



No. 2 / 2017

SABOA BUS

VEHICLE OF COMMUNICATION OF THE SOUTHERN AFRICAN BUS OPERATORS ASSOCIATION



IVECO BUS



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AT A PRICE.**

**IT JUST HAPPENS
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SCANIA

No progress no option

THE annual SABOA conference and exhibition served as a platform for several important product announcements, including MAN's launch of its next generation Lion's Explorer body and Mercedes-Benz's OF1723 entry level commuter chassis, as well as Scania's re-entry into front engine automatic fray. Greyhound's new DreamLiner – bodied by Neobus on MAN's leading edge RR4 chassis – was on eye-catching display in the outside exhibition area. Suppliers of services and components allied to the bus and coach industry were also well represented.

The two-day format of the conference and exhibition appears to have become well-established, favoured because it enables plenty of scope for the networking that is integral to the event.

Although there is substantial activity on the product front, it seems that there is less movement towards the resolution of the issues that continue to dog the sector. During the technical committee meeting run in conjunction with the conference, the fact that many operators are approaching the crisis period in the contract renewal process again was raised, as March 2018 expiry looms. For companies looking to recapitalise, being in possession of a contract is essential – and contracts are tied to permits. With operators' efforts to obtain clarity having proven fruitless, the issue is becoming a pressing concern, because there is scant hope of new negotiated

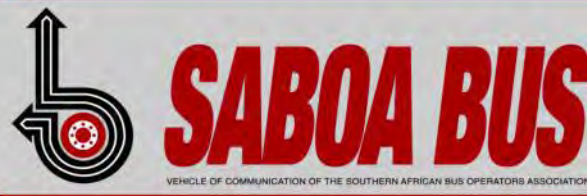
contracts or tenders being in place by next March. While there are moves afoot to redesign contracts, little progress has been made.

The Department of Transport's Ibrahim Seedat – addressing the conference on the topic of IPTN progress at municipalities – urged operators to push government harder – possibly in collaboration with rail and taxi transport providers – to combat the 'common enemy' of increasing car use, which is increasing at double the rate of the upswing in public transport adoption. Collaboration would be important, he said, to combat the mode of inertia that has set in. Pressure on government from informed stakeholders would be essential in driving transformation. Operators shouldn't be pondering what's in it for them today, but considering how to take their sector in the cities and urban areas to a higher level further down the line, said Seedat.

With Gauteng's population likely to top 12 million in 20 years, up from the current 13,5 million, there will be 24 million people moving around the province daily, according to Jack van der Merwe of the Gautrain Management Agency.

It's apparent that even if progress is slow, settling for the status quo is not an option.

Cindy Haler, Editor



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Afriway makes an impact at SABOA

Iveco is letting its Afriway units speak for themselves, with numerous demo units in the market delivering convincing performances. A unit on display at the recent SABOA exhibition also proved a talking point

EFFICIENCY, reliability, safety and total cost of ownership – the values emblazoned on Iveco Bus's Afriway unit on display at the recent SABOA exhibition – are the qualities the OEM is focusing on for its range of Afriway commuter buses, available in 4x2 and 6x2 with automatic and manual transmission options.

Iveco Bus head Ray Karshagen says that the OEM's focus now is on bedding down its product range, which has expanded from the initial 4x2, 12,3 metre, 18 tonne GVM with 65-seater capacity to include the 6x2, 14 metre 26-tonner carrying 80 seated passengers.

An informal survey conducted during the exhibition yielded uniformly positive feedback, says Karshagen, with delegates viewing the Afriway unit on outside display remarking on the vehicle's visual appeal and the quality of finishes. Even opinions on what were initially perceived as negatives on the vehicle have been swayed. The one-piece windscreen, for instance, had been viewed by some operators as a drawback, largely because of the expense of replacement. However, says Karshagen, Iveco Bus has ensured cost effective aftermarket pricing, overcoming this reservation. In addition, he says, feedback indicates that the single-piece unit is more flexible and absorbs impacts more readily than its more rigid two-piece counterpart and is therefore less susceptible to damage.

Positioning the engine over the front axle (for weight distribution and to minimise driveline damage in frontal impact) had also initially been greeted with scepticism but is now finding favour as it aids engine cooling. The 6 litre 280 hp Tector 6 engine is also delivering impeccable results, says Karshagen, and carries a price tag far below that of competitors.

There is strong demand for automatic transmissions, probably because the training ground for the driver pool is the large operators, who run a lot of automatics. Karshagen says that the bottom line sting traditionally inflicted by automatics has largely been eliminated. "When comparing a manual and automatic, it was customary for the automatic to cost a lot more and to have much higher fuel consumption, because automatics were never as efficient. With the new automatic transmissions, the fuel efficiency gap between manual and automatic has closed tremendously. Our demo units in the market often equal the fuel performance of a manual or are, at most, 5% higher: there's no longer that big gap."

Karshagen says that buying patterns in the segment have shifted perceptibly. Large private fleets continue to account for the bulk of bus sales, with state-owned enterprises (municipal and provincial) and smaller operators making up the balance.



By Cindy Haler



New entrants are a growing factor in the latter category, as public transport has been identified as a source for empowerment: the sub-contracting of a portion of subsidised contracts is being implemented as a measure to empower previously disadvantaged operators. Because new entrants may not have the wealth of experience that builds a store of technical knowledge, purchasing decisions are increasingly being based on the ability of OEMs to play a role in providing or securing financing for buses.

If an OEM is able to extend financing, its product will generally be in the mix – and with financial wherewithal often the deciding factor, buyers tend to work on the assumption that all the OEMs are providing good products. It's an assumption that is largely well founded, notes Karshagen, who says that "there isn't a bad product anymore" – although there is a market for operators running short term contracts who are on the lookout for lower priced rather than top quality products.

The buying decisions of state-owned entities are also increasingly being driven by the availability of assistance with funding – again, based on the assumption that the products on offer are good.

With banks wary of the passenger transport sector, OEMs are being called on to offer some level of financial comfort in the form of risk-sharing to financial institutions – despite the fact that once an operator has been awarded a contract, it is

secure for the duration of the contract period (unlike trucking). Banks rely on the risk mitigation that OEMs can offer, in the shape of buy-backs and remarketing agreements. In-house financing, an alliance with a bank for financing, or 'sweetening the pill' with risk mitigation have become entrenched as key factors in today's market.

