THE WORLDWIDE NETWORK OF PORT CITIES

aiVP

The **AIVP** Days

Dublin - Ireland
28 - 30 May 2015
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General Assembly
and the AIVP Days

"Working Waterfront": a City-Port mix in progress

In pertnership with:

Comhairle Cathrach
Bhaile Átha Cliath
Dublin City Council

COMHLACHT CHALAFORT
ÁTHA CLIATH
DUBLIN PORT COMPANY

KEY NOTE SPEAKER: WORKING WATERFRONT, A CITY-PORT MIX IN PROGRESS
Thursday, 28 May 2015: 14:00 - 14:20

Adv Phyllis Difeto has extensive experience serving at various senior management positions including being a Senior Commissioner with the Commission for Conciliation, Mediation and Arbitration ("CCMA"), Transnet National Ports Authority and Transnet Group.
Phyllis is appointed by the Minister of Public Works as the Councillor for the South African Council for the Quantity Surveying Profession. Further, she is appointed by the Minister of Trade and Industry as a Designate Member to the Special Economic Zones (SEZ) Advisory Board.
She was appointed by the Minister of Transport as the International Maritime Organisation (IMO) Auditor for the South African Government under the IMO Voluntary Organisation Audit Scheme. She was a member of the South African Working Group established by the Government to review existing legislation and develop new enabling maritime labour legislation as a process of ratifying the Maritime Labour Convention. She is a Director for Global Maritime Legal Solutions (Pty) Ltd. She has also participated in the Presidential Ocean Lab initiative intended to maximise the economic potential of South African ocean.
During South Africa's Chairmanship for the Global BRICS Business Council she served as Secretariat for the Global BRICS Business Council, South Africa BRICS Business Council and the BRICS Business Council Financial Services Working Group. She was exposed to engagements at a platform which strengthens and promotes economic, trade, business and investment ties amongst the Business communities of the five BRICS countries.

Phyllis DIFETO
Chief Operating Officer
Transnet National Ports Authority
Johannesburg, South Africa

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"WORKING WATERFRONT" A CITY – PORT MIX IN PROGRESS

AIVP CONFERENCE DUBLIN 28 - 29 MAY 2015

Adv Phyllis Motsatsi Difeto

Chief Operations Officer, Transnet National Ports Authority

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TRANSNET IS THE CUSTODIAN OF RAIL, PORTS AND PIPELINES

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Transnet SOC LTD Head Office Structure

Ports and Terminals

National Ports Authority (TNPA)

- 8 Commercial ports – Ngqura became operational during October 2009
- Revenue R8.4bn
- Assets R56bn
- 3 558 employees

Port Terminals (TPT)

- 16 Cargo Terminals operating across 7 SA ports
- Revenue 7 bn
- Assets R13.5 bn
- 6 324 employees

Rail network and Equipment

Freight Rail (TFR)

- 20 500 km of railway track
- 182 million tons of freight
- General freight and 2 heavy haul export lines
- Revenue R22.2 bn
- Assets R54.7bn
- 24 177 employees

Rail Engineering (TRE)

- Support to TFR for rolling stock maintenance
- Revenue R9.8bn
- Assets R6.8bn
- 13 020 employees

Pipelines

Pipelines (TPL)

- 18 billion litres of petroleum products and gas through 3000km pipelines, mainly to Gauteng
- Revenue R1.3bn
- Assets R20.1bn
- 600 employees

Supporting

- Transnet Capital Projects
- Transnet Property
- Transnet Foundation

- R300 billion of capital expenditure over next 7 years
- CSI in Education, Health, Sport, Arts and Culture and Container Assistance.

To assist in lowering the cost of doing business in South Africa, enabling economic growth and ensuring security of supply through providing appropriate port, rail and pipeline infrastructure in a cost-effective and efficient manner, within acceptable benchmarks.

PORT AND RAIL NETWORK

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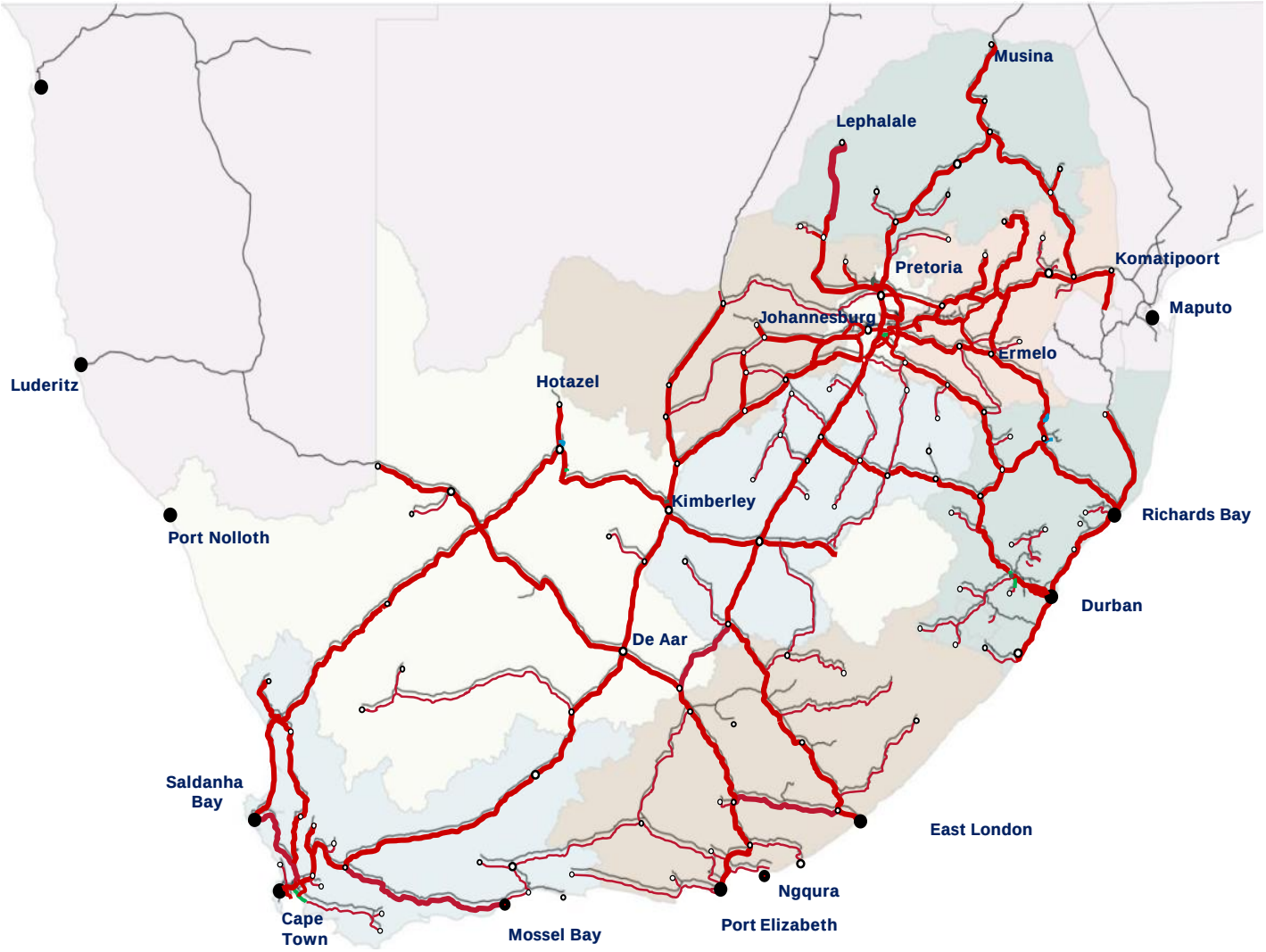
Port Infrastructure

- 18 container berths
- 5 automotive berths
- 27 dry bulk berths
- 37 break bulk berths
- 16 liquid bulk berths

Rail Infrastructure

- 20 500 route km
- Core network: 12 801 route km
- **Network Electrification:**
  - 50kV AC (861km),
  - 25 kV AC (2309km)
  - 3kV DC (4935km)
  - Diesel (11974km)
- **Axle loading**:
  - Main lines at 22t / axle
  - Coal & ore lines 30t /axle (coal line operated at 26 t / axle)



PIPELINE NETWORK

Pipeline Infrastructure

Crude Oil Pipeline

- Length: 580 km
- Capacity = 5,2 Blpa

Refined Fuels Pipeline

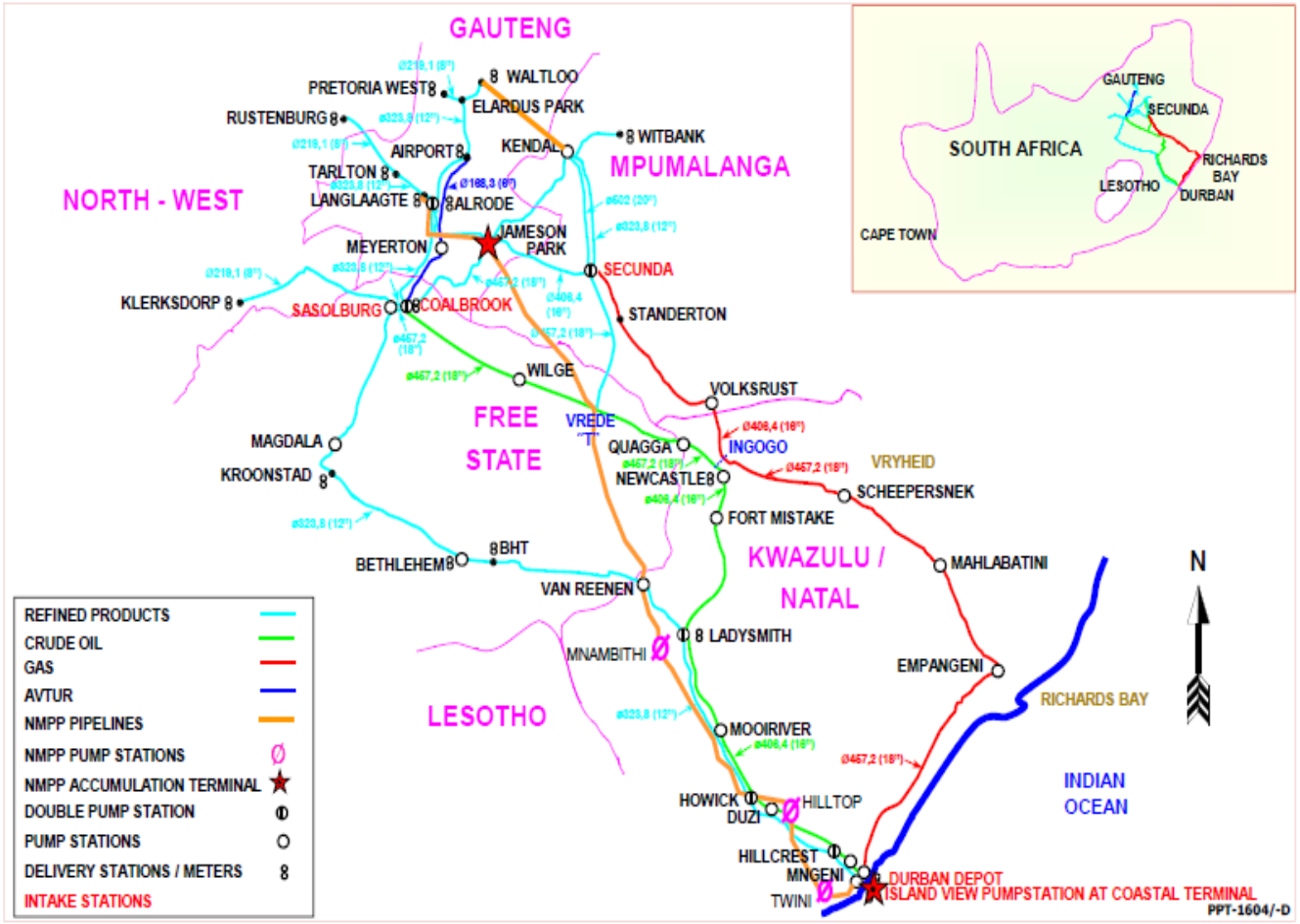
- Length: 725 km + ±1000km network
- Capacity= 4,3 Blpa

