

URBAN RAIL AS BACKBONE FOR SMART MOBILITY

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Urban Mobility is NOT about transport, it is about PEOPLE...





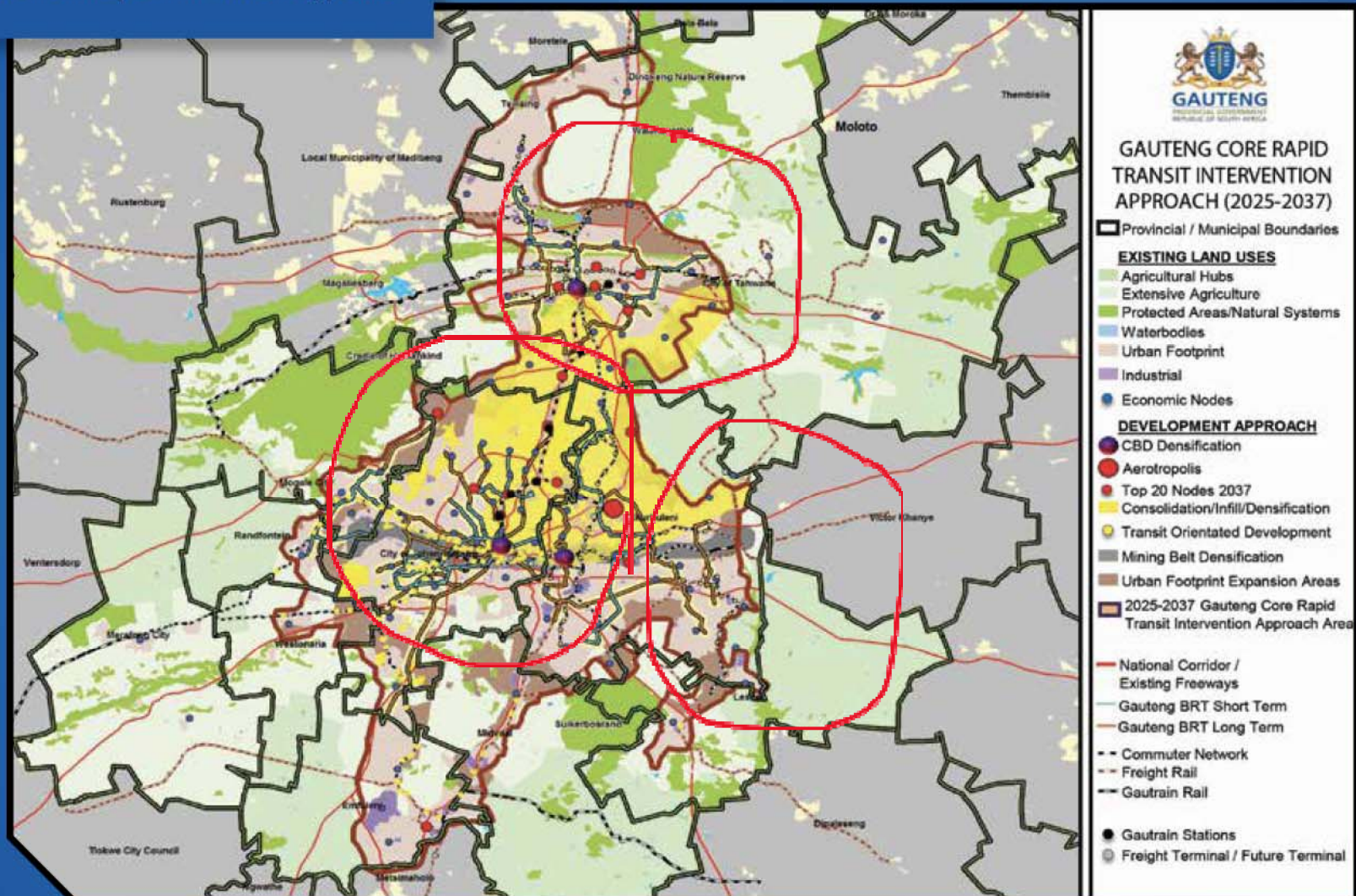
AFRICA

Study Area



Gauteng City Region: 3 Interconnected Cities – 12 million people

Core Public Transport Intervention Approach



ITMP-25

25-year Integrated Transport Master Plan

To facilitate the implementation of the ITMP25, eight mutually supportive strategic interventions were identified. These interventions are arranged into the following four clusters:

- Land Use Development;
- Strategic Public Transport Network;
- Freight Transport; and
- Road Transport.

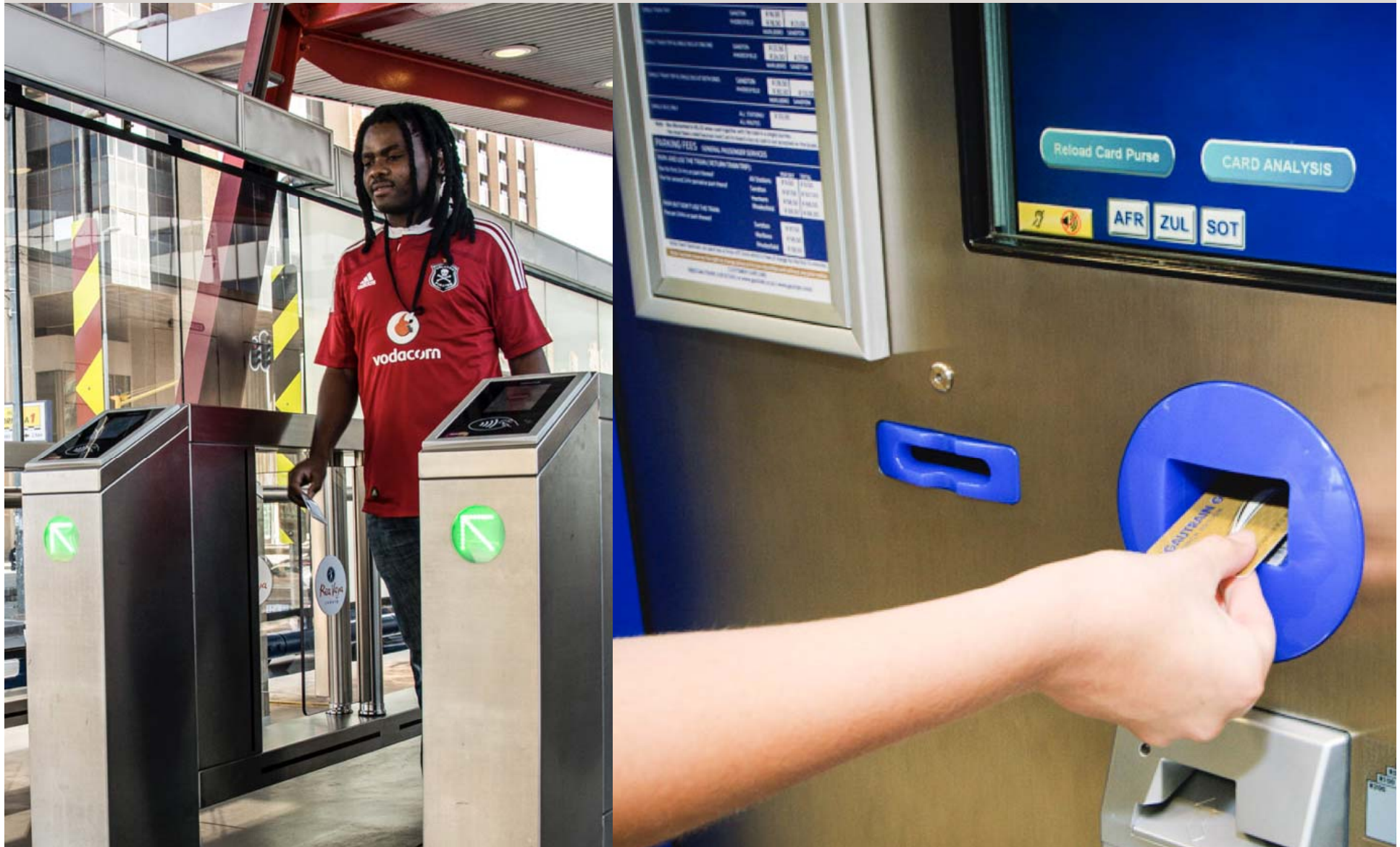
Collectively, these interventions provide the long-term planning framework to support economic growth; help to create jobs; improve quality of life and reduce the impact on the environment.