Along with this trend, there is a growing move among large operators from having their own workshops. Instead, there is increasing reliance on the OEMs to offer repair and maintenance support. The value of this route lies in fixed costs for the operator for the duration of the contract with the OEM.

Another emerging trend is a gradual shift away from single-brand loyalty, as big operators alter their buying patterns to dual sourcing rather than depending on a sole supplier.

What these developments equate to is a shift in how buses are sold: with a fairly level playing field on the product front, operators are driven by total operating cost for vehicles, what it will cost to operate a contract, and what is left as wealth once a contract is finished (a vehicle that costs R1,5 million but is worth R1 million at the end of a contract versus one that retains no residual value).

With Iveco still a relative newcomer to the market, Karshagen says the OEM is starting to benefit from its placement of numerous 'seed' units in the market, which are garnering positive feedback and yielding good fuel consumption.

Capable of tapping into 65 to 70% of potential market volume with its expanded Afriway lineup, Karshagen says that consolidating its position is Iveco's focus at present. The huge volumes the market had anticipated in the BRT segment have failed to materialise, and this year's market volumes are likely to track last year's performance. "Iveco's strategy is to be good at what we've launched: we're establishing the Afriway name in the market, along with everything it stands for – efficiency, reliability, safety and low cost of ownership." ■



MAN launches Lion's Explorer G2

MAN's second generation (G2) Lion's Explorer range of bodies incorporates a host of aesthetic and practical enhancements

MAN has unveiled the next generation of its Lion's Explorer bodywork – launching a superb looking vehicle which also boasts greater robustness.

MAN Truck & Bus SA bus head Philip Kalil-Zackey says, "We've incorporated the last few years of field experience on what improvements we could make on the body and have incorporated that with new styling. It's not only a facelift – we've also looked at how we can make the bus more robust."

The bus moved from the production line at MAN's Olifantsfontein assembly plant to the SABOA exhibition – where it was swiftly spoken for by the Paruk Group.

Kalil-Zackey is confident that the offering will breathe new life into the commuter bus segment. "It's attracting the right attention from customers. Any issues we may have got wrong in the past have been corrected in this bus – and customers have seen this for themselves."

The new look – the latest design, courtesy of MAN's design engineers in Germany, incorporating requirements raised in SA – also aligns the vehicle with MAN's global family of Lion's buses and coaches; their shared DNA is evident.

The previous Lion's Explorer bodywork has endured for a decade, benefiting from minor upgrades, with the next generation slotting in with MAN's policy of investing in a major upgrade every 10 years.

One of the changes, the need for which originated in SA, was the switch to a hinge-type front grille, whose positive locking system equips the bus for duty on rough roads. As well as improving air flow for cooling, the front grille design facilitates easy access for daily maintenance checks.

In addition, LED strip daytime running lights have been introduced. LED rear lights – including stop/park and indicator lights – are vertically mounted on both sides of the rear dome, duplicated on the top of the dome.

The front, rear and roof of the bus have benefited from design tweaks, with tapering of the roof at the front reducing drag co-efficient which will, over time, provide better fuel consumption. Other changes include an improved, sloped approach, along with a slight lift at the rear for optimised airflow.

A curved, rubber-glazed windscreen and curved rear-view mirrors improve peripheral vision for the driver, while reducing glare.

While the show bus featured coach-style mirrors, less costly conventional mirrors are also an option. Clients have numerous choices to make in specifying vehicles to their exact

requirements, says Kalil-Zackey.

The body is manufactured using 3CR12, corrosion-resistant steel which combines the benefits of longevity and improved overall tare weight.

The bus features a narrower driver's door, with MAN asserting that the driver's workstation is "in a class of its own". Controls are logically arranged and in easy reach, with a central LCD display incorporating servicing and diagnostic information. The driver's seat and steering wheel are pneumatically adjustable.

An increased air intake system prevents the ingress of dust.

A wider, pneumatically operated passenger door, has large glass panels, adding to aesthetic appeal and giving the driver good curb-side visibility. Handrails and non-slip flooring facilitate safe boarding and disembarking, with the option of an out-swing step to reduce the height of the first step to 300 mm. Doors are interlinked to the park brake as an additional safety feature.

The vehicle interior benefits from a single-piece GRP header box, for a clean look. This design enhancement also streamlines the production process.

The passenger saloon features a bolt-on solution for USB chargers. With many operators choosing to provide on-board wi-fi connectivity, it's a natural progression. "While passengers are surfing the net, they can have their phones on charge – it's a nice benefit. This option is at a small extra cost, but in terms of the value it brings to the operator, it's minuscule."

G2 Lion's Explorer options available include: 12,5 metre bodywork with MAN HB2 and HB3 chassis (240 hp 4x2 with Voith Automatic and 360 hp 4x2 with TipMatic transmission); 13,9 metre on HB4 (360 hp 6x2, TipMatic); and 22 metre bustrain bodywork (360 hp HB4BT).



MAN Bus & Coach head Philip Kalil-Zackey and MAN Automotive MD Markus Geyer: the next generation Lion's Explorer was unveiled at the SABOA, to an enthusiastic response

Scania expands arsenal with automatic

Scania has made a crucial addition to its product portfolio with the introduction of an automatic transmission on its F250 4x2 chassis, with the F310 6x2 poised to follow suit

FRONT engine buses dominate the South African commuter bus landscape – accounting for three quarters of the market, by some estimates – and there is growing demand among operators for automatic transmissions in these front engine vehicles, primarily for ease of operation.

Scania's re-introduction of an automatic option to its front engine chassis range positions the OEM to service a far greater portion of the market than was possible solely with its manual offerings. It's not new territory for the OEM, which had in the past established a sizable footprint with its Voith-fitted F94. An upgrade to a new chassis platform, however, saw the automatic option dropped from the line-up.

Alan Hugo, head of Scania SA's bus and coach operation, says the expansion of the bus range paves the way for the manufacturer to break into fleets from which it was excluded with its purely manual line-up.

With a demo unit on display at the recent SABOA exhibition set to be incorporated into a fleet for testing – gauging its performance and total operating cost against Scania's manual variants, as well as automatic counterparts from other OEMs – Hugo says that Scania is delighted to have re-entered this segment. The re-introduction of an automatic has been a priority for the division for some time, he says, with extensive time and resources invested in the R&D underpinning the initiative.

The manufacturer will now be in a position to approach several key fleets it has earmarked, says Hugo. "There are fleets we haven't been able to call on because we haven't had the right bus for their application – and there are other fleets in which we are present but where we will have a broader reach now. The front engine segment is the mainstay of Scania's bus and coach operation: the fact that we're able to compete on different playing fields now gives as a new perspective – and, of course, a whole new hunger."

