us to the following questions that we would like to see addressed in papers presented at this Thredbo conference:

### **What performance measurements and obligations should be built into contract/concession agreements? What are the risks? What are the views of operators and authorities about performance and compliance measures?**

A key issue here relates to the data issues surrounding performance measures. Performance measures need to be readily specified with good quality, reliable data. With greater access to management information driven by availability of technology as well as moves towards open data are we seeing a move towards less complex, more transparent performance measures that also improve the clarity of the contracts without sacrificing minimum service level agreements?

**What are the proven incentive and penalty regimes? Why do actual public transport systems differ from original promises? What are the contributing factors?**

These are issues relating to the delivery of transport services. From the experience of transport delivery, can one specify performance indicators for an ideal contract and to what extent do they differ across regions/cultures/regulatory frameworks and modes (can we learn from other sectors such as air services)? Do we know enough about passenger behaviour according to where they live (e.g. urban, regional etc) and their perception of service attributes? What about interface and integrated networks that are fundamental to the transport system as a value chain?

**Do we understand how the engineering choices regarding technologies and operational models relate to the goals set out? What effects do they eventually deliver?**

Do we sufficiently understand the role of technologies in bringing about enhanced performance management and compliance with contractual conditions? How can (new) technologies work best for operators and authorities to bring about greater integration between modes, understanding of customer preferences, generation of relevant management information etc.?

**What are the wider economic benefits of high speed inter-urban rail?**

How can adjacent regions (and regional authorities) work together to maximise wider economic benefits?

**Papers**

**Data / Performance Measurement**

*Benchmarking bus services in Australia*

Keith Boyer (TransLink Transit Authority, Australia), Robin Barlow (Deloitte Touche Tohmatsu, Australia)

*Estimating and evaluating the efficiency of public transport operations*

Johan Holmgren (Linköping University, Sweden)

**Delivery**

*The relationship between bus contract costs, user perceived service quality and performance assessment.* David Hensher (Institute of Transport and Logistics Studies, The University of Sydney Business School, Australia)

*Incorporation of customer satisfaction in public transport contracts*  
Mathetha Mokonyama (Council for Scientific and Industrial Research, South Africa), Christo Venter (Department of Civil Engineering, University of Pretoria, South Africa)

*Regulation, trust and contractual incentives around transport contracts - Is there anything bus operators can learn from public air service contracts?*  
Rico Merkert (Cranfield University, UK), David Hensher (Institute of Transport and Logistics Studies, University of Sydney, Australia)

## **Technologies**

*The impact of compliance measures on the operation of a bus system: the case of Transantiago*  
Pablo Beltran, Antonio Gschwender, Carolina Palma (Public Transport Authority of Santiago, Chile)

## **Regional / Rail**

*Impacts of increased rail infrastructure charges in Sweden*  
Anders Ljungberg (Swedish Transport Administration, Sweden)

*Energy efficiency and environmental requirements in the awarding of regional rail services and rolling stock: the ECORailS project*  
Ferdinando Stanta (Studio Stanta consulting, Italy), Guido Piccoli, Nicola Pascal (ALOT Agenzia della Lombardia Orientale per i Trasporti e la Logistica, Italy)

*Post-project evaluation of travel demand forecasts: The case of new transport system facing a competing railway*  
Nobuhiro Sanko, Takayuki Morikawa, Yoshitaka Nagamatsu (Kobe University, Japan)

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## **Workshop 2: Bus Rapid Transit (as part of enhanced service provision)**

**Chair:** [Professor Juan Carlos Muñoz](#)

Director, Bus Rapid Transit - Across Latitudes and Cultures (BRT-ALC), A Volvo Centre of Excellence for Bus Rapid Transit development, Santiago, Chile; Professor of Transport Engineering and Logistics, Pontificia Universidad Católica de Chile

**Rapporteur:** [Dr Dario Hidalgo](#)

BRTs are fast becoming public transport systems of choice on high density urban corridors in developed and developing countries. These systems are not only relatively easier to implement and more flexible than light rail/tram

systems but are often less expensive to implement and operate. This workshop will therefore focus on the role of BRTs as part of enhanced public transport service provision. Are these systems delivering on expectations of enhanced service provision? When do we consider BRT systems as opposed to conventional public bus systems and other options including light and heavy rail? What are the lessons that we can learn from the design, contracting, implementation, performance measurement and monitoring of BRT systems in developed and developing countries? Are these lessons equally applicable between developed and developing countries?

The workshop is divided into four sections, with similar content, in which special questions are asked and ideas for future research are elicited: case studies in developing and developed countries; improved performance and operations; better contracts and institutional settings; and enhanced policies.

### **Case studies in developing and developed countries**

- What are the success factors, issues and barriers for BRT implementation in different contexts?
- How the experiences can be replicated or adapted to other cities and countries?
- What questions that remain unanswered can be extracted from these experiences?

### **Papers**

*A critical evaluation of bus rapid transit implementation in Beijing* Taotao Deng (Shanghai University of Finance and Economics, China), John D. Nelson (Centre for Transport Research, University of Aberdeen, UK)

*Critical factors for successful implementation of bus rapid transit systems, and Brazil's empirical experience in the field* Heitor Pereira do Nascimento (Tocantins State Technological and Scientific Support Foundation, Brazil), Alvaro Gonzalez Rodriguez (Transportation Engineering Programme, COPPE, Federal University of Rio de Janeiro, Brazil), Julienne Santana de Morais (Goiania's Mass Transportation Metropolitan Company, Brazil), Miguel Angelo Pricinote (National Association of Public Transportation, Brazil), Marcos Fleming Balieiro Alves (San Marino Neobus, Brazil), Joaquim Jose Guilherme de Aragao (University of Brasilia, Brazil)

*The lurch towards formalization: lessons from the implementation of BRT in Johannesburg, South Africa* Christoffel Venter (University of Pretoria, South Africa)

*Hybrid urban public transport systems in developing countries: portents and prospects* Pablo Salazar Ferro, Roger Behrens, Peter Wilkinson (Centre for Transport Studies, University of Cape Town, South Africa)

*TransMilenio BRT system in Bogota, high performance and positive impact – main results of an ex-post evaluation* Dario Hidalgo (EMBARQ, The WRI Center for Sustainable Transport, Colombia), Liliana Pereira (Steer Davies Gleave, Colombia), Nicolas Estupinan (CAF, Latin American Development Bank), Pedro Luis Jimenez (National Planning Department, Colombia)

## **Improved performance and operations**

- How to enhance operational features of BRT, such as capacity and reliability?
- What is needed to apply advanced concepts in BRT operations?

