

OC241404

27 January 2025

Tēnā koe

I refer to your email dated 6 December 2024, requesting the following under the Official Information Act 1982 (the Act):

*"in relation to the private share targets for public transport set by the current government.*

1. *Any communication from the Ministry of Transport to NZTA about these targets*
2. *All internal communication within the Ministry of Transport about these targets, including but not limited to emails, texts, and Teams messages.*
3. *Any impact analysis or investigation that has been done by the Ministry of Transport about changing these targets.*
4. *For example, impact analysis on costs, environment / green house gas emissions, uptake of public transport, etc.*
5. *Any communication that has been sent by the Ministry of Transport to councils about these targets.*
6. *Any communication that has been sent by councils to the Ministry of Transport about these targets."*

19 documents fall within the scope of your request and are detailed in the document schedule attached as Annex 1. The schedule outlines how the documents you requested have been treated under the Act.

Certain information is withheld under the following sections of the Act:

- |             |   |
|-------------|---|
| 9(2)(a)     | to protect the privacy of natural persons   |
| 9(2)(f)(iv) | to maintain the constitutional conventions for the time being which protect the confidentiality of advice tendered by Ministers of the Crown and officials  |
| 9(2)(g)(i)  | to maintain the effective conduct of public affairs through the free and frank expression of opinions by or between or to Ministers of the Crown or members of an organisation or officers and employees of any public service agency or organisation in the course of their duty |
| 9(2)(k)     | to prevent the disclosure or use of official information for improper gain or improper advantage.   |

With regard to the information that has been withheld under section 9 of the Act, I am satisfied that the reasons for withholding the information at this time are not outweighed by public interest considerations that would make it desirable to make the information available.

Four documents have been supplied to you as excerpts from a larger document, as provided for by section 16(1)(e) of the Act. This has been done because the relevant material to your request is only a small section of the overall document. You would otherwise receive around 80 additional blank pages marked out-of-scope. Documents supplied as excerpts are clearly identified in Annex 1.

You asked for information on the following:

- *“Any impact analysis or investigation that has been done by the Ministry of Transport about changing these targets.*
  - *For example, impact analysis on costs, environment / green house gas emissions, uptake of public transport, etc.*
- *Any communication that has been sent by the Ministry of Transport to councils about these targets.*
- *Any communication that has been sent by councils to the Ministry of Transport about these targets”*

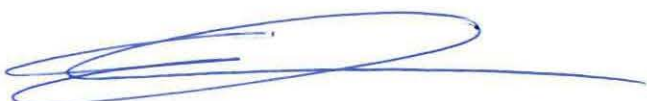
I am refusing this part of your request under the following section of the Act:

18(e)                    that the document alleged to contain the information requested does not exist or, despite reasonable efforts to locate it, cannot be found

You have the right to seek an investigation and review of this response by the Ombudsman, in accordance with section 28(3) of the Act. The relevant details can be found on the Ombudsman's website [www.ombudsman.parliament.nz](http://www.ombudsman.parliament.nz)

The Ministry publishes our Official Information Act responses and the information contained in our reply to you may be published on the Ministry website. Before publishing we will remove any personal or identifiable information.

Nāku noa, nā



Liz Anderson  
**Manager (Acting) – Urban Development and Public Transport**

## Annex 1: Document Schedule

Doc #	Reference number	Date	Title of Document	Proposed decision on request
1	-	05/04/24	RE: PT Meeting – GPS Funding & Farebox Recovery	Released, some out-of-scope material withheld
2	-	10/06/24	Draft GPS 2024 implementation work programme briefing	Released, some out-of-scope material withheld
3	-	10/06/24	ANNEX 1 GPS 2024 Implementation Work Programme Joint MoT NZTA view.docx	Supplied as excerpt. Attachment to Document 2 Released, some out-of-scope material withheld, along with some information withheld under s(9)(2)(f)(iv).
4	-	14/06/24	FW: public transport funding project - GPS updated timelines please - extra information by midday 13/6 please	Released, some out-of-scope material withheld, along with some information withheld under s(9)(2)(f)(iv).
5	-	14/06/24	GPS 2024 Priority Actions - Milestones and timelines for delivery (2024 to 2027)	Attachment to Document 4. Released, some information withheld under s(9)(2)(f)(iv).
6	-	14/06/24	OC240570 GPS 2024 Implementation Programme Overview - Briefing	Released in full.
7	OC240570	14/06/24	GPS 2024 Implementation Programme Overview Briefing	Supplied as excerpt. Attachment to Document 6. Released, some information withheld under s(9)(2)(f)(iv).
8	-	23/07/24	RE: GPS Monitoring briefing and work programme	Released, some information withheld under s(9)(2)(f)(iv) and s(9)(2)(g)(i).
9	-	23/07/24	RE: Draft briefing for consultation: PEP and GPS 2024 Reporting	Released, some information withheld under s(9)(2)(f)(iv) and s(9)(2)(g)(i).
10	-	23/07/24	GPS 2024 Implementation Work Programme Joint MoT NZTA view v2.docx	Supplied as excerpt. Attachment to Document 9. Released, some information withheld under s(9)(2)(f)(iv).
11	-	31/07/24	RE: PMO Monthly Report: Request to update the July 2024 report	Released, some out-of-scope material withheld, along with some information withheld under s(9)(2)(k).

Doc #	Reference number	Date	Title of Document	Proposed decision on request
12	-	31/07/24	Final OC240703 GPS 2024 Report and Performance and Efficiency Plan – Briefing – Policy 240724.docx	Supplied as excerpt. Attachment to Document 11. Released, some information withheld under s(9)(2)(f)(iv).
13	-	16/09/24	question (not for a story just yet)	Released, some information withheld under s(9)(2)(a).
14	-	03/10/24	RE: [Out of Scope] – feedback ideally by midday tomorrow	Released, some out-of-scope material withheld, along with some information withheld under s(9)(2)(f)(iv).
15	-	25/10/24	FW: Heads up information	Released, some out-of-scope material withheld, along with some information withheld under s(9)(2)(a).
16	-	25/10/24	Template – letter to councils re specific requirements re Ministerial expectations v4.docx	Attachment to Document 15. Released, some out-of-scope material withheld.
17	-	18/09/24	Teams Message	Released, some out-of-scope material withheld.
18	-	21/11/24	Teams Message	Released in full.
19	-	27/11/24	Teams Message	Released in full.

**From:** [Nick Potter](#)  
**To:** [Adam Lawrence](#)  
**Cc:** [Liam Fechny](#); [Marieka Curley](#); [Andrew Wilson](#)  
**Subject:** RE: PT Meeting - GPS Funding & Farebox Recovery  
**Date:** Friday, 5 April 2024 4:09:14 pm  
**Attachments:** [image001.png](#)

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Great. I'll send through a meeting invite now.

Enjoy your weekend,

Nick

**Nick Potter** ([he/his](#))  
Principal Adviser | Urban Development and Public Transport  
Te Manatū Waka Ministry of Transport  
E [n.potter@transport.govt.nz](mailto:n.potter@transport.govt.nz) | [s 9\(2\)\(a\)](#)



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**From:** Adam Lawrence <[Adam.Lawrence@nzta.govt.nz](mailto:Adam.Lawrence@nzta.govt.nz)>  
**Sent:** Friday, April 5, 2024 4:04 PM  
**To:** Nick Potter <[N.Potter@transport.govt.nz](mailto:N.Potter@transport.govt.nz)>  
**Cc:** Liam Fechny <[L.Fechney@transport.govt.nz](mailto:L.Fechney@transport.govt.nz)>; Marieka Curley <[M.Curley@transport.govt.nz](mailto:M.Curley@transport.govt.nz)>; Andrew Wilson <[Andrew.Wilson@nzta.govt.nz](mailto:Andrew.Wilson@nzta.govt.nz)>  
**Subject:** RE: PT Meeting - GPS Funding & Farebox Recovery

Nick,

Thank you for your email, and good to see you again.