Response to the move has been very good, continues Hugo, adding that he is confident that converts will value Scania's 'total transport solution' philosophy. "It's a quality product, backed by the quality service and solid infrastructure Scania has in place."



While Hugo is well aware that Scania is taking on well-entrenched players with the introduction of its automatic, he is confident that 'new kid on the block' status will be no barrier. "There are other established, reputable suppliers – but Scania is more than just a product. We're in the business of providing total transport solutions. We're intent on building partnerships with our customers. We're interested in our customers' customers. If the operator is successful, Scania is successful."

In addition, he adds, Scania has very robust chassis in its F250 and F310 offerings. "The chassis are tried and tested. We've been running them with some of the country's biggest fleets over what are probably the worst routes in the country. The only difference now is that we have an automatic transmission too."

Although demand for manual transmission vehicles remains high, Hugo notes that preference for automatic is growing. He attributes this to the advantages the automatic gearbox offers, including, among others, reduced maintenance requirements, safety and driver comfort.

Without pinning down a market share goal, Hugo is adamant that Scania intends to actively pursue fleets that it has been unable to penetrate, and that the F250 will gain traction as it proves its mettle in the segment. ■



By Cindy Haler

Busmark strives for long life, reduced operating costs

Busmark continues to introduce product refinements, to extend vehicle lifespan as well as to reduce operational costs

BUSMARK displayed a 40-seater body on the MB917 chassis, with the interior design on show set for incorporation into Busmark's popular Hino and Isuzu models in the same 40 passenger capacity, in semi-luxury execution. The OEM offers seating configurations from 28 to 40, depending on customer requirements.

Danie Human, Busmark GM of sales & marketing, says that the body builder has phased in a range of changes in its development and design of new products. "We are now incorporating ABS interior cladding and GRP ceilings with LED lighting and have developed an entirely new dash and console. We have also separated the instrument cluster from the dash area to simplify maintenance. The front bonnet area now features a different opening mechanism to ensure optimal workspace for daily checks."

Both ABS (thermoplastic) and GRP (glass-reinforced plastic) are lightweight and offer exceptional strength, rigidity and robustness. The use of floor materials to cover the floor and sides up to window height significantly eases interior maintenance.

In addition, vehicle design has been honed to create the necessary space towards the front for a left-hand side front entrance, while bonded windows are now fitted as standard.

Human says that as Busmark's design work is geared to meeting operators' requirements, new development has focused on reducing overall bodyweight which, in turn, ensures reduced running costs for customers. "We're building all structures with 3CR12, which offers weight savings and a host of other advantages for all of our African customers," says Human. Operators monitor running costs strictly – and these initiatives will ensure better results, he says.



"We are doing continual improvements on our products and know that this will extend operation time, as well as reducing operational costs over the lifespan of a vehicle. It is very important for us to ensure that the end customers derive all possible benefits."

The economic climate continues to exert pressure on the market, notes Human. "We certainly hope that more tenders and contracts will be awarded to ensure an increase in volumes. Many tenders are not forthcoming and this will definitely influence annual volume predictions." ■

MBSA unveils entry level commuter chassis

Mercedes-Benz SA Bus & Coach unveiled its OF1723 chassis, a new addition to its product portfolio introduced in response to customer demand for an entry level commuter bus. The chassis is ideal for the transport of scholars and workers, according to Mercedes-Benz SA. The chassis is to be bodied by approved Mercedes-Benz body builders, with the full unit to be available by the fourth quarter. Based on tried and tested Daimler technology, the chassis incorporates ABS as standard, along with spring suspension, Telma retarder and drum brakes – equipping it for the arduous terrain characteristic of South African operating conditions. Complying with Euro III emission regulations, units are sourced from Daimler India Commercial Vehicles. Mercedes-Benz SA reports an overwhelming response at the exhibition, with customers showing huge interest – and many requesting demo units. ■



A new bus ticketing solution for South Africa

Through TickiPay, bus operators will be freed from running a hardware intensive, cash-based operation where plastic or paper tickets are issued by the provider, to the future of ticketing where passengers use what they already have in their pocket to pay and travel: cell phones.

SOUTH Africa's public transport industry needs to get onboard with innovations in transport ticketing. Transport ticketing has followed the same overall structure for decades: transport operators sold tickets that authorised passengers to travel via either hand written tickets or from proprietary point of sale systems or even driver consoles. The traditional paper ticket has evolved over the years into tokens, magnetic stripe tickets, and smartcards. Cash payments have also evolved to include digital payments via debit or credit card, sometimes linked to the customer's smartphone.

The new approaches to ticketing differ from traditional fare collection systems in two significant ways: they do not require physical tickets to be issued, nor do they necessarily require cash to be used in the transaction.

A world in which passengers can choose how they pay, whether through payment cards, smartphones or wearable tokens, is closer than ever. It will be a world in which time spent queuing for a ticket is a thing of the past, one in which the paper tickets no longer clutter the passenger's pockets.

We are living in an information era whereby consumers are demanding the best experience possible when they interact with organisations, whether that is a retail store or their bank – or indeed their bus operator. As we become more immersed in today's digital-first era, we can expect travel to become even more intelligent and mobile.

Two interesting technologies have been adopted by transport providers in the last few years: mobile and

electronic ticketing, and cashless EMV based payments. Mobile and electronic ticketing has been around for a while now and is becoming commonplace in public transport networks around the world.

Both these technologies have two things in common. They allow transport providers (authorities and operators) to move away from having to issue expensive ticket media for travel (whether that be a smartcard, token or mag-stripe paper ticket) and release providers from providing expensive physical sales facilities such as ticket vending machines. Why incur all the cost of issuing ticket media when you can use what people already have in their pocket to travel, like a bank card or mobile phone? And if you're a passenger, why would you want to stand in queue to be issued with a ticket?

Some of the factors that will influence the future of ticketing in South Africa include the following:

- *Mobile and electronic tickets:* These are no longer emerging technologies, adopting mobile or electronic tickets can no longer be perceived as a risk as it was eight years ago. More and more transport providers are benefitting from this technological revolution, in many cases with pressure from passengers driving the move to make this technology a standard requirement. In some transport networks, mobile and electronic ticketing has become the dominant form of fare collection, accounting for over 60% of ticket sales and rising.
- *The smartphone:* The smartphone is becoming ubiquitous, even more than payment cards. For 2017, the number of smartphone users in South Africa is estimated to reach 16,1 million and is expected to reach almost 22 million by the year 2021.