## **Papers**

*Impact of design elements on the capacity and speed of Bus Rapid Transit (BRT): the case of a single lane per direction corridor* Luis Antonio Lindau, Brenda Medeiros Pereira (EMBARQ Brazil, Laboratorio de Sistemas de Transporte, Universidade Federal do Rio Grande do Sul, Brazil), Rodrigo Alberto de Castilhoa (EMBARQ Brazil), Mara Chagas Diógenes (Laboratorio de Sistemas de Transporte, Universidade Federal do Rio Grande do Sul, Brazil), Juan Carlos Herrera (Departamento Ingenieria de Transporte y Logística, Pontificia Universidad Catolica de Chile)

*Designing an express service for a bus corridor in Santiago, Chile* Homero Larrain (Department of Industrial Engineering, Universidad Diego Portales, Chile), Juan Carlos Munoz, Ricardo Giesen (Department of Transport Engineering and Logistics, Pontificia Universidad Catolica de Chile)

*High frequency BRT control strategies: what can we achieve in time savings, reliability and comfort?* Felipe Delgado, Juan Carlos Munoz, Ricardo Giesen (Pontificia Universidad Catolica de Chile)

*Passenger capacity in bus rapid transit systems formula development and application to the Transmilenio system in Bogota, Colombia* Dario Hidalgo (EMBARQ, The WRI Center for Sustainable Transport, USA), German C. Leras, Enrique Hernandez (Steer Davies Gleave, Colombia)

## Better contracts and institutional settings

- Can BRT operations be improved through public participation, adequate institutional settings and enhanced education?
- How to progress an agenda for better service delivery and enabling policies?

*Assessing gaps on training and education for BRT systems* Tiago Veras, Rosario Macario (CESUR, Instituto Superior Tecnico, Lisbon Technical University, Portugal)

*Organisational structures and functions in bus rapid transit, and opportunities for private sector participation* Brendan Finn (ETTS Ltd, Ireland)

*The implementation of BRT programme in South Africa* Pauline Froschauer (Namela, South Africa)

## Enhanced policies

- Key issues in BRT are not necessarily technical, and can be addressed through adequate policies. How does policy affect BRT implementation? Is BRT the new Tram?

## Papers

*A first glimpse on policy packaging for implementation of BRT projects* Luis N. Filipe, Rosario Macario (Instituto Superior Tecnico, Lisbon Technical University, Portugal)

*Can bus really be the new tram?* Paul Hodgson, Stephen Potter, James Warren (Open University, UK), David Gillingwater (Loughborough University, UK)

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## Workshop 3A: Governance, contracting, ownership and competition issues in public transport: Lessons that can be learnt from developed and developing economies

**Chair:** [Professor John Stanley](#)

Adjunct Professor and Bus Industry Confederation Senior Research Fellow in Sustainable Land Transport, Institute of Transport and Logistics Studies, The University of Sydney Business School, Australia

**Rapporteur:** [Dr Andrew Smith](#)

This workshop has been structured around the papers that have been offered and will consider its range of questions in this way. The following notes summarise some of the matters to be included in the discussion, which will take place according to these issues rather than in accord with the detail of specific papers.

**Governance of the system(/contracts)**

- How fully should system outcome goals be specified? (e.g., transport targets, land use, environmental outcomes, social inclusion)
- What purchaser (government)/provider goals are to be expected?
- What forms of purchaser-provider relationship and contractual detail are likely to deliver the most effective outcomes in terms of meeting these goals?
  - In terms of tactical level planning
  - In terms of allocating the rights to provide service
  - In terms of other considerations
- What are the key requirements for improving outcomes at the system level?

**Papers**

*Change in metropolitan rail frameworks – a New Zealand case study* Aidan Smith, Martin Gylmn (Ministry of Transport – Te Manatū Waka, New Zealand)

*Determinants of institutional design in urban mobility systems* Maria Spandou, Rosario Macario (Instituto Superior Tecnico, Lisbon Technical University, Portugal)

*Hybrid steering methods in the governance of public transport a successful way to meet demands* Lisa Hansson (Swedish National Road and Transport Research Institute, Sweden)

*Integrated public transport networks in South Africa: incorporating the informal sector - the Nelson Mandela Bay Model* Paul Browning, Lesiba Mudau (Transport Consulting (Pty) Ltd, South Africa)

*Why has the implementation of the policy on public transport contracting been so slow in South Africa?* Jackie Walters (ITLS Africa, University of Johannesburg, South Africa)

## Governance of projects

- What important differences are there in governance at project level, as compared to the system level? (e.g., can major projects be a stimulus for better land use/transport integration)
- What is the reason for these differences?
- What are the key requirements for successful governance at project level? (e.g., how important is an agreed system development plan)
  - Do major projects create a risk of loss of network control?
  - What qualities should all major projects embody?