Andrew and I are happy to meet up and discuss how we can work together. We are available 11.30-12.30am on Tue 9 Apr, if you can please send an invite.

I also need to check with some of our other teams who may need to be looped in.

Ngā mihi  
Adam

**Adam Lawrence**

**Lead Advisor Public Transport**

Transport Services

Mobile: [s 9\(2\)\(a\)](#)

**Waka Kotahi NZ Transport Agency**

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**From:** Nick Potter <[N.Potter@transport.govt.nz](mailto:N.Potter@transport.govt.nz)>  
**Sent:** Friday, April 5, 2024 2:42 PM

**To:** Adam Lawrence <[Adam.Lawrence@nzta.govt.nz](mailto:Adam.Lawrence@nzta.govt.nz)>; Andrew Wilson <[Andrew.Wilson@nzta.govt.nz](mailto:Andrew.Wilson@nzta.govt.nz)>  
**Cc:** Liam Fechner <[L.Fechner@transport.govt.nz](mailto:L.Fechner@transport.govt.nz)>; Marieka Curley <[M.Curley@transport.govt.nz](mailto:M.Curley@transport.govt.nz)>  
**Subject:** PT Meeting - GPS Funding & Farebox Recovery

Kia ora Andrew and Adam

It was good to see you again yesterday. We're keen to follow up with you on a couple of related issues that need some quick attention: Out of Scope and farebox recovery rates.

As you know, the draft GPS includes an action to "Increase farebox recovery and third-party revenue by Public Transport Authorities." We've been asked by the Minister's office to draft some milestones and timelines for delivering on this proposed action (at very short notice) and we've suggested this for starters:

Milestone	Timing (next three years – high level is OK)
Complete review of opportunities to increase farebox recovery rates and third-party revenue and implications for effective and efficient services	By end of Q1 2024/25 (By end of September 2024)
Implement recommendations from review	Q2 2024/25 onwards (October 2025 onwards)

Our view is that it's important to review the opportunities and implications of increasing farebox recovery rates before setting any specific requirements/expectations to ensure that this is part of broader work to improve the efficiency and effectiveness of PT networks before a strict policy is set. It would be great to meet with you to discuss what a review could cover, who should lead it and be involved (we're keen for our agencies to work together on this), and also timeframes. We're also keen to get a better understanding of how this action relates to development of the NLTP, as we understand that NZTA is intending to address the PT aspects of this in May.

Out of Scope

Given final policy decisions on the GPS are imminent, could we please arrange to meet early next week to discuss this? Some possible meeting times are:

- Monday 8 April 3:30-4:30pm
- Tuesday 9 April: Any time between 10:30-12:30 or 4-5pm.

Feel free to extend the invite to anyone else at your end too.

Cheers,  
Nick

**Nick Potter** ([he/his](#))

Principal Adviser | Urban Development and Public Transport

Te Manatū Waka Ministry of Transport

E [n.potter@transport.govt.nz](mailto:n.potter@transport.govt.nz) | [§ 9\(2\)\(a\)](#)



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## MINISTRY OF TRANSPORT

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**From:** [George Ross](#)  
**To:** [Rory Leonard](#); [Rebecca Ellery](#); [Bryan Field](#); [Joanna Heard](#); [Bev Driscoll](#); [Matthew Skinner](#); [Erin Wynne](#); [Roselle Thoreau](#); [Jessica Ranger](#); [Harriet Shelton](#)  
**Cc:** [Tim Herbert](#); [Mitch Macaulay](#); [Oliver Findlay-Badham](#); [Quaid Forbes](#)  
**Subject:** Draft GPS 2024 implementation work programme briefing  
**Date:** Monday, 10 June 2024 4:51:01 pm  
**Attachments:** [image001.png](#)  
Out of Scope

[ANNEX 1 GPS 2024 Implementation Work Programme Joint MoT NZTA view.docx](#)

Relevant excerpt provided  
as Document 3

Kia ora koutou,

Out of Scope

I have also attached the GPS work programme that Mitch has been working on and

If you have any comments, can you send them across by COP tomorrow.

Ngā mihi

George

**George Ross** ([he / his](#))

Kaitohutohu Matua | Senior Advisor – Investments

Te Rautaki Pūnaha Waka me te Pūtea Haumi | System Strategy & Investment

Te Manatū Waka Ministry of Transport

s 9(2)(a)

E: [g.ross@transport.govt.nz](mailto:g.ross@transport.govt.nz) | [transport.govt.nz](https://transport.govt.nz)

Action #	Action description	Lead Agency(s)	Milestones	Document 3	Timing for delivery / completion
Out of Scope					
9	Public transport funding: Increase farebox recovery and third-party revenue by Public Transport Authorities.	<ul style="list-style-type: none"> <li>NZTA</li> <li>Public Transport Authorities</li> <li>Ministry of Transport</li> </ul>	<ul style="list-style-type: none"> <li>Phase 1 - Establish foundations: By end of Q4 2023/24 (by end of June 2024) <ul style="list-style-type: none"> <li>Establish nationally consistent private share definitions, measures, and baselines across all public transport authorities. Private share includes farebox recovery and third-party funding sources (Lead: NZTA).</li> <li>Establish interim target for each public transport authority (Lead: NZTA).</li> <li>Monitor and report on progress (Lead: NZTA)</li> </ul> </li> </ul>		Delivery from July 2025

Andrew

\_\_\_\_\_

10: PUBLIC TRANSPORT FUNDING		MANAGEMENT FEEDBACK	SUPPORT/NOT	OVERALL PROGRAM/PHASE/ON TRACK
<b>OUTPUTS</b> <ul style="list-style-type: none"> <li>Increase farebox recovery and third-party revenue by Public Transport Authorities.</li> </ul>	<div> <div>2024</div> <div>May</div> <div>Jun</div> <div>Jul</div> <div>Aug</div> <div>Sep</div> <div>Oct</div> <div>Nov</div> <div>Dec</div> <div>2025</div> <div>Jan</div> </div>			
	Establish foundations and set interim targets			

8 Monitor and report on progress (Lead: NZIA)

Kia ora Rebecca, sorry for the delay.  
Regarding the dates, there is one mistake in the second milestone, the milestone starts at 1.7.24

So just to clarify:  
Milestone 1 – 1.7.24 until 31.12.24  
s 9(2)(f)(iv)

Hope that is clear,  
If you need anything else let me know.  
Talia

From: Rebecca Ellery <R.Ellery@transport.govt.nz>  
Sent: Wednesday, June 5, 2024 11:33 AM  
To: Talia Cohen Wolf <Talia.CohenWolf@mta.govt.nz>  
Subject: public transport funding project - GPS updated timelines please

You don't often get email from [r.ellery@transport.govt.nz](mailto:r.ellery@transport.govt.nz). [Learn why this is important](#)

Hi Talia  
For the Ministers top 10 priorities in the GPS, one of which is public transport funding I am pulling together a high-level timeline which I will keep updated regularly but is also going to be attached to the next GPS paper going to the Minister on Friday.  
I have the following stages of work for this that I received from Nick Potter (table below) who pointed out that you were the lead on this.  
Can you please confirm if these high level stages are still appropriate and whether you have any key milestones that I could also include? The below is start and end date.  
Establish foundations and set interim targets 7/01/2024 12/31/2024  
s 9(2)(f)(iv)

The output for this phase will look similar to the below. Keen to include milestones as well as phases like you have above, ie. Is there a key decision or milestone at the end of or within any of these phases?