Aviation Turbine Fuel Pipeline

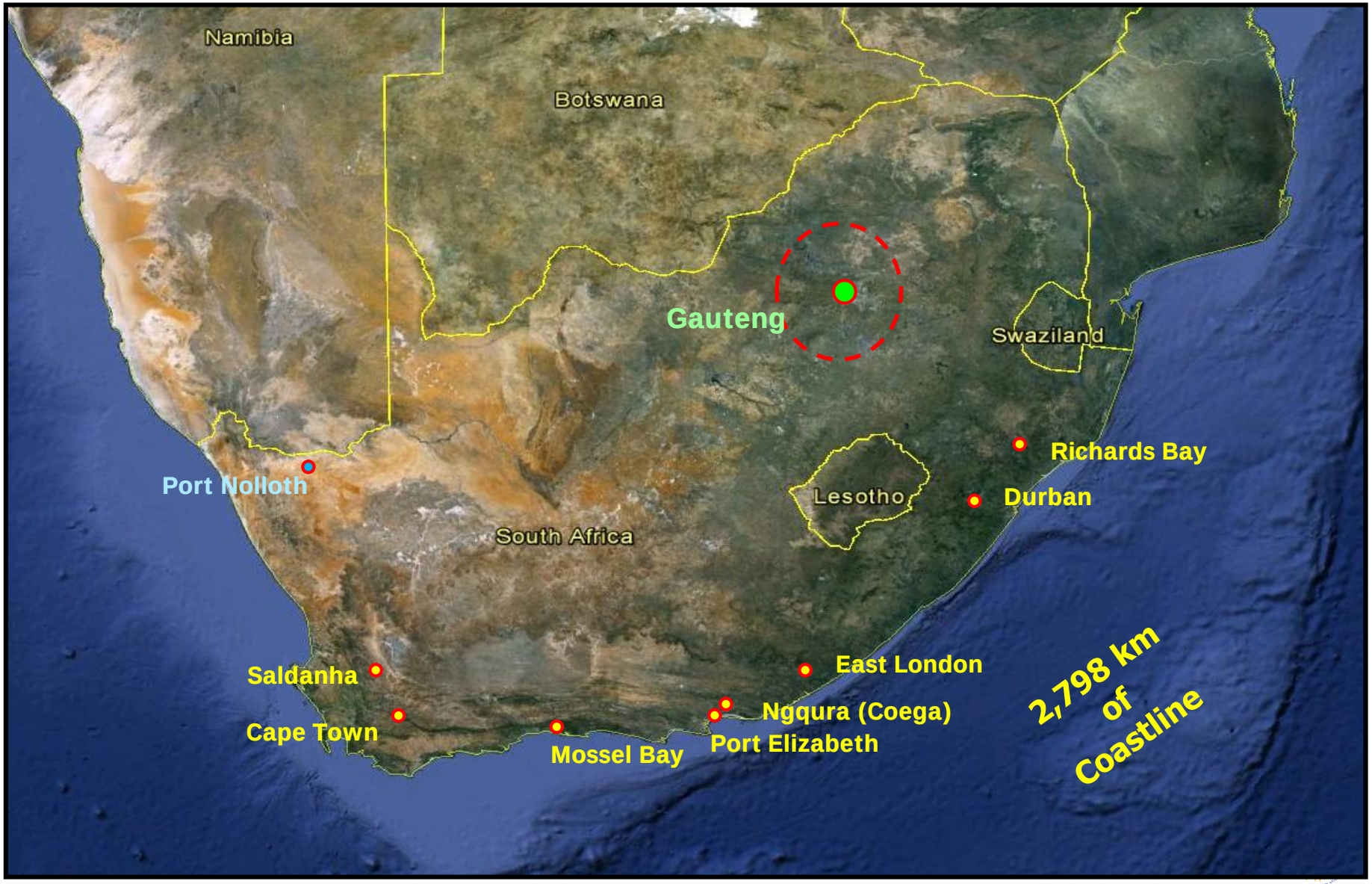
- Length: 94 km
- Capacity = 1,1 Blpa

Methane-rich Gas Pipeline

- Length: ±570km
- Capacity = 17m GJ pa



SOUTH AFRICAN PORT SYSTEM



TRANSNET NATIONAL PORTS AUTHORITY CORE FUNCTIONS

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Landlord	Promote the use, improvement and development of ports, and control land use within the ports, having the power to lease port land under conditions it determines
Master planner	Plan, improve, develop and maintain port infrastructure
Authority over ports navigation	Make and apply rules to control navigation within port limits and approaches, ensure protection of the environment and ensure safety and security within port limits
Authority for ports services & facilities	Ensure that port services and facilities are provided, and may enter into agreements or licence other parties to provide these
Marketer & administrator	Ensure that adequate, affordable, equitable and efficient port services and facilities are provided for port users
Change agent	Ensure non-discriminatory, fair, transparent access to port services and facilities; advancement of previously disadvantaged people; promotion of representivity and participation in terminal operations; enhanced transparency in port management
Coordinator with other state agencies	Advise on all matters relating to the port sector, and liaise with all stakeholders

INTEGRATED SYSTEM OF SOUTH AFRICAN PORT

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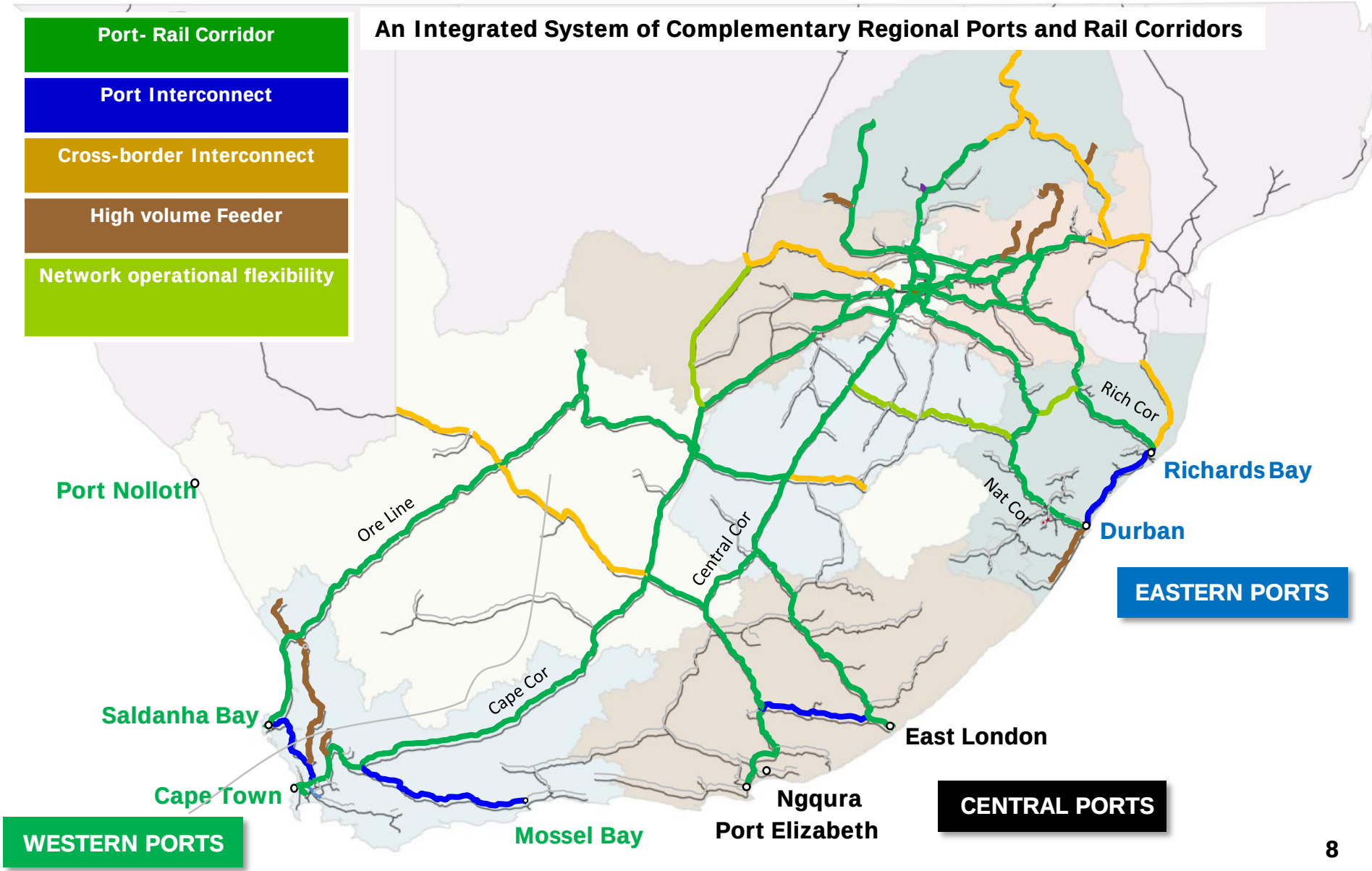
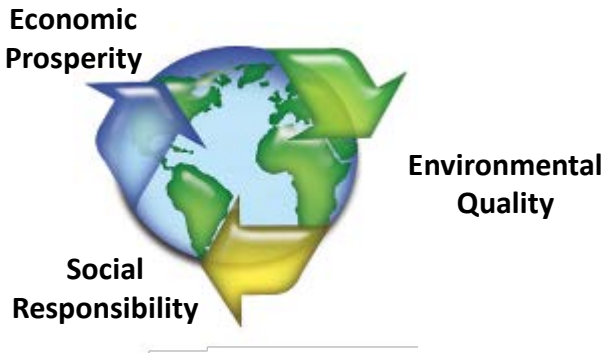


PORT PLANNING PROCESS

PORT FRAMEWORK PLANS:

- Annually revised;
- Periodically updated; and
- Continuously adjusted as the environment changes (economies; policies; demand; technology).

IMPORTANCE OF PORT PLANS:



- Ensure that the ports are prepared for demand
  - Volume;
  - Sustainability; and
  - Technology
- Management of land use.
- Provision of an optimised investment framework for TNPA

PORT PLANS CREATION PROCESS

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National Ports Plan
PDFPs (Long term plans; Land Use Plans)
Development Strategies
Researched projects for implementation

National Development Strategies

Investment plans

Land Use Plans

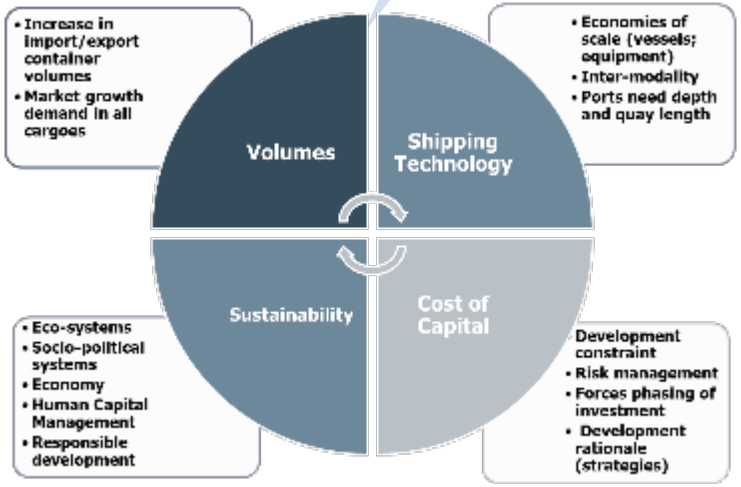
Scenario Planning

(Sustainability; Benchmarking, conceptual long-term layouts)

Demand matched to CAPACITY

(Simulations; Best Practices)

Port Demands



Port Planning integrates and collaborates with:

- Internal Stakeholders (Land Use Plans; design capacities)
- External Stakeholders (city planning; government; industry; communities)

to develop the port plans

NATIONAL CONTAINER INFRASTRUCTURE DEVELOPMENT STRATEGY

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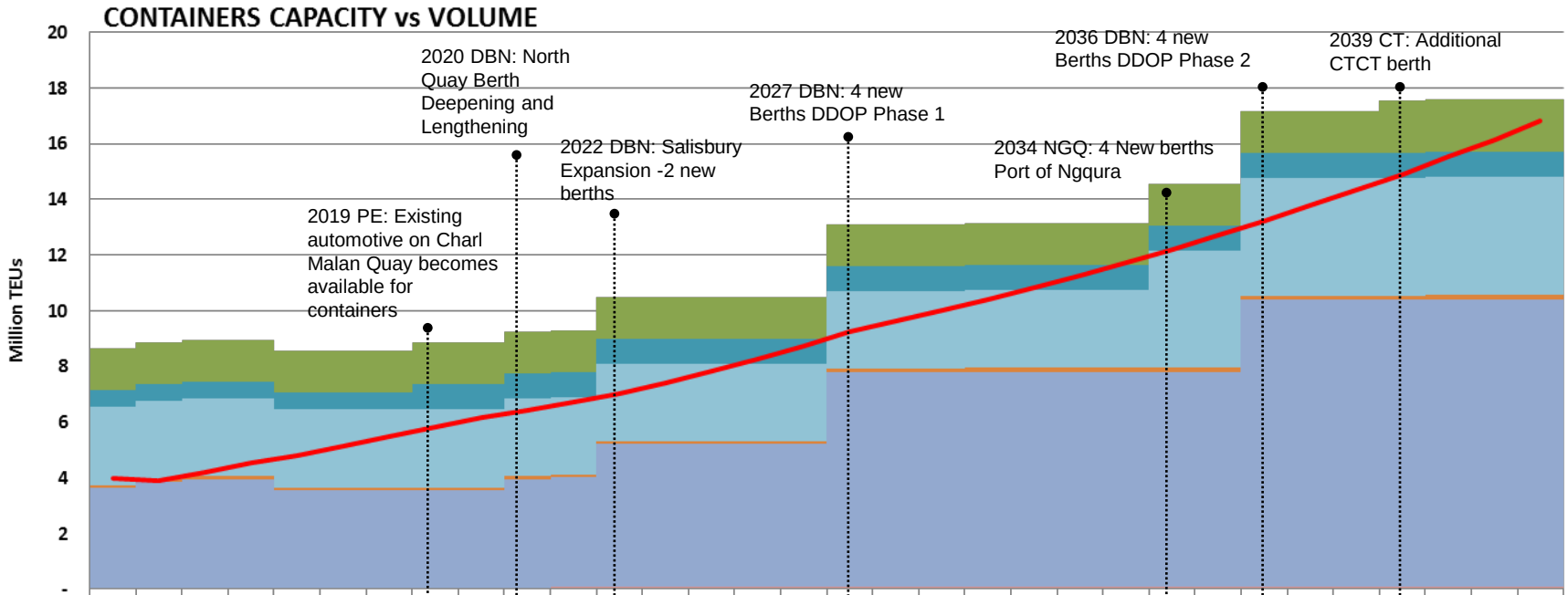

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042
Cape Town Capacity	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.9	1.9	1.9	1.9
Port Elizabeth Capacity	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.9	0.9	0.9	0.9	0.9	0.9	0.9	0.9	0.9	0.9	0.9	0.9	0.9	0.9	0.9	0.9	0.9	0.9	0.9	0.9	0.9	0.9	0.9	0.9	0.9
Ngqura Capacity	2.8	2.8	2.8	2.8	2.8	2.8	2.8	2.8	2.8	2.8	2.8	2.8	2.8	2.8	2.8	2.8	2.8	2.8	2.8	2.8	2.8	2.8	2.8	4.2	4.2	4.2	4.2	4.2	4.2	4.2	4.2	4.2
East London Capacity	0.09	0.09	0.09	0.09	0.09	0.09	0.09	0.09	0.09	0.09	0.09	0.09	0.09	0.09	0.09	0.09	0.09	0.09	0.09	0.14	0.14	0.14	0.14	0.14	0.14	0.14	0.14	0.14	0.14	0.19	0.19	0.19
Durban Capacity	3.6	3.8	3.9	3.9	3.5	3.5	3.5	3.5	3.5	3.9	3.9	5.1	5.1	5.1	5.1	5.1	7.7	7.7	7.7	7.7	7.7	7.7	7.7	7.7	7.7	10.3	10.3	10.3	10.3	10.3	10.3	10.3
Richard Bay Capacity	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Total Capacity	8.6	8.8	8.9	8.9	8.5	8.5	8.5	8.8	8.8	9.2	9.3	10.5	10.5	10.5	10.5	10.5	13.1	13.1	13.1	13.1	13.1	13.1	13.1	14.5	14.5	17.1	17.1	17.1	17.5	17.6	17.6	17.6
Total Demand (FDM)	4.0	3.9	4.2	4.5	4.8	5.1	5.5	5.8	6.2	6.4	6.7	7.0	7.4	7.8	8.3	8.7	9.2	9.6	10.0	10.4	10.8	11.3	11.7	12.2	12.7	13.2	13.8	14.3	14.9	15.5	16.2	16.8
Capacity Surplus/ Shortfall	4.7	4.9	4.8	4.4	3.8	3.4	3.1	3.0	2.7	2.8	2.6	3.5	3.1	2.7	2.2	1.8	3.9	3.5	3.1	2.7	2.3	1.9	1.4	2.3	1.8	3.9	3.4	2.8	2.6	2.1	1.4	0.8

Cape Town Capacity | Port Elizabeth Capacity | Ngqura Capacity | East London Capacity
Durban Capacity | Richard Bay Capacity | Total Demand (FDM)

CONTAINER SHORT TERM & FUTURE OUTLOOK

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Port of Durban Short Term Outlook 2019

PORT	CAPACITY (in TEU'S)	VOLUMES (2014/15)	DRAFT
Durban	3.5	2.75	10m to 12.8m

Port of Durban Future Outlook 2042

Container : Port of Durban 2042
Capacity 10.8m teus
Port of Durban : 11 berths from current 8 berths

CONTAINER SHORT TERM & FUTURE OUTLOOK

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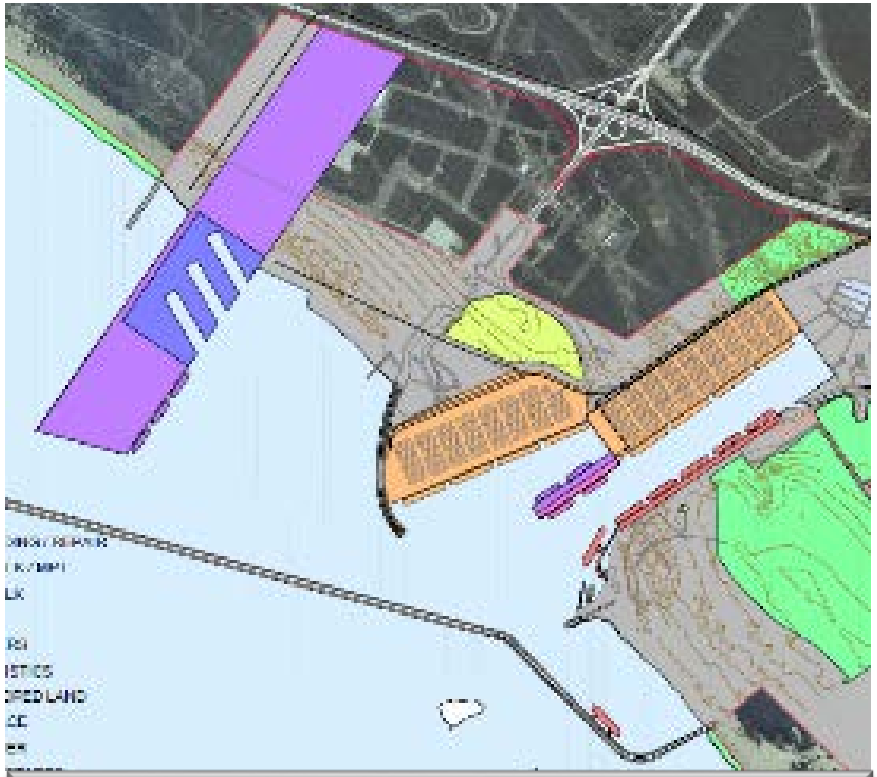
Port of Ngqura Short Term Outlook 2019

PORT	CAPACITY (in TEU'S)	VOLUMES (2014/15)	DRAFT
Port of Ngqura	2.8	0.82	16m

Port of Ngqura Future Outlook 2042



Container: Port of Ngqura 2042
Capacity 4.2m teus
Port of Ngqura : 8 berths from current 4 berths

CONTAINER SHORT TERM & FUTURE OUTLOOK

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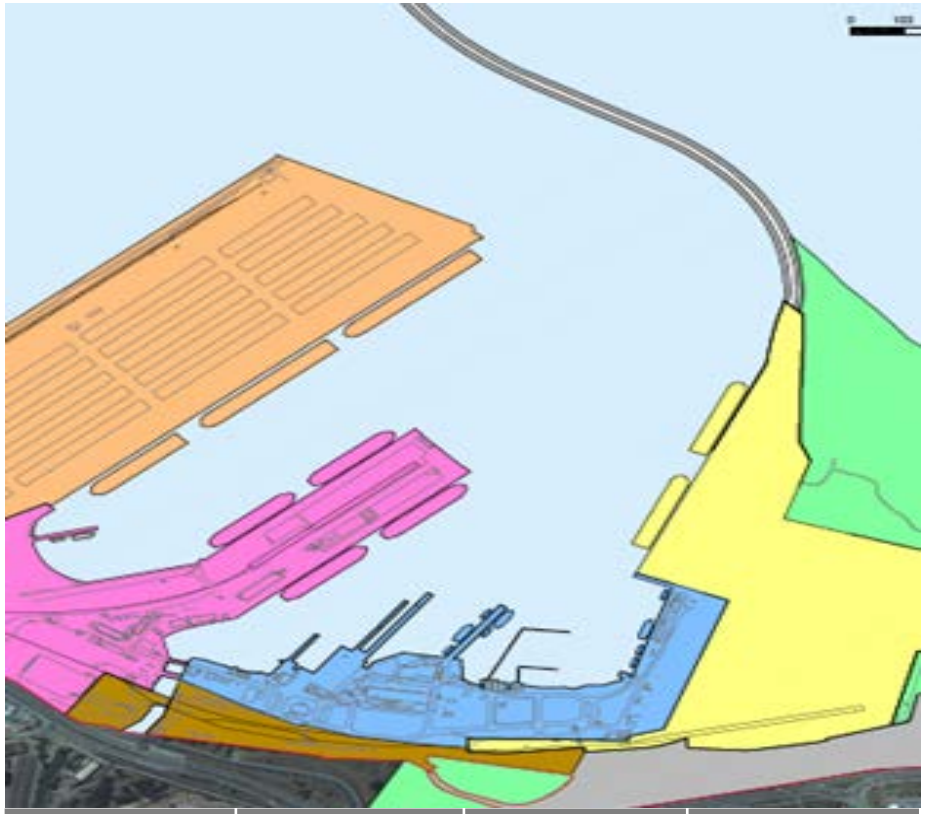
Port Elizabeth Short Term Outlook 2019



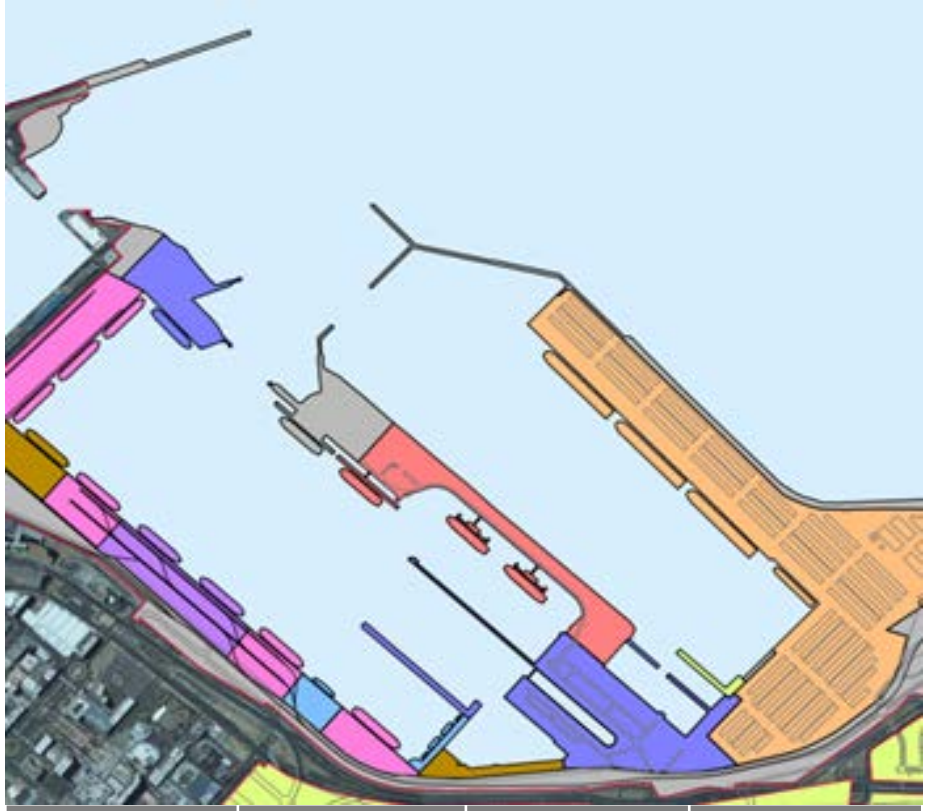
PORT	CAPACITY (in TEU'S)	VOLUMES (2014/15)	DRAFT
Port Elizabeth	0.6	0.26	12.2m