Traditionally transport providers had to act as a local currency, swapping cash for ticket media to travel. The ubiquitous nature of the smartphone frees providers from this approach and allows them to use what passengers have in their pockets to travel. It is also interesting to

By Sam Mokoena, MD: TickiPay Payment Solutions

note that smartphone penetration is still way ahead of contactless payment penetration in all markets.

- *Challenges of fare collection:* Most bus operators indicate that they encountered multiple challenges in fare collection. Major issues include the cost of upgrading or maintaining a fare collection system, cash handling, fare evasion, and managing expectations.
- *Concerns about costs:* The capital cost of introducing or upgrading a ticketing system is another commonly cited concern by most transport operators. Capital costs for installing or upgrading a ticketing system can run into the millions. And, the costs don't end with installation, there are operational and maintenance costs of legacy ticketing systems.
- *Collecting and counting cash:* There are also challenges with cash handling in the ticketing ecosystem, defined broadly as collection, processing, and potential leakage. Given the high reliance on visual inspection, it is not surprising that fare evasion or ticket fraud is one of the top six challenges identified. Most operators have insufficient resources for proper fare enforcement.
- *Payment options:* While no single issue stands out, passengers clearly encounter a number of obstacles when using existing ticket fare payment systems. Paying with cash is still an issue for many passengers, although it remains the preferred option for some, and finding an outlet to purchase tickets for passes is also a challenge. Ticket fare collection systems must cater for all passengers, including the unbanked. It will be important to keep these concerns in mind as transport operators modify existing approaches or introduce new fare collection systems.
- *Other concerns:* Other challenges faced by transport operators include passenger capacity and surges-in-demand, standing in queue to buy a ticket and sales staff costs.

Transport ticketing solution options

Having mentioned all these challenges faced by transport operators, there is TickiPay, a new ticketing, payment and access control system provider. TickiPay is a cloud based, deployment driven, end to end ticketing and fare collection system. This ticketing system allows for ticket purchasing, display, and access control. The system also comprises back-end infrastructure for secure payments, ticket management, customer service, reporting and real-time analytics.

TickiPay makes use of industry leading technologies and is able to integrate into any existing fare management

system, allowing for sales of tickets on its website, mobile app and in retail stores to boost bus operators' ticket sales and increase convenience for bus operators.

Operators without their own fare management systems can add, edit and manage their own routes and fares end-to-end, manage their own access control and customer support, view and export a range of reports from the TickiPay fare management engine.

TickiPay's access control solutions for bus companies comprises mobile or fixed access control equipment for barcodes, 2D/QR codes and RFID tickets. TickiPay provides the operator with a free-to-use mobile application for access control that allows for different access control set-ups.

Meanwhile, TickiPay accepts a variety of payment options including debit cards, credit cards, EFT, cash, eWallet accounts, pay-at-store, SnapScan and others.

TickiPay also provides a robust data analytics report dashboard via its mobile and web application. Transactions can be viewed in real time and reports are customised to show data ranges, comparison of routes, trip performance, set view parameters like per day or per month, quantities and values, sales by day, payment types and channels and many more.

A variety of ticket media including custom mobile tickets, electronic tickets, paper tickets, paper and fabric wristbands and even RFID wristbands and EMV smart cards are available to choose from. TickiPay, however, believes mobile and electronic tickets are the future for transport or bus ticketing in Africa. The ubiquitous nature of the mobile phone and the development of cloud computing has disrupted industries around the globe and the transportation industry is no different. TickiPay believes mobile and electronic ticketing has changed how transport providers can view ticketing.

Some of the the advantages of using TickiPay as a ticketing and fare collection system include: low or no capital costs, increased sales channels, increased points of presence in addition to online and mobile presence. The system is quick to deploy and entry to market; it increases passenger satisfaction; provides real-time data analytics, improved planning and access to strategic data and information, reduction in operational costs, increase in ticketing capacity, as well as access to online and mobile marketing and promotions options, and many more.

Through TickiPay, bus operators will be freed from running a hardware intensive, cash-based operation where plastic or paper tickets are issued by the provider, to the future of ticketing where passengers use what they already have in their pocket to pay and travel: cell phones. ■

Annual Report of the Council 2016/2017

Overview of presentation

- Vision of SABOA
- Management committees of SABOA
- Specific matters dealt with during 2016/17
 - Policy issues
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 - Road Transport Management System
 - Driver training academy for the bus industry
 - Review of the White Paper on National Transport Policy
 - Taxi intimidation
 - Empowerment of SMME members of SABOA
 - Training
 - BRTs
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 - External committees/meetings
 - SABOA services/benefits
 - New members
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- Personnel



**By Professor Jackie Walters,
SABOA special adviser**

SABOA VISION

SABOA is the credible voice of an inclusive, efficient, sustainable and transforming bus industry, which plays a pivotal role in an integrated transport system through safe, reliable and affordable bus services that add value and is attractive to our stakeholders.

COUNCIL MEMBERS OF SABOA

Elected members

Category A (1 – 30 buses)

Messrs	R S Nche	City Road Trans Service (Vice-President)
	D Sambo	Sambo Express
	J Vanqa	Vaal Maseru Bus Service
	J Mayekiso	Mayekiso Bus Service
	S Maharaj	Maphumulo Mail Service
	N Dollie	Overland Tours
	T Lebitsa	Hlakanang Bus Company
	C Bailey	Bailey's Bus Service
Ms	I Mncwango	Gauteng Women in Transport
Vacant	(The vacancy on Council is due to a vacancy in the KZN Branch)	

Category B (30+ buses)

Messrs	A Sefala	Ipelegeng (President)
	A R Komane	NTI
	M H Heyns	Putco
	F E Meyer	Golden Arrow Bus Service
	T Murugan	South Coast Bus Service
	L Raath	Buscor
	N Madyibi	Mayebuye Transport Corporation
	S G Mitchell	Interstate Bus Lines
	P Zondo	Brakpan Bus Company
Vacant	(Vacancy due to the passing away of Mr Alex Heyns of Vaal Maseru in January 2016) (Mr Meyer replaced Mr N Cronje who retired in October 2015 and Mr Raath replaced Mr Bokaba who resigned)	

Associate Members

Mr	P Kalil-Zackey	MAN Truck & Bus
Ms	K Bell	Standard Bank Vehicle Asset & Finance