Out of Scope

As I mention above this needs to go to the Minister on Friday so please let me know as soon as you can.  
Much appreciated  
Rebecca

Ngā mihi

Rebecca Ellery  
Portfolio Manager - Programme Management Office  
Te Manatū Waka Ministry of Transport  
s 9(2)(a) E: [r.ellery@transport.govt.nz](mailto:r.ellery@transport.govt.nz) | [transport.govt.nz](http://transport.govt.nz)

NZ Government Auckland Policy Office  
Level 7, 167b Victoria Street West, Auckland

Availability: I work limited hours on Thursday.

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## GPS 2024 Priority Actions

### Milestones and timelines for delivery (2024 to 2027)

Action name: **Public transport funding**: Increase farebox recovery and third-party revenue by Public Transport Authorities.

Lead: NZ Transport Agency Waka Kotahi (NZTA)

Milestone	Timing (next three years – high level is OK)
<b>Phase 1 - Establish foundations and set interim targets</b> <ul style="list-style-type: none"> <li>a) Establish nationally consistent private share definitions, measures, and baselines across all public transport authorities, including data collection and analysis.</li> <li>b) Set interim private share expectations for each PTA and NZTA to work with PTAs to start increasing private share on annual basis towards 2018/19 levels.</li> <li>c) Identify initiatives to increase private share: <ul style="list-style-type: none"> <li>• Obtaining cost efficiencies and maximising value for money spent on public transport.</li> <li>• Maximising patronage and therefore passenger fare revenue.</li> <li>• Develop third party revenue streams.</li> </ul> </li> </ul>	Jul 2024 to 31 Dec 2024 (Q2 2024/25)

s 9(2)(f)(iv)

**From:** [George Ross](#)  
**To:** [Abby McRoberts - parliament](#)  
**Cc:** [Tim Herbert](#); [Mitch Macaulay](#); [David Wood](#); [amy.moorhead@nzta.govt.nz](mailto:amy.moorhead@nzta.govt.nz); [Anaru Silao](#); [Chris Bunny](#)  
**Subject:** OC240570 GPS 2024 Implementation Programme Overview - Briefing  
**Date:** Friday, 14 June 2024 11:16:29 am  
**Attachments:** [image001.png](#)  
[OC240570 GPS 2024 Implementation Programme Overview - Briefing - Policy.docx](#) Relevant excerpt provided as Document 7

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Kia ora Abby,

Please find a copy of OC240570 – GPS 2024 Implementation Programme Overview Briefing attached.

This is a joint briefing between the Ministry and NZTA on the actions signalled in GPS 2024, and how we will work together to monitor and deliver these actions.

I'll walk over some hard copies shortly. Give me call if you have any questions.

Ngā mihi

George

**George Ross** ([he / his](#))

Kaitohutohu Matua | Senior Advisor - Investments

Te Rautaki Pūnaha Waka me te Pūtea Haumi | System Strategy & Investment

**Te Manatū Waka Ministry of Transport**

s 9(2)(a)

E: [g.ross@transport.govt.nz](mailto:g.ross@transport.govt.nz) | [transport.govt.nz](https://transport.govt.nz)



## 10: PUBLIC TRANSPORT FUNDING

LEAD AGENCY | TEAM:  
NZTA | PUBLIC TRANSPORT

SUPPORT: MOT

OVERALL PROGRAMME: **ONTRACK**

Document 7

### OUTPUTS

- Increase farebox recovery and third-party revenue by Public Transport Authorities.

2024								2025
May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan

Phase 1: Establish foundations and interim targets

s 9(2)(f)(iv)

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**From:** [Amy Moorhead](#)  
**To:** [Mitch Macaulay](#)  
**Cc:** [Tim Herbert](#)  
**Subject:** RE: GPS Monitoring briefing and work programme  
**Date:** Tuesday, 23 July 2024 12:12:33 pm  
**Attachments:** [image001.png](#)  
[GPS 2024 Implementation Work Programme Joint MoT NZTA \(NZTA comments\).docx](#)  
[20240612 Implementation plan timelines for brief inclusion v4 \(1\).pptx](#)

Relevant excerpt provided  
as Document 7 for both attachments

Kia ora Mitch,

Just coming back to you with our comments on this one. I haven't tracked changes, but almost all of our items have been checked and confirmed or updated with current milestones. Exceptions as follows.

Out of Scope

Should be able to come back on the above items by end of the day. In the meantime, everything else is good to go.

Cheers,  
Amy

**From:** Mitch Macaulay <M.Macaulay@transport.govt.nz>  
**Sent:** Thursday, July 18, 2024 2:33 PM  
**To:** Amy Moorhead <Amy.Moorhead@nzta.govt.nz>  
**Cc:** Tim Herbert <t.herbert@transport.govt.nz>  
**Subject:** GPS Monitoring briefing and work programme

Hey Amy,

Understand you spoke with Tim yesterday about the monitoring and reporting briefing we're pulling together next week. We'll share a draft of this with you tomorrow for feedback, and have set up a time on Monday for us to discuss. The briefing will confirm what's in the Monthly report for the Minister and

s 9(2)(g)(i)

We're going to attach the Work Programme again for his info, so I'm just making sure this document is still up to date. Could you ask your teams to take a look over it again and send

me any updates needed by **noon on Tuesday**? Hopefully it's a pretty quick exercise given we only updated it last month.

Will send around the briefing tomorrow!

Mitch

**Mitch Macaulay**  
Principal Advisor – Investment

s 9(2)(a)

| E: [m.macaulay@transport.govt.nz](mailto:m.macaulay@transport.govt.nz) | [transport.govt.nz](http://transport.govt.nz)



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**From:** [Mitch Macaulay](#)  
**To:** [Kim.Marshall@nzta.govt.nz](#); [amy.moorhead@nzta.govt.nz](#)  
**Cc:** [Tim Herbert](#); [Rory Leonard](#)  
**Subject:** RE: Draft briefing for consultation: PEP and GPS 2024 Reporting  
**Date:** Tuesday, 23 July 2024 5:26:00 pm  
**Attachments:** [image001.png](#)  
[GPS 2024 Implementation Work Programme Joint MoT NZTA view v2.docx](#) Relevant excerpt provided as Document 10

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Thanks Rory. I've also updated the Implementation Programme as per the feedback you have both sent through (thank you both!)

See attached for your info. If you have any further updates needed let me know by noon tomorrow (but it all should be about right, as I've just drawn on what you've provided me).

Amy – s 9(2)(g)(i)

s 9(2)(i)(iv)

Mitch

---

**From:** Rory Leonard <R.Leonard@transport.govt.nz>  
**Sent:** Tuesday, July 23, 2024 5:04 PM  
**To:** Kim.Marshall@nzta.govt.nz; amy.moorhead@nzta.govt.nz  
**Cc:** Tim Herbert <t.herbert@transport.govt.nz>; Mitch Macaulay <M.Macaulay@transport.govt.nz>  
**Subject:** Draft briefing for consultation: PEP and GPS 2024 Reporting

Hi Amy and Kim,

Please find attached an updated draft briefing, we've made changes based on our conversation yesterday and the feedback you provided Mitch today.

If you have any additional feedback please get that across to us by noon tomorrow. With this being due to the Ministers office tomorrow we won't be able to include any feedback after then as we'll need to get this through DCE sign off etc.

Thanks heaps for your contribution on this and please let Mitch or I know if you have any questions.

All the best,

**Rory Leonard** (he/him)  
Kaitohutohu Matua | Senior Adviser – Investment  
Te Manatū Waka Ministry of Transport

s 9(2)(a)

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# GPS PRIORITY ACTIONS MILESTONES, PHASES AND PROGRESS

Document 10

## 10: PUBLIC TRANSPORT FUNDING

LEAD AGENCY / TEAM:  
NZTA / PUBLIC TRANSPORT

SUPPORT: MOT

OVERALL PROGRAMME: **ONTRACK**

### OUTPUTS

- Increase farebox recovery and third-party revenue by Public Transport Authorities.