Port Elizabeth Future Outlook 2042

Container: Port Elizabeth 2042
Capacity 0.9 teus
Port Elizabeth : 6 berths from current 3 berths

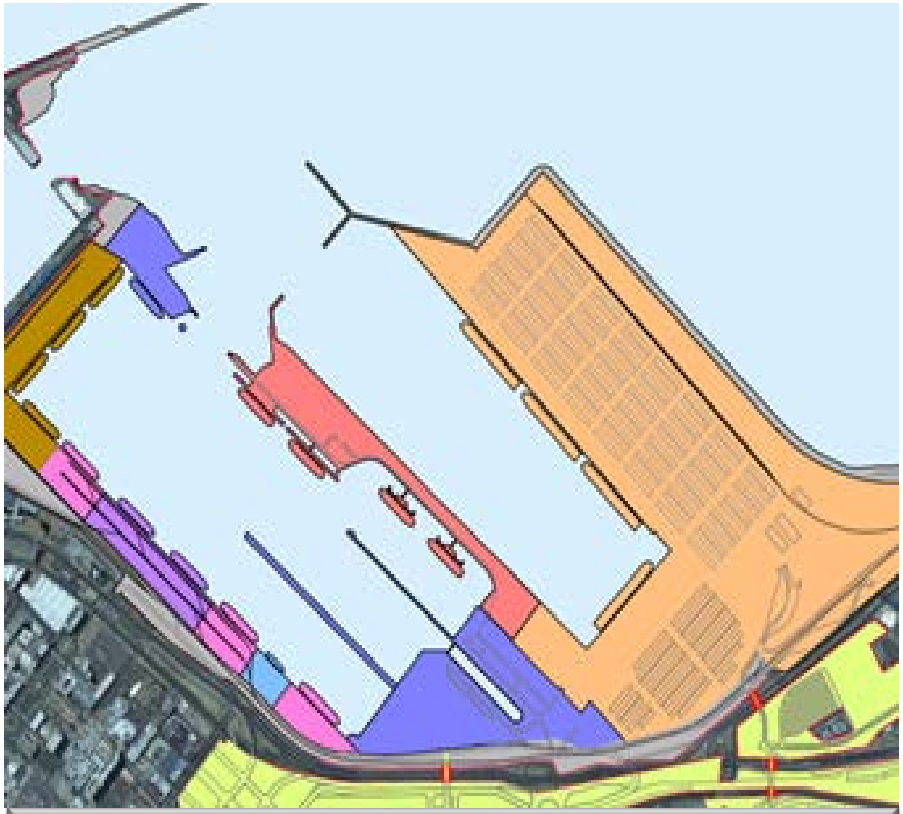
CONTAINER SHORT TERM & FUTURE OUTLOOK

Port of Cape Town Short Term Outlook 2019



PORT	CAPACITY (in TEU'S)	VOLUMES (2014/15)	DRAFT
Cape Town	1.5	0.89	12.2m – 15.5m

Port of Cape Town Future Outlook 2042



Container: Port of Cape Town 2042
Capacity of 1.9m teus
Port of Cape Town: maintain 4 berth

CONTAINER FUTURE OUTLOOK (2042)

Container Ports (2042)

Planned Durban Dig Out Port: : 8 berths (Durban Capacity from 3.5mt to 3.9mt north quay deepening in 2020, 5.1mt in 2022 Salibury expansion , 7.7mt in 2027 phase 1 DDOP 4 berths, 10.3mt in 2036 phase 2 DDOP 4 more new berths)

NATIONAL DRY BULK INFRASTRUCTURE DEVELOPMENT STRATEGY

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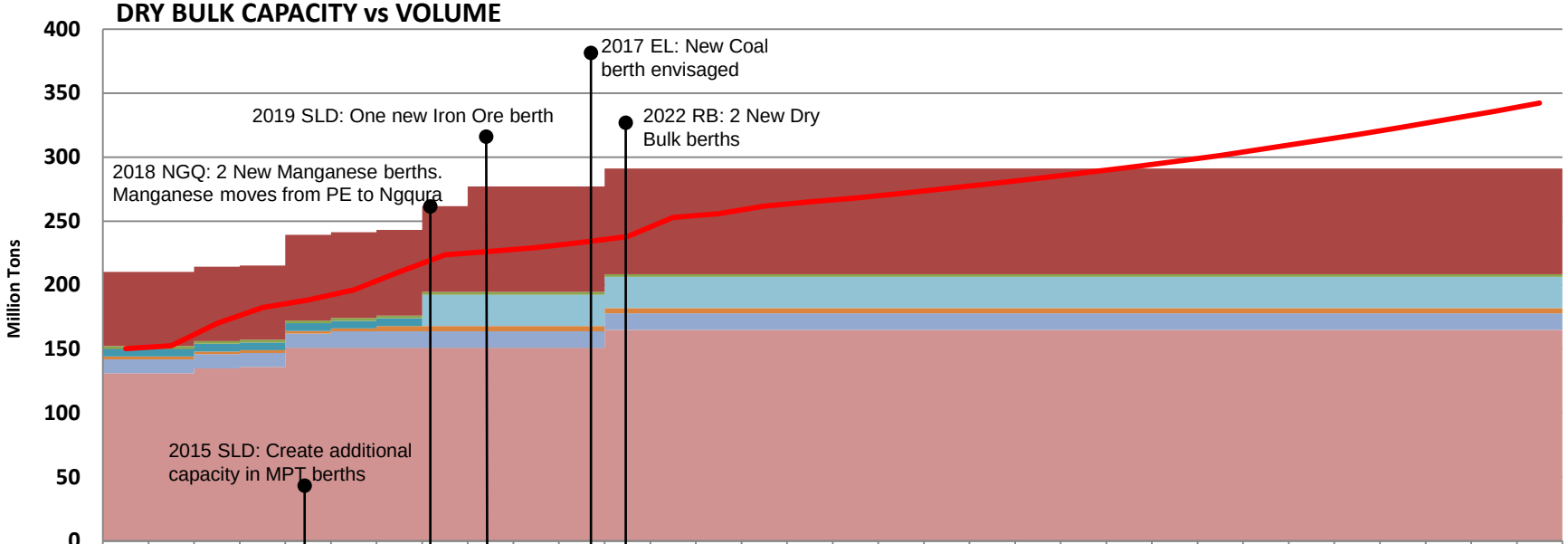
DRY BULK CAPACITY vs VOLUME



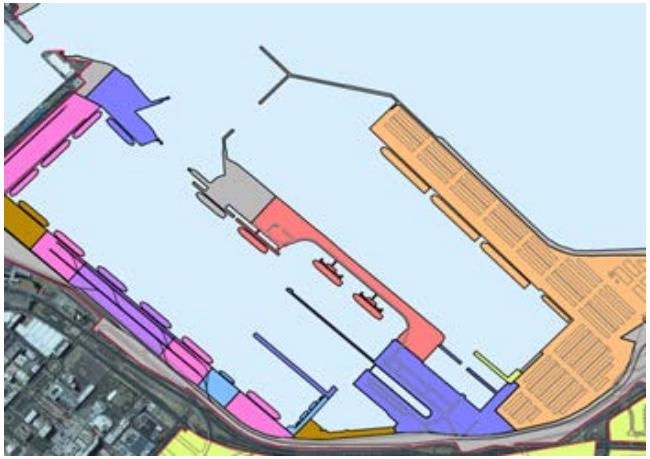
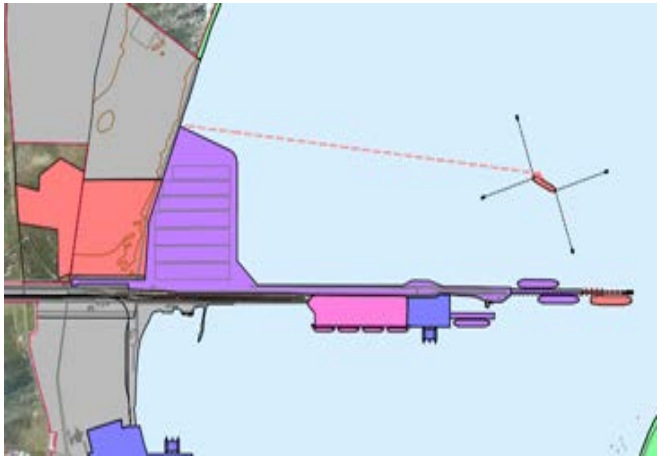
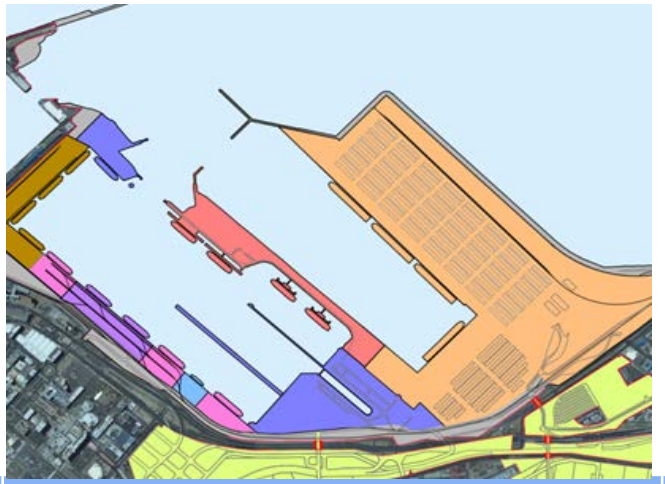
	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042
Saldanha Capacity	58,0	58,0	58,0	58,0	67,0	67,0	67,0	67,0	82,5	82,5	82,5	82,5	82,5	82,5	82,5	82,5	82,5	82,5	82,5	82,5	82,5	82,5	82,5	82,5	82,5	82,5	82,5	82,5	82,5	82,5	82,5	82,5
Cape Town Capacity	2,1	2,1	2,1	2,1	2,1	2,1	2,1	2,1	2,1	2,1	2,1	2,1	2,1	2,1	2,1	2,1	2,1	2,1	2,1	2,1	2,1	2,1	2,1	2,1	2,1	2,1	2,1	2,1	2,1	2,1	2,1	2,1
Port Elizabeth Capacity	6,0	6,0	6,0	6,0	6,0	6,0	6,0	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Ngqura Capacity	-	-	-	-	-	-	-	24,5	24,5	24,5	24,5	24,5	24,5	24,5	24,5	24,5	24,5	24,5	24,5	24,5	24,5	24,5	24,5	24,5	24,5	24,5	24,5	24,5	24,5	24,5	24,5	24,5
East London Capacity	2,2	2,2	2,2	2,2	2,2	2,2	4,0	4,0	4,0	4,0	4,0	4,0	4,0	4,0	4,0	4,0	4,0	4,0	4,0	4,0	4,0	4,0	4,0	4,0	4,0	4,0	4,0	4,0	4,0	4,0	4,0	4,0
Durban Capacity	11,0	11,0	11,0	11,0	11,0	13,0	13,0	13,0	13,0	13,0	13,0	13,0	13,0	13,0	13,0	13,0	13,0	13,0	13,0	13,0	13,0	13,0	13,0	13,0	13,0	13,0	13,0	13,0	13,0	13,0	13,0	13,0
Richard Bay Capacity	131,0	131,0	135,0	136,0	151,0	151,0	151,0	151,0	151,0	151,0	151,0	165,0	165,0	165,0	165,0	165,0	165,0	165,0	165,0	165,0	165,0	165,0	165,0	165,0	165,0	165,0	165,0	165,0	165,0	165,0	165,0	165,0
Total Capacity	210,3	210,3	214,3	215,3	239,3	241,3	243,1	261,6	277,1	277,1	277,1	291,1	291,1	291,1	291,1	291,1	291,1	291,1	291,1	291,1	291,1	291,1	291,1	291,1	291,1	291,1	291,1	291,1	291,1	291,1	291,1	291,1
Total Demand (FDM)	150,4	152,7	169,9	182,6	188,4	196,3	210,3	223,6	226,5	229,4	233,5	237,8	252,9	255,7	261,8	265,1	268,1	271,7	275,5	279,4	283,5	287,7	292,1	296,6	301,3	306,6	312,1	317,7	323,5	329,5	335,8	342,2
Capacity Surplus/ Shortfall	59,9	57,6	44,4	32,7	50,8	44,9	32,8	37,9	50,6	47,7	43,6	53,2	38,1	35,4	29,3	26,0	23,0	19,3	15,6	11,6	7,6	3,4	-1,0	-5,5	-10,3	-15,5	-21,0	-26,6	-32,4	-38,5	-44,7	-51,1