## Papers

*Critical factors in financing and management of light rail transit systems in Spain Delphi methodology approach* Julian Sastre Gonzalez, Clara Zamorano Martin (Spain)

*PPP scheme selection for the construction and exploitation of the new intermodal station in Vitoria-Gasteiz (Alava, Bask Country, Spain)* Jaime Salom Gracia, Julian Sastre Gonzalez, Ana Sastre Lopez (Spain)

*Responses to regulatory reform in the paratransit sector: Results of empirical interviews with operators in Cape Town* Herrie Schalekamp, Roger Behrens (University of Cape Town, South Africa)

## Impacts of rail competition

- Has competition reduced costs?
- Has it improved service quality?
- Has private sector involvement in provision/operation of rail systems/services delivered benefits exceeding the costs?
- How can prospects for lower costs/higher quality be enhanced by the planning for, and contracting of, rail services?
- Is Ken Gwilliam's regulatory cycle alive and well for rail?

## Papers

*Assessing the impact of rail franchising on labour productivity and input prices: Evidence from Britain* Andrew Smith, Phill Wheat, Chris Nash (ITS Leeds, UK)

*Private sector involvement in urban metros: experience and lessons from South East Asia* David Bray (University of South Australia), Philip Sayeg (Policy Appraisal Services Pty Ltd, Australia)

*The slow track to success: organization and performance of the Norwegian rail passenger transport tender* Silvia J. Olsen, Jorgen Aarhaug, Frode Longva (Institute of Transport Economics, Norway)

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## **Workshop 3B: Governance, ownership and competition issues in deregulated (free market) public transport: Lessons that can be learnt from developed and developing economies**

**Chair:** [Professor Didier van de Velde](#)

Delft University of Technology, The Netherlands; Partner and Consultant, inno-V, The Netherlands

**Rapporteur:** [Professor John Preston](#)

Lecturer in Transport Economics, Institute for Transport Studies, University of Leeds

### **What is a clever way to regulate deregulated public transport markets?**

Free competition on the road, as a radical alternative to competitive tendering and public monopoly, has for many years been more the exception than the rule in public transport markets. In Europe, the most well known, though disputed example of this regime, is the British bus market outside of London, which was deregulated in 1986. Yet, recent developments, especially in Europe, show that such market-initiated regimes may gain in popularity with the growing deregulation of long-distance bus markets, international railway markets, national railway markets and even parts of local and regional bus markets that were previously submitted to competitive tendering only.

This leads us to the following questions that we would like to see discussed during the workshop:

- Can and should competitive pressure through free market initiative play a more important role in the future of public transport markets? (i.e., autonomous market initiative, loose from any competitive tendering initiated by transport authorities). Are there clever ways to combine competitive tendering with autonomous market initiative? Should there, e.g., be a possibility for autonomous market entrants to infringe upon tendered concession areas?
- How much regulation is needed to make deregulated markets work? Is it possible to organise such intervention without ending up monopolising the service design initiative on the side of the authority?

What can be learned from the experiences of countries like Britain and New Zealand who have used such regime for a substantial period of time?

- Can the opening of the international and of some national railway markets in Europe be an interesting test case for a further deregulation in the urban and regional public transport markets in Europe and elsewhere? Are bus lessons applicable to railways? And what is there to learn from the coach and airline business in this respect?
- Do circumstances matter to the optimality of alternative configurations of free market regimes? Should one advise different solutions for emerging economies and more established public transport markets in other parts of the world?

## Papers

*Competition for the passenger rail market in France, the introduction of franchises for the regional trains* Dominique Bouf, Alain Bonnafous (Laboratoire d'Economie des Transports, University of Lyons, France)

*Evaluating the long term impacts of transport policy: the case of bus deregulation* John Preston, Talal Almutairi (University of Southampton, UK)

*Introducing ITS in unsubsidised public transport* Koos van Zyl (SAHA International, South Africa), Jonathan Myers (Epsilon Delta Pty Limited, Australia)

*Organisation of paratransit in Nairobi – voluntary vs. mandatory savings and credit cooperatives* Risper Orero and Dorothy McCormick (Institute for Development Studies, University of Nairobi, Kenya)

*Railway regulation in Germany and Sweden* Bertil Hysten (VTI Transport Research, Sweden)

*Ten years after the bus deregulation in Japan, Part 1: A qualitative analysis on institutional changes* Yoshinori Takahashi (Kinki University, Japan)

*Ten Years after the Bus Deregulation in Japan, Part 2: A quantitative analysis on welfare changes* Hiroki Sakai (Humanities Centre, Tottori University of Environmental Studies, Japan)

*The case for intercity bus deregulation in Germany* Andreas Knorr (German University of Administrative Sciences Speyer, Germany), Alexander Eisenkopf, Christian Burgdorf (Zeppelin University Friedrichshafen, Germany), Andreas Arndt (Cologne Business School, Germany)

## Workshop 4: Designing contracts/concessions: What has worked and what has not and why?

Chair: [Dr David Bray](#)

Rapporteur: [Professor Corrine Mulley](#)

### How can the design of contracts be improved to achieve better quality and lower cost service outcomes?

A range of issues are involved in the design of contracts for the supply of transport services, which are sometimes provided together with necessary assets. The designer has to take account of a range of policy objectives (and constraints) such as service quantity and quality, integration and coordination of service delivery, fare and ticket systems, inter-modalism, social objectives such as affordability, transitional arrangements where substantial change is to occur, the role of authorities and operators in service planning, risk transfer, funding constraints, and change that is likely to occur over the life of the contract. The complexities are especially great in the case of public transport.

Considerable experience has been accumulated with regard to these matters in the course of the extensive use that has been of contractual arrangements for the delivery of transport infrastructure and services. There is a need to distil this experience so that the design of contracts can be improved to better achieve government objectives for the desired services. This requires an understanding of objectives, contractual design issues, options and trade-offs, and the role of circumstance in affecting these factors. Examining what has worked and what has not and why will contribute to this understanding.

This leads us to address the following questions through consideration of papers presented in this workshop:

**Contractor selection:** Does the choice of competitive tendering, negotiated contracts or direct awards influence public transport quality, customer satisfaction and patronage? What tender assessment criteria will lead to the choice of the most suitable contractor? How much information is needed to support a sound decision by an authority?

