



CITY OF CAPE TOWN
ISIXEKO SASEKAPA
STAD KAAPSTAD

WELCOME TO DAY 1 OF THE PLANNING INDABA

11 MARCH 2025

We appreciate your participation and look forward to your valuable contributions.

Urban
Planning
& Design
Department

2025
Planning
Indaba &
Exhibition

Making progress possible. **Together.**

SESSION 1:

OPENING AND WELCOME ADDRESS

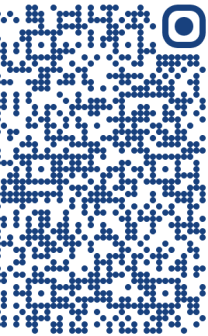


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SESSION 1: OPENING AND WELCOME ADDRESS

SESSION 1	OPENING	LEAD
09h00 – 09h10	Opening and housekeeping rules Location of facilities, WI-FI details, session etiquettes, social media guidelines	Nishendra Moodley
09h10 – 09h20	Welcome address and purpose of the planning Indaba Rob Mc Gaffin Executive Director: Planning and Environment Directorate	Rob McGaffin
09h20 – 09h30	Setting the tone- a brief introduction to Indaba themes Erika Naude Director: Urban Planning and Design Department	Erika Naude



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SESSION 2a:

PANEL CONVERSATION



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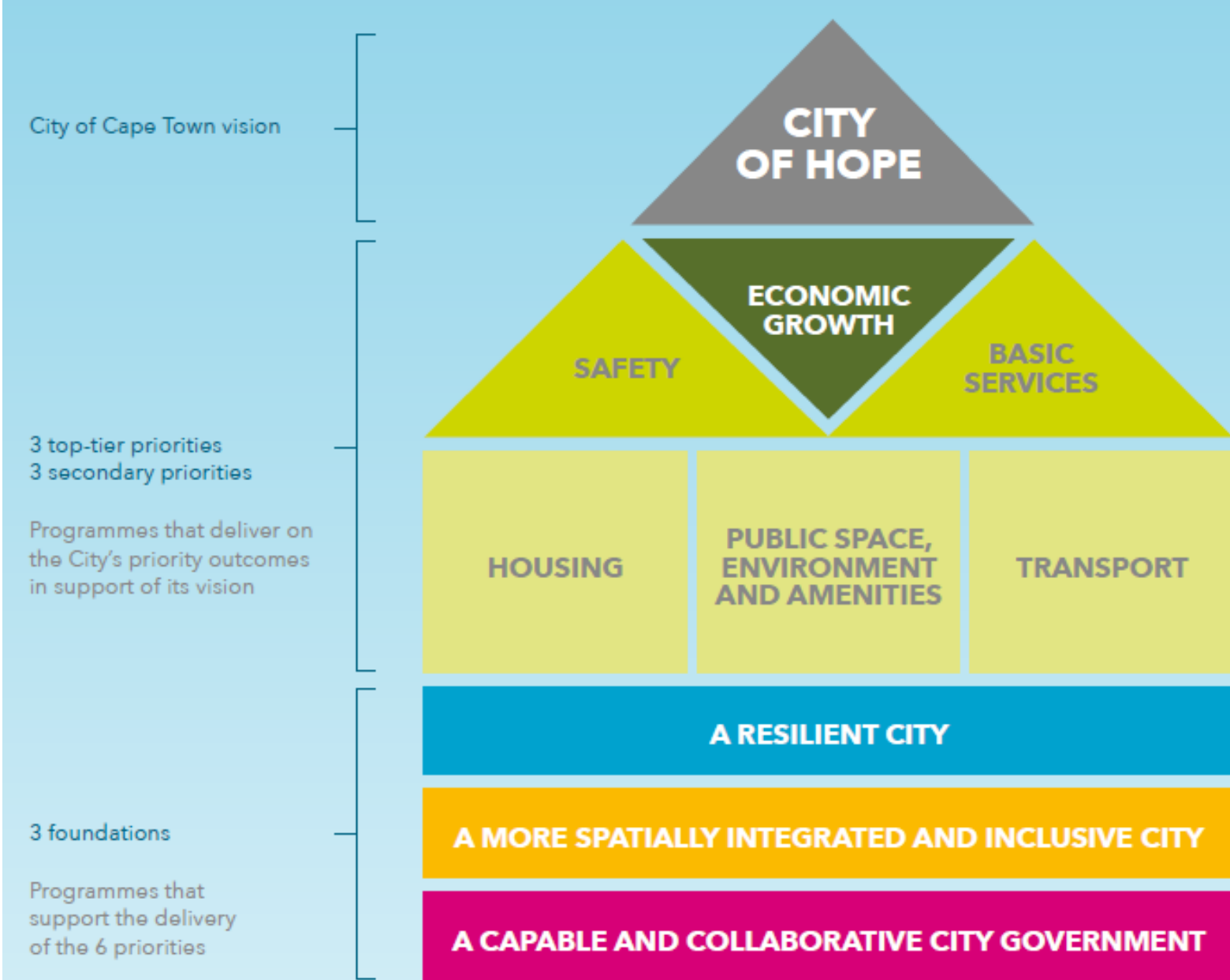