Saldanha Capacity
Cape Town Capacity
Port Elizabeth Capacity
Ngqura Capacity
East London Capacity
Durban Capacity
Richard Bay Capacity
Total Demand (FDM)

DRY BULK SHORT TERM & FUTURE OUTLOOK (2019 AND 2042)

Port of Richard Bay	Port of Durban	Port of East London
Richards Bay: 12 berths / 151mt	Durban: 9 berths / 11mt	East London: 2 berths/ 2.2mt
Richards Bay: 14 berths/ 165 mt	Durban: 10 berths/ 13mt	East London: 2 berths / 4.0mt

DRY BULK SHORT TERM & FUTURE OUTLOOK (2019 AND 2042)

Port of Ngqura	Port of Cape Town	Port of Saldanha
		
		
Ngqura: 0 berths	Cape Town: 2 berths/ 2.1mt	Saldanha Bay: 3 berths 67mt
Ngqura: 2 berths/ 24.5mt	Cape Town: 2 berths/ 2.1mt	Saldanha Bay: 4 berths 82mt

NATIONAL AUTOMOTIVE INFRASTRUCTURE DEVELOPMENT STRATEGY

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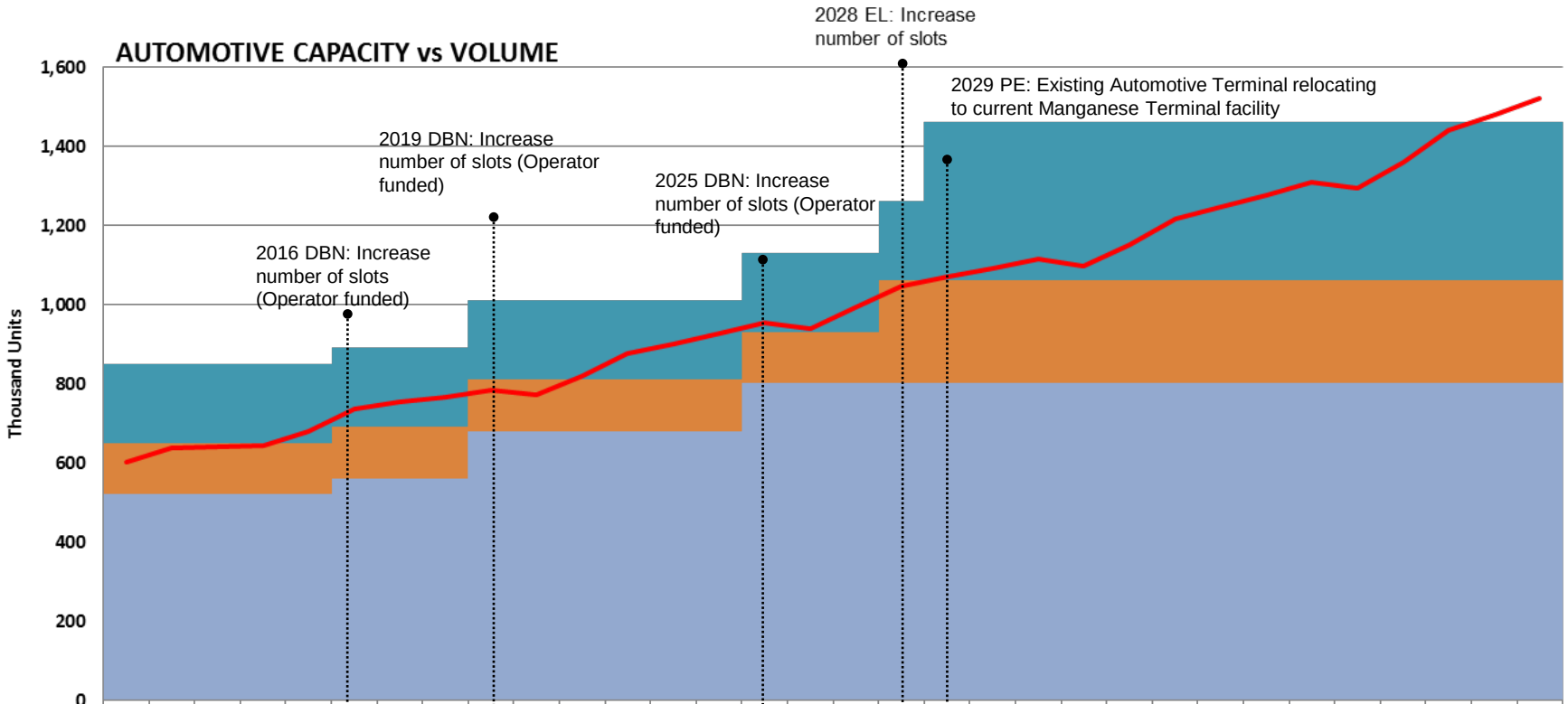
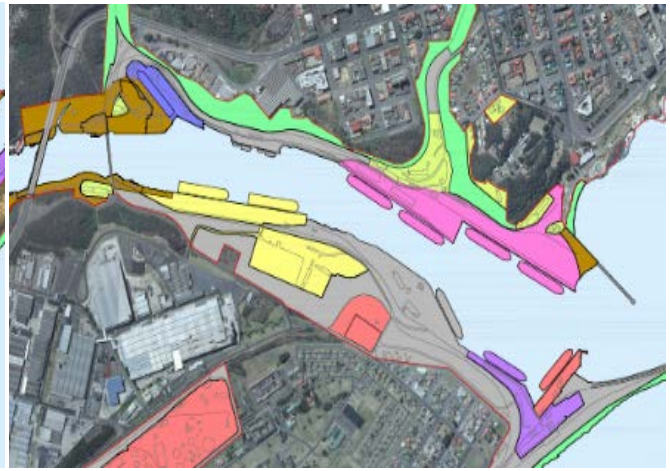
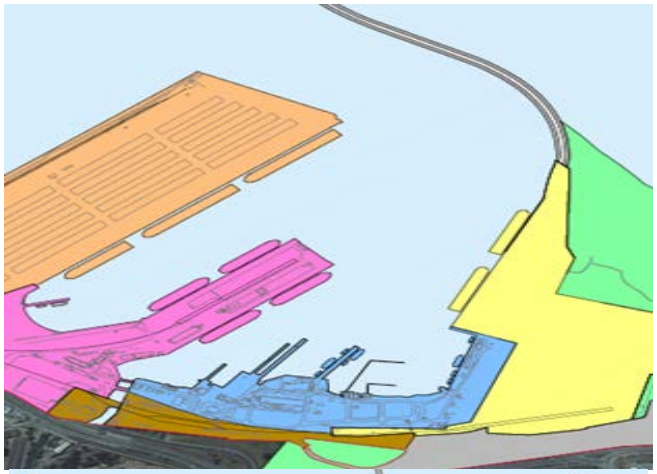


	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042
Port Elizabeth Capacity	200.0	200.0	200.0	200.0	200.0	200.0	200.0	200.0	200.0	200.0	200.0	200.0	200.0	200.0	200.0	200.0	200.0	200.0	400.0	400.0	400.0	400.0	400.0	400.0	400.0	400.0	400.0	400.0	400.0	400.0	400.0	400.0
East London Capacity	130.0	130.0	130.0	130.0	130.0	130.0	130.0	130.0	130.0	130.0	130.0	130.0	130.0	130.0	130.0	130.0	130.0	260.0	260.0	260.0	260.0	260.0	260.0	260.0	260.0	260.0	260.0	260.0	260.0	260.0	260.0	260.0
Durban Capacity	520.0	520.0	520.0	520.0	520.0	560.0	560.0	560.0	680.0	680.0	680.0	680.0	680.0	680.0	800.0	800.0	800.0	800.0	800.0	800.0	800.0	800.0	800.0	800.0	800.0	800.0	800.0	800.0	800.0	800.0	800.0	800.0
Total Capacity	850.0	850.0	850.0	850.0	850.0	890.0	890.0	890.0	1,010	1,010	1,010	1,010	1,010	1,010	1,130	1,130	1,130	1,260	1,460	1,460	1,460	1,460	1,460	1,460	1,460	1,460	1,460	1,460	1,460	1,460	1,460	1,460
Total Demand (FDM)	601.1	637.2	639.3	644.1	680.1	737.0	753.8	765.4	784.3	772.0	819.0	876.1	901.1	926.1	952.7	938.7	992.0	1,047	1,069	1,092	1,116	1,096	1,150	1,216	1,246	1,277	1,310	1,294	1,360	1,440	1,480	1,522
Capacity Surplus/ Shortfall	248.9	212.8	210.7	205.9	169.9	153.0	136.2	124.6	225.7	238.0	191.0	133.9	108.9	83.9	177.3	191.3	138.0	212.8	390.4	367.8	343.6	363.7	309.9	243.7	213.3	182.6	149.8	165.5	99.7	19.9	-20.8	-62.1

Port Elizabeth Capacity | East London Capacity | Durban Capacity | Total Demand (FDM)

AUTOMOTIVE SHORT TERM & FUTURE OUTLOOK (2019 AND 2042)

Port of Durban	Port of East London	Port Elizabeth
		
Durban: 3 berths/ 560.0 units	East London: 2 berths/ 130.0 units	Port Elizabeth: 2 berths/ 200.0 units
Durban: 3 berths/ 800.0 units (increase no of slots operator funded 2016/19/25)	East London: 2 berths / 260.0 units (increase no of slots operator funded 2028)	Port Elizabeth: 2 berths/ 400.0 units (existing Auto terminal relocating to current Manganese Terminal 2029)

PEOPLE PORT'S CONCEPT

INTRODUCTION

- South African planning for public spaces has been fragmentally planned via different Provincial and municipal by-laws. Public space is defined in various ways and includes open parks, fishing areas, viewing decks, areas in a development where the general public is permitted, etc.
- All sea-ports in South Africa are public ports and have spaces dedicated to some public access. The introduction of the the 'International Ship and Port Facility Security Code (ISPS) code' has had an impact on public access to ports. Mounting public pressure has called for a relaxing of the strict enforcement of public access to Ports.
- The planning should be seen as an opportunity to strengthen City-Port relations. And the port authority is often in the unique position to act as a strategic partner in certain developments and can facilitate opportunities between private companies and national or regional governments. This also includes research regarding sustainable development' (PIANC, 2014:17).

TNPA's POSITION

- There is a strong case to strengthen public access to Ports in Southern Africa.
- Transnet National Ports Authority's 'People's Port' concept is a step in the right direction to ensure the sustainability of public access into Ports in South Africa.
- Planned Port developments such as the proposed Durban Dig Out Port will need to incorporate public space planning as per requirements of the Spatial Planning and Land Use Management Act(2013).
- Further research and development for peoples port planning and infrastructure implications need to be explored through Front End Loading Studies.

LEGAL & POLICY FRAMEWORK

- It has been common and customary practice in South African Ports for the public spaces to be permitted in certain parts of the ports that do not impact on shipping operations. The ISPS code did have implications on public access to ports in South Africa however strong public opposition to the Port restricting access to ports has resulted in the Port permitting access to the general public as well as subsistence fisherman.