**Authority capacity:** Do the structure and capacity of the authority affect the performance of contracts?

**Respective roles of authorities and contractors:** To what extent should various roles (and hence risks) be transferred to contractors and what should be retained by authorities? What is needed for an effective partnership between a contractor and the authority?

**Structure of payments/incentives:** How should payments to contractors be structured to achieve price and quality outcomes? What evidence is there for cost-quality trade-offs?

**Robustness:** How should contracts be structured to allow for uncertainty over the duration of the contract (such as inflation and socio-economic conditions), to allow for changes in government policy (such as fares and modal priorities) and to ensure attractive conditions for retendering or other arrangements at the end of a contract?

**Infrastructure provision:** In what circumstances should contracts for the provision of services also include the provision of infrastructure?

**Social objectives:** What social objectives have been incorporated into contracts and criteria for contractor selection, and to what effect?

## Papers

### Contract structure and arrangements

*Choose your partners: the partnership criterion as a mechanism for fostering effective partnership relationships between contracting parties* Jenny Alvin (Corporate Capability Pty Ltd, Australia), Jonathan Myers, Neil Frost (SAHA International, South Africa)

*Redesigning the New Zealand Public Transport Operating Model: A description of process and outcomes to date* Rachel Drew (New Zealand Bus), Mark Lambert (Auckland Transport, New Zealand), Raewyn Bleakley (Bus and Coach Association, New Zealand), Rhona Hewitt (Greater Wellington Regional Council, New Zealand)

*Service development in Dutch public transport tendering* Didier van de Velde, Wijnand Veeneman (Delft University of Technology, The Netherlands)

## **Contract, price, performance**

*Key factors reflecting the bids in public procurement of bus transports in Sweden* Helene Lidestam (Linköping University, Sweden)

*Ten years of tendering public transport concessions in the Netherlands; a stochastic frontier analysis* Wijnand Veeneman, Jos Blank, Didier van der Velde (Delft University of Technology, The Netherlands)

## **Contract payments**

*Evolution of the structure of bus contract payments* Kha Truong (Deloitte Touche Tohmatsu, Australia), Matthew Gillet (Department of Transport, Victoria, Australia)

*Towards a simplified payment formula as a reference point for bus contract negotiation or assessment* David Hensher, Corinne Mulley (Institute of Transport and Logistics Studies, The University of Sydney Business School, Australia), Neil Smith (Transit Systems Australia)

## **Contract risk**

*Managing risk in bus service contracts – lessons from infrastructure alliances* Robin Barlow (Deloitte Touche Tohmatsu, Australia)

*Risk assessment in PPP concessions - intuitive hunch over rationality?* Demi Chung, David Hensher, John Rose (Institute of Transport and Logistics Studies, The University of Sydney Business School, Australia)

## **Industry performance**

*Development of small and medium enterprises in the South African contracting system: success or failure?* Danie Ackerman (Transport and Economic Support Services, South Africa), Lesiba Manamela (Department of Transport, South Africa), Retha Claassen (Transnomics, South Africa)

## **Railways**

*How optimal was the Sydney Metro contract?: comparison with international best practice* Cameron Gordon (University of Canberra, Australia), Rhonda Daniels, Corinne Mulley, Nick Stevens (Institute of Transport and Logistics Studies, The University of Sydney Business School, Australia)

*Rail access charges in France: beyond the opposition between competition and financing* Yves Crozet (Laboratoire d'Economie des Transports, France)

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## Workshop 5: Network and system planning: How best to deliver this under alternate contract regimes in order to grow patronage and service levels

**Chair:** [Professor Sergio Jara Diaz](#)

Professor of Transport Economics, University of Chile

**Rapporteur:** [Alejandro Tirachini](#) Doctoral Candidate, Institute of Transport and Logistics Studies, The University of Sydney Business School, Australia

### **What are the relations among design (operations, infrastructure and contracts), pricing, levels of service and patronage of Public Transport Systems?**

In recent years there has been a renewed interest in the development of public transport in urban areas, which has triggered a debate regarding technologies, design, pricing, subsidies and contract forms for optimal policy design including financing and social well-being. In this workshop, theory and cases will be used to feed the discussion regarding the links between all these elements and the impacts on their necessary integration. This leads us to the following questions:

- What are considered to be the effective sets of tools to secure minimum standards of service delivery from an authority's point of view?
- What are the innovations and enhancements in public transport design and operations that appear attractive and feasible to implement for users and operators in different social and economic environments?
- What can be learned from the international experience regarding the above mentioned issues?
- What are the main aspects to consider in the different dimensions of integrated public transport?

### **Papers**

#### **Methodological views**

*A simulation of the simple Mohring Model to predict patronage and value of resources consumed for enhanced bus services* Geoffrey Clifton, John Rose (Institute of Transport and Logistics Studies, University of Sydney, Australia)

*The relations between optimal design and pricing of public transport* Sergio Jara-Diaz, Antonio Gschwender (Universidad de Chile, Chile)  
*Sensitivity testing of inputs into the Mohring Model: How sensitive are patronage and value of resources consumed estimates for enhanced bus services to changes to parameter inputs?* John Rose, Geoffrey Clifton (Institute of Transport and Logistics Studies, University of Sydney, Australia)

*Sensitivity testing of inputs into the Mohring Model: How sensitive are patronage and value of resources consumed estimates for enhanced bus services to changes to parameter inputs?* John Rose, Geoffrey Clifton (Institute of Transport and Logistics Studies, University of Sydney, Australia)

*Urban bus transport: open all doors for boarding* Alejandro Tirachini (Institute of Transport and Logistics Studies, University of Sydney, Australia), Sergio Jara-Diaz (Universidad de Chile, Chile)

*Accommodating perceptual conditioning in the valuation of expected travel time savings for cars and public transport* Zheng Li, David Hensher, John Rose (ITLS, University of Sydney, Australia)