Executive Committee (2016/17)

Messrs A Sefala	Ipelegeng Transport Trust (President)
RS Nche	City Road Trans Service (Vice-President)
A R Komane	NTI
J Vanqa	Vaal Maseru Bus Company
M H Heyns	Putco
F E Meyer	Golden Arrow Bus Service
S Maharaj	Maphumulo Mail Service
Ms I Mncwango	GWIT

Council/ EXCO meetings 2016/17

27 January 2016	- Special EXCO meeting
27 January 2016	- EXCO/Council meeting
31 March 2016	- EXCO meeting
26 May 2016	- EXCO/ Council/AGM
28 July 2016	- EXCO meeting
29 Sept 2016	- EXCO/Council meeting
17 Nov 2016	- EXCO meeting
26 January 2017	- EXCO/Council meeting

POLICY ISSUES

- DoT announced that negotiated contracts will be concluded with operators to bring more stability to the industry.
- Increased funding for public transport was a major focus of the association over the period 2013/16.
- In October 2015, an additional amount of R1.4 billion was made available for public transport for the next three financial years.
- Due to state budget cuts which had to be applied by all state departments the amount was later reduced to R700 million which will be spread over three years on the following basis:
 - 2016/17: R250 million
 - 2017/18: R250 million
 - 2018/19: R200 million



- At present the DoT is compiling a Public Transport Turnaround Plan with the objective to develop a strategic motivation and business case for additional funding to support land-based public transport in SA.
- In the meantime the Competition Authorities have launched an investigation into the following issues involving land passenger transport:
 - Price setting mechanisms
 - Price regulation
 - Route allocation, licensing and entry requirements
 - Allocation of operational subsidies
 - Transport planning
 - Transformation in the land-based public transport industry.

The investigation is expected to take two years and will involve all land-based modes of transport – rail and road transport over short and long distances.

- Workshop on optimisation of public transport contracting costs
Held between DOT, SABOA, Monitoring companies and companies involved on bus contracting.
Purpose:
 - To discuss the public transport turnaround strategy of the DoT
 - To discuss potential cost savings in contracting road-based public transport – a high level overview provided by SABOA
 - The views of two currently contracted companies on potential cost savings in contracting public transport
 - The view of a contract monitoring company on potential cost savings in contracting public transport

SABOA ANNUAL REPORT

PUBLIC TRANSPORT

Scholar transport

- In addressing the 2016 SABOA conference in March 2016, the Department of Transport highlighted the issues below as major issues in subsidised scholar transport.
 - Number of learners who qualify to be provided with subsidised transport exceeds the budgets available to provide such services
 - New settlements and schools need to be coordinated
 - Funding streams need to be able to respond to the constantly changing demand for services
 - Dedicated services can respond to changing demands better than contracted commuter bus services
 - Data management and reporting challenges
- Scholar transport forms part of the Department of Transport's Turnaround Plan.

Scholar transport in Gauteng

- In the 2015/16 Annual Report we reported in detail on SABOA's efforts to resolve the lack of compliance to the tender evaluation criteria by the Gauteng Department of Education in its 2014 tender.



- Due to a lack of progress in resolving this matter it was reported to the Public Protector.
- The office of the Public Protector has been interacting with the Gauteng Department of Education regarding this matter throughout 2015 and 2016.
- A report on SABOA's complaint is expected soon.

VOLVO AT SABOA - Committed to Customer Service



A warm welcome



Match customer needs



Clear agreement



Open dialogue



Right first time



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Subsidised commuter transport/bus industry challenges

- The Department of Transport is preparing a Turnaround Plan for Public Transport.
- Internal and external role players will be consulted for inputs prior to the final approval and implementation of the Plan
- The following areas are being covered in the Turnaround Plan:
 - Subsidised scholar transport and community services in rural areas;
 - Public transport needs to be designed and managed as an integrated network (bus, rail and taxi);
 - In light of lessons learnt in the past 7 years, IPTN components should be scaled down as a result of their high costs and consideration should be given to providing quality integrated public transport;
 - It is necessary to adopt a different strategy in order to determine appropriate solutions for different public transport challenges in each area;
 - Funding for public transport needs to be revived to mitigate fragmentation.
- A draft of the Turnaround Plan was made available to SABOA and a workshop which was held on 19 January 2017 to prepare comments for submission to the Department of Transport.
- SABOA met with the Department of Transport on 09 February 2017 to discuss its comments and to submit a written copy thereof to the Department of Transport.

Tourist transport

- On 1 July 2016 the Minister of Transport gave notice in the *Government Gazette* that the NPTR would be operational with effect from 29 July 2016 and will undertake the following functions:
 - The accreditation of operators of tourist transport services; and
 - Receiving and deciding on applications for the granting, renewal, amendment or transfer of operating licenses for tourist transport services.
- Applications for interprovincial services must still be made to the relevant Provincial Regulatory Entities (PRE's) until such time that a notice is published in the *Government Gazette* giving notice that the NPTR will commence undertaking this function
 - The introduction of the NPTR will alleviate many of the difficulties that tourist transport operators experienced at Provincial Regulatory Entities.



- In view of the fact that many tourist transport operators are also involved in interprovincial transport, we wish to encourage the Department of Transport to allocate the function of interprovincial transport applications to the NPTR as soon as possible.

SABOA COMMITTEES

Technical committee activities

- During the past financial year the SABOA Technical Committee held its first meeting on 18 February 2016 at Bedford Centre, thereafter joint meetings with the Operations Committee were held as follows:
 - 23 June 2016 Zwartkop
 - 22 September 2016 Isringhausen
 - 24 November 2016 Emperor's Palace
 - 22 February 2017 Vix-Questek
- Issues discussed during the year:
 - Vehicle license fees
 - Permits for bi-articulate buses
 - Renewal of vehicle license fees on a 6-monthly basis with roadworthy certificate
 - Road Traffic Regulation amendments
 - RTMS/PBS
 - Tyre regulation: Redisa
 - Paint testing by SABS
 - Various speakers on topical issues



SABOA ANNUAL REPORT

Operational committee activities

• Meetings were held as follows:

- 17 February 2016 SABOA offices
- 13 May 2016 SABOA offices

Thereafter the meetings were combined with the technical committee as outlined before.