- The Spatial Planning and Land Use Management Act (SPLUMA)(2013) requires that land for parks, open space and other uses be provided in a land development area. Open Space 'in relation to a land area, means land that is set aside or to be used by a community as a recreation area, irrespective of ownership of such land'(Spatial Planning and Land Use Management Act,2013).

- Organs of State are not exempt from the Spatial Planning and Land Use Management Act (2013) and will be required to comply with provisions of the mentioned Act. In essence, although public spaces exist in Ports across South Africa, SPLUMA codifies a statutory legal requirement that public space planning for future development of new ports such as in the proposed Durban Dig Out Port will be required.

- SPLUMA (2013) requires that the land required for parks, open space must be provided within the land area to which the development application refers or may be provided elsewhere in the municipal area, at the discretion of the municipality.

- Transnet National Ports Authority (2013) has updated its Port Development Frameworks mandated through the National Ports Act (2005). A 'peoples port' concept has been piloted through the land use plans and will need further research and close planning with Cities and Provinces in South Africa.

LEGAL & POLICY FRAMEWORK

The International Ship and Port Facility Security Code ISPS Code

- In line with the International Maritime Organisation, “The International Ship and Port Facility Security Code (ISPS Code) is a comprehensive set of measures to enhance the security of ships and port facilities, developed in response to the perceived threats to ships and port facilities in the wake of the 9/11 attacks in the United States. In essence, the Code takes the approach that ensuring the security of ships and port facilities is a risk management activity and that, to determine what security measures are appropriate, an assessment of the risks must be made in each particular case.

- The purpose of the Code is to provide a standardised, consistent framework for evaluating risk, enabling Governments to offset changes in threat with changes in vulnerability for ships and port facilities through determination of appropriate security levels and corresponding security measures.”Transnet National Ports Authority is a signatory to the ISPS Code.

- With the implementation of the ISPS Code, people access to the South African Ports has become more controlled.

THE NATIONAL CASE

- All Ports have some elements of public interface and access whereby the general public access. The recent round of Port Development Framework Plans have encouraged the public access in certain regions of the port. The key users and features of public spaces include:

USERS	FEATURES
Scientists, Specialists, Public	**Mangroves, rivers, estuary**
Fisherman	**Beaches, fishing jetties**
Surfers, bathers	**Beaches, tidal pool, club**
Public	**Water-world, museums, parks, heritage sites**
Residents, Local community	**Lake development**
Learners	**Education Centre**
SMME's	**Market, retail, commercial, trade**

- Conceptual and Prefeasibility Research on the People's Port Concept is being conducted in the following ports:

  - Richards Bay
  - Durban
  - Durban Dig Out Port
  - East London
  - Port Elizabeth
  - Mossel Bay
  - Cape Town
  - Saldanha

PORT-CITY CONCEPTS / PROJECTS
PORT DEVELOPMENT FRAMEWORK PLANS

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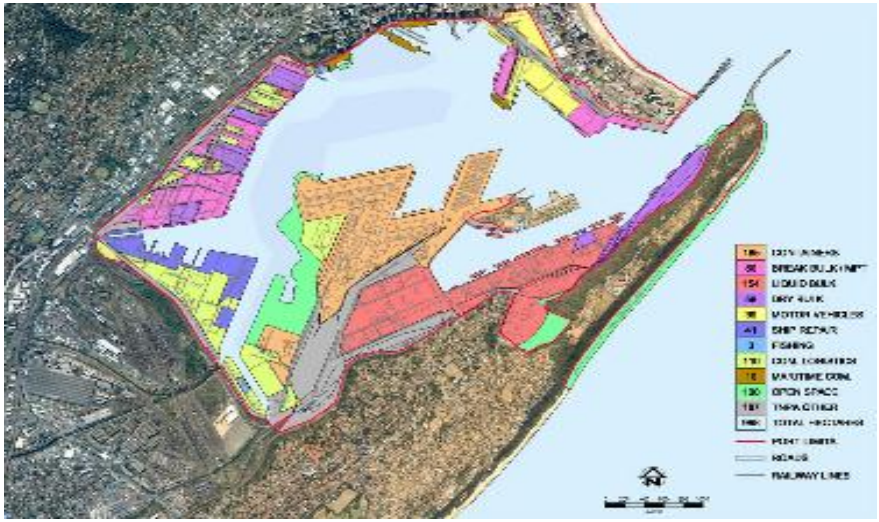
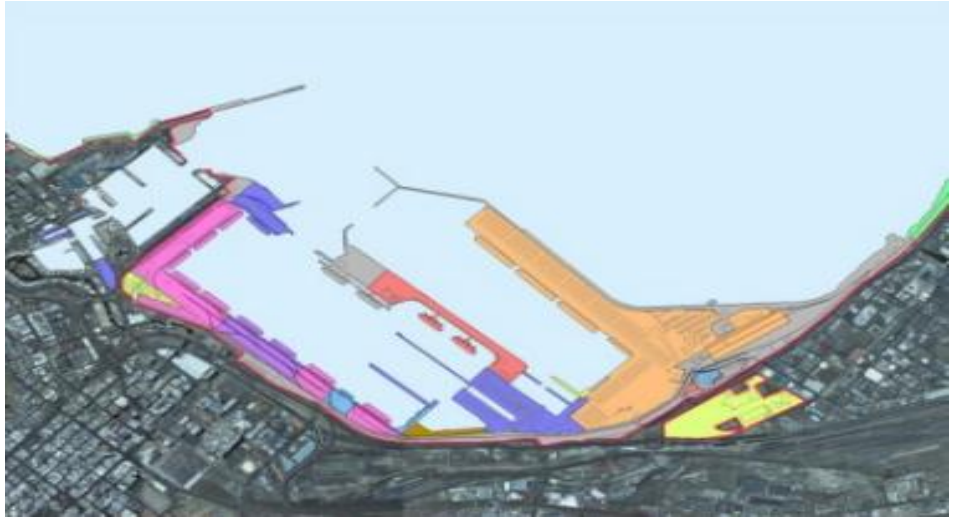
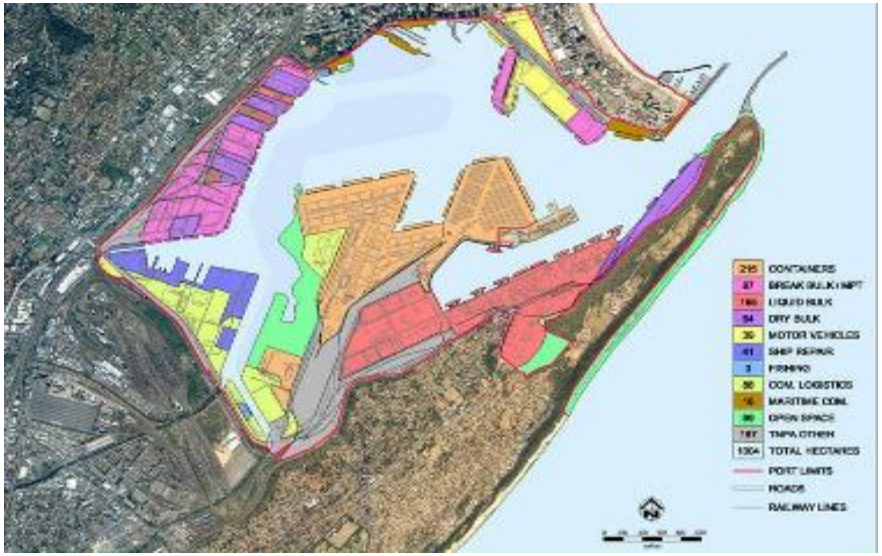
Port of Durban Current Layout