The aim is integrated and seamless mobility from door tot door



Integrated Ticketing



Complementary Feeder Service



Mini-Bus Taxis



Promoting Non-Motorised Transport



BUT: Urban Rail as Backbone



The Need for Change in Gauteng

Rapid Population Growth



Gauteng's population will increase to **18.7m** by 2037

Annual **population growth** in Gauteng (+1.7%) is **well above** the SA expected rate

Deep Poverty and Inequality



Gauteng's unemployment rate is **29%**, which is above the SA average

Employment in the formal sector has declined to around **77%**

Significant Traffic Congestion



Peak hour trips on key roads take **70%** longer than during the off-peak

If no improvements are made average road speeds could deteriorate to **10km/hr** by 2037

Intense Global Competition

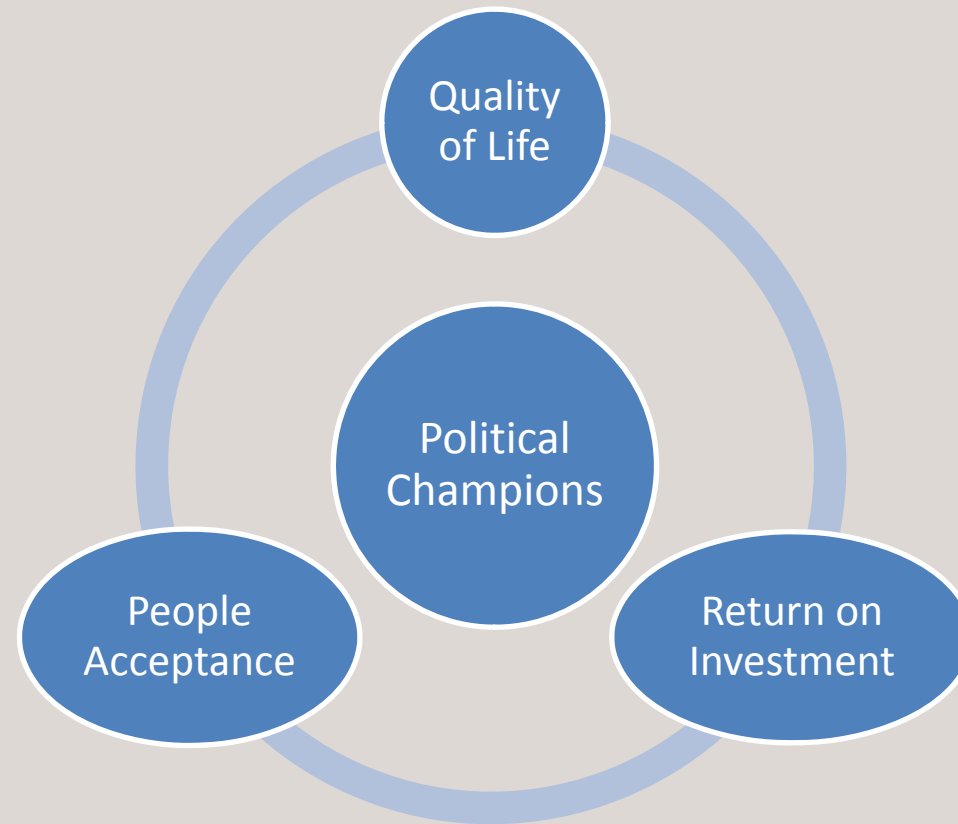


The City of Johannesburg is ranked **42nd** out of 44 cities on the Global Power City Index (2018)