2024								2025
May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan

Phase 1: Establish foundations and set interim targets (by December 2024)

- Establish nationally consistent private share definitions, measures, and baselines across all public transport authorities, including data collection and analysis
- Identify and set interim private share targets with each public transport authority
- Identify and develop initiatives for increasing private share funding for public transport with each public transport authority

s 9(2)(f)(iv)

**From:** [Mitch Macaulay](#)  
**To:** [Bryan Field](#)  
**Cc:** [Tim Herbert](#)  
**Subject:** RE: PMO Monthly Report: Request to update the July 2024 report  
**Date:** Wednesday, 31 July 2024 4:21:00 pm  
**Attachments:** [image001.png](#)  
[Final OC240703 GPS 2024 Reporting and Performance and Efficiency Plan - Briefing - Policy 240724.docx](#)

Relevant excerpt provided  
as Document 12

Out of Scope

**From:** Victoria Joy Acharya <[V.Acharya@transport.govt.nz](mailto:V.Acharya@transport.govt.nz)>  
**Sent:** Wednesday, July 31, 2024 3:31 PM  
**To:** Tim Herbert <[t.herbert@transport.govt.nz](mailto:t.herbert@transport.govt.nz)>; Bryan Field <[B.Field@transport.govt.nz](mailto:B.Field@transport.govt.nz)>; Mitch Macaulay <[M.Macaulay@transport.govt.nz](mailto:M.Macaulay@transport.govt.nz)>  
**Cc:** Tony Frost <[t.frost@transport.govt.nz](mailto:t.frost@transport.govt.nz)>  
**Subject:** RE: PMO Monthly Report: Request to update the July 2024 report

Kia ora koutou

I want to clarify the projects and programmes that are part of the PMO monthly reports.

The sections highlighted in orange are the reports you are responsible for updating.

PMO Monthly Report (1-pager)	Details	SMEs / Project lead / Project Manager updating the report
Out of Scope		
GPS Priority Actions	Actions in scope of the report: Out of Scope 3. Public Transport Funding Out of Scope	Tim Herbert / Mitch Macaulay / Bryan Field

Please feel free to reach out if you have any questions.

Ngā mihi

**Victoria Acharya** ([she / her](#))

Kaitātari Pūrono | Reporting Analyst – Programme Management Office (PMO)

s 9(2)(a)

E: [V.Acharya@transport.govt.nz](mailto:V.Acharya@transport.govt.nz) | [transport.govt.nz](https://transport.govt.nz)

**From:** Victoria Joy Acharya

**Sent:** Wednesday, July 31, 2024 11:57 AM

**To:** Tim Herbert <[t.herbert@transport.govt.nz](mailto:t.herbert@transport.govt.nz)>; Bryan Field <[B.Field@transport.govt.nz](mailto:B.Field@transport.govt.nz)>; Mitch Macaulay <[M.Macaulay@transport.govt.nz](mailto:M.Macaulay@transport.govt.nz)>

**Cc:** Tony Frost <[t.frost@transport.govt.nz](mailto:t.frost@transport.govt.nz)>

**Subject:** PMO Monthly Report: Request to update the July 2024 report

Mōrena koutou

This email details the reports and key dates for the **July 2024** reporting period.

We have created an updated report layout for you from this month. It has been brought to our attention that the Investment team is developing a monthly reporting for the Minister of

Transport. To minimise any reporting duplication from your team, the scope of the GPS reporting has been updated to only cover the **GPS Priority Actions**. This approach was discussed with and approved by David Wood. He also advised that both the Investment and PMIM teams are to contribute to this report.

I've listed the actions for your reference below:

Out of Scope

### 3. Public Transport Funding

Out of Scope

The PMO team is keen to support you in making the process easier for you. Please let me know if there's any way I can help you with this (eg. Is there an opportunity for me to pre-populate the report for you?)

The reporting templates and guidance are linked for you below:

Document title	Notes	TARDIS link
GPS Priority Actions	This is the reporting template to be updated. For the PMO report, we are after information you already know/have on the actions where other agencies are involved. We are not asking for NZTA to complete this report.	s 9(2)(k)
Out of Scope		

Out of Scope

The reports are due to be completed by **COB 5 August**. Please note that the PMO might be in touch at any point after your submission as part of the QA of the report process.

Feel free to get in touch should you have any questions or feedback.

Ngā mihi

**Victoria Acharya** ([she / her](#))

Kaitātari Pūrongo | Reporting Analyst – Programme Management Office (PMO)

s 9(2)(a) E: [V.Acharya@transport.govt.nz](mailto:V.Acharya@transport.govt.nz) | [transport.govt.nz](https://transport.govt.nz)



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10	<b>Public transport funding:</b> Increase farebox recovery and third-party revenue by Public Transport Authorities.	<ul style="list-style-type: none"> <li>NZTA</li> <li>Public Transport Authorities</li> <li>Ministry of Transport</li> </ul>	<p>Work is underway in three phases to develop and implement initiatives that will increase farebox recovery and third party revenue. For clarity, we expect to see an increase in recovery in our current year end results. Recovery will increase over time as new initiatives are progressively implemented.</p> <p>Phase 1 - Establish foundations and set interim targets:</p> <ul style="list-style-type: none"> <li>Establish nationally consistent private share definitions, measures, and baselines across all public transport authorities, including data collection and analysis</li> <li>Identify and set interim private share targets with each public transport authority</li> <li>Identify and develop initiatives for increasing private share funding for public transport with each public transport authority</li> </ul> <p>s 9(2)(f)(iv)</p>	<p>Phase 1 complete by December 2024</p> <p>s 9(2)(f)(iv)</p>
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IN CONFIDENCE

Document 12

Page 9 of 11

IN CONFIDENCE

Action #	Action description	Lead Agency(s)	Milestones	Timing for delivery / completion
			s 9(2)(f)(iv)	

**From:** [Jessica Ranger](#)  
**To:** [Matthew Winthrop](#); [Liam Fechny](#)  
**Cc:** [Nick Potter](#)  
**Subject:** RE: question (not for a story just yet)  
**Date:** Monday, 16 September 2024 3:24:10 pm  
**Attachments:** [image001.png](#)  
[image002.jpg](#)  
[image003.png](#)

Yup

**From:** Matthew Winthrop <[M.Winthrop@transport.govt.nz](mailto:M.Winthrop@transport.govt.nz)>  
**Sent:** Monday, September 16, 2024 3:04 PM  
**To:** Jessica Ranger <[J.Ranger@transport.govt.nz](mailto:J.Ranger@transport.govt.nz)>; Liam Fechny <[L.Fechney@transport.govt.nz](mailto:L.Fechney@transport.govt.nz)>  
**Cc:** Nick Potter <[N.Potter@transport.govt.nz](mailto:N.Potter@transport.govt.nz)>  
**Subject:** RE: question (not for a story just yet)

I'll mention in the email back to Dom that reinstating the 50% farebox recovery ratio policy is an option provided as advice rather than official advice – sound ok?

**From:** Jessica Ranger <[J.Ranger@transport.govt.nz](mailto:J.Ranger@transport.govt.nz)>  
**Sent:** Monday, September 16, 2024 2:49 PM  
**To:** Matthew Winthrop <[M.Winthrop@transport.govt.nz](mailto:M.Winthrop@transport.govt.nz)>; Liam Fechny <[L.Fechney@transport.govt.nz](mailto:L.Fechney@transport.govt.nz)>  
**Cc:** Nick Potter <[N.Potter@transport.govt.nz](mailto:N.Potter@transport.govt.nz)>  
**Subject:** RE: question (not for a story just yet)

Apologies – just remembered one thing. It was just advice on potential stuff that could be looked at rather than policy development.