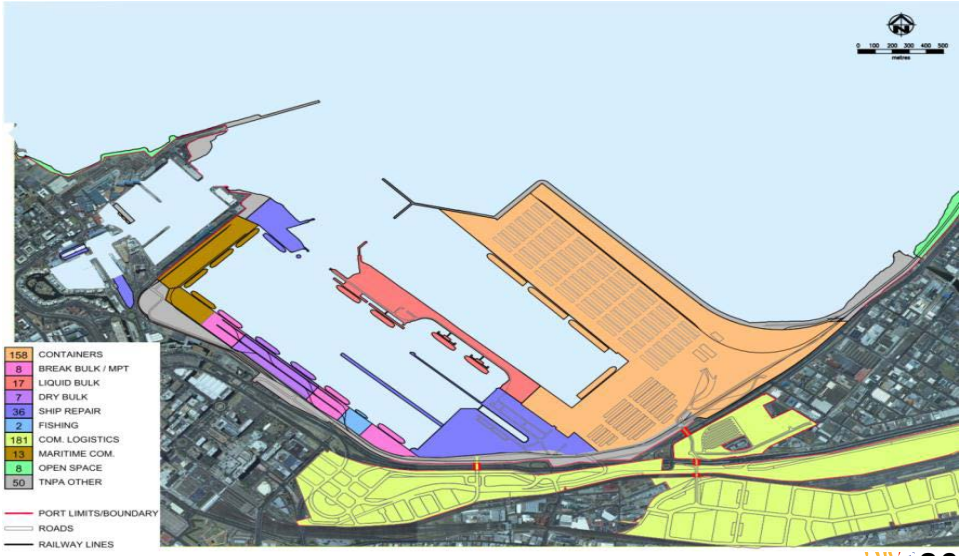
Port of Cape Town Current Layout



Port of Durban Medium Term Layout

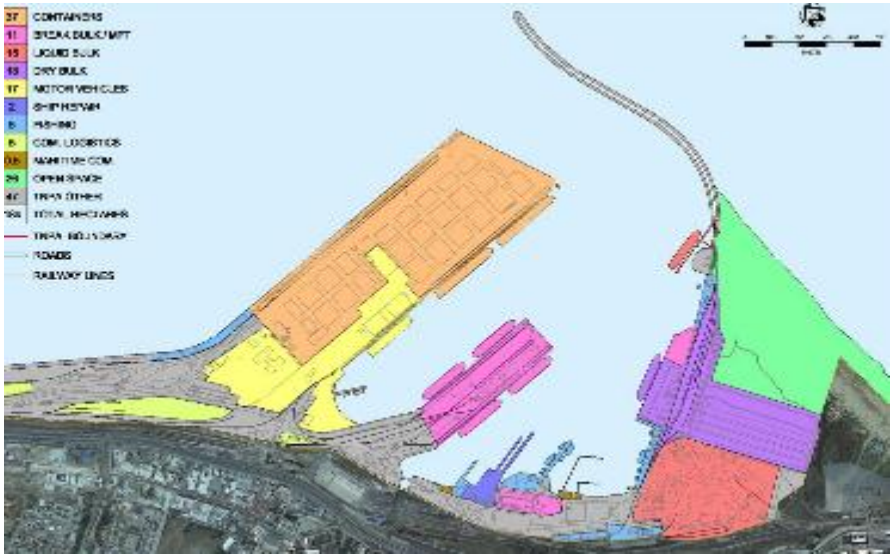


Port of Cape Town Medium Term Layout



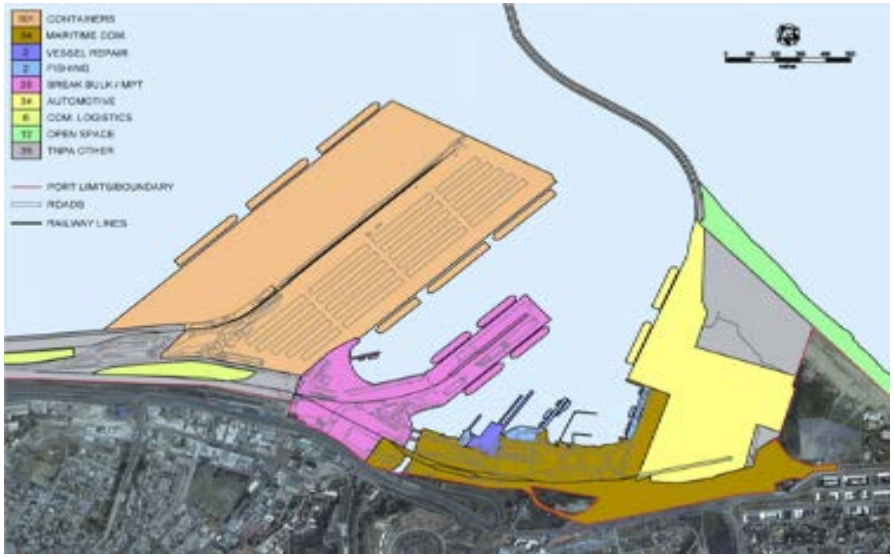
PORT-CITY CONCEPTS / PROJECTS
PORT DEVELOPMENT FRAMEWORK PLANS

Port of Port Elizabeth Current Layout

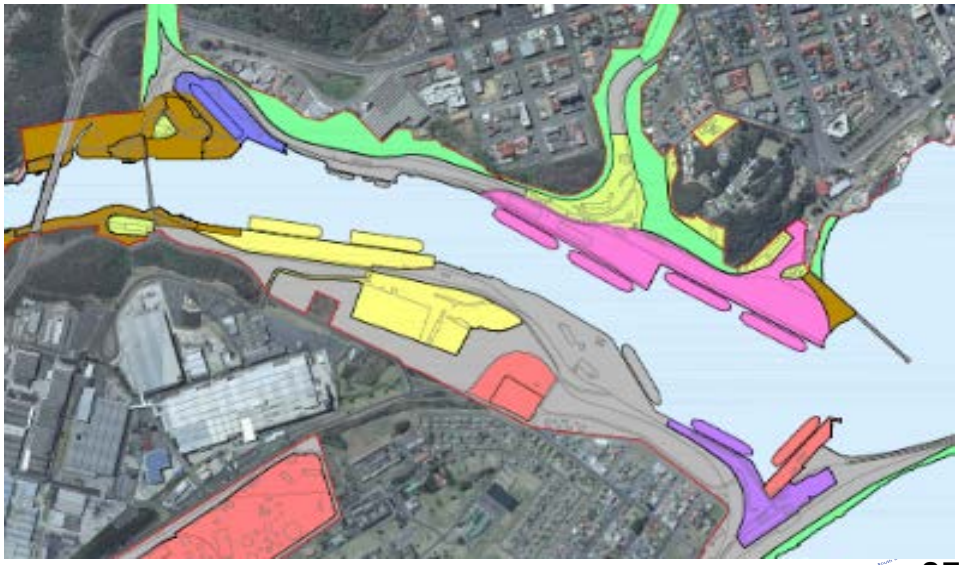


Port of East London Current Layout

Port of Port Elizabeth Medium Term Layout



Port of East London Medium Term Layout



PORT-CITY CONCEPTS / PROJECTS
PORT OF DURBAN

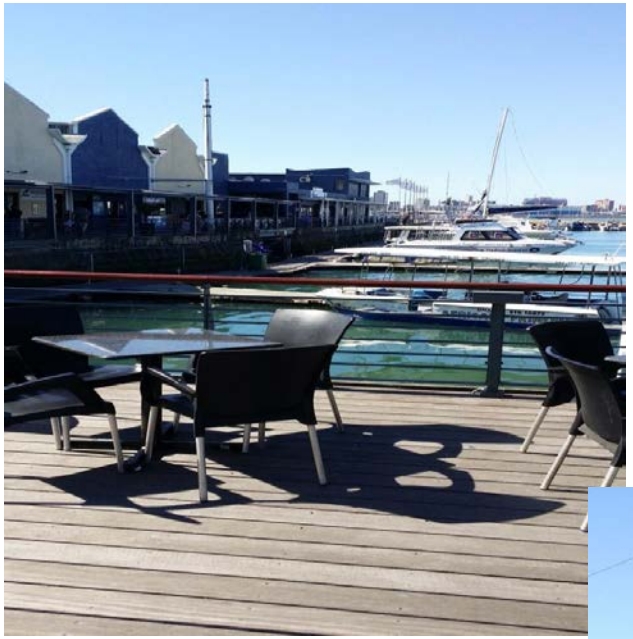
- The Port of Durban provides a full range of port services to the local Durban and KZN hinterland, as well as serving the Gauteng and Southern African hinterlands.

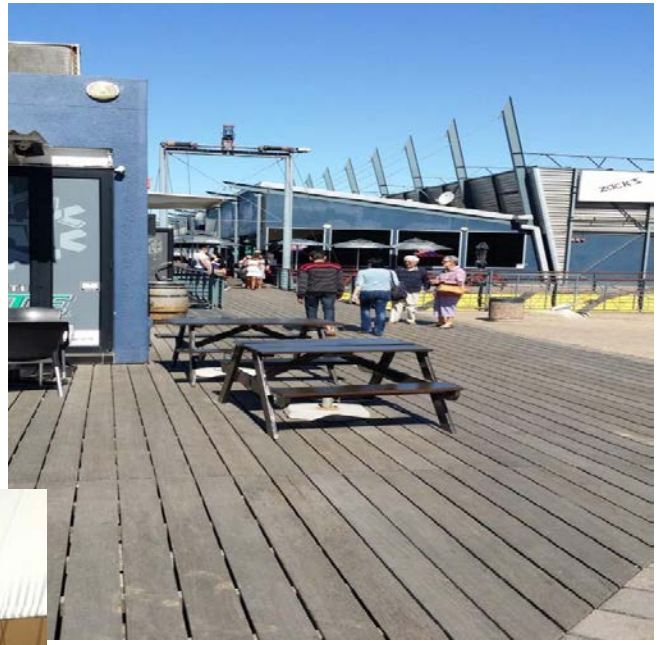
- It is South Africa's premier container, vehicle and liquid bulk port, and also provides break bulk and MPT, dry bulk, ship repair, cruise liner, navy, fishing and recreational facilities.

- The development plans for Durban are driven by the major container expansions required to ensure that the port component of the Durban to Gauteng Freight Corridor can meet future demand.

- Short term port expansions will be made within the existing port, followed by the medium term development of a complementary new port on the old airport site, followed by a long term expansion in Bayhead.

PORT-CITY CONCEPTS / PROJECTS
PORT OF DURBAN: WILSONS WHARF





CRUISE TERMINAL - CONTEXT

- In the last few years, the Port of Durban's potential to be a reputable cruise destination has grown.

- This does not exclude the Port of Cape Town's growth in terms of being an attractive port of call for international cruise liners.

- The proposed Cruise Terminal developments set the stage for Durban and Cape Town Cities to:

  - Explore and maximise available tourism opportunities the two provinces have to offer.
  - Create new opportunities for exploration by SA and international tourists and meet the growing trend of consumer demand for cruise tourism.
  - The projects will provide certainty for the growing cruise ship industry, helping to position Durban and Cape Town Ports as world-class cruise tourism destinations.

Cruise Statistics for Durban								
	2006	2007	2008	2009	2010	2011	2012	2013
Number of Calls	50	34	60	65	57	66	57	68
Number of Passengers	67,017	69,091	114,909	136,101	155,583	197,244	157,132	186,128

CRUISE TERMINAL - CONTEXT

- T-Jetty is an operational area;
- Area is congested;
- Further development or increase in capacity will exacerbate safety issues;
- N-shed was upgraded to serve as a temporary passenger terminal facility;
- This passenger terminal is small, lacks capacity and facilities; and
- Larger, passenger terminal to meet increased business growth is required.

PORT-CITY CONCEPTS / PROJECTS
PORT OF DURBAN: PUBLIC SPACE INITIATIVES

- The Port of Durban has had public space elements throughout its history and up to its current state.
- The Point Waterfront precinct was part of Transnet and was eventually sold to a public private consortium in which the eThekwini Municipality is a shareholder.
- Other areas such as the Wilson Wharf restaurant and small to medium enterprises precinct have been developed by private and public sectors and reside within the Port.
- The Port also has the BAT Centre and Maritime Museum as public centres.
- Future development plans are in process for a dedicated cruise precinct.

PORT-CITY CONCEPTS / PROJECTS
DURBAN DIG-OUT PORT (DDOP)

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PORT-CITY CONCEPTS / PROJECTS
DURBAN DIG-OUT PORT (DDOP)

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3 Dimensional Artist Impression: Economic Growth Potential for Urban Environment

PORT-CITY CONCEPTS/PROJECTS
DURBAN DIG-OUT PORT (DDOP)

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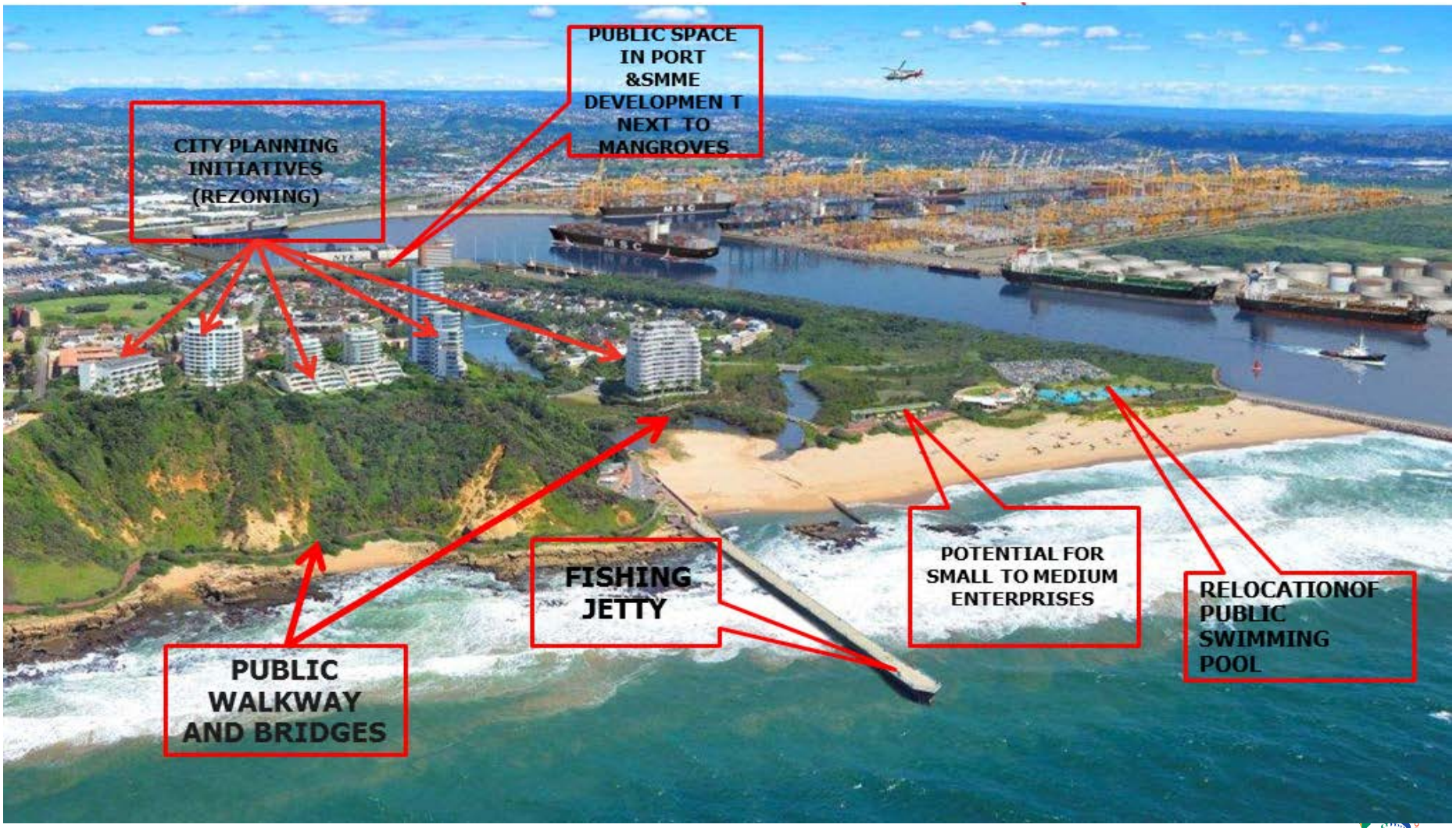
3 Dimensional Artist Impression: Economic Growth Potential for Urban Environment