SESSION 2a: PANEL CONVERSATION – INTERPRETING THE CITY OF HOPE

SESSION 2a	Panel Conversation: Interpreting the City of Hope Vision A thought-provoking discussion with industry experts on the interpretation and implementation of the City of Hope Vision. Panelists will explore the core principles, goals, and aspirations behind the vision, providing insights into how it aligns with development in their relative fields.	
09h30 – 10h20	PANELISTS • Hugh Cole: Policy and Strategy. City of Cape Town • Deon van Zyl: Western Cape Property Development Forum (WCPDF) • Zama Mgwatyu: Development Action Group (DAG) • Prof. François Viruly University of Cape Town (UCT) • Prof Nancy Odendaal University of Cape Town (UCT)	Nishendra Moodley & Anna Du Plessis
	Participation from the floor Via MentiMeter	All

SESSION 2: PANEL CONVERSATION

Interpretation of the City of Hope



MENTIMETER QUESTIONS

QUESTION 1: What 3 words or phrases from the interview stand out for you?

QUESTION 2: What should the City be prioritising?

COMFORT BREAK

10h20 - 10h30



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SESSION 2b:

FORWARD LOOKING



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SESSION 2b: FORWARD LOOKING – GROWTH ESTIMATE REPORTS

SESSION 2b	Forward looking - growth estimate reports Insights will be provided on projected growth patterns, demographic shifts, and other critical trends that inform future planning and decision-making.	
10h30 - 10h45	Presentation 1: Residential growth estimates 10h45– 11h00 Attendees are invited to share insights, ask questions or provide input.	Kayleen Simpson
11h00 - 11h15	Presentation 2: Non-residential growth estimates 11h15 – 11h30 Attendees are invited to share insights, ask questions or provide input.	Paul Court
11h30 - 11h45	Presentation 3: Community facilities growth estimates 11:30 – 11:40 Community services 11:40 – 11:50 Education 11:50 – 12:00 Health 12h00 – 12h20 Attendees are invited to share insights, ask questions or provide input.	Bradley Burger Wesley Vorsatz Graham Nevin
12h20 - 12h30	Wrap up morning session and outline afternoon session	Anna Du Plessis

PRESENTATION 1:

RESIDENTIAL DWELLING UNIT PROJECTIONS (2050)

KAYLEEN SIMPSON



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ONCE ON LANDING PAGE SCROLL DOWN TO THE COMMENTS SESSION



Submit your comments

Provide your input, comments or suggestions for the:

- Three growth estimate presentations
- Six core thematic areas

You are welcome to email your written comments related to the Planning Indaba to Future.CapeTown@capetown.gov.za.

