INFRASTRUCTURE AND TRANSPORT
MINISTERS' MEETING

National Road Transport Technology Strategy

ISBN 978-1-922879-44-8 (Digital)
October 2025

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Contact us

Email: OFTT@infrastructure.gov.au

Website: www.infrastructure.gov.au

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Vision

This Strategy is the collective vision of Australia's Infrastructure and Transport Ministers for a **safer**, more **efficient**, **productive**, **sustainable** and **accessible** transport system for all Australians, through deployment and uptake of new road transport technologies to enhance social, environmental and economic well-being.

Infrastructure and Transport Ministers' Meeting

The Infrastructure and Transport Ministers' Meeting (ITMM) brings together Commonwealth, state and territory ministers with responsibility for infrastructure and transport. ITMM provides a forum to enable national cooperation and consistency on enduring strategic issues and address issues requiring cross-border collaboration. Local government representatives may be invited to participate in meetings depending on agenda topics of relevance.

New road transport technologies like connected and automated vehicles (CAVs) are coming, and through this Strategy, ITMM is making sure Australia is ready to maximise the benefits these technologies have to offer. ITMM recognises that technology adoption will be important for achieving transport outcomes into the future, and in supporting urban amenity and liveability objectives[1]. This Strategy builds on earlier work of ITMM and its predecessors including via the 2016 *National Policy Framework for Land Transport Technology*[2] and 2012 *Policy Framework for Intelligent Transport Systems in Australia*[3].

The term 'Australian governments' is used throughout this Strategy to mean Commonwealth, state and territory governments (i.e. those that are represented at ITMM).

Objective

The objective of this Strategy is for Australian governments to take a **nationally consistent approach to road transport technology deployment where this is needed** to achieve the Strategy's vision.

The Strategy does this by setting out:

- the role of Australian governments in enabling technology development, deployment and uptake through policy leadership, regulatory stewardship and targeted investments, and
- guiding principles to help governments across all jurisdictions make consistent decisions on how to best support new road transport technologies.

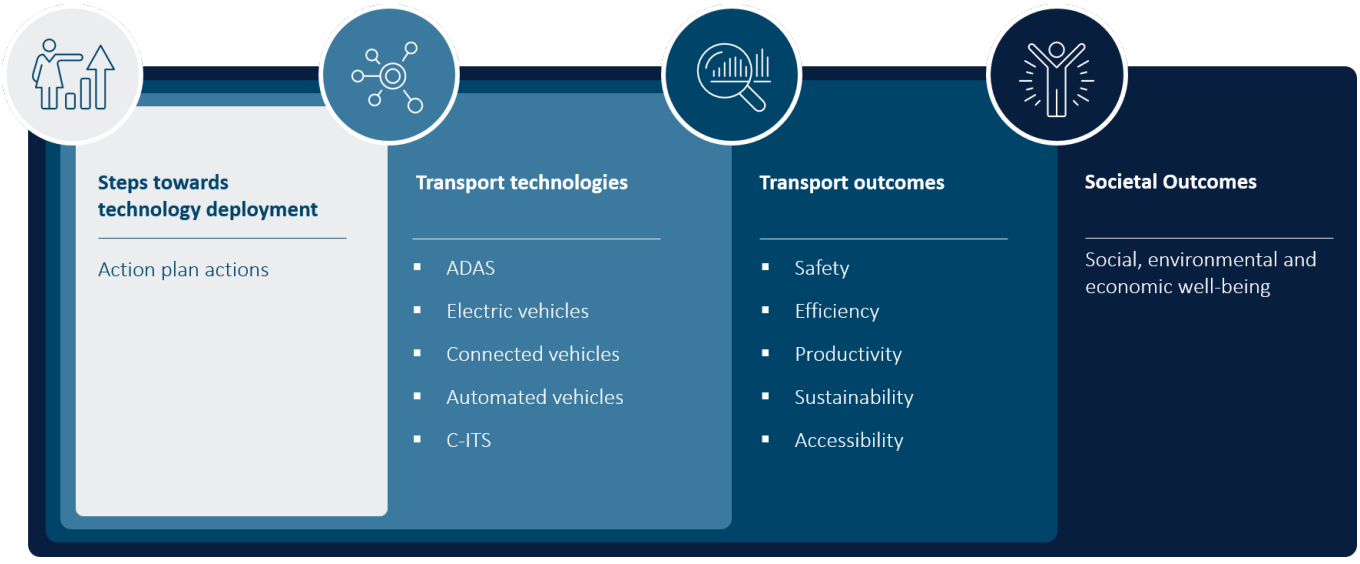
By defining what governments will do, the Strategy **provides certainty about the policy environment for technology deployment**, to road managers, industry, road users and the research sector.