**From:** Matthew Winthrop <[M.Winthrop@transport.govt.nz](mailto:M.Winthrop@transport.govt.nz)>  
**Sent:** Monday, September 16, 2024 2:48 PM  
**To:** Liam Fechny <[L.Fechney@transport.govt.nz](mailto:L.Fechney@transport.govt.nz)>  
**Cc:** Jessica Ranger <[J.Ranger@transport.govt.nz](mailto:J.Ranger@transport.govt.nz)>; Nick Potter <[N.Potter@transport.govt.nz](mailto:N.Potter@transport.govt.nz)>  
**Subject:** RE: question (not for a story just yet)

Looks good, no changes from me. Thanks Liam and team, will send this over now.

**From:** Liam Fechny <[L.Fechney@transport.govt.nz](mailto:L.Fechney@transport.govt.nz)>  
**Sent:** Monday, September 16, 2024 2:38 PM  
**To:** Matthew Winthrop <[M.Winthrop@transport.govt.nz](mailto:M.Winthrop@transport.govt.nz)>  
**Cc:** Jessica Ranger <[J.Ranger@transport.govt.nz](mailto:J.Ranger@transport.govt.nz)>; Nick Potter <[N.Potter@transport.govt.nz](mailto:N.Potter@transport.govt.nz)>  
**Subject:** RE: question (not for a story just yet)

Hi Matt,

Some lines below, Jess has approved, so happy to discuss if you'd like to make any changes but otherwise good to go across to the Office!

- I am committed to ensuring public transport is delivered efficiently and reliably in New Zealand.
- It is important the private share of funding for public transport increases to reduce funding pressure on councils and the National Land Transport Fund.
- NZTA is currently developing an approach to increase the share of public transport revenue from passenger fares. NZTA is working with councils to do this.
- NZTA will initially set interim farebox recovery targets on a region-by-region basis to reflect the context and circumstances of each region.
- Longer-term targets will be set by the end of next year after gathering further evidence and feedback from councils.
- The Government is not intending to reinstate the 50% farebox recovery ratio policy at this stage.

Ngā mihi,

Liam Fechny ([he / him](#))

Kaitohutohu | Adviser – Urban Development and Public Transport  
Te Manatū Waka Ministry of Transport

s 9(2)(a) E: [l.fechney@transport.govt.nz](mailto:l.fechney@transport.govt.nz) | [transport.govt.nz](http://transport.govt.nz)



---

**From:** Jessica Ranger <[J.Ranger@transport.govt.nz](mailto:J.Ranger@transport.govt.nz)>  
**Sent:** Monday, September 16, 2024 2:03 PM  
**To:** Dominic Cowell-Smith <[Dominic.Cowell-Smith@parliament.govt.nz](mailto:Dominic.Cowell-Smith@parliament.govt.nz)>; Media Mailbox <[media@transport.govt.nz](mailto:media@transport.govt.nz)>; Tim Herbert <[t.herbert@transport.govt.nz](mailto:t.herbert@transport.govt.nz)>  
**Cc:** Suzanne Cookson <[S.Cookson2@transport.govt.nz](mailto:S.Cookson2@transport.govt.nz)>; Abby McRoberts - parliament <[Abby.McRoberts@parliament.govt.nz](mailto:Abby.McRoberts@parliament.govt.nz)>; Nick Potter <[N.Potter@transport.govt.nz](mailto:N.Potter@transport.govt.nz)>; Liam Fechny <[L.Fechney@transport.govt.nz](mailto:L.Fechney@transport.govt.nz)>  
**Subject:** RE: question (not for a story just yet)

No prob – we'll work with Comms to get something to you.

Ngā mihi

Jess

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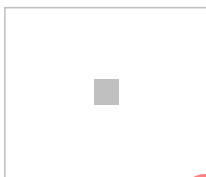
**From:** Dominic Cowell-Smith <[Dominic.Cowell-Smith@parliament.govt.nz](mailto:Dominic.Cowell-Smith@parliament.govt.nz)>  
**Sent:** Monday, September 16, 2024 1:55 PM  
**To:** Media Mailbox <[media@transport.govt.nz](mailto:media@transport.govt.nz)>; Jessica Ranger <[J.Ranger@transport.govt.nz](mailto:J.Ranger@transport.govt.nz)>; Tim Herbert <[t.herbert@transport.govt.nz](mailto:t.herbert@transport.govt.nz)>  
**Cc:** Suzanne Cookson <[S.Cookson2@transport.govt.nz](mailto:S.Cookson2@transport.govt.nz)>; Abby McRoberts - parliament <[Abby.McRoberts@parliament.govt.nz](mailto:Abby.McRoberts@parliament.govt.nz)>  
**Subject:** FW: question (not for a story just yet)

Afternoon team

Please see below query from s 9(2)(a) – could the office please have some lines in response by the end of the day?

Many thanks and happy to discuss,

Cheers  
Dom



**Dominic Cowell-Smith**  
Private Secretary (Transport) | Office of Hon Simeon Brown  
Minister of Transport | Minister for Auckland | Minister for Energy | Minister for Local Government

s 9(2)(a) [ent.govt.nz](http://transport.govt.nz) Website: [www.Beehive.govt.nz](http://www.Beehive.govt.nz)  
Private Bag 18041, Parliament Buildings, Wellington 6160, New Zealand

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**From:** s 9(2)(a)  
**Sent:** Monday, September 16, 2024 1:41 PM  
**To:** Ben Craven <[Ben.Craven@parliament.govt.nz](mailto:Ben.Craven@parliament.govt.nz)>  
**Subject:** question (not for a story just yet)

Hi Ben,

Hope you're well. Just got this from the proactive release on the GPS. Saw the bit at the bottom?

Not planning to do a story just yet, but thought I'd ask whether the govt had any plans to look into the idea proposed in the box at the bottom - increasing farebox revenue by reinstating the 50% farebox recovery ratio policy.

Just curious to know if it was on your agenda or if it's been ruled out

[https://www.transport.govt.nz/assets/Uploads/GPS-Proactive-Release-Documents-13-27\\_Marked-Up-04.09-FINAL-Post-office-comments-marked-up\\_Redacted.pdf](https://www.transport.govt.nz/assets/Uploads/GPS-Proactive-Release-Documents-13-27_Marked-Up-04.09-FINAL-Post-office-comments-marked-up_Redacted.pdf)

**Question:** How much revenue would a 10 percent increase in Farebox rates generate and options to increase Farebox share?

*A 10 percent increase in farebox rates would likely reduce the NLTF share by between \$10 and \$20 million per annum*

The table below details revenue and funding sources for public transport services over the past 15 years. Officials estimate that a 10 percent increase in farebox revenue would generate approximately \$30 to \$40 million in annual revenue, reducing the National Land Transport Fund (NLTF) and local share by between \$10 and \$20 million each, given the proportional split and Funding Assistance Rate (FAR) of approximately 51 percent. This is based on pre-pandemic revenue fare revenue of \$361 million (2018/19 financial year).

Officials expect that farebox revenue will significantly increase in the coming financial year (likely greater than 10 percent). This is due to the removal of significant subsidies that have been provided since COVID (conclusion of the half-price fares in June 2023, changes to the Community Connect Scheme, no additional top-ups to replace fare revenue following post-COVID patronage reductions). This will result in less Crown funding, but NLTF and local share will be similar to previous years.