*Analyzing the structure of informal transportation: the evening commute problem* Celeste Chavis (Institute of Transportation Studies, University of California, Berkeley, USA)

## **Planning lessons**

*Public transport Integration in a privatised market: policy lessons from abroad* Charles Rivasplata (Urban and Regional Planning Department, San Jose State University and San Francisco Municipal Transportation Agency, USA)

*Ownership, integration and customer orientation in Norwegian and Swedish long distance passenger coach transport* Jurgen Aarhaug, Nils Fearnley (Institute of Transport Economics, Norway), Gunnar Alexandersson, Staffan Hulten (Stockholm School of Economics, Sweden)

*Fundamentals for redesign the management of intercity transport in Brazil: the system's main purpose* Leandro Rodrigues e Silva, Yaeko Yamashita, Joaquim Jose Guilherme de Aragao (University of Brasília, Brazil)

## **Infrastructure**

*Network-designed contracting: a proposed research agenda to regulate transport infrastructure and economic growth* Rodrigo Otavio Moreira da Cruz, Joaquim Jose Guilherme de Aragao, Yaeko Yamashita (University of Brasília, Brazil)

*Risk and rewards in public transport development driven by sport mega-events in Russia* Andrei Dementiev (Higher School of Economics, Moscow, Russia)

*Rail track charging – EU-directive, Swedish concerns and theory* Kjell Jansson (Governmental agency Trafikanalys, Sweden), Harald Lang (Royal Institute of Technology, Sweden)

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## **Workshop 6: The Public Agenda: What is working and what is missing? (including social inclusion)**

**Chair:** [Dr Janet Stanley](#)

Chief Research Officer, Monash Sustainability Institute, Monash University, Melbourne, Australia

**Rapporteur:** [Dr Karen Lucas](#)

Senior Research Fellow in Transport, Accessibility and Social Disadvantage, Transport Studies Unit, University of Oxford

### **What are we yet to understand and implement in relation to the broader agenda of mobility and the place and goals of public transport, in terms of social inclusion and sustainability goals?**

Social and environmental planning and policy is increasingly being recognised as a central issue in transport. The ability to travel despite not having car access is of considerable importance to society in terms of the wellbeing of citizens and the national economic costs associated with inequality, disadvantage and exclusion. Private cars are a large source of greenhouse gasses, an issue which needs transformational thinking and actions by those involved in the transport sector. The implications and opportunities of these social and environmental issues for the development of the public transport sector is very significant, yet one which we are yet to really understand and plan for. While some considerations are being given to these issues by some developed countries, we are yet to grasp the magnitude of these issues in developing countries who are often largely dependent on the informal transport sector. There is presently a small window of opportunity to facilitate much better planning and solutions within developing countries to avoid the significant problems (in terms of congestion, greenhouse gas emissions and other pollution, poor land spatial and urban planning, and inequality and promulgation of disadvantage) which are now occurring in many developed car dependent economies. This workshop will consider the present state of these fields, the interdependence of these issues with economic policy, the

opportunities which will arise with solutions to these problems and the future development of solutions to these issues in terms of integrated, inclusive and sustainable mobility options and public transport systems.

This leads us to the following questions:

- **What is the role of public transport in promoting social inclusion?** The discussion will seek to further define the role of transport in promoting social inclusion. It will consider issues such as whether the inclusive role of transport is universal or the part played by transport depends on issues such as the type of transport system (car/public transport/active transport/informal transport); the stage of development of the country; the geographic location of people (urban/regional/ rural/remote); the extent of exclusion present and the size and characteristics of the population centre. How do we promote inclusion through transport options? Does the improvement of mobility options for social exclusion have co-benefits in other areas?

## Papers

*Accessibility: user satisfaction, authority satisfaction, or society satisfaction?*  
Rosario Macario, Ana Galelo (Instituto Superior Tecnico, Lisbon Technical University, Portugal)

*Applying a social exclusion approach to transport disadvantage in South Africa*  
Karen Lucas (Transport Studies Unit, University of Oxford, UK)

*Mobility, social capital and sense of community: what value?* John K. Stanley, David A. Hensher (Institute of Transport and Logistics Studies, The University of Sydney Business School, Australia), Janet R. Stanley (Monash Sustainability Institute, Monash University, Australia)

- **What is the role of informal transport in the public transport mix in developing and developed countries?** At present there are differing balances between the size of the formal public transport system and the informal transport systems between developed and developing countries. This discussion considers what should be the ideal balance between these two systems in developed and developing countries. Does the informal transport systems in developed and developing countries have the same characteristics or are they so different that there is not the opportunity to universalise principles and systems and are there opportunities for co-learning? What other factors should be considered in this context, such as characteristics of the country, the extent of urban versus rural populations, the poverty levels Developing countries appear to be

transitioning from informal transport while developed countries appear to be expanding the informal transport systems. How do we understand the right mix?

## Papers

*Achieving an integrated social, environmental and economic agenda for the informal transport sector in developing economies* Janet Stanley (Monash Sustainability Institute, Monash University, Australia), Karen Lucas (Transport Studies Unit, University of Oxford, UK)

*An investigation into the feasibility and potential benefits of shared taxi services to commuter stations* Steven D. Wright, John D. Nelson (Centre for Transport Research, University of Aberdeen, UK)

*Van services operation in Rio de Janeiro current scenario and a prospective analysis* Ronaldo Balassiano, Marcio Peixoto de Sequeira Santos, Richard William Campos Alexandre (Transport Engineering Programme, Federal University of Rio de Janeiro, Brazil)

- **Governance models, organisation and management in public transport and informal transport systems.** The place of stakeholder engagement and decision-making needs to be considered in transport systems. This includes the passengers voice and the interface between the owner/operators/regulators of informal and formal transport. Should the public transport regulator also regulate the informal system? How can the systems be coordinated in developed and developing countries? Can the informal transport system be formally managed and should it be? Do the regulators of the formal transport system understand the needs being met by the informal sector? What are the implications of governance models for the goals of social inclusion and sustainable transport?