The Strategy will be implemented through four-year action plans that **identify the national priority steps Australian governments will take together** to prepare for the deployment of key technologies where a national approach would bring the greatest benefits.

State and territory strategies and roadmaps set out the **activities they are undertaking within their own jurisdictions** to facilitate technology deployment.

The diagram below illustrates the relationship between the actions in the action plans and achievement of the Strategy's vision. The actions aim to advance deployment of road transport technologies, to deliver transport system outcomes. These transport system outcomes in turn contribute to advancing societal outcomes.

Diagram 1: Outcomes of technology deployment and adoption in the road transport sector



Introduction

In August 2016, the then Transport and Infrastructure Council (now ITMM) released the *National Policy Framework for Land Transport Technology* (the Policy Framework). It outlines how governments worked together to foster an integrated policy approach to the development and adoption of emerging transport technologies. The Policy Framework was underpinned by a series of four-year action plans (the *National Land Transport Technology Action Plan* 2016–19 and 2020–23) outlining governments' short to medium term priorities.

Road transport is vital for facilitating connections between people, places, goods and services, and moving freight produced and/or consumed within Australia. Deployment and uptake of road transport technologies can make transport safer and more efficient, productive, sustainable and accessible, which in turn enhances economic, environmental and societal well-being.

The road transport technology landscape is changing rapidly. Advances in sensor technology, automation, artificial intelligence, connectivity, and data processing and analysis are being applied to road vehicles, infrastructure, and road management systems. Road vehicles are becoming increasingly connected, electric and automated. Enabling new technologies allows consumers to access the latest vehicles that are safer and have lower emissions.

The *National Road Transport Technology Strategy* (the Strategy) updates the 2016 Policy Framework to reflect these changes and explicitly focus on road transport including private and commercial road users, vehicles and digital and physical road infrastructure. The *2024–27 National CAV Action Plan* is the first action plan under the updated Strategy.

The main priority under the Strategy and 2024–27 Action Plan is advancing vehicle connectivity and automation, including their supporting infrastructure and systems, complementing initiatives to increase electric vehicle (EV) uptake (and therefore advance vehicle electrification). Progressing these technologies together maximises technical, environmental and consumer benefits.

The Strategy and 2024–27 Action Plan will guide work already underway to prepare for CAVs and related future mobility technologies and services. As technology continues to evolve, the Strategy and future action plans will support deployment and uptake of new technologies as they emerge.

Relationship to other strategies

This Strategy helps implement:

- the vehicle safety priority and CAVs enabling action in the *National Road Safety Strategy 2021-2030*[4]
- elements of the *National Freight and Supply Chain Strategy*, and
- four of the seven Principles (Principles 1, 3, 5 and 7) of the *National Urban Freight Planning Principles*[5].

The Strategy also complements a range of state and territory transport strategies and roadmaps[6] by encouraging national consistency and integrated approaches across jurisdictions in deploying and adopting road transport technologies. The state and territory strategies and roadmaps set out in more detail the particular plans and actions each has in place to prepare for, or roll out, new transport technologies.

This Strategy complements the *National Electric Vehicle Strategy* [7] by helping to advance vehicle connectivity and automation, so that these can progress alongside vehicle electrification. CAVs, depending on how they are deployed, can help deliver energy savings and potentially emissions reductions by addressing the human factors that contribute to inefficient driving.

There are also a number of other Commonwealth technology-related strategies that are guiding technology deployment and uptake across the Australian economy, including the *National Quantum Strategy*, *2023-2030 Australian Cyber Security Strategy, Safe and Responsible AI in Australia consultation: Australian Government's interim response* and *National Robotics Strategy,* and these may therefore also support road transport technologies like CAVs, including Co-operative Intelligent Transport Systems (C-ITS).[8] The *Data and Digital Government Strategy* (DDGS)[9] is guiding Commonwealth government entities to deliver simple, secure and connected public services for all people and business through data and digital capabilities. The Strategy aligns with the outcomes of the DDGS to build partnerships with state and territory governments for the sharing of data, embed co-design of data and digital solutions, promote interoperability and adopt emerging technology.

Technology adoption will also be important in supporting urban amenity and liveability objectives. In April 2023, the National Cabinet agreed[10] a range of reforms to support a national approach to the growth of our cities, towns and suburbs, including re-instating a shared vision to ensure growth in cities is sustainable via a new *National Urban Policy*.

Australia's Disability Strategy 2021-2031[11] provides a vision for an inclusive Australian society. Policy priorities under the 'Inclusive Homes and Communities' outcome area of Australia's Disability Strategy 2021-2031 work to encourage all levels of government to ensure that transport systems are accessible for the whole community and that communication systems are reliable, accessible and responsive to people with disability. These policy priorities have informed this Strategy.