Gauteng needs to invest in infrastructure to better compete on the global stage



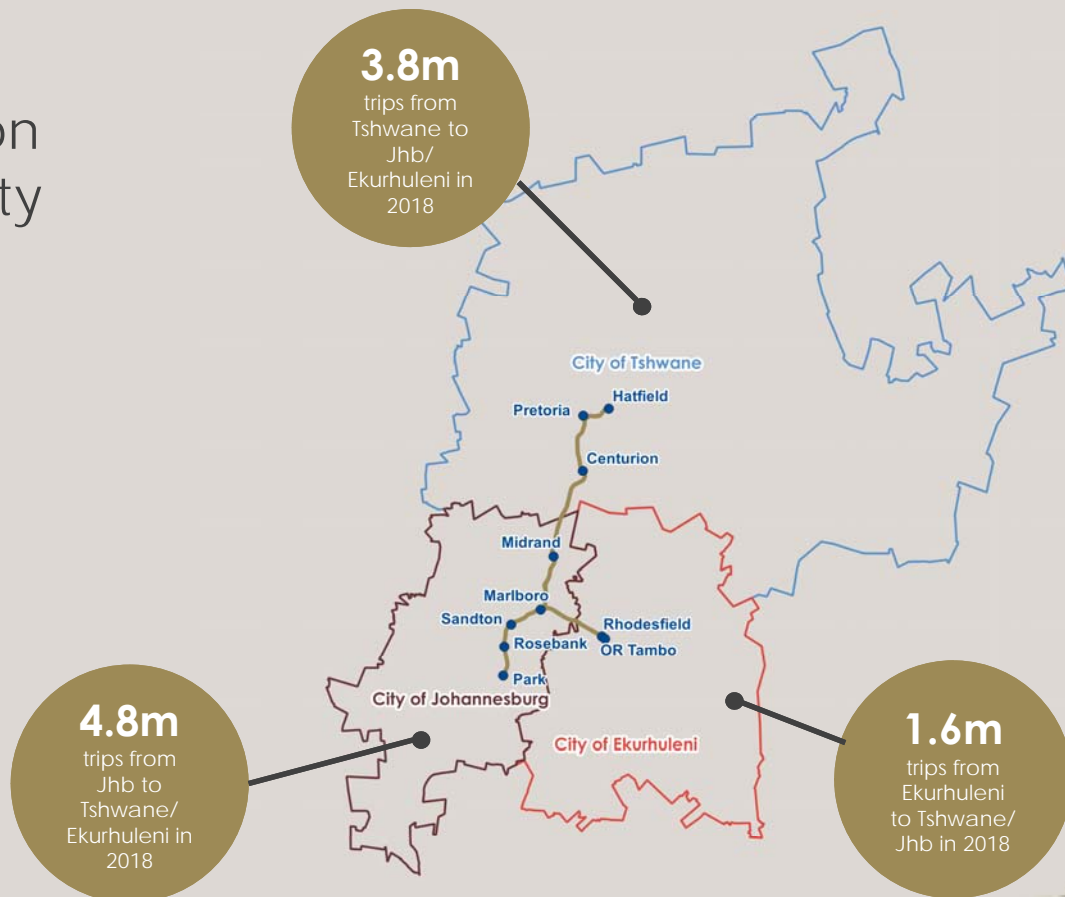
Critical for Success



Integrating the Region and its Communities



c.70% of all trips on Gautrain cross a city boundary



Integrating the Region and its Communities



Why do people use Gautrain to cross city boundaries?