• Issues discussed during the year:

- Driver database
- Driver Training Academy
- Turnaround strategy for public transport
- Electronic tickets
- Reselling of tickets
- Expiry dates on tickets
- BRT developments

COASA sub-committee activities

Meetings were held as follows:

- First meeting held on 10 February and thereafter joint meetings with the Gauteng Branch. Joint meetings were held as follows:
 - 8 June 2016 Vix-Questek
 - 14 September Vix-Questek
 - 23 November Vix-Questek
 - 14 February SABOA offices

Issues discussed during the year:

- Cross-border time tables
- Permits/Operating licenses
- SARPAC clustering of modes
- Driver Training Academy
- Taxi intimidation
- National Public Transport Regulator
- Meeting with Minister of Tourism
- Lesotho border post issues
- Bus indabas/strategic planning

ROAD TRANSPORT MANAGEMENT SYSTEM

- In view of the importance of road safety for the industry, the National Council of SABOA resolved to adopt the Road Transport Management System (RTMS) and to encourage its members to apply for the accreditation of the RTMS system.
- RTMS is an industry-led, government supported, voluntary, self-regulation scheme that encourages road transport operators to implement a management system (SANS 10399:2012) with outcomes that improve road safety.

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- A number of workshops were held in 2016 in various provinces to promote the RTMS system and to elaborate on the benefits for operators who are accredited. Workshops will again be arranged in 2017.
- SABOA wishes to encourage its members to consider applying for RTMS accreditation as it has distinct benefits for operators and improves road safety

DRIVER TRAINING ACADEMY FOR THE BUS INDUSTRY

- As was reported in the 2015/16 Annual Report, the National Executive Committee of SABOA resolved in July 2015 to establish a Driver Training Academy for the bus and coach industry in South Africa.
- A Steering Committee was established to undertake some of the tasks required for the establishment of the Driver Training Academy. The following objectives have been identified by the Steering Committee:
 - To meaningfully contribute to reduce road fatalities
 - To make a better trained driver available to the market
 - To standardise and achieve an international standard of driver training in the industry
 - To make the driver qualification nationally respected amongst all employers
 - To establish and maintain a database of qualified / disqualified drivers
 - To address gender equity challenges in the industry
 - To make high quality driver training available to SMME bus operators
 - To set a nationally accepted standard for all driver training
 - To accredit existing training academies /centres (not to establish a new national academy)
 - To promote continuous training and re-training of drivers
- In order to expedite the establishing of the Driver Training Academy, the Executive Committee approved of the

following way forward:

- A business plan is to be compiled which will be used to obtain funding for the establishment of the Driver Training Academy
- A 'request for proposal' process will be followed to appoint a knowledgeable person to compile the business plan
- Once the business plan is available, identified companies will be visited to secure funding for the Driver Training Academy

REVIEW OF THE WHITE PAPER ON NATIONAL TRANSPORT POLICY

- On 17 and 18 March 2016 the second consultative workshop to review the WP was hosted by the DoT
- A major shift in policy is not expected as the overall vision and strategic objectives remain
- A number of challenges face the transport sector:
 - Fragmentation in government planning, implementation and funding of public transport.
 - Ineffective measures to improve transport safety, in particular road transport.
 - Persistent under-performance in passenger and freight rail transport.
 - Slow progress in serving marginalised rural populations.
 - Poor implementation of existing policy.
- Review process was expected to be completed in March 2017
- To date, there have been no further reports from the DoT.

TAXI INTIMIDATION

- In view of the ongoing intimidation by taxi operators on bus operators SABOA requested the Minister of Transport in December 2015 to appeal to the taxi industry to refrain from intimidating bus operators.

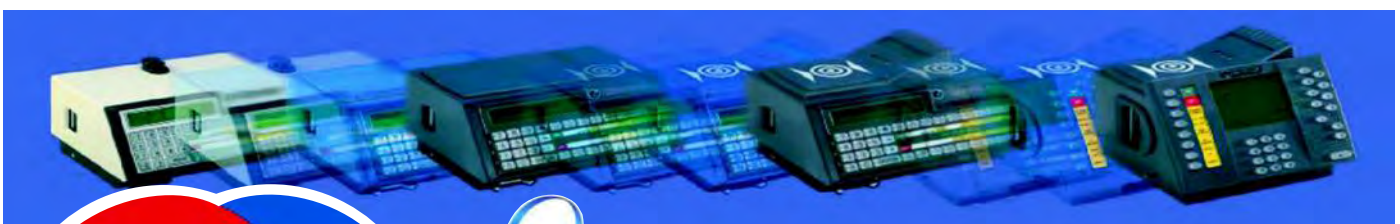


- The Minister reported that she had a discussion with the leadership of SANTACO and that they committed SANTACO to a non-violence stance in interacting with other public transport stakeholders.
- There has, however, been no improvement and SABOA requested the Minister to arrange a meeting between SANTACO, NTA and SABOA, chaired by the Minister, to address this matter.
- A meeting was arranged for 8 August 2016, chaired by Mr Mokonyama of the Department of Transport. At the meeting with the taxi associations it was resolved that bilateral meetings should be held between SANTACO and SABOA and between the NTA and SABOA.
- In spite of all SABOA's efforts to obtain suitable meeting dates for the bilateral meetings there has been no response from the two taxi associations.
- The following actions were also taken by SABOA to address taxi intimidation:
 - Letter to the previous Minister of Police (Minister Nhleko) in December 2015. SABOA met with the SAPS Stakeholder Manager on 29 June 2016 and it was agreed to establish a Stakeholder Forum to address taxi intimidation. Since this date it has not been possible to reach the Stakeholder Manager.
 - Reported the taxi intimidation to the Public Protector in September 2016 but the office of the Public Protector referred SABOA to the SAPS.
- Reported the taxi intimidation to the Independent Police Investigative Directorate (IPID) in October 2016 and met



with them on 07 December 2016. IPID confirmed that they only investigate instances where there is a lack of progress made by the SAPS in respect of reported incidents.

- Taxi intimidation was dealt with by the SABOA National Council and at the strategic planning workshop in January 2017.
- The way following way forward was approved by the National Council:
 - Again raise the matter with the Minister of Transport. In the meantime Mr Maswanganyi replaced Ms Peters as Minister of Transport. A request for a meeting with Minister Maswanganyi has been submitted to discuss taxi intimidation and other pertinent issues in the industry.
 - Write to the National and Provincial Commissioners of Police for assistance.
 - Approach the Public Protector for an appointment to emphasize the seriousness of the matter and to try and convince them to investigate the matter.