Context

Since 2016, road transport technologies and the features available to vehicle buyers have continued to develop and evolve. By 2031, embedded mobile connectivity (i.e. cellular communications technology that connects the vehicle to the internet) is forecast to be in 93% of new passenger vehicles sold in Australia (and in 40% of the fleet), and C-ITS connectivity (i.e. communications technology that that enables C-ITS messages to be exchanged) in 25% of new passenger vehicles.[12] Passenger vehicles capable of highly automated driving (early operational design domains) are forecast to enter the market from 2026, and form 2% of new car sales by 2031.[13] By 2050, 66% of new light vehicles sold (and 30% of the light vehicle fleet) are predicted to have Level 4 and 5 automation.[14]

A range of driver assistance features have become increasingly common in new light passenger vehicles (e.g. advanced emergency braking, steering and lane centering systems, parking assistance and adaptive cruise control), and these are flowing through to other vehicle classes (such as buses and freight vehicles). Modern heavy vehicles are starting to be fitted with features like advanced emergency braking, lane keeping systems and intelligent speed assistance.

Some of these features are part of Advanced Driver Assistance Systems (ADAS) – systems that can steer and accelerate/decelerate the vehicle. ADAS are increasingly offered in high-end vehicles, offering significant assistance while still requiring a human driver to remain in control of the vehicle. In future, automated vehicles (i.e. vehicles with an Automated Driving System (ADS)) are expected to enter the Australian market and will have the capability to perform the dynamic driving task (in some conditions) without the need for input from a human driver.

Embedded mobile connectivity is increasingly standard in new vehicles. Vehicle manufacturers are offering subscription services to vehicle owners for infotainment, and to activate optional features and provide over the air software updates for vehicle systems. Cloud connected services (provided by road managers and third parties via mobile phone apps and navigation units) and telematics services are delivering warnings and information to drivers on things like speed limits, congestion, hazards, and route and parking information to enable safer and more convenient journeys.

Intelligent Transport Systems (ITS) – the traffic management control and information systems that use integrated communications and data processing technologies to convey information to and from the roadside, including traffic lights – are becoming more sophisticated, making use of technology advances to improve road safety, efficiency and management. These are being enhanced by co-operative ITS, or C-ITS, which allow vehicles to communicate, and eventually cooperate, with each other, road infrastructure and other road users like pedestrians, by exchanging real-time safety warnings and other information about the road environment – C-ITS incorporates short-range, direct communications between vehicles, and between vehicles and infrastructure, as well as long-range communications via mobile networks.

Australian governments are actively preparing for new technologies. All jurisdictions have agreed to develop an end-to-end regulatory framework for the safe commercial deployment of automated vehicles (AVs) in Australia. This will include a new national AV safety law (AVSL), an AV in-service safety regulator, vehicle standards for AVs, and regulation of AV users through state and territory laws.

Technology trials have also progressed in number and sophistication – all states and territories have trialed AVs, and Queensland, New South Wales and Victoria have also trialed C-ITS[15]. Governments have also made significant investments in research, including through iMOVE Australia and relevant Austroads program streams.

All Australian governments have a strong focus on reducing greenhouse gas emissions from road transport. In 2022, the Australian Government legislated Australia's greenhouse gas emission reduction targets, and plans to reach Net Zero by 2050. This includes the commitment to developing 6 sectoral plans, one of which focuses on the transport sector called the Transport and Infrastructure Net Zero Roadmap and Action Plan. It will examine the potential pathways to reduce greenhouse gas emissions to net zero by 2050 across all transport modes (road, aviation, maritime and rail), freight and supply chains, active transport planning, and supporting infrastructure.

The Australian Government is already decarbonising light road transport with the *National Electric Vehicle Strategy*[16], and is introducing a New Vehicle Efficiency Standard[17] for light vehicles. State and territory governments also have their own EV initiatives.[18] These policies also support uptake of connectivity and automated safety features as new vehicles that enter the market, particularly low and zero emission vehicles, often come equipped with the latest communication and driver assistance technologies.

Role of governments

Australian governments are working together through this Strategy to support technology deployment where national approaches are needed. Governments want to work with industry, researchers and the broader community to progress the deployment and use of new road transport technologies where these can contribute to achieving the Strategy's vision. Each has a role to play in deployment and adoption.

Industry and the research sector develop new technologies – the research sector generates the scientific and other knowledge that underlies these technologies and helps governments and industry better understand how new technologies operate and their impacts, while industry innovates and brings new technologies to market on a commercial basis. Business and the broader community are able to drive demand for, and uptake of, new technologies where they have the trust, confidence, skills, awareness and opportunity to use them.

Australian governments provide a policy and regulatory environment for technology deployment and uptake, and invest when appropriate in supporting infrastructure, technology development and deployment. In performing their role, governments also support the roles of other sectors. Co-development, trials and co-investment are proven approaches for building the capacity of both government and industry.