## Papers

*The impact of the application of new technology on public transport service provision and the passenger experience: a focus on implementation in Australia* John Nelson (Centre for Transport Research, University of Aberdeen, UK), Corinne Mulley (Institute of Transport and Logistics Studies, The University of Sydney Business School, Australia)

*Organisational structure, ownership and dynamics on control in the informal local road passenger transport sector* Brendan Finn (ETTS Ltd, Ireland), Amal Kumarage (University of Moratuwa, Sri Lanka), Samson Gyamera (Centre for Urban Transportation, Ghana)

*Rural school transportation in Brazil: management and regulatory issues emerging from field research findings* Heitor Pereira do Nascimento, Juliana Gomes Gularte, Gizelle Coelho Netto, Artur Carlos de Moraes, Joaquim Jose Guilherme de Aragao (University of Brasilia, Brazil)

*Thinking on public accountability: how to address quality of policy design and decision-making?* Rosario Macario (Instituto Superior Tecnico, Lisbon Technical University, Portugal)

- **Does transport in regional/rural areas have unique features?** The issues of urban transport tend to dominate discussions, however there is evidence which suggests that accessibility is more difficult in regional and rural areas. Low density population reduces public transport viability and increases problems of social exclusion and the size of carbon emissions per passenger due to low passenger numbers and distance. Innovative solutions are needed to address these issues, including use of taxis, school buses and taking services to people. Discussion will take place on how to address these rural issues, the barriers to various solutions and the model for development of rural services.

## Papers

*Rural school transport in Brazil: an indispensable service for the education policy* Willer Luciano Carvalho (University of Brasília, Brazil), Yaeko Yamashita (Federal University of Tocantins, Brazil)

*Rural school transportation: technological advances* Willer Luciano Carvalho, Poliana de Souza Leite, Joaquim Jose Guilherme de Aragao (University of Brasília, Brazil), Heitor Pereira do Nascimento (Federal University of Tocantins, Brazil)

- **Sustainability and transport** How does the present car dependence in developed countries mitigate against both social and environmental goals? Rapid urbanisation is occurring in many developing countries with strong movement towards car dominated transport. There is presently a small window of opportunity to facilitate much better planning and solutions within developing countries to avoid the significant problems (in terms of congestion, greenhouse gas emissions and other pollution, poor land spatial and urban planning, and inequality and promulgation of disadvantage) which are now occurring in many developed car dependent economies. How can this development opportunity be used to maximise the development of public transport? What is the place of planning and urban design of

alternative forms of mobility to promote sustainability and inclusion (such as walking, bicycles, scooters, disability transport)?

## Papers

*How to boost public transport service delivery in South Africa to address social exclusion and energy issues* Laverne Dimitrov (Development Bank of Southern Africa, South Africa)

*Road tolls as a finance instrument for increased public transport: the Helsinki MA debate revisited* Marko Nokkala (VTT Technical Research Centre of Finland)



# PROGRAMME: SOCIAL EVENTS



**Sunday 11<sup>th</sup> September**

Welcome Cocktail

**Monday 12<sup>th</sup> September**

Gala Dinner

**Wednesday 14<sup>th</sup> September**

International Steering Committee Dinner

**Thursday 15<sup>th</sup> September**

Closing Dinner

## ***Accompanying persons programme***

***Bookings and enquiries can be made at the Ushaka Tours office in the Southern Sun Elangeni Hotel***

### **Durban harbour cruise**

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Afternoon: 13:30 – 16:00

Price: R295.00 per person

Duration: 2.5 Hours

#### **Includes: Transport, Tour guide & Harbour Cruise**

Depart from the Southern Sun Elangeni and travel to Wilson's Wharf to board the Isle of Capri where we follow the shipping route into the port, observing how big liners navigate the corridor that leads them through the sand banks. We also see the different docking points, cargo loading areas and Durban's famous North Pier, where large cargo vessels exit the harbour through a very narrow channel. Return to your hotel at approximately 16:00.

## **LE 01 – Hluhluwe Game Reserve & St Lucia Estuary**

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Morning: 06:30 – 18:30  
Price: R1200 person (Open Safari Vehicle)  
Duration: 12 Hours

An early departure at 06:30 from the Southern Sun Elangeni Hotel, as you travel north through Zululand to the Hluhluwe Game Reserve. Enjoy a morning of game viewing in this 96 000ha game reserve, home to the “Big Five” and many antelope and bird species. We then head for the St Lucia Estuary – a World Heritage Site, where you will board a charter boat and enter the Wetland World of Lake St Lucia. Some 38 682ha of lake, island and estuary, this wetland is home to the Nile crocodile, more than 800 hippos and an astonishing diversity of ecosystems, birds and wildlife. A light lunch is served on board. After a two hour cruise we head back to shore and then back to the Southern Sun Elangeni Hotel in the early evening

## **LE 02 – Shakaland Zulu Cultural Experience**

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Morning: 08:30 – 17:00  
Price: R995 per person  
Duration: 8.5 Hours

Depart from the Southern Sun Elangeni Hotel at 08:30 and travel north to Zululand home of the Great Zulu King “Shaka” and his wife Nandi, to Shakaland in the Nkwaleni Valley. An audio visual presentation starts this awesome display of Zulu Culture and Beliefs. Learn about the bee-hive huts, the Sangoma and how Zulu Warriors made their spears. Complete this wonderful experience with a traditional Zulu style lunch. Return to the Southern Sun Elangeni Hotel in the late afternoon.