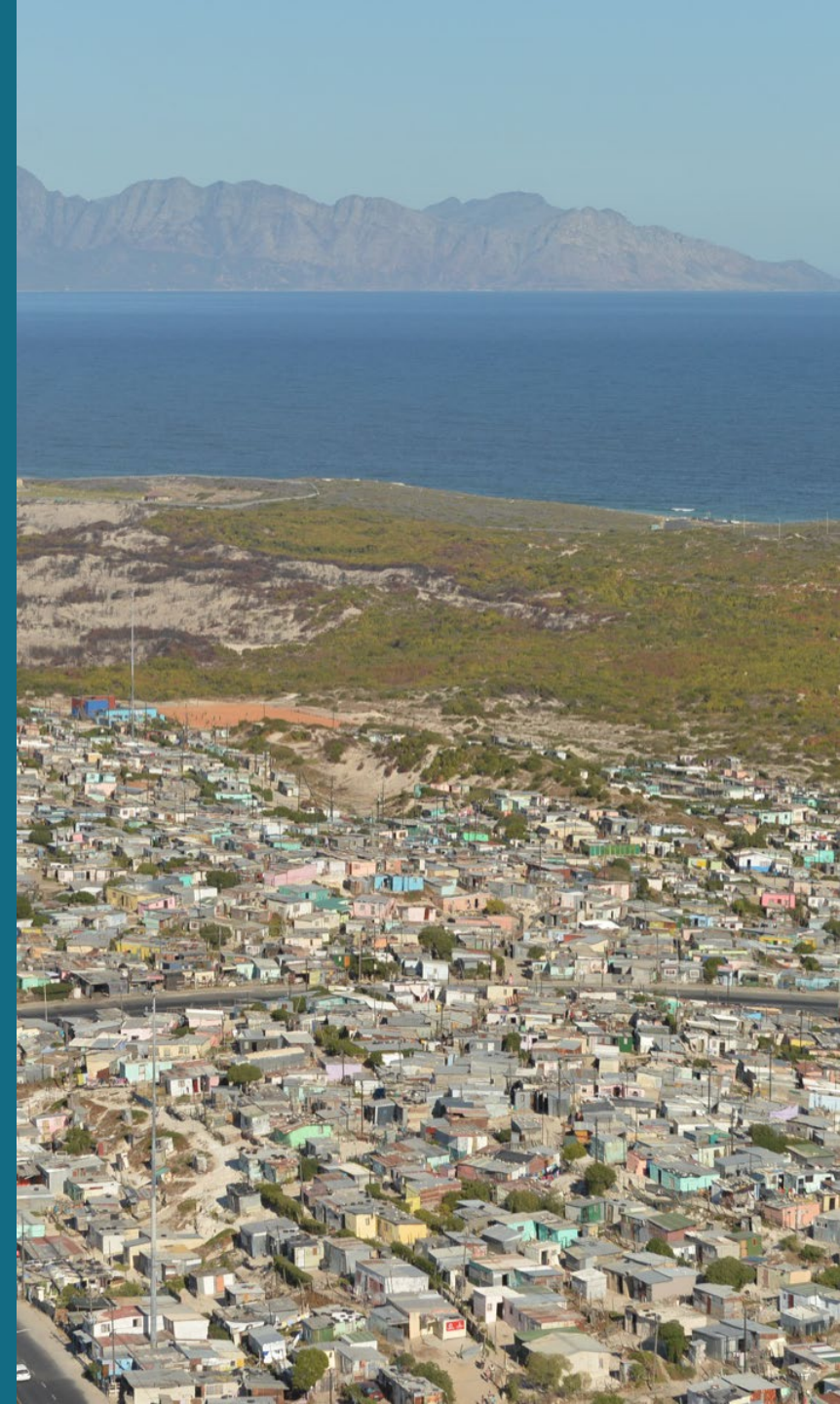


PLEASE NOTE

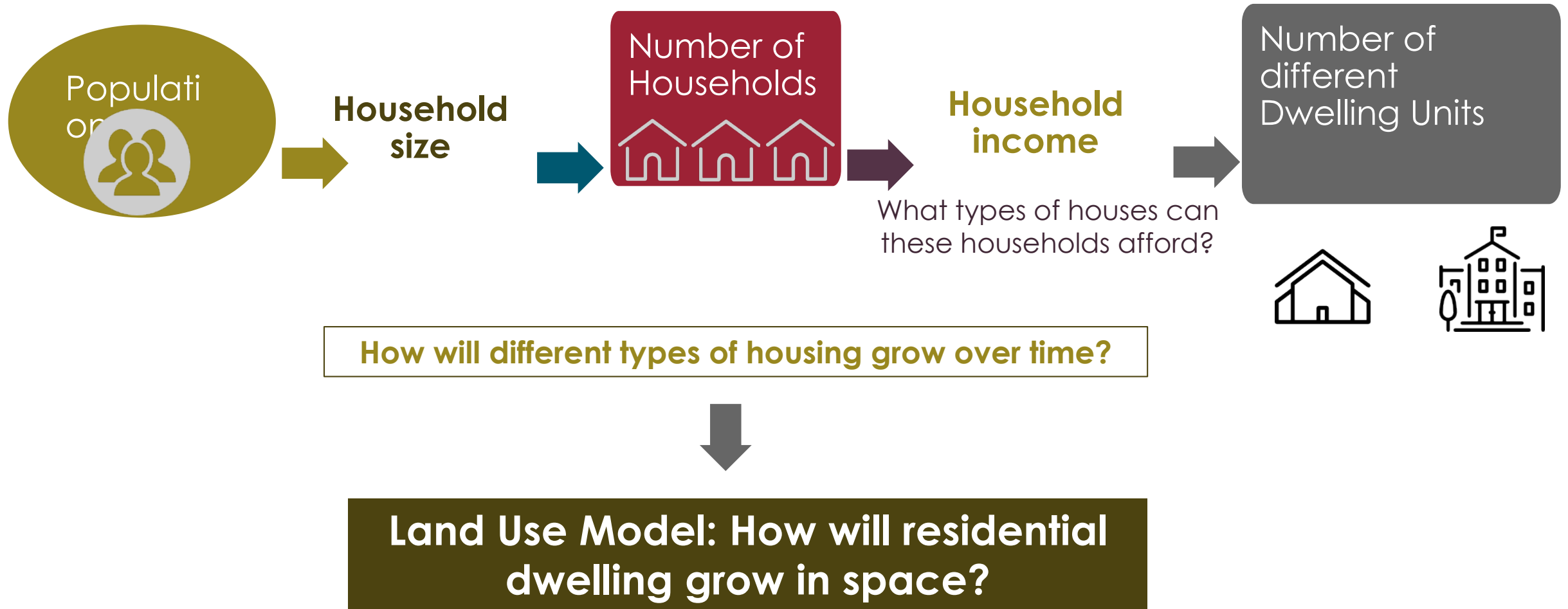
The closing date for written