The role of the Commonwealth, states and territories in supporting road transport technologies may be different. For example, where a national approach is required, the Commonwealth has a national policy leadership and coordination role; while the states and territories, where acting as road managers or service providers, may be more directly involved in technology deployment.

Local government also has a role to play in the deployment of road transport technology as the manager of local roads and services, but is not party to the strategy due to its different participation in ITMM. Australian governments will work with local governments to implement the strategy and action plan(s), where relevant.

Australian governments may undertake one or more of the following roles to enable deployment and uptake of road transport technologies:

1. Policy leadership

- providing strategic leadership and clear policy statements to guide nationally consistent decisions by governments at all levels on technology deployments
- facilitating collaboration between industry, government and researchers, and
- raising awareness and trust, and educating business and the public (including people with disability, people from culturally and linguistically diverse backgrounds and First Nations people) on key aspects of new technologies (noting industry also has a role in educating users about the technologies they supply).

2. Regulatory stewardship

- developing and maintaining a regulatory environment that balances enabling technology deployment with community expectations, including in relation to safety, security, privacy and accessibility
- removing unnecessary regulatory barriers and ensuring regulation is appropriately technology neutral and adaptable to changing circumstances, and
- undertaking evidence-based and consultative regulatory development.

3. **Targeted and coordinated investment where there is market failure or a clear public benefit (e.g. where it would benefit broader transport networks and transport users)**

    - making enabling investments e.g. investing in research, trials, skills development, supporting infrastructure or data streams, and
    - providing market leadership by investing directly in technology development and/or deployment e.g. procuring and deploying key technologies in line with the principles in this Strategy or encouraging early technology adoption through fleet procurement.

Principles guiding government action

Australian governments, through ITMM, have agreed to the following policy principles to guide nationally consistent decision-making across all jurisdictions to support deployment of new road transport technologies. A principles-based approach provides flexibility for jurisdictions, as differences between jurisdictions (including size, population density and geography) will impact decision-making.

These principles are intended to guide government action, both where it provides the environment for the private sector to deploy technology and/or where government is the deployer of technology.

Policy principles

1. **Improving transport outcomes:** Government decisions to support road transport technology deployment will be based on the capability of the technology/ies to improve safety, efficiency, productivity, sustainability and accessibility outcomes for transport users, the economy, environment and broader society as identified in the vision for this Strategy.

2. **Safe and secure operations:** Government decisions to support road transport technology deployment will be based on the ability to ensure the safe and secure deployment, operation and maintenance of these technologies in the Australian context. When critical systems fail they must fail safely.

3. **Nationally compatible deployment:** Where technologies will be deployed across jurisdictional borders, governments will take a national perspective on implementation recognising the impacts on other jurisdictions/operators, including by:

    a. identifying critical standards (including technology and data standards) for harmonisation internationally and across jurisdictions – relevant international or regional standards should be adopted, unless there is a compelling reason for a unique Australian requirement, and

    b. ensuring systems and practices are compatible and interoperable to enable a seamless user experience across Australia.

4. **Evidence based, strategic and value for money investment:** Where government investment is identified as needed to support the deployment of new technologies, that investment will be evidence-based, consistent with long term strategic planning, and deliver value for money for the whole of life of the investment.

5. **Leveraging existing investments, market approaches and devices:** Where appropriate, planning for new technologies will leverage existing infrastructure and networks (private sector or government, including public transport), market approaches and consumer devices and equipment (such as smart phones) in order to encourage effective, efficient and equitable deployments.

6. **Encouraging competition, choice and innovation:** Where feasible and appropriate, governments should avoid favouring particular technologies, applications and business models, and new technologies should be implemented in a way that supports appropriate data sharing in line with privacy and security requirements.

7. **Sustainable technology deployment:** Road transport technology deployment decisions should consider the whole of life sustainability impacts of the technology, including installation, operations, maintenance, and decommissioning and recycling at end of life.

8. **User-centric implementation:** New technologies should be designed, implemented and delivered in a way that meets the needs of those using them (e.g. travelers with disability, older and younger travelers, those on low incomes, First Nations people, culturally and linguistically diverse people, those in regional and remote areas, pedestrians, cyclists and users of multiple transport modes), including in a way that is consistent and familiar, and protects user privacy and security.

9. **Adapting to future change:** New technologies should be implemented in a way that supports resilient, reliable and scalable solutions, backwards compatibility or equivalent functionality, future upgrades, and possible future transitions to other technology platforms.

Benefits and challenges of road transport technologies

Deployment and uptake of road transport technologies brings a range of potential benefits that contribute to economic, environmental and social well-being. For example, CAVs are estimated to provide $13 billion in social and economic value to the Australian community by 2050 by improving productivity, accessibility and safety, and reducing congestion and fuel use.[19]

Achieving the benefits will depend on how technologies and services are designed, deployed and adopted. Deployment and uptake of new technologies also presents challenges for governments and society that need to be managed in order to realise the benefits.