Funding type / source	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
<b>Private</b>	266,917	270,455	286,474	298,793	312,306	340,482	393,673	359,075	362,442	362,259	287,461	251,915	159,194	153,618
Fare revenue	266,337	269,791	285,626	297,993	311,343	339,532	392,605	357,973	361,463	360,965	285,563	249,653	156,318	148,912
Third-party revenue	580	664	849	800	963	950	1,068	1,102	979	1,294	898	2,262	2,876	4,705
<b>Public</b>	322,268	354,651	416,491	437,482	467,460	494,355	515,946	552,013	599,433	699,255	805,833	867,674	930,867	1,026,801
Local funding	146,469	158,963	185,092	190,960	204,830	216,962	223,633	248,014	270,933	318,431	329,972	341,900	423,474	329,768
NZTA funding	156,133	175,325	210,106	224,210	238,577	251,142	264,323	279,435	299,633	351,521	360,764	369,067	430,703	356,236
Crown funding	19,667	20,371	21,293	22,306	24,051	26,220	27,943	26,566	28,866	29,303	115,097	156,706	76,690	340,798
<b>Total public transport services</b>	589,185	625,106	702,965	736,275	779,766	834,837	909,619	911,088	961,875	1,061,514	1,093,297	1,119,581	1,090,061	1,180,419
Private share of PT service costs	45%	43%	41%	41%	40%	41%	43%	39%	38%	34%	26%	23%	15%	13%

#### Option to increase Farebox share

An option to increase Farebox revenue and its proportional share of public transport services, could be to require NZTA to reinstate the 50 percent farebox recovery ratio policy, which was established in 2010. At the time, this was a target for Public Transport Authorities (PTA) to achieve over two National Land Transport Programme (NLTP) cycles (by the mid-2010s). While limited policy work has been undertaken and we have not engaged with either NZTA or PTA's on reinstating the policy, we consider that regions would again need at least two NLTP cycles to build towards the target, as most regions are well below 30 percent farebox revenue – this would not be a 'quick fix' for GPS 2024. Officials expect that a 50 percent farebox target will be easier for the larger cities, including Auckland and Wellington. Further policy work could be commissioned to provide more robust estimates, more evidence, and an approach which looks at the impacts for all regions.

s 9(2)(a)

s 9(2)(a)

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**From:** [Andrew Wilson](#)  
**To:** [Jessica Ranger](#); [Talía Cohen Wolf](#); [Adam Lawrence](#)  
**Cc:** [Liam Fechney](#); [Chris Young](#)  
**Subject:** RE: **Out of Scope** - feedback ideally by midday tomorrow  
**Date:** Thursday, 3 October 2024 10:55:19 am  
**Attachments:** [image001.png](#)

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Hi Jess,

We suggest wording along the lines of the following:

*Additionally, to implement the GPS direction, NZTA has initiated a programme of work with PTAs focused on increasing private share funding. This includes farebox recovery and third-party revenue across all public transport modes. The programme involves setting region-specific interim targets this year to drive shorter-term improvements, as well as identifying longer-term initiatives and targets to sustain progress over time.*

s 9(2)(f)(iv)

Let me know if any questions.

Cheers,

**Andrew Wilson** (he/him)  
**Team Leader / Public Transport**  
 s 9(2)(a)

---

**From:** Jessica Ranger <J.Ranger@transport.govt.nz>  
**Sent:** Wednesday, October 2, 2024 3:16 PM  
**To:** Talía Cohen Wolf <Talía.CohenWolf@nzta.govt.nz>; Adam Lawrence <Adam.Lawrence@nzta.govt.nz>; Andrew Wilson <Andrew.Wilson@nzta.govt.nz>  
**Cc:** Liam Fechney <L.Fechney@transport.govt.nz>  
**Subject:** **Out of Scope** - feedback ideally by midday tomorrow

Kia ora Talía and team

Out of Scope

We have drafted this para and we're keen to get your feedback on whether any changes are needed. The briefing is due shortly, so it would be good if we could get any comment from you by middayish tomorrow.

*Additionally, NZTA is currently investigating how to increase the private share (which includes the farebox recovery) across other public transport modes. This work will include setting region specific targets that take into account local network design and role.* s 9(2)(f)(iv)

s 9(2)(f)(iv)

Auckland and Wellington are likely to have the most ambitious private share targets, given they are our two largest PTAs, and currently and historically have had among the highest private share levels.

Ngā mihi

Jess

**Jessica Ranger (she/her)**

**Kaiwhakahaere | Manager – Urban Development and Public Transport**

**Ministry of Transport | Te Manatū Waka**

s 9(2)(a)

E: [j.ranger@transport.govt.nz](mailto:j.ranger@transport.govt.nz) | [transport.govt.nz](http://transport.govt.nz)



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## MINISTRY OF TRANSPORT

**Wellington (Head Office)** | Ground Floor, 3 Queens Wharf | PO Box 3175 | Wellington 6011 | NEW ZEALAND | Tel: +64 4 439 9000 |

**Auckland** | NZ Government Auckland Policy Office | Level 7, 167B Victoria Street West | PO Box 106238 | Auckland City | Auckland 1143 | NEW ZEALAND | Tel: +64 4 439 9000 |

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**From:** [Tim Herbert](#)  
**To:** [Investment](#)  
**Subject:** FW: Heads up information  
**Date:** Friday, 25 October 2024 9:31:28 am  
**Attachments:** [image001.png](#)

[Template - letter to councils re specific requirements re Ministerial expectations v4 .docx](#) Provided as Document 16  
 Out of Scope

fyi

**From:** Kevin Wright <Kevin.Wright@nzta.govt.nz>

**Sent:** Thursday, October 24, 2024 7:49 PM

**To:** Tim Herbert <t.herbert@transport.govt.nz>; Megan Campbell

<M.Campbell@transport.govt.nz>; Chris Jones <C.Jones@transport.govt.nz>; Marcus Schutenko

<M.Schutenko@transport.govt.nz>; Andrew Hicks <A.Hicks@transport.govt.nz>; Alexis Garland

<A.Garland@transport.govt.nz>; Harriet Shelton (h.shelton@transport.govt.nz)

<H.Shelton@transport.govt.nz>; Roselle Thoreau <R.Thoreau@transport.govt.nz>; Emma

Petrenas <E.Petrenas@transport.govt.nz>; Joanne Leung <j.leung@transport.govt.nz>

**Cc:** Amy Moorhead <Amy.Moorhead@nzta.govt.nz>; Anaru Silao <anaru.silao@nzta.govt.nz>;

Kim Marshall <Kim.Marshall@nzta.govt.nz>; Ian Melsom <ian.melsom@nzta.govt.nz>

**Subject:** Heads up information

Hi all

I am circulating for your information documents that were mentioned at the most recent meeting of NZTA/MoT managers. Below is a brief explanation about each document.

Ministerial expectations – We have developed specific requirements relating to aspects of the Ministerial expectations applicable to approved organisations. The specific requirements relate to [Out of Scope](#) public transport private share and reporting requirements.

Attached is a proposed letter to approved organisations which is going through our sign-off process, then will be provided to the Minister's officer for the Minister's information and then sent to approved organisations.

Out of Scope

Ngā mihi  
 Kevin

**Kevin Wright** (he/him) BCom/LLM

**Senior Manager Investment Assurance**

Investment & Finance,

Te Ama | Commercial and Corporate

Email: [kevin.wright@nzta.govt.nz](mailto:kevin.wright@nzta.govt.nz)

Phone: s 9(2)(a)

Mobile:

NZ Transport Agency Waka Kotahi

Auckland, Level 5, Aon Centre, 29 Customs Street West

Private Bag 106602, Auckland 1143, New Zealand

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Date

[Name]

[job title]

[organisation]

[Email address]

cc. [DRR name and email address]

Dear name

### Specific requirements relating to Ministerial expectations

In our September letter regarding decisions on the 2024-27 National Land Transport Programme, we informed you of the relevant Ministerial expectations set out in the Government Policy Statement on land transport 2024 (GPS 2024) that apply to approved organisations and the terms and conditions relating to those expectations.

We are following up with specific requirements in relation to Out of Scope and private share of public transport expenditure, and reporting. This information is set out in Attachment 1 and on the NZTA website and may be updated from time to time. We will notify your organisation of any changes.

### Ministerial expectations in GPS 2024

The GPS 2024 includes a Statement of Ministerial Expectations for NZTA and the sector in general. NZTA is expected to ensure that Road Controlling Authorities and Public Transport Authorities take appropriate steps to meet the Ministerial expectations, where applicable, and comply with self-assessment and reporting requirements. This is to demonstrate the steps that an approved organisation has taken to meet relevant expectations (including those for which there may be specific requirements).