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EMPOWERMENT OF SMME MEMBERS OF SABOA

SABOA fully supports the empowerment of SMME bus operators and this is evidenced by the following:

- The SABOA constitution was amended in 2003 to give effect to this view.
- An Empowerment Committee consisting of Council members was appointed and provision is made in the SABOA budget to cover the travel and accommodation costs of Empowerment Committee members when they visit provincial governments and established operators in the provinces to promote the empowerment of SMMEs or to discuss empowerment initiatives.
- The Empowerment Committee has been busy with a number of initiatives in various provinces, but its efforts are being hampered by the lack of financial information from SMMEs involved in this process and the availability of funding for these transactions.
- In January 2016, the Empowerment Committee submitted a report of its activities to the National Council of SABOA and requested that SABOA should recommend to government that 15% of all commuter contracts should be awarded to SMME bus operators.
- This proposal of the Empowerment Committee was approved by the National Council and letters to this effect



were sent to the National Department of Transport as well as to all the MECs for Transport in the provinces.

- SABOA subscribes to Tender News and throughout the year, as and when tender opportunities became known to SABOA, members were made aware of these opportunities.

TRAINING ACTIVITIES

- The following training programmes were presented with funding from the TETA:
 - Advanced scheduling (skills programme)
 - RPL National Certificate: Professional Driving (learnership)
 - FET Certificate: Road Transport Supervision (learnership)
- SABOA wishes to thank TETA for its continued commitment to the training of SMMEs in the bus industry as well as Learncorp for training that they conduct on behalf of SABOA
- Road Passenger Transport Management Programme
330 students enrolled for the UJ programme

BUS RAPID TRANSIT SYSTEMS

- SABOA has stated repeatedly that it is in favour of Bus Rapid Transit (BRT) systems as part of an urban transport solution in South Africa.
- These systems are being developed in many of the metropolitan areas in the country.
- It is also SABOA's view that BRT systems are appropriate for many urban areas although it could differ from metropolitan area to metropolitan area depending on the operating circumstances and requirements, level of funding that is available etc.
- Metropolitan Councils should however ensure that proper viability impact studies are undertaken to determine the need for a BRT system or whether existing public transport systems should be improved.
- BRT systems will need continued financial support due to low population density and relatively high operating costs.
- SMME bus operators are however excluded from participating in these systems as they are not regarded as 'affected operators'.
- It is SABOA's view that their exclusion is the result of a narrow interpretation of section 41 of the National Land Transport Act (NLTA) by the Cities.
- The narrow interpretation relates to the fact that Cities only consider operators who operate route-based services on the routes intended for BRT services whilst section 41

of the NLTA refers to operators operating in the area under the jurisdiction of the City.

- SABOA has submitted a proposal to the National Department of Transport to amend section 41 of the NLTA to ensure that there is no room for misinterpretation.
- During a meeting between the Department of Transport and SABOA on 24 August 2016, the Department reaffirmed its view that it was unfair to exclude SMME bus operators from participating in BRT developments.
- The Department also confirmed that it was not required to amend section 41 of the Act as the matter could be addressed by means of a change in policy.
- SABOA was requested to provide the Department of Transport with a memorandum on the matter to enable the Department to discuss the matter with local governments.
- The memorandum was submitted to the Department in December 2016 and is currently under consideration.

CROSS-BORDER MATTERS

- Bilateral agreements which regulate cross-border transport exist between South Africa and Zimbabwe, Zambia, Mozambique, Malawi, Botswana and Swaziland and a number of committees have been established by the Cross-Border Road Transport Agency to:
 - monitor carriers on the routes;
 - promote efficient law enforcement on the routes;
 - exchange information pertaining to the routes;
 - determine passenger transport needs;
 - execute such other functions as may be determined by the committees
- SABOA is represented on these committees.
- SABOA raised its concern with the C-BRTA about:
 - The number of permits issued to taxi operators in relation to bus operators, intimidation by taxi operators on bus operators, the questioning of the legality of bus operators' permits by taxi operators and that the focus of

the C-BRTA is mainly on the taxi industry.

- SABOA stressed that in view of the fact that most cross-border routes are long-distance routes, the bus industry should form the backbone of cross-border industry and not the taxi industry. Taxi-type vehicle are not designed for long-distance routes whilst buses are designed for such routes
 - The C-BRTA needs to find a scientific methodology to regulate market access to avoid issues of over-trading
 - The non-issuing of permits to Lesotho due to taxi intimidation. In spite of court orders that were issued to prevent taxi operators from intimidating bus operators, the matter remains unresolved. This together with the fact that the Free State government does not recognise cross-border permits resulted in the non-issuing of permits to Lesotho.
 - SABOA also commented on the C-BRTA's proposed policy reform document which addressed the possibility of introducing restrictions on the distances that the different modes may travel in order to enhance safety.
- These matters are still under discussion with the C-BRTA.

SABOA SHORT-TERM INSURANCE SCHEME

- The Scheme was awarded to Ibititi Underwriting Managers on 1 December 2014 for a period of 5 years
- One of the biggest benefits to our SMME members who have 30 or fewer buses is that if they join the Scheme they get membership of SABOA free of charge.
- The Scheme is, however, not limited to SMME members. It provides cover for large operators as well and packages to suit the needs of large operators can be structured.
- SABOA would like to invite its members who are not on the Scheme to consider requesting a free no-obligation quotation from the Scheme as this could be to your benefit.



SABOA BUS INDABAS AND STRATEGIC PLANNING SESSION

- The purpose is to promote the SABOA Short-term Insurance Scheme and to inform members of the developments in the bus industry.
- Bus Indabas were held in 2016 throughout the country.
- A decision was also taken by the SABOA National Council in January 2016 that provincial strategic planning workshops need to be held to ensure that more members are involved in this process.
- It was therefore decided to combine the Bus Indabas and the provincial strategic planning workshops. These events were hosted as follows:
 - Polokwane: 26 July 2016
 - White River: 18 August 2016
 - Klerksdorp: 07 September 2016
 - Bloemfontein: 28 September 2016
 - Boksburg: 12 October 2016
 - Mthatha: 26 October 2016
 - Cape Town: 16 November 2016
 - Durban: 23 November 2016
- All the Bus Indabas/strategic planning workshops were well attended and the initiative will be repeated on the same basis in the second half of 2017.
- At the strategic planning workshop of the National Council which was held on 26 – 27 January 2017 the following focus areas were identified for the year:
 - Focus area 1: Build trusting relations with government and key stakeholders to advance government strategy to enhance public transport.
 - Focus area 2: SABOA to lobby government to legislate and motivate government and business entities to develop SBO's capacity to participate in mainstream contracts.
 - Focus area 3: Decrease the level of taxi intimidation.
 - Focus area 4: to standardise and lower heavy vehicle licence fees across provinces.