The Strategy provides policy guidance to support technology deployment decisions and harness the benefits of new technologies while also addressing the challenges of technological change.

Safety

Australian governments have committed to a vision of zero road deaths and serious injuries by 2050.[20] Consistent with the Safe System approach to road safety, vehicle and road transport technologies could reduce the number and severity of crashes by reducing the likelihood and impact of human mistakes and reducing instances of excessive speeding. C-ITS and ADAS features could improve human decision-making by providing warning messages and alerts, and assisting the driver. For example, Lane Keeping Systems (an ADAS feature that warns the driver when the vehicle is leaving its lane and provides steering input to keep the vehicle in its lane) in light vehicles could reduce fatal and serious injury crashes resulting from unintentional lane departures by 22%.[21] In the future, vehicles with an ADS are expected to further improve safety by reducing the ability for human mistakes to contribute to crashes.

C-ITS could also improve road safety by providing vehicles with information and warnings. For example, the *Ipswich Connected Vehicle Pilot Safety Evaluation* found that, at 100% C-ITS penetration, the eight C-ITS use cases investigated could reduce the rate of fatal and serious injury crashes by 13-20%.[22] Vehicle technology may also improve safety at intersections, particularly for vulnerable road users like pedestrians. For example, analysis of Australian real-world crash types undertaken by Austroads in 2017 found that two C-ITS use cases at intersections (Intersection Movement Assist and Right Turn Assist) had the potential to reduce the targeted crash type by 35-50% and 25-40% respectively.[23] Also, the *Ipswich Connected vehicle Pilot Safety Evaluation* found that the use case 'Turning Warning for Vulnerable Road users at signalised intersections' could reduce fatalities by 6.1% and serious injuries by 4.3% for the relevant crash types targeted.[24]

Road crashes are costly both in human and financial terms, with the social costs estimated to be $27 billion annually.[25] By 2050, CAVs are estimated to reduce crash costs Australia-wide by approximately $15 billion. This increases to $152 billion by 2070, with 8,000 lives saved.[26]

Safety is of paramount importance, and while CAVs can have safety benefits they may also present safety risks. For example, ADSs are expected to rely on a complex integration of software and hardware to safely drive the vehicle. This may introduce new safety risks such as design or programming flaws, system errors and potential human/machine interaction issues that may lead to crashes. There may also be flow-on safety risks associated with CAVs if something goes wrong and there are no options for journey continuation and/or seeking assistance.

AVs may be enabled by Artificial Intelligence (AI), and this is considered a higher-risk application of AI.[27] The Australian Government is committed to putting in place appropriate guardrails for critical and enabling technologies. For example, the *Safe and Responsible AI in Australia Interim Government Response* outlines pathways to ensure the design, development and deployment of AI in legitimate, but high-risk, settings is safe and can be relied on, and that AI in low-risk settings can continue largely unimpeded.

Australian governments are working to harness the safety benefits and mitigate the safety risks of CAVs by developing a fit-for-purpose national regulatory framework for AVs to safely operate on Australia's roads, and via actions in the 2024–27 Action Plan to advance nationally consistent C-ITS deployment.

Efficiency and productivity

Road transport technologies can improve the efficiency and productivity of existing infrastructure and transport networks. For example, ITS is used on motorways and other major roads to manage incidents and traffic flows via dynamic speed zones, active lane management and e-tolling. The enhanced connectivity and real-time information provided by C-ITS to drivers (and potentially directly to ADS in the future), could enable better route and end of journey planning and smoother traffic flows. The costs of congestion are large, forecast to be around $30 billion by 2030[28], and so small reductions can have a big impact. Microsimulation experiments done as part of iMOVE Australia research suggest C-ITS could reduce peak congestion in arterial corridors by 11%, and improve average peak hour travel speeds in Melbourne CBD by 10%.[29]

CAVs could improve transport efficiency and reduce congestion by, for example, enabling vehicles to travel closer together (this may also include platooning where a lead vehicle controls the speed and direction of 'follower' vehicles), and increase productivity by freeing up time individuals previously spent on driving for other, more productive activities. They may also enable some freight movements to be undertaken when there is relatively low traffic (e.g. at night) to help reduce congestion at other times. These benefits depend on how CAVs are deployed. For example, if they are deployed in a way that reduces shared and active transport use and encourages more journeys and vehicles on the road network then this may result in re-congestion which, in turn, impacts livability particularly in urban areas. This is something that will need to be managed as CAVs enter the market in greater numbers.