We have developed specific requirements to achieve particular expectations including measures to assess whether an approved organisation is making appropriate progress. These requirements apply from October 2024 onwards.

### Reporting requirements

We set out the information requested for the October to December quarterly report (Reporting Schedule in Attachment 2). This requires your organisation to self-assess in relation to most of the expectations and provide quantitative information relating to Out of Scope and private share of public transport. We want to gain an understanding of any gaps or issues and streamline reporting using an appropriate template. Lessons and improvements will be embedded into the January to March reporting period.

### **Public Transport (increasing private share of expenditure)**

In August we issued a draft advice note to Public Transport Authorities (PTAs) which sets out how NZTA intends to work with PTAs to increase the private share of public transport expenditure. This can be found on our website <https://www.nzta.govt.nz/assets/Walking-Cycling-and-Public-Transport/docs/increasing-the-private-share-of-public-transport-expenditure-pta-advice-note-august-2024.pdf>

The note contains a website link to definitions of private share of public transport which will enable a common basis for reporting: Investment and expenditure | NZ Transport Agency Waka Kotahi (nzta.govt.nz).

I encourage you to ensure that your staff are familiar with these specific requirements in relation to your organisation's activities. To assist with streamlining reporting, it would be helpful if you could nominate to your NZTA Director of Regional Relationships a person from your organisation who will be responsible for quarterly reporting.

If you have any questions, please contact the Director of Regional Relationships for your region.

We look forward to continuing to work closely with you in coming months as we refine what approved organisations are expected to focus and report on from January 2025 onwards.

Yours sincerely

Brett Gliddon

Chief Executive

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## Attachment 1

### Specific Requirements relating to Ministerial expectations: reporting requirements, and private share of public transport expenditure.

1. **Specific Requirements:** This document sets out other requirements permitted by the existing approval terms and conditions (**General Terms**) that apply to funding from the National Land Transport Fund during the 2024-2027 National Land Transport Programme period (**Specific Requirements**).
2. **Description:** These Specific Requirements:
  - 2.1 relate to Ministerial expectations set out in the Government Policy Statement on land transport 2024/25–2033/34 (**GPS**);
  - 2.2 need to be read together with the September 2024 letter from the chief executive of NZTA to each approved organisation with the heading “2024–27 National Land Transport Programme – Final Decisions” which refers to how NZTA will apply the Ministerial expectations to approved organisations;
  - 2.3 apply to all relevant approved activities (and their associated funding approvals) carried out by an approved organisation and NZTA (for its own activities);
  - 2.4 must be complied with as a condition of receiving funding from the NLTF during the 2024-2027 NLTP period for the relevant approved activities; and
  - 2.5 apply from 1 October 2024 (although NZTA will take into account when notice of these requirements was given to a relevant organisation and when the Reporting Schedule (referred to in clause 4.2 below) first became available or included relevant reporting details).
3. **Review:** These Specific Requirements reflect that the relevant Ministerial expectations may require approved organisations and NZTA (for its own activities) to add to, or change, existing approaches, and arrangements (including with third party suppliers) and that a reasonable period will be required for this to occur. NZTA intends to monitor progress during FY2024/2025 and may review (and update or add to) these Specific Requirements (and/or the associated reporting) to ensure that they remain appropriate for the relevant Ministerial expectations.
4. **Reporting:**
  - 4.1 Approved organisations and NZTA (for its own activities) must:
    - (a) provide reports relating to (and on its level of achievement against) each Specific Requirement and other Ministerial expectations, including as described in Reporting Schedule; and
    - (b) monitor, collect and retain all information (including by reference to relevant time periods) reasonably required to support the reporting required by the

Reporting Schedule that relates to the Specific Requirements and other Ministerial expectations.

- 4.2 NZTA will provide fuller detail about reporting in a separate document to be called the 'Reporting Schedule' (or something similar). The Reporting Schedule will be made available via NZTA's website. The Reporting Schedule may be updated or replaced from time to time and will set out (by reference to each Specific Requirement and other Ministerial expectation) details about the following, in each case as reasonably provided for by NZTA:
- (a) the date for delivery of the first report, the frequency of that report and the relevant period it needs to cover (e.g. monthly, quarterly or annually);
  - (b) the format of the report, how the report is to be delivered (e.g. which reporting tool or process) and the content of the report (e.g. expenditure and revenue; activity volume, type, and location; actual performance against baseline, prior performance and target performance; and reasons for under-performance).
- 4.3 The frequency, format, content, and delivery of reports may differ between Specific Requirements and other Ministerial expectations and may also differ across different time periods.
- 4.4 For convenience, the Reporting Schedule may also be used by NZTA to specify other matters on which NZTA would like approved organisations to report, including so that NZTA can meet other reporting and information requests made of it by the Minister (e.g. monthly reporting on the percentage of the sealed local road network in lane kilometres with resealed and resurfaced pavement and rehabilitated pavement).
- 4.5 NZTA expects that, wherever possible, existing reporting tools and processes will be used for this reporting (e.g. Programme Monitor, Transport Investment Online, end of year achievement returns and via regular reporting to and by the Road Efficiency Group, including via the Transport Insights web portal).

5. These Specific Requirements relate to the following:

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Approved Activities relevant to **Public Transport (Share of Expenditure)**

Ministerial Expectation*	Approved Activity and Funding Approval <sup>+</sup>	Specific Requirement
Specific expectations relating to public transport	Public Transport Services Public Transport Infrastructure	<p>(i) Actively work towards increasing the private share of public transport expenditure on an annual basis (e.g. ensuring passenger fares and third-party revenue covers a greater portion of public transport expenditure).</p> <p>(ii) Actively engage with NZTA to agree and set interim private share targets by 19 December 2024 and longer-</p>

Ministerial Expectation*	Approved Activity and Funding Approval <sup>+</sup>	Specific Requirement
		<p>term targets by 19 December 2025.</p> <p>(iii) Demonstrate support for the National Ticketing Solution and actively work towards delivering and operating the National Ticketing Solution in partnership with NZTA, including by meeting NZTA fares and pricing requirements set out in the development guidelines for regional public transport plans.</p>

\* The primary relevant Ministerial expectation has been listed. A Specific Requirement may also be relevant to other Ministerial expectations set out in the GPS.

<sup>+</sup> A Specific Requirement may also be relevant to other approved activities and funding approvals that include, or relate to, the same content.

6. The Specific Requirements apply in addition to the General Terms and do not limit them, or NZTA's powers under them.
7. NZTA may at any time impose other specific requirements (and associated reporting) for approved activities and funding approvals (including for other Ministerial expectations set out in the GPS).

## Attachment 2

### Reporting schedule

The required content of the quarterly report on Ministerial expectations and specific requirements is set out in the table below. This applies for the quarter 1 October to 31 December 2024. Unless otherwise advised or updated, this applies to subsequent quarter reports. Unless otherwise advised, the quarterly report shall be provided by the 20th of the month after the end of the quarter.