## **LE 03 – Battlefields**

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Morning: 06:30 – 18:30  
Price: R650 per person  
Duration: 12 Hours

Depart from the Southern Sun Elangeni Hotel at 06h30 and travel west, to visit the battlefields of Isandlwana and Rorke’s Drift. The initial battle of the Anglo Zulu War of 1879 is world-renowned. The British defeat at Isandlwana on 22 January 1879 and then the heroic stand by a handful of men at Rorke’s Drift later that same day and through the night. 11 Victoria Crosses were awarded for the defence of Rorke’s Drift. Lunch will be served at a local country restaurant. Return to the Southern Sun Elangeni Hotel at approximately 18h30.

### **LE 04 – Zulu village & safari**

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Morning: 08:30 – 16:30  
Price: R995 per person  
Duration: 8 Hours

Depart at 08h30 from the Southern Sun Elangeni Hotel and travel West through the scenic Natal Midlands towards the Capital City of Kwazulu – Natal, Pietermaritzburg to Tala Private Game Reserve. On arrival board your open safari vehicles for a two hour game drive through Private Game Reserve, a wonderful opportunity to spot rhinoceros, giraffe, buffalo, zebra and rare roan and sable antelope. We then depart for the majestic Valley of 1000 Hills for a light lunch (cash bar) followed by a Zulu Cultural experience. Return to the Southern Sun Elangeni Hotel at approximately 16h30.

### **LE 05 – Township tour**

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Morning: 09:00 – 12:30  
Price: R480 per person  
Duration: 3.5 Hours

Depart from the Southern Sun Elangeni Hotel and travel the streets of one of the main townships of Durban. See the bustling neighborhood life. Most who venture there, come back enlightened and fascinated by this face of Africa. Return to the Southern Sun Elangeni Hotel.

### **LE 06 – Durban City Tour**

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Morning: 09:00 – 12:30  
Price: R330 per person  
Duration: 3 Hours

After breakfast we depart from the Southern Sun Elangeni Hotel at 09h00 and travel along Durban's Golden Mile onto the entrance of Africa's largest working harbour. We then head along the Victoria Embankment to the Victoria Street Market where you can do some shopping for fantastic curios, continue to the Botanical Gardens which are known to have one of the finest orchid houses in the world. A stop at the Moses Mabhida Stadium (excludes funicular) before heading to the Southern Sun Elangeni Hotel where your tour will terminate.

### **LE 07 – Valley of 1000 Hills**

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Morning: 13:30 – 17:00  
Price: R430 per person  
Duration: 3.5 Hours

Depart at 13h30 from the Southern Sun Elangeni Hotel and travel via the suburbs of Westville, Pinetown, Kloof and Hillcrest to the Valley of 1000 Hills to "Phe-zulu Village" for a Zulu cultural experience. Learn more about the

traditions and beliefs of the Zulu custom. Enjoy some Zulu Dancing and singing before walking through the crocodile and Reptile Park. Return to the Southern Sun Elangeni Hotel.

### **LE 08 – Durban ocean cruise**

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Morning: 08:30 – 12:00  
Price: R375 per person  
Duration: 3 Hours

Relax and unwind and see Durban from a different angle, we offer cruising on Durban's warm Indian Ocean aboard various luxury motorized sailing craft. Join us for daytime cruising or lazy sundowners while enjoying the tranquillity that the ocean has to offer. You are guaranteed to have a memorable experience enjoying the scenery in the company of your colleagues.

### **LE 09 – Ushaka Marine World – SeaWorld experience**

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Morning: 09:30 – 14:00  
Price: R340 per person  
Duration: 4.5 Hours

Africa's largest marine theme park is situated at the southern end of Durban's glorious 'Golden Mile'. Durban's newest world-class Saltwater Aquarium. Over 30 indoor and outdoor exhibits. Includes dolphin, seal and penguin show, in Africa's largest dolphinarium. Come nose to snout with the star of "Jaws" with just a few millimetres of glass between you as you traverse the wreckage of a 1970s cargo ship. See one of the largest connections of sharks in the southern hemisphere and wind your way – carefully – through the half a kilometre of themed viewing tanks, past seven massive aquarium tanks and 25 smaller exhibits as you discover other dangers of the deep.

### **LE 10 – Karkloof canopy tour**

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Morning: 08:00 – 17:00  
Price: R790 per person  
Duration: 8 Hours

Head West towards the Natal Midlands and Karkloof Forest. Here you will enjoy an unequalled experience gliding along steel cables of up to 175m long between eight canopy level platforms built high within the indigenous forest, which offers spectacular views over the forest canopy.

## **Post Conference Getaway (16<sup>th</sup> – 18<sup>th</sup> September 2011)**

### **PR 1 / PT 1 St Lucia estuary & Hluhluwe & Shakaland experience**

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Price per Person sharing:	R6 000
Single Rate:	R7 200
Duration:	3 Days / 2 Nights
Minimum Numbers:	4 persons
Includes:	Accommodation, Transport, Registered Tour Guide and meals as stipulated
Excludes:	Anything of a Personal Nature and not mentioned above

### **PROGRAMME:**

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#### **Day 1: 16<sup>th</sup> September 2011**

##### **Route: Durban – Hluhluwe**

Depart at 07h00 from your Hotel and travel through the scenic sights of Zululand to one of KwaZulu – Natal's World Heritage Sites – St Lucia. Few places on earth can rival the bio-diversity of this 38 000 hectares Lake St Lucia Park. This vast unspoilt area has at its heart – Lake St Lucia, which is connected to the sea via a narrow estuary. Our first stop is at the launch site of our charter boat, for a two-hour boat cruise on this magical water wonderland and help you decipher what bird that is calling and give you more fascinating information on the large water mammal the hippo as well as the devious Nile Crocodile that is lurking around. Lunch stop will be in the small fishing village of St Lucia (for clients own account). Overnight at a lodge in the Town of Hluhluwe.