Shifting from car to Gautrain typically saves

43 minutes

between **Pretoria** Station (Tshwane) and **Sandton** Station (Johannesburg) at typical 7am peak

Shifting from car to Gautrain typically saves

44 minutes

between **Rhodesfield** Station (Ekurhuleni) and **Sandton** Station (Johannesburg) at typical 7am peak

Shifting from car to Gautrain typically saves

31 minutes

between **Pretoria** Station (Tshwane) and **Rhodesfield** Station (Ekurhuleni) at typical 7am peak



How Gautrain is Delivering Change

Five Pillars of Impact





Delivering Jobs and Social Investment



Construction Phase Impacts (Over six years)

- **35,000 direct jobs** delivered* and around 87,300 through supply chain and wage spend
- **R128m spent on training** by the Concessionaire and their contractors
- **20,300 direct jobs for young people**
- 51% of jobs at the entry level (NFQ 0-1)
13% mid-level (NFQ 2-4)
35% at the higher level (NFQ 4+)
- **R19.4bn** contribution to GDP over 6 years



Operational Impacts (Over six years)

- **10,900 direct jobs** delivered* and around 61,000 through supply chain and wage spend
- **R59m spent on training** by the Concessionaire to date
- **5,800** direct jobs for young people
- 93% of jobs are mid-level roles (NFQ 2-4)
7% are at the higher level (NFQ 4+)
- **R20.4bn** contribution to GDP over first 6 years

Average length of employment at Gautrain

= 5.75 years

Average length of employment in South Africa

= 4 years



**1 job = 1 full year of employment*

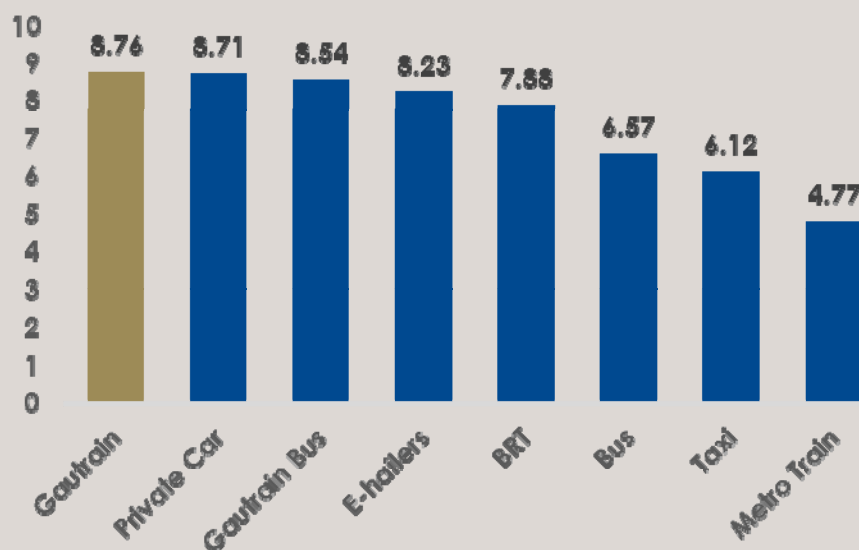
Sources: Seriti; Hatch Calculations; Bombela Operating Company; Stats SA; CIDB; KPMG



Influencing Transport Choices

Gautrain represents a new era in public transport

Quality of service rating (Max score = 10)



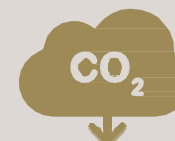
87% of Gauteng residents think that Gautrain is a good idea

Each person who has chosen to make a trip on the Gautrain instead of in a car has delivered...

R74 of economic benefit per trip



Reduced costs from fatal accidents



CO2 emission savings



Saves 22 minutes on average



Sources: GMA Market Segmentation Report; GMA Perceptions Survey; Hatch Calculations



Reinforcing Development Nodes

Since 2010...