The data generated by road transport technologies and systems can be analysed in real-time, increasingly with the help of AI, to enable better responses to incidents and manage road network demand, as well as over the longer term to improve transport planning, investment and maintenance decision-making. For example, data analysis can support evidence-based access decisions for heavy vehicles and help assess road network performance including understanding the impact of high productivity vehicles on the network e.g. on assets like bridges and pavements. This data is also important for developing digital twins (virtual representations of real-world assets, processes or systems) that can be used for predicting and planning for current and future road transport and infrastructure needs.

Australian governments are working together to advance C-ITS and develop a fit-for-purpose national regulatory framework for AVs, so that the productivity benefits of these technologies can be realised. Data sharing opportunities are being considered through the road manager and vehicle generated data sharing actions in the 2024–27 Action Plan, and relevant National Transport Commission and Austroads programs.

Sustainability

Transport is Australia's third largest source of greenhouse gas emissions and is projected to become the largest source if nothing is done. While restrictions during the early period of the COVID-19 pandemic resulted in a measurable decrease in transport emissions, the pre-2019 emissions trajectory has largely resumed and is projected to increase.[30]

In 2023, Australia's transport emissions made up 21% of national emissions and are expected to grow by 4 per cent to 2030 (peaking in 2027) before declining to be 3 per cent lower than 2023 levels by 2035.[31] Emissions from light vehicles, which includes cars and light commercial vehicles, comprise 62 per cent of all transport emissions.[32] Emissions from light vehicles are expected to decline from around 2026 as uptake of low and zero emission vehicles increases.[33] EVs are expected to make a significant contribution to achieving net zero emissions by 2050. Reducing exhaust pipe emissions also results in broader benefits including less pollution, with associated improvements in health outcomes.

The National Electric Vehicle Strategy, the introduction of a New Vehicle Efficiency Standard, Euro 6 noxious emission standards for light vehicles and Euro VI noxious emission standards for heavy vehicles, as well as improvements to fuel quality, alongside state and territory EV initiatives, are helping address road transport emissions. Other road transport technologies could also reduce emissions. For example, ITS, C-ITS and CAVs could help smooth traffic flows and improve journey times thereby reducing fuel use and energy consumption, as could driver assistance features like adaptive cruise control that maintain a constant driving speed. The emissions reduction impacts of these traffic smoothing technologies will likely diminish as the proportion of EVs in the fleet increases, particularly if renewable electricity is used for EV charging. Achieving these benefits also depends on how they are deployed. For example, if CAVs are not EVs and they are deployed in a way that re-congests the road network, this could increase energy use and therefore emissions. CAVs are estimated to result in fuel use reductions worth $6 billion and greenhouse gas emissions reductions worth $1 billion by 2050.[34]

Use of ITS, such as signal priority or 'green-waving' through intersections, can help achieve faster, more reliable and attractive mass transit like bus and light rail services on roads, with significantly lower environmental impacts per passenger than private vehicles. Similarly, emerging shared mobility (e.g. automated public transport and ride share capabilities, e-scooters, etc) and active travel options can also help improve transport sustainability by reducing fuel use and emissions. Mobility as a Service (MaaS), where a single technology platform is used to book and pay for multiple stages of a journey across multiple services and/or modalities, can make these options easier and more attractive to adopt. However, as with CAVs, the potential for ITS to improve traffic flow and journey times may also encourage more private vehicle use, and this would need to be managed.

AI has the potential to contribute to reducing greenhouse gas emissions by analysing road transport sector data (e.g. data related to energy consumption, emissions and environmental impact) to identify areas for improvement, enable smarter decision-making and optimise resource use. It has potential applications in transport energy management systems, predictive maintenance and the integration of renewable technologies.

Australian governments are working together to harness the sustainability benefits of road transport technologies through the vision and principles in this Strategy, specific actions on sustainability and MaaS in the 2024–27 Action Plan, and by working to support CAV, including C-ITS, deployment.

Accessibility

New road transport technologies could help transport systems meet the needs of all users, including older people and people with disability. For example, MaaS could provide easier transfers between multimodal services for transport users. AVs (e.g. shuttles, ride-share, taxis, private vehicles) could improve transport access for people unable to drive themselves and, in the case of on-demand services, provide access where and when required. They could also provide greater transport options for people in regional areas. Achieving the accessibility benefits will depend on how these technologies are deployed. For example, people with reduced mobility may find it more difficult to access transport without a driver or steward present to assist, or if CAVs are deployed in a way that reduces gaps between vehicles making it more difficult for pedestrians to cross non-signalised streets. Accessibility will also depend on the design and operation of these future services, including the human-machine interface.[35]

The United Nations Convention on the Rights of Persons with Disabilities (to which Australia is a signatory) and the *Disability Discrimination Act 1992* (DDA) state that people with disability must not be discriminated against in the provision of services (including transport services). There are accessibility requirements for public transport (including road transport such as buses and taxis) provided in the *Disability Standards for Accessible Public Transport 2002* (Transport Standards)[36] which are made under the DDA.