Supporting delivery on the Minister of Transport's expectations outline in GPS 2024	Specific requirements	What was achieved in the quarter	Method of collection or reporting
<p><i>A focus on delivery</i></p> <p>Approved organisations are expected to:</p> <ul style="list-style-type: none"><li>• demonstrate contribution of their proposed activities to the GPS strategic priorities and GPS expectations.</li><li>• actively seek to progress and deliver their funded activities in line with the GPS expectations.</li><li>• ensure their business cases are focussed on the primary transport objective(s) of their projects, are completed in a timely fashion to control costs and deliver on the strategic priorities of the GPS.</li><li>• maintain a tight control on the scope and cost of their projects and adopt a "no frills" approach. (GPS 2024 gives examples of "no frills" and NZTA is</li></ul>		<p>Self-report:</p> <p>red = unlikely to meet expectation</p> <p>orange = tracking towards expectation</p> <p>green = likely to meet expectation</p> <p>Unable to assess = insufficient information</p> <p>Narrative comment is required:</p> <p>One sentence on each bullet point may be sufficient where reporting compliance. An example can be given to demonstrate compliance.</p> <p>If reporting non-compliance, give explanation.</p>	Word document template

Supporting delivery on the Minister of Transport's expectations outline in GPS 2024	Specific requirements	What was achieved in the quarter	Method of collection or reporting
considering providing further guidance around this approach).			
<p><i>A focus on core business</i></p> <p>Road controlling authorities are expected to:</p> <ul style="list-style-type: none"> <li>act primarily as delivery agencies (alongside NZTA), recognising that the Ministry of Transport is to lead the oversight and development of policy for New Zealand's transport system.</li> </ul>		<p>Self-report <i>red orange green grey</i>.</p> <p><i>Narrative comment is required on how the Approved Organisation is focusing on its core delivery role.</i></p>	Word document template
<p><i>A focus on value for money</i></p> <p>Approved organisations are expected to:</p> <ul style="list-style-type: none"> <li>choose the most advantageous combination of whole of life cost and infrastructure quality to meet a "no frills" specification that delivers the primary transport objective of the project in the most cost-effective manner. This requires identifying the project's primary objectives and will affect option selection. (NZTA is currently revising its guidance in this regard).</li> <li>monitor its operational expenditure to ensure that it is achieving value for money and that it can deliver within approved NLTF funding approvals.</li> </ul>		<p>Self-report <i>red orange green grey</i>.</p> <p><i>Narrative comment is required on the first, third and fourth bullet points.</i></p> <p><i>One sentence on each bullet point may be sufficient where reporting compliance. An example can be given to demonstrate compliance.</i></p> <p><i>If reporting non-compliance, give explanation.</i></p> <p><i>Report expenditure for the quarter for each activity class in accordance with NLTF investment</i></p>	<p>Word document template</p> <p>Reporting expenditure continues to be via Transport</p>

Supporting delivery on the Minister of Transport's expectations outline in GPS 2024	Specific requirements	What was achieved in the quarter	Method of collection or reporting
<ul style="list-style-type: none"> <li>focus on providing services that meet the needs and expectations of users.</li> <li>in the case it has approved funding for a road safety promotion programme, will identify the most cost effective and beneficial method for carrying out that programme. This may be supporting national advertising, rather than engaging in regional or local advertising and only engaging in advertising where necessary.</li> </ul>		<p><i>Claims and Obligations Policy</i>  <a href="#">National Land Transport Fund Investment Claims and Obligations Policy   NZ Transport Agency Waka Kotahi (nzta.govt.nz)</a>.</p> <p><i>Report forecast expenditure for the rest of the NLTP period for each activity class.</i></p> <p><i>Report on effectiveness of completed road safety promotion activities</i></p>	<p>Investment Online.</p> <p>Forecasting future expenditure continues to be via the Programme Monitor.</p> <p>Word document template</p>

Out of Scope

Supporting delivery on the Minister of Transport's expectations outline in GPS 2024	Specific requirements	What was achieved in the quarter	Method of collection or reporting
<p>Out of Scope</p> <p>RELEASED UNDER THE OFFICIAL INFORMATION ACT 1982</p>			
<p><i>Consider other revenue sources and other funding and delivery models</i></p> <p>Approved organisations are expected to:</p>		<p>Self-report <i>red orange green grey.</i></p> <p><i>Narrative comment is required.</i></p>	<p>Word document template</p>

Supporting delivery on the Minister of Transport's expectations outline in GPS 2024	Specific requirements	What was achieved in the quarter	Method of collection or reporting
<ul style="list-style-type: none"> <li>consider relevant funding and financing options in relation to each of their projects.</li> <li>consider relevant sources of third party funding in relation to their projects and actively pursue those deemed suitable and include in each project's funding mix.</li> <li>consider relevant delivery models that represents value for money and balance appropriate levels of risk and timely delivery.</li> </ul>		<p><i>One sentence on each bullet point may be sufficient where reporting compliance. An example can be given to demonstrate compliance.</i></p> <p><i>If reporting non-compliance, give explanation.</i></p>	
<p>Out of Scope</p> <p>RELEASED UNDER THE OFFICIAL INFORMATION ACT 1982</p>			

Supporting delivery on the Minister of Transport's expectations outline in GPS 2024	Specific requirements	What was achieved in the quarter	Method of collection or reporting
Out of Scope			

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Supporting delivery on the Minister of Transport's expectations outline in GPS 2024	Specific requirements	What was achieved in the quarter	Method of collection or reporting
Out of Scope			
<p><i>Specific expectations relating to public transport</i></p> <p>Public transport authorities are expected to:</p> <ul style="list-style-type: none"> <li>actively work towards increasing farebox recovery by 30 June 2027. This includes operating within approved funding of public transport continuous programmes, reviewing services that are delivering very low farebox recovery and considering appropriate fares.</li> <li>support and actively work towards transition to, delivery of and operation of the National Ticketing Solution in partnership with NZTA. This includes aligning concessionary fare structures with national policy to make the National Ticketing Solution cost effective and value for money for customers.</li> </ul>	<p>(i) Actively work towards increasing the private share of public transport expenditure on an annual basis (e.g. ensuring passenger fares and third-party revenue covers a greater portion of public transport expenditure).</p> <p>(ii) Actively engage with NZTA to agree and set interim private share targets by 19 December 2024 and longer-term targets by 19 December 2025.</p>	<p><i>Report baseline private share of public transport expenditure for 2023/24 for total PT services in accordance with NZTA's advice note to PTAs 'Increasing the private share of public transport expenditure' dated August 2024.</i></p> <p><i>Report private share of public transport expenditure for the quarter. Provide an explanation if there has been a decrease during the quarter.</i></p> <p><i>Identify initiatives taken during the quarter to increase private share.</i></p>	<p>Word document and Excel template</p> <p>Word document and Excel template</p>

Supporting delivery on the Minister of Transport's expectations outline in GPS 2024	Specific requirements	What was achieved in the quarter	Method of collection or reporting
	(iii) Demonstrate support for the National Ticketing Solution and actively work towards delivering and operating the National Ticketing Solution in partnership with NZTA, including by meeting NZTA fares and pricing requirements set out in the development guidelines for regional public transport plans.	<i>Narrative comment is required on steps taken by the PTA to support the NTS.</i>	Word document and Excel template

Authorised person from Approved Organisation to sign-off report.

If unable to report on a Ministerial expectation, please provide an explanation.

Some rough notes from the meeting with the Total Mobility coordinators just now. They're not comprehensive. Out of Scope

Out of Scope

- **There was a question re farebox recovery** from Total Mobility (as it falls under public transport activity class). Adam Lawrence of NZTA response was that TM is considered separately from bus, train, ferry private share.

Out of Scope



1

<https://www.thepost.co.nz/nz-news/360494147/new-processing-fee-app-wellington-snapper-top-ups>

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21/11/2024



## **New processing fee for in-app Snapper top-ups**

Beginning on Monday travellers using the Snapper app to top up will have to pay a 1.5% processing fee.

[www.thepost.co.nz](https://www.thepost.co.nz)

Between the extra revenue and the new Snapper processing fees, they should be creeping closer to their farebox recovery target

<https://www.nzta.co.nz/news/national/534941/bus-and-train-fares-may-surge-by-up-to-70-percent-to-meet-nzta-targets>



## Bus and train fares may surge by up to 70% to ...

It comes as the New Zealand Transport Agency tells councils to hit higher revenue targets.

WWW.NZTA.CO.NZ

Letters have been sent

Document 19

27/11/2024

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