PORT-CITY CONCEPTS / PROJECTS
DURBAN DIG-OUT PORT

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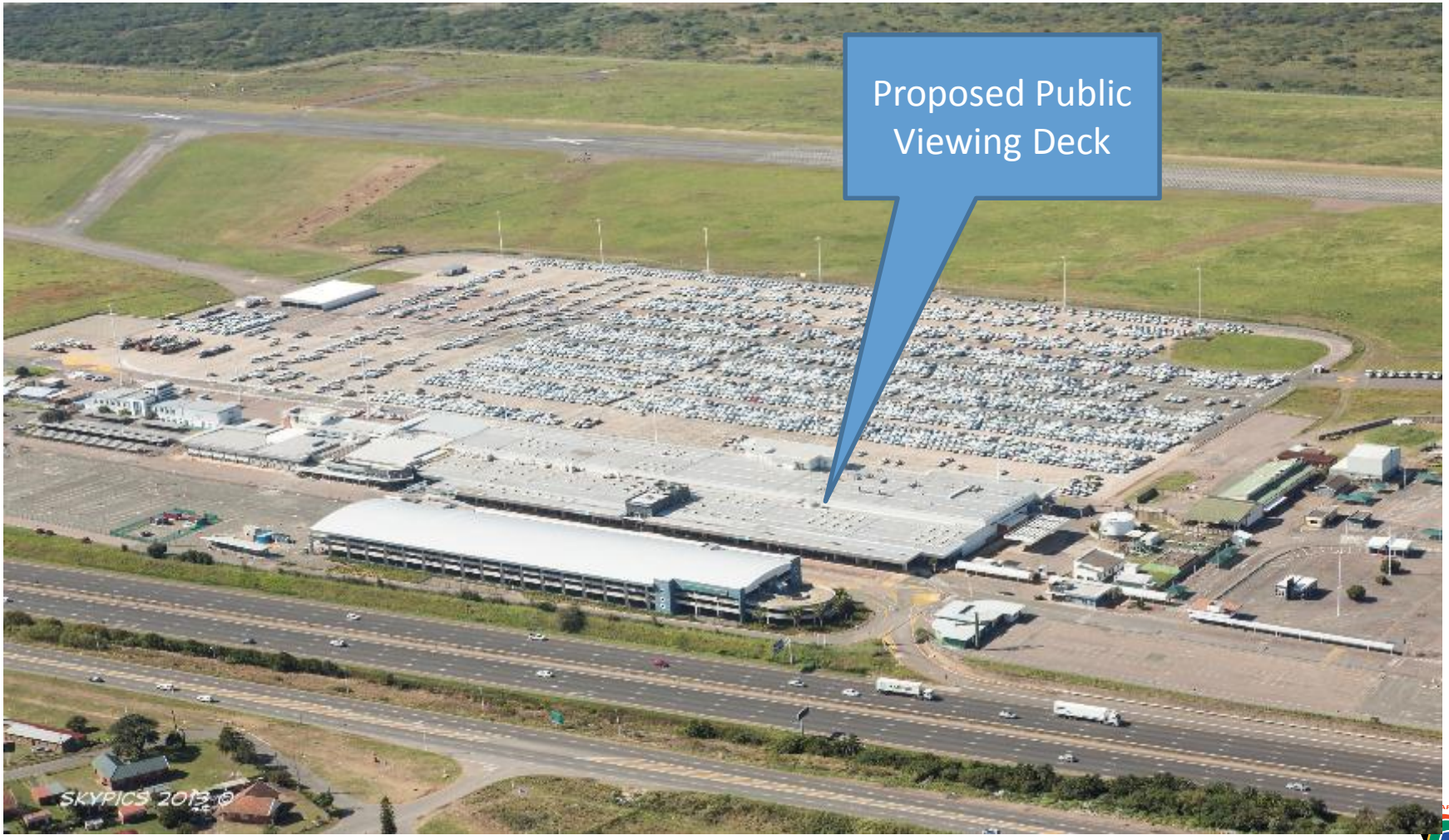
Existing Infrastructure At Old Durban International Airport Site



PORT-CITY CONCEPTS / PROJECTS
PORT OF CAPE TOWN

- Cape Town is the premier port for the Western Cape region, providing a full range of port services.

- The Duncan Dock precinct provides berthing for multi-purpose and bulk vessels, as well as for fishing and recreational craft and the ship repair industry.

- The container terminal is situated in the Schoeman Basin. The V+A Waterfront occupies the older portion of the port.

- Future port growth is limited by landside capacity, and the incorporation of the Culemborg and Salt River rail yards for back-of-port activities, and further seaward expansion to meet future container growth, will be required.

PORT OF CAPE TOWN – ARTIST'S IMPRESSION

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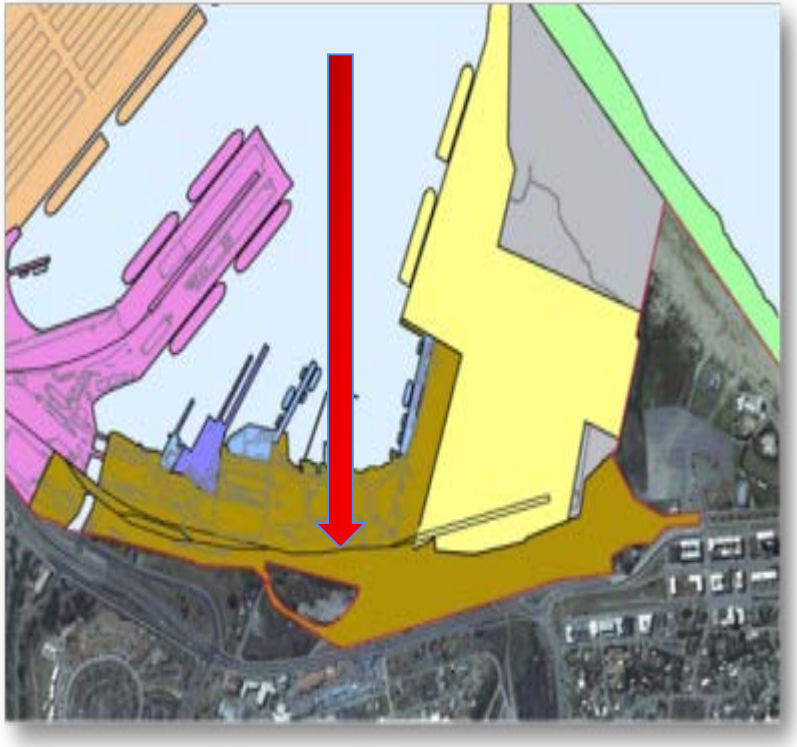
PORT OF PORT ELIZABETH : MARINA AND MARITIME COMMERCIAL DEVELOPMENT

Marina and Maritime Commercial Precinct (Mustard)



Project Vision

The project is aimed at ensuring that the Port of Port Elizabeth is a **People Centric Port** by ensuring:

- The achievement of the fundamental imperatives of a Developmental State alluded to in the introduction;
- That TNPA acts as a catalyst for sustainable economic development by providing opportunities for expansion and growth of existing business; and
- That TNPA promotes the concept of a 'People's Port' that accommodates
- The diverse people of Nelson Mandela Bay both culturally and economically.

PORT OF PORT ELIZABETH - BEFORE

PORT OF PORT ELIZABETH - AFTER

EAST LONDON: OPPORTUNITIES FOR PEOPLES PORT CONCEPT / PROJECTS

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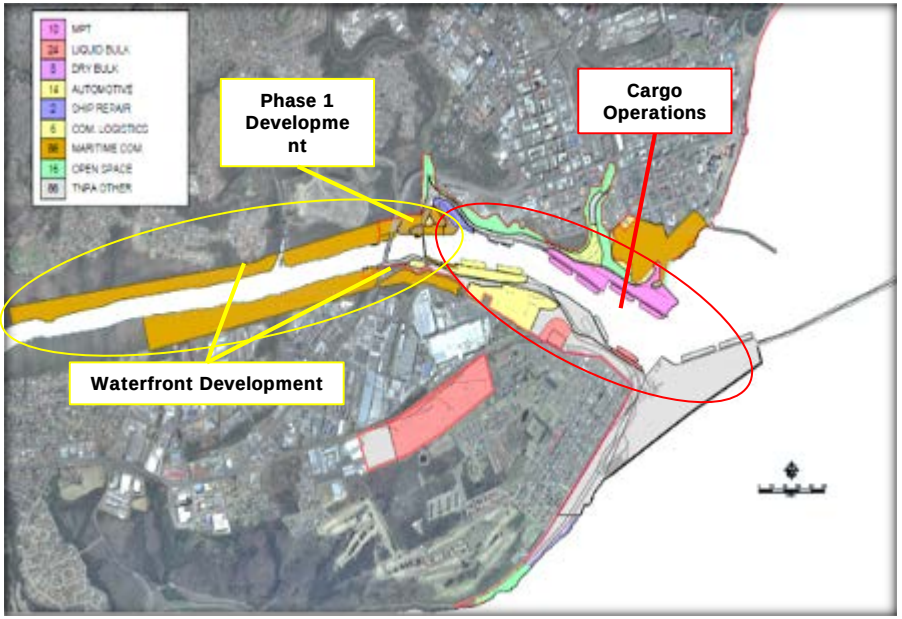

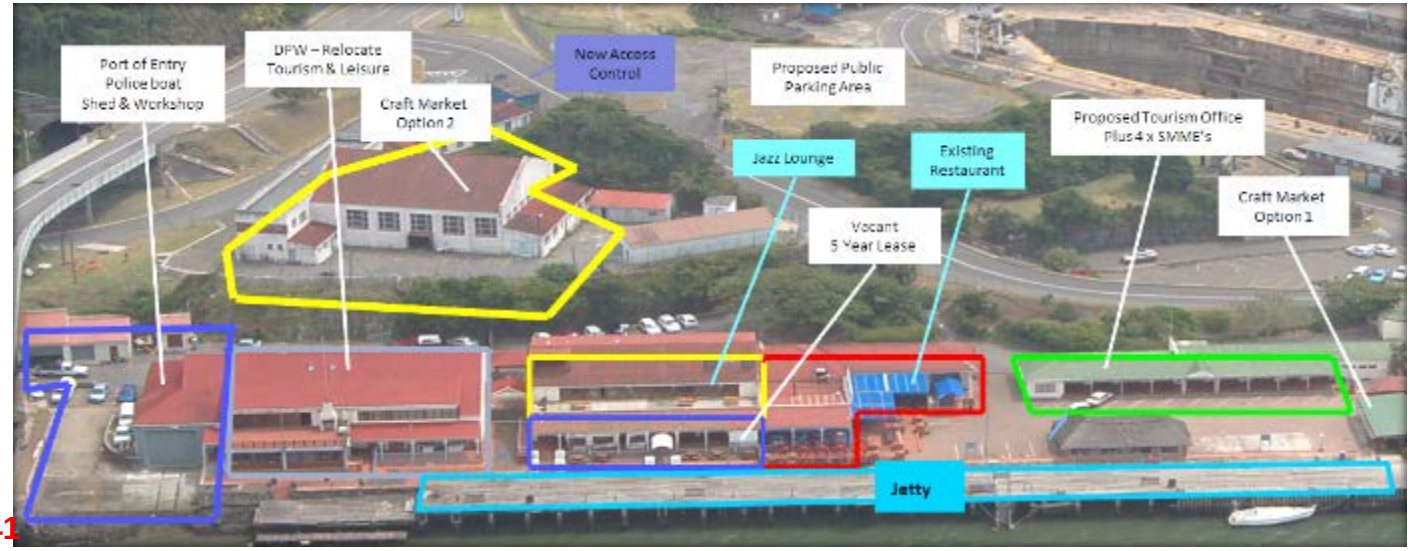

Phase 1- Revitalisation and replacement of the Jetty

Phase 2 – Extended Development Water Front development

- International and domestic water sports
- Developmental water sports

KEY MESSAGE

- The port industry is in a state of radical change and the biggest challenge confronting it is uncertainty. Since uncertainty is here to stay, we need to recognize it, manage it, and even try to profit from it. This requires approaches for port planning and design that emphasize the importance of flexibility and adaptability in coping with uncertainties.

- The impact of the global economic downturn is a daily reminder to ports of the need to change "business as usual". The pressures to integrate the global supply chain; the need for greater port expansion; and the immediate requirement to preserve natural resources requires innovative techniques.

CONCLUDING THOUGHTS

Trade Facilitation

New Business Opportunities

Economic Growth

Skills Development

Job Creation

Competitive Supplier Development

Poverty Alleviation

THANK YOU

PROPOSED ARTIST IMPRESSION: CRUISE TERMINAL

PORT OF DURBAN – ARTIST'S IMPRESSION