Australian governments are also working together to help deliver on the accessibility potential of road transport technologies through the vision and principles in this Strategy, and the actions on visual alerts, sound and haptic technologies in vehicles and accessibility guidance for CAVs in the 2024–27 Action Plan.

Equity

New road transport technologies offer significant improvements in safety, journey efficiency and convenience, sustainability, and accessibility for road users. There is a risk that these benefits may not be distributed (or be able to be accessed) equitably, particularly for some groups including those on low incomes, people with disability, older and younger people, First Nations people, culturally and linguistically diverse people, those in regional and remote areas and people from intersectional[37] cohorts. While digital inclusion nationally continues to steadily improve, there are persistent digital divides in Australia between First Nations and Non-First Nations people (particularly those living in remote and very remote areas) and between people in metropolitan and regional areas. Excluded and highly excluded Australians make up 23.6% of the national population – highly excluded Australians are more likely to have a disability, live in public housing, have not completed secondary school or be over 75 years of age.[38]

Road transport is vital for accessing economic opportunities, health care and other services and social engagement. There are deployment challenges involved with some cohorts, including people in geographically remote locations, and technology limitations that may impact how, where and when technology is deployed. Equity should be considered when planning for technology deployments, including deploying technology in a way that does not further entrench technology divides.

For example, access to improvements in vehicle safety or accessibility may depend on the ability to pay to purchase a new vehicle, or to make adjustments to a vehicle, but this may be mitigated to some extent by services that can be delivered via shared transport models or widely available consumer devices like smartphones. Connectivity, including C-ITS, can enable the exchange of safety messages and alerts between vehicles, road infrastructure and vulnerable road user devices (e.g. for pedestrians, cyclists and those on mobility scooters). CAVs could make transport more affordable by encouraging and making it easier to use cheaper shared transport models and public transport, or free options like walking and cycling. Depending on how CAVs are deployed, they could increase vehicle costs and diminish mass transit and active transport infrastructure (if resources are diverted away from these). They may also be of limited benefit in areas where there are limited shared transport options e.g. in regional Australia.

There is a link between equity and accessibility, for example, better vehicle and service design and CAV shared transport models could make access to transport more equitable for a range of vulnerable groups. Similarly, addressing sustainability can improve equity as vulnerable groups are more likely to be impacted by climate change.

Australian governments are considering equity through the principles in this Strategy, and the actions on visual alerts, sound and haptic technologies in vehicles, accessibility guidance for CAVs and sustainable technology deployment in the 2024–27 Action Plan.

Security

New road technologies could present cyber security risks. For example, CAVs, including the communications to and from vehicles, may be susceptible to disruption from a range of sources. This could include service outages, technical failure, hacking or other cyber-attacks. The data collected from vehicles could also be vulnerable to cyber-attacks and/or theft by malicious actors. Like safety, the security of new technologies is of primary importance and designing vehicles, services and infrastructure for security should be a baseline consideration.

There are existing security requirements that may apply to road transport sector participants such as telecommunications interception and data retention under the *Telecommunications (Interception and Access) Act 1979*, protection of networks and facilities from unauthorised interference and access under the *Telecommunications Act 1997*, and notification of critical cybersecurity incidents under the *Security of Critical Infrastructure Act 2018*.

Australian governments are also addressing these issues through the vision and principles in this Strategy, and by having specific requirements in the AV regulatory framework to guard against third-party interference and an action in the 2024–27 Action Plan on options to manage the security of C-ITS communications.

Data and privacy

New road transport technologies, including vehicles and surrounding infrastructure, are expected to generate large amounts of data, for example data on vehicle speed, heading, location, crash status – some of which could be personal data and present privacy risks. Much of this data is collected by the private sector (e.g. vehicle manufacturers) but this could potentially be shared more broadly, including with governments, for a range of beneficial purposes. Governments, including road managers, also hold useful data (e.g. on speed signs, roadworks, incidents, etc) that could be shared under the right conditions. While access to, and use of, this data can inform and enhance government and private sector decision-making and service design, careful consideration must be given to balancing potential benefits (e.g. improved safety, productivity, innovation and competition), with appropriate privacy protections for individuals.

For example, vehicle manufacturers collect vehicle data to improve the features and services they offer and may also make data available to others, including third party service providers. The approach to collecting vehicle data may not be uniform among manufacturers as they may have different strategies and capabilities. C-ITS will rely on data from vehicles and road manager data to inform the safety and other messages it delivers to improve road user safety and road network productivity. Governments and the private sector will need to cooperate to share data with appropriate privacy protections to develop use cases that support C-ITS service delivery.

There are existing privacy requirements that may apply to the collection, storage, disclosure and use of personal information (e.g. the *Privacy Act 1988*), and the substance and contents of communications (e.g. telecommunications-specific privacy requirements in the *Telecommunications Act 1997*).