**MEALS INCLUDED: Dinner**

#### **Day 2: 17<sup>th</sup> September 2011**

##### **Route: Hluhluwe**

After breakfast depart for the Hluhluwe Game Reserve, the oldest game reserve in Africa, in search for the Big Five! This game reserve is world famous for saving the black and white rhino from extinction. Explore the reserve where you may have the chance of finding elusive "Big Five", as well as many other varieties and species of mammals and birds. Catch a glimpse of the old Africa where the mighty beasts once reigned supreme. Lunch today is included in the tour price. At 12h30 we will arrive at Hilltop Camp the main camp of Hluhluwe Game Reserve, perched high on a hill overlooking the majestic hills and valleys of this pristine game reserve. Lunch in their local restaurant – why not try their famous Nyala Pie! Overnight at a lodge.

**MEALS INCLUDED: Breakfast, Lunch and Dinner**

### **Day 3: 18<sup>th</sup> September 2011**

#### **Route: Hluhluwe – Shakaland - Durban**

After breakfast it is time to bid this wildlife sanctuary farewell as we head back south towards Eshowe to Shakaland – home of the great Zulu King Shaka. Today we will enjoy the Nandi Experience (Zulu Cultural Experience) – named after King Shaka’s wife – Nandi. An informative audio-visual presentation kicks off this wonderful experience. We are guided, by the local Shakaland Guide around a traditional Kraal. Riveting lectures and stories of typical Zulu customs and traditions are told in true imaginative Zulu style. Witness the Sangoma (witchdoctor) throwing her bones, or watch the pretty Zulu maidens go about their daily chores. Of course a Zulu Cultural Experience would be incomplete without a performance of true thundering Zulu dancing and singing from the Zulu warriors and maidens. We sit down to a traditional Zulu lunch, Zulu stew, and pap and samp and beans are just a few of the delicious items you will sample. After lunch we are wished Hamba Kahle by the Zulu Warrior – meaning ‘go well’, return to Durban arriving at approximately 16h30 where your tour will terminate.

#### ***MEALS INCLUDED: Breakfast and Lunch***

#### **Terms and Conditions: Local Excursions**

1. All Local Excursions depart with a minimum of four (4) passengers unless otherwise stated. No tours will be confirmed until such time as four (4) passengers have booked and paid in full.
2. Accompanying Persons’ Day Tours as they appear on the above can be booked and paid for on the day of arrival at the conference by means of credit card or bank transfer.
3. Availability will be strictly on a first come first served basis. Late bookings for local tours can be made at the tour desk located in the Ushaka Tours office, but will be subject to availability at the time of booking.
4. Once payment has been received in full the following cancellation policy will apply:

Less than 24 hours notice prior to departure date:  
50% cancellation fee

Less than 12 hours notice prior to departure date:  
100% cancellation fee

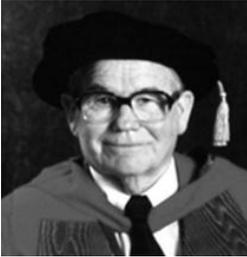
***Your local tour will only be confirmed once full payment has been received.***

5. Local tours include
  - a. Entrance Fees
  - b. Registered Tour Guide
  - c. Lunch on full day tours only
  - d. Transport
  
6. Local tours exclude
  - a. Beverages at lunch time on full day tours
  - b. Gratuities of any kind
  
7. All local tours will depart from the Southern Sun Elangeni Hotel

**For more information on local attractions, information can be found at the Concierge desk of the hotel.**



# MICHAEL BEESLEY AWARD



**Michael Beesley**

The Thredbo Series was established in 1989 by Professor David Hensher and the late Professor Michael Beesley CBE. Since then it has been held biennially in locations all over the world. In 2005 the conference series' International Steering Committee established the Michael Beesley Award to pay tribute to his memory. The award recognises the best workshop paper presented at the conference by a person in the early stages of their career (first ten years). The person must be the primary author of the paper presented. The award is determined by the Michael Beesley Award Committee Chair (appointed by the Conference Chair) in consultation with all Workshop Chairs. The award recipient will receive a trophy presented on the closing day of the conference at the conference dinner.

An honourable mention will be made of two other presenters who will receive certificates of recognition. The Thredbo 9 awardee was Anne Yvrande-Billon Centre ATOM, University Paris 1 France. With honourable mentions for Jürgen Kaiser, Director, Public Transport Consulting, PTV AG, Germany and Wijnand Veeneman, Technical University of Delft, The Netherlands. The Thredbo 10 awardee was Andrei Dementiev, Higher School of Economics, Russia, with an honourable mention to Brain Caulfield Centre for Transport Research, Department of civil Structural and Environmental Engineering, Trinity College, Dublin. The Thredbo 11 awardee was Alejandro Tirachini (Doctoral Programme, Institute of Transport and Logistics Studies, Faculty of Economics and Business, The University of Sydney, Australia) with honourable mention to Arne Beck for his paper Commercial public transport services by bus and Mathias Walter for his paper Some determinants of cost efficiency in German public transport.

Professor Beesley's widely known work in transport economics has had a major impact on the literature and the way we think of the transport task. Among his numerous academic and other publications were many dealing with the question of evaluating Government policies for industries in which the public interest is a major concern. In 1992 his book on *Privatisation*,

*Regulation and Deregulation* (Routledge), summed up much of his work in those areas and his 1993 book on *Urban Transport: Studies in Economic Policy* (Butterworths) brought together his major contributions in transport economics.

The obituaries in the press in Britain by Stephen Littlechild, Harold Rose, Christopher Foster and David Currie speak volumes of Michael's contributions: 'the most influential industrial economist of his generation in the field of transport and public utility policy', 'he was the intellectual architect of the privatisation, competition, and deregulation of the utility industries in the 1980's', 'in 1983 he published with Stephen Littlechild the principles for RPI-X (price Cap) regulation, which became the fundamental tenet of the UK regulatory model', and "many informed commentators see Michael Beesley as the grandfather of the British model of regulation'.

The 2011 Michael Beesley Award consists of an aluminium shape of the African continent, symbolising the conference and its contribution to public transport activities in Africa.