ALIGNMENT OF THE BUS SECTOR CHARTER TO THE AMENDED DTI CODES OF GOOD PRACTICE

- After the publication of the revised DTI Codes of Good Practice in October 2014, the Department of Transport embarked on a consultative process to solicit views and inputs in the sector to align the Bus and Coach Sector Charters to the revised DTI B-BBEE Codes of Good Practice.
- Agreement was reached on all the elements except preferential procurement.
- In spite of a joint meeting held with the DoT and the DTI the matter remains unresolved.
- A request to meet with the Departments of Energy in an attempt to find a solution to the problem was agreed to by the DoT and DTI and was scheduled for May 2016 but was cancelled by government at very short notice. To date, the meeting has not materialised despite many efforts to revive the initiative.
- The draft Bus Sector Charter was published in the *Government Gazette* for comments and SABOA submitted comments to the Department of Trade and Industry on 27 June 2016.
- At the BEE Indaba that was held from 10-12 November 2016 a number of amendments to the Bus Sector Charter were announced.
- SABOA requested a meeting with the Department of Transport to obtain clarity regarding the announced amendments to the Bus Sector Charter but to date a meeting has not yet been secured.
- SABOA would like to express its concern at the amendments which had been made to the Bus Sector Charter without any consultation with the industry.
- We also wish to repeat our request for a meeting with the Department of Transport to clarify the situation.

WAGE NEGOTIATIONS

- In 2015 the parties in SARPBAC could not reach agreement and a settlement outlined below was only reached through mediation:
 - 9% increase for the period 01 July 2015 - 30 June 2016
 - 4% increase for the period 01 July 2016 - 31 December 2016
 - 4% increase for the period 01 January 2017 - 31 March 2017
- In the 2017 negotiations it became evident at an early stage that the parties were far apart in their demands and that it would be difficult to reach a settlement without industrial action.
- In spite of dispute mediation a settlement could not be reached and a national strike in the bus industry took effect on 12 April 2017. A settlement was finally reached on 9%.

CONFERENCE AND EXHIBITION/GALA DINNER

- On 9 and 10 March 2016 the two-day Annual SABOA conference was held at the CSIR. A gala dinner was also held with more than 300 people attending.
- The conference was attended by 480 delegates whilst 52 exhibition stands were displayed in the inside exhibition area. A variety of buses and coaches were also displayed in front of the venue.
- SABOA wishes to thank all sponsors and participants for their loyal support that made the conference a memorable occasion

SABOA INITIATIVES

- In order to enhance the image and effectiveness of SABOA, the National Council resolved as follows:
 - To work towards the establishing of Branch offices in the provinces. To this end the first Branch office was opened in Cape Town in 2015.
 - In November 2016 a Branch office was also opened in Nelspruit
 - In November 2016 a Branch office was also opened in Nelspruit.
 - It is planned that one more branch office will be opened in 2017
 - To purchase office space for SABOA when its current lease expires in 2021.

RESEARCH

- Research is currently under way to gauge the risk appetite of contracted bus operators and how real or perceived risk is factored into contract pricing
- The objective is to determine if an improved risk share between authorities and operators could positively influence the pricing of commuter bus contracts in future

COMMENTS ON POLICY/LEGISLATION/SABS REPORTS

- Various SABS Reports
- Amendments to the Road Traffic Regulations
- Various C-BRTA Documents
- AARTO Amendment Bill
- Draft Carbon Tax Policy Document
- Draft Bus Sector Charter



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LIAISON WITH STAKEHOLDERS

- Minister of Transport
- Minister of Police
- Various MEC's for Transport
- National Department of Transport
- National Department of Tourism
- Various Provincial Departments of Transport
- Various Provincial Departments of Education
- Parliamentary Portfolio Committee on Transport
- Gauteng Portfolio Committee on Transport
- Gauteng Portfolio Committee on Education
- Northwest Provincial Regulatory Entity
- Gauteng Provincial Regulatory Entity
- Western Cape Provincial Regulatory Entity
- Mpumalanga Regulatory Entity
- Independent Police Investigative Directorate
- Public Protector
- Limpopo Portfolio Committee on Transport
- Road Traffic Management Corporation
- Tourism Business Council of South Africa
- SARPBAC

EXTERNAL COMMITTEES

- White paper consultative forum
- Ekurhuleni Transport Committee
- City of Tshwane's TRT Committee
- City of Tshwane Intermodal Committee
- City of Johannesburg's BRT Committee
- City of Nelspruit BRT Committee
- COJ Passenger Forum
- SANRAL
- C-BRTA Passenger Forum meetings
- DOT BEE Alignment Committee
- National Tourism Stakeholder Forum
- National Treasury's Carbon Tax Committee
- Department of Transport's Turnaround Plan for Public Transport

SABOA SERVICES/BENEFITS

- Calculation of tariffs
- Implementation of fares
- National Road Traffic Act and Regulations
- Contracting
- NLTA
- General transport-related matters
- Information to new entrants who wanted to enter the industry

MEMBERS

- During the 2016/17 financial year, SABOA approved 88 applications for Principal membership and 4 applications for Associate membership. The current membership profile of SABOA is as follows:
 - Principal members: 922
 - Associate members: 60

SABOA MAGAZINE/NEWSLETTER

- The Association's official magazine, *SABOA BUS*, was published quarterly. From reports it is evident that this publication is well received. On behalf of SABOA we wish to thank Titan Publications for a job well done.
- The SABOA monthly newsletter, FaxTalk has been revamped and renamed to SABOA Talk. It is also designed and printed by Titan Publications. We wish to thank Titan Publications for their loyal support.

REPORT FROM THE AUDITOR

- Report from the Auditor
 - The 2016/17 audited financial statements were approved by Council
 - The report is available to members for inspection at the SABOA offices

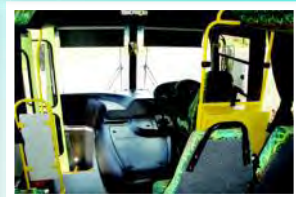
PERSONNEL

- A vote of thanks to all staff members for their support during the year
- Special word of thanks to Eric Cornelius for the exceptional effort that he puts into supporting the industry and association
- Vote of thanks to all members and chairpersons of committees of SABOA for all their valuable inputs during the year. ■



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