Australian governments are also addressing these issues through the principles in this Strategy, the actions in the 2024–27 Action Plan on examining the treatment of CAVs under relevant laws and on road manager and vehicle generated data sharing, and relevant National Transport Commission and Austroads programs.

Harmonisation, standards and interoperability

Road transport technologies, including data and associated systems, that need to operate across jurisdictions risk incompatibility and lack of interoperability if they are not based on common standards. Harmonisation helps minimise barriers to entry and deployment, and with technology uptake, competition, efficiency and upgrade paths. For example, harmonisation in C-ITS deployments will be vital for getting a critical mass of compatible vehicles and infrastructure in Australia that can communicate with each other nationally to achieve the full benefits of C-ITS. This can be difficult to accomplish due to jurisdictional differences, including pre-existing ICT systems.

Technologies should be mature and proven. As a small market, Australia benefits from aligning technology and standards choices with larger markets. For example, Australia's vehicle standards are generally aligned with the United Nations World Forum for Harmonization of Vehicle Regulations.

National consistency is a key principle informing development of the national AV regulatory framework. Australian governments are working towards national consistency for C-ITS based on the *Principles for a National Approach to C-ITS in Australia*[39], the vision and principles in this Strategy and through the C-ITS implementation plan actions in the 2024–27 Action Plan.

Supporting infrastructure

New road transport technologies will require supporting digital and physical infrastructure to operate effectively. As technology continues to develop, there is a challenge for governments to identify and understand what infrastructure will be required and when, and how to deliver this to ensure value for money. For example, physical infrastructure like lines and signs may need to be adjusted and harmonised across jurisdictions to accommodate CAVs, however this will depend on the capability of vehicle sensors and connectivity which are still developing. Similarly, the extent to which CAVs will depend on connectivity to drive safely and cooperate with each other (as opposed to relying solely on sensors) is not yet clear, but connectivity is expected to enhance performance (e.g. to help AVs perceive the road environment outside sensor range) and service offerings. The particular infrastructure needs of different vehicle types, such as heavy vehicles, should also be considered.

The infrastructure of other sectors, like telecommunications and electricity networks, are important enablers of road transport technologies. For example, vehicle connectivity and ITS make use of fixed and mobile communications networks to provide services. There is existing telecommunications infrastructure in Australia that could play a role in connecting CAVs, including terrestrial mobile (e.g. 4G and 5G) and Low Earth Orbit satellite networks. CAVs may need accurate satellite positioning information to maintain awareness of their location on the road. As connectivity, automation and electrification increasingly converge in vehicles, they will rely on electricity networks for charging.

The need for supporting infrastructure should be considered early in the road planning stage. This consideration should identify and safeguard future sites, taking into account proper planning considerations and technical guidelines as they relate to colocation of mobile telecommunications infrastructure with other services or uses (e.g. EV charging).

Australia's large land mass and sparse population create cost and other challenges for deploying infrastructure in regional and remote areas. These should be considered when planning for new road transport technologies, noting that there are existing programs[40] to, for example, fund the rollout of fixed and mobile communications and EV charging infrastructure in these areas.

The Australian and New Zealand Governments have developed SouthPAN[41] which will provide positioning with close to 10cm level accuracy to be available everywhere across Australia and New Zealand, overcoming gaps in mobile, internet and radiocommunications.

Further to this, the Australian Government has, through the National Positioning Infrastructure Capability, unified networks of ground-based positioning infrastructure to support the delivery of centimetre-level accurate positioning services. Geoscience Australia anticipates improved positioning services will offer benefits to the safety, productivity and security of transport technology. Further work is needed to determine how increased accuracy of positioning systems could help support the operation of CAVs and other road transport technologies.

Australian governments continue to work through the relevant Austroads programs to identify the digital and physical infrastructure needs of CAVs, and through the actions in the 2024–27 Action Plan on examining international efforts to develop a ratings framework for assessing road readiness for CAVs, developing guidance on the physical road infrastructure needed for CAVs, and investigating how precise positioning can support CAVs.

Disruption and change

New road transport technologies could disrupt established markets and businesses, impacting, among other things, safety, employment, skills requirements, competition, land use planning and government revenue. Technology transitions may be rapid or gradual (a gradual transition is expected for CAVs[42]) but gradual transitions may not preclude there being shocks for some firms or industries.

For example, CAVs could potentially reduce the need for traditional driving skills, which may reduce costs for some industries and address skills shortages, but may create a need for reskilling and redeployment of drivers to other roles e.g. shifting to provide customer service to CAV passengers. CAVs may also reduce personal vehicle ownership, creating more demand for shared transport models and less demand for parking in city areas.

Australian governments are considering the workforce implications of CAVs through an action in the 2024–27 Action Plan.

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