Office

+820,000 sqm floorspace
45% increase in median sales
values per sqm

Within 2km of stations



Retail

+31,000 sqm floorspace
32% increase in median sales
values per sqm

Within 2km of stations



Other
Commercial

+805,000 sqm floorspace
109% increase in median
sales values per sqm

Within 2km of stations



Residential

+138,000 sqm floorspace
52% increase in median sales
values

Within 2km of stations

+1,656,000 sqm more commercial space around stations since 2010

87% occupancy rates in new commercial space which supports around **66,000 jobs**



Sources: GeoTerra; Lightstone; Homes and Communities Agency Employment; SAPOA; Hatch Calculations



Changing Perceptions and Attracting Investment

↑ Foreign Direct Investment

Over **R44bn** of FDI into Gauteng in 2016

This is the highest recorded since 2003

Johannesburg was the **2nd** highest recipient of FDI in Africa between 2013-16

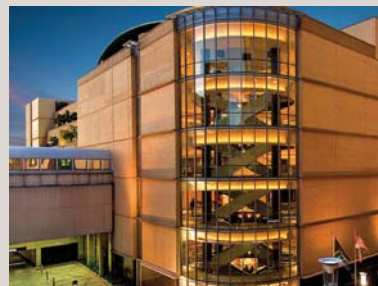


↑ Conferences

Over **80** conference centres in Gauteng