comments is Friday, 28 March 2025.



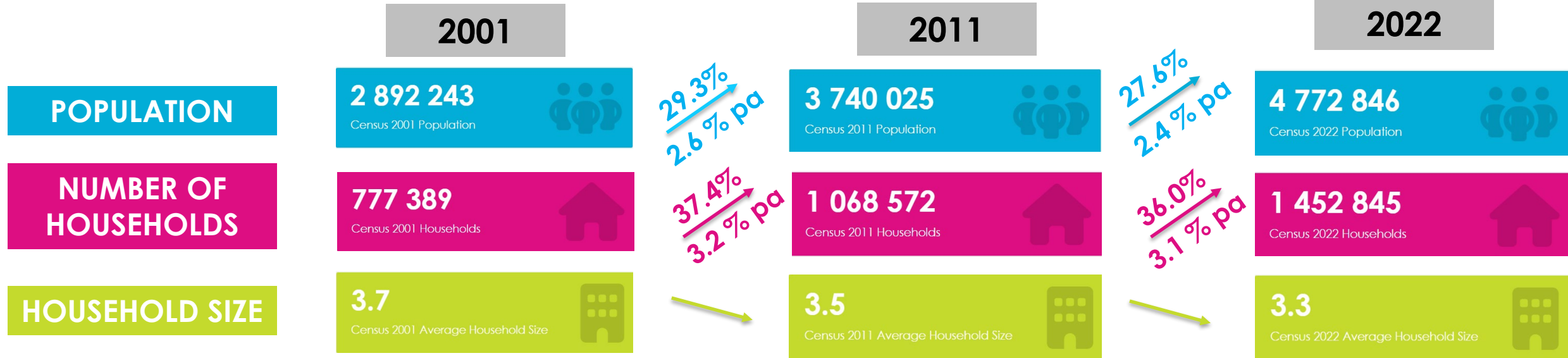
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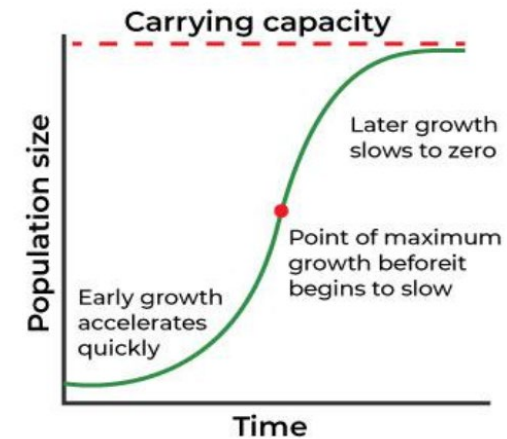
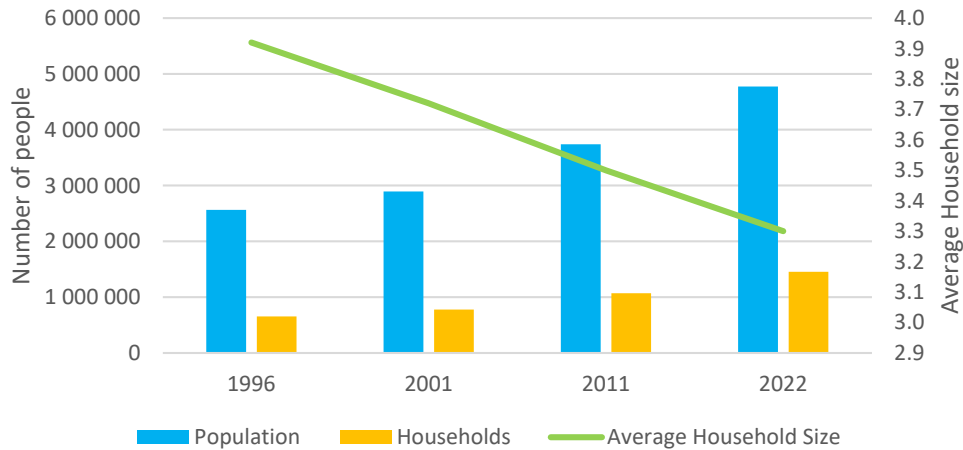
Residential dwelling unit projections (2050)



Population and household growth – trends (2001 - 2022)

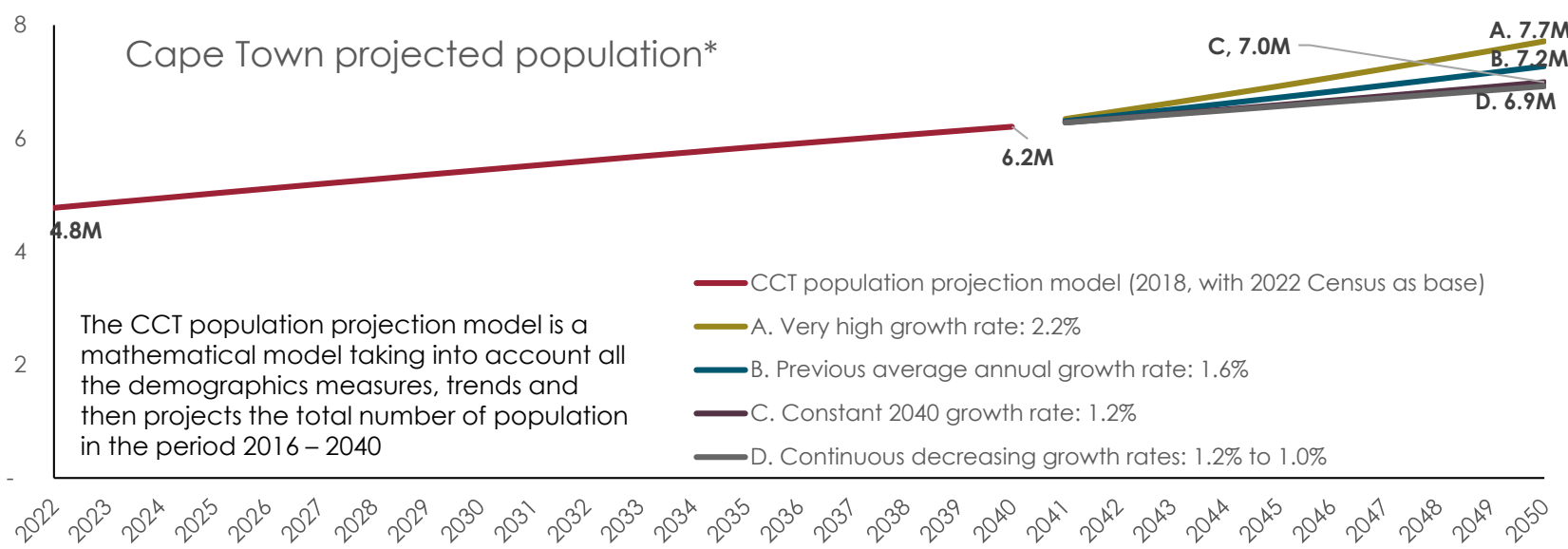


Population and Household Growth 1996-2022



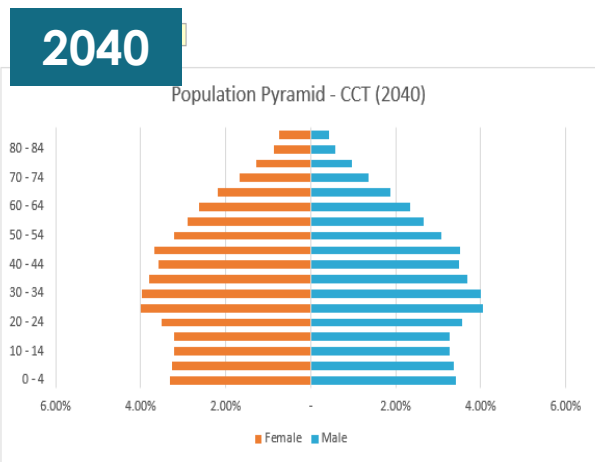
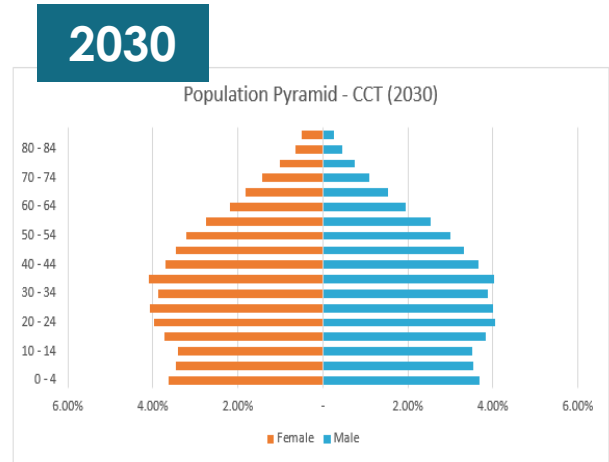
Population and household growth – projections

2050 Growth Scenario C: It is expected that Cape Town will grow to an **estimated 7 million people by 2050**



The population of Cape Town is changing:

- **Growth rate:** Population is growing, but at a slower rate than in the past
- **Age profile:** It is getting older - the proportion of the population aged 65 and older could rise significantly in the next 25 years, from 6.2% in 2016 to 10.6% in 2035 and further to 15% by 2050.
- **Migration trends:** are uncertain- influenced by the effects of climate change impact on livelihoods and changes to relative economic prosperity of cities throughout Sub-Saharan Africa.



	Current (2024)	Projected (2050) – Scenario C	Growth in Numbers (2024-2050)
Total Population	4.8 million people	7 million people	Additional 2.2million people
Total Households	1.5 million households	2.1 million households	Additional 600 000 households
Average household size	Assuming a constant household size of 3.3		

Emerging residential dwelling typologies 2025



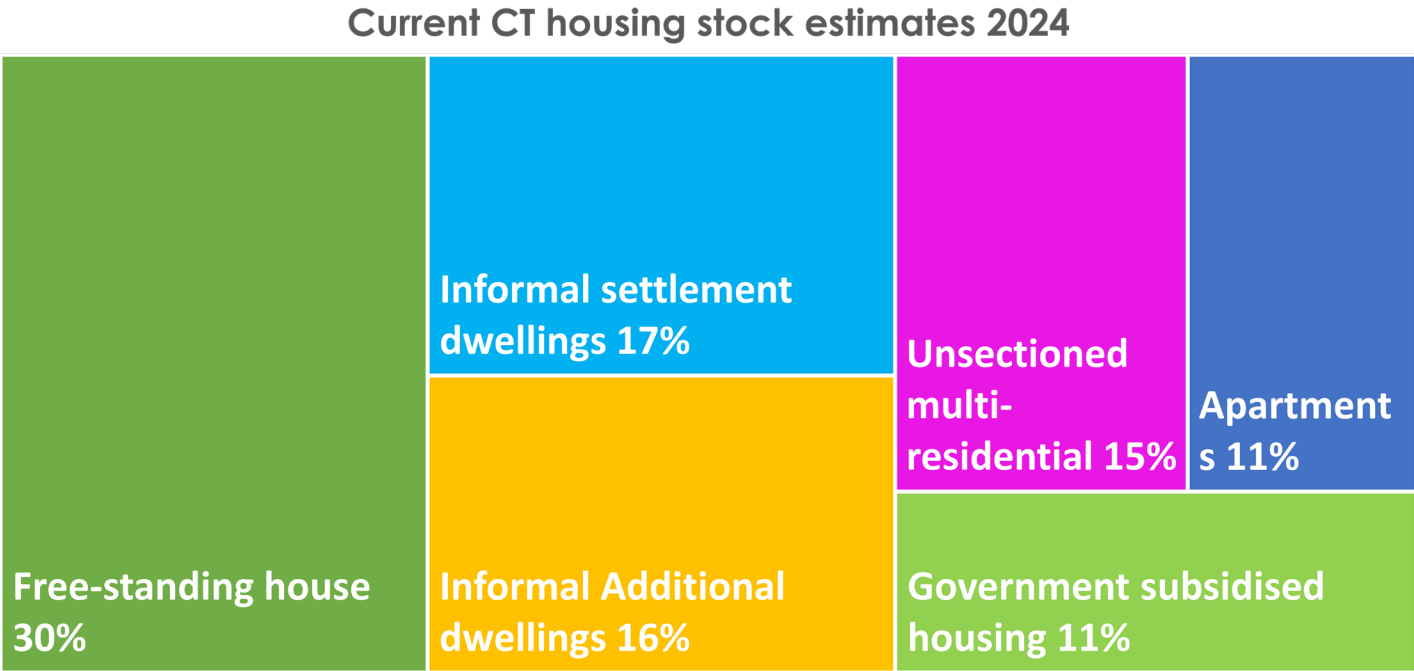
How to decide on housing typologies for projections:

- Distinct market characteristics (price point, demand responsiveness, supply constraints)
- Differing implications for infrastructure planning
- Quantifiable – can we establish a baseline and track annual growth

	Dwelling Types	Definition	Primary Data Source – City administrative data
	Informal settlement dwellings	Any informal main dwelling which is a makeshift structure (intended or used for human habitation) built without formal approval and not intended as a permanent dwelling. The City categorises informal settlements into five types of Areas of Informality	Annual Roof top counts using aerial photography
	Informal Additional dwellings (ADIs)	A structure constructed of any material, intended or used for human habitation, on the same residential registered property as a main dwelling, with no approved plans. It may be an extension of or separate from the main dwelling and can either supplement or replace a formal structure. (Commonly referred to as backyard dwellings)	Triangulated data from multiple sources: Targeted survey (2017), Aerial photography
	Government subsidised housing (BNG)	means housing developed in terms of the Integrated Residential Development Programme (IRDP) which is fully funded by the state for qualifying persons via national housing grants. This housing typology is an ownership tenure model;	Adding building plan completions to General Valuations data (2022)
	Unsectioned multi-residential	Comprises multiple dwelling units under single ownership, where units cannot be individually owned or titled, with occupants leasing or renting units. Council Rental Units and older blocks of flats Hostels Old age homes Barracks Student housing prisons	Estimated by applying an assumed 'internal living area' to the square meterage (as provided in GV2022)
	Apartments (Sectional title)	Consists of individually owned units within a shared property scheme. Each unit has its own title deed, while common areas are co-owned and managed by a body corporate. Examples include flats and townhouses, where owners contribute levies for shared maintenance and governance.	Adding building plan completions to General Valuations data (2022)
	Free-hold house	Refers to a standalone residential property where the owner holds full ownership of both the building and the land it occupies.	Adding building plan completions to General Valuations data (2022)

Current Cape Town housing stock- estimated proportions across typologies

Dwelling Types	Relative confidence level in base data	Current Estimated proportion of CT housing stock
Informal settlement dwellings	Medium	17%
Informal Additional dwellings (ADIs)	Low	16%
Government subsidised housing (BNG)	High	11%
Unsectioned multi-residential	Medium	15%
Apartments (Sectional title)	High	11%
Free-hold house	High	30%
		100%



Various City administrative datasets (2024)

Formal dwelling units: Houses and Apartments

Freehold House

1. Formal dwelling/house or brick/ concrete block structure on a separate stand/yard/ farm
2. Cluster house in complex/
Townhouse (semi-detached house in complex)

Current estimated number: **475 000**

Apartments (Sectional Title)

3. Formal dwelling/ house/ flat/ room in backyard/ servants quarters/ granny flat/ cottage

Current estimated number: **180 000**



Formal dwelling units: Government Subsidised Housing (BNG) and unsectioned multi-residential

Government subsidised housing (BNG)



Current estimated number: **170 000**



Unsectioned multi-residential

- Some facilities are shared by individuals or households
- No sectional title in place

Current estimated number: **200 000**



Formal Additional Dwellings (ADF)

Refers to any house/flat/room on a property, or larger dwelling/servants quarters/ granny flat on the same residential registered property as a main dwelling, built according to approved architectural plans.

Informal settlement dwelling units and Informal Additional Dwellings (ADIs)

Informal Formal Dwelling units

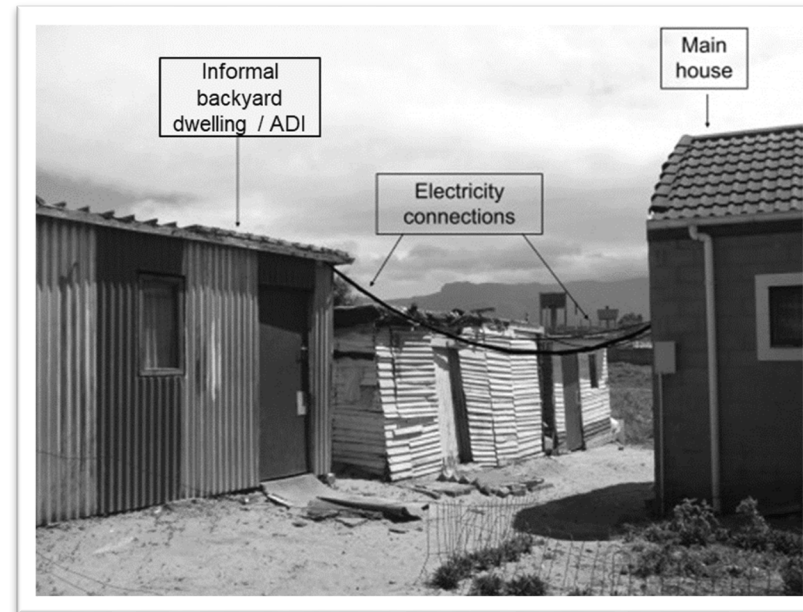
Stats SA defines this as an “Informal dwelling NOT in backyard.” These are made up of informal dwellings which are makeshift structures not erected according to approved architectural plans, e.g. “in an informal/squatter settlement or on farm”.



Current estimated number: **270 000**
Highly fluctuating year-on-year growth rate

Informal Additional Dwellings (ADIs)

Stats SA defines this as an “Informal dwelling in backyard.” **ADIs** are makeshift backyard structures not erected according to approved architectural plans and are **largely** (but not exclusively) **constructed of informal materials**.



Current estimated number: **250 000**

Informal Additional Dwellings (ADIs) – continuum of intensification

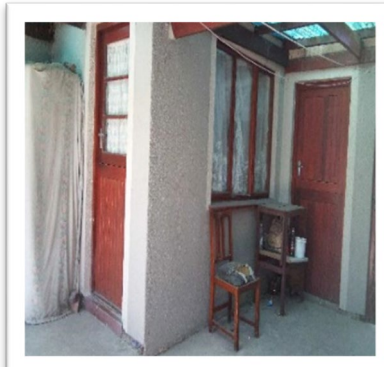
Current estimated number: **250 000**

Informal Additional Dwellings (ADIs)

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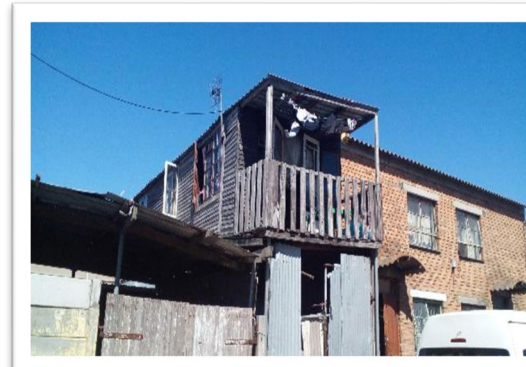


A combination of both