The number is growing annually

3 of the largest 5 conference centres are within **3km** of Gautrain stations



↑ Visitors

Over **4.3m** visitors came to Gauteng in 2016

The number is growing annually

45% of South Africa's tourism income generated in Gauteng



Creating Jobs in Development Nodes near Townships



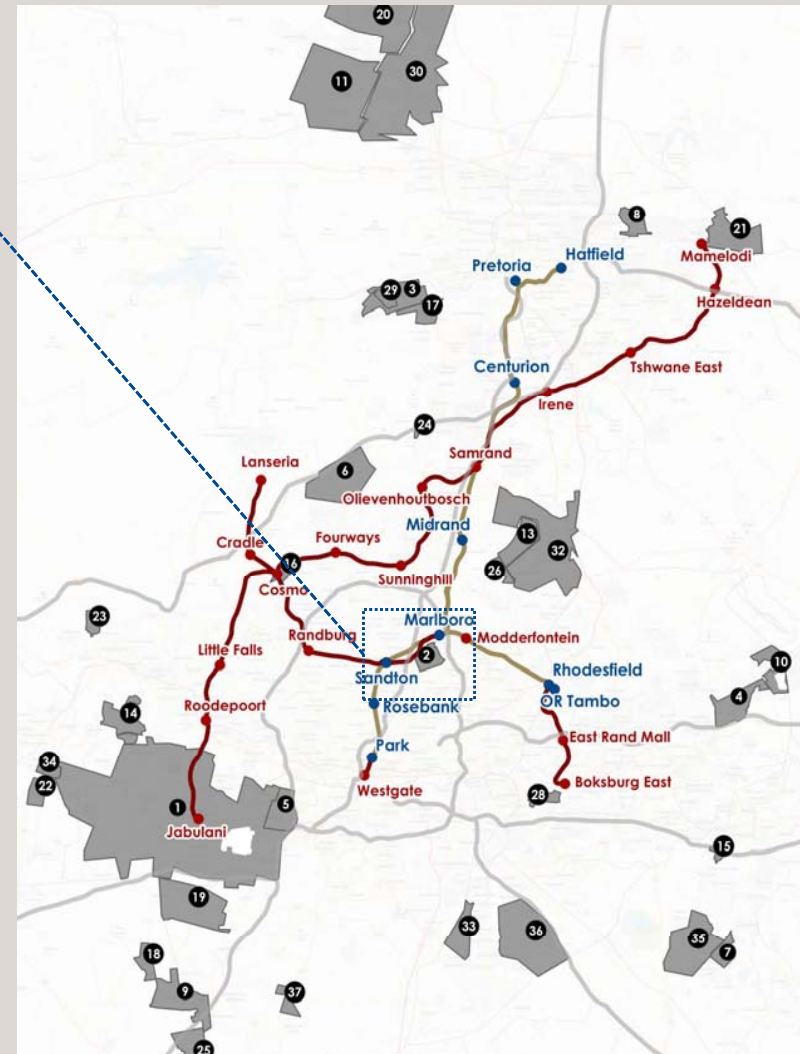
Alexandra and Sandton/Marlboro

Alexandra residents can easily access Marlboro and Sandton (via the Grayston Pedestrian Bridge)

Commercial floorspace around these stations has grown by **506,000 sqm** since 2012

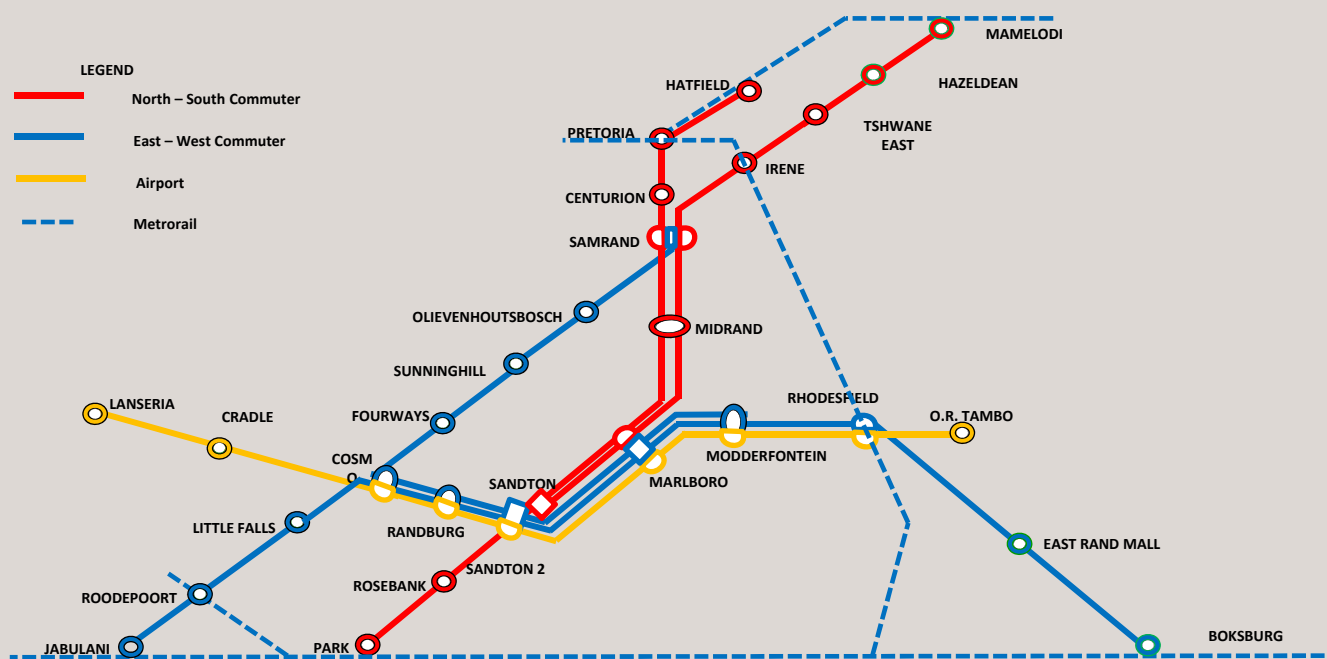
A proportion of new jobs are taken by people from Alexandra – E.g.

- Around **50%** of staff at Radison Blu Gautrain live in Alexandra
- Around **40%** of staff at Saint restaurant and bar live in Alexandra



The Proposed GRRIN Extensions

Gauteng Rapid Rail Integrated Network



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Thank you for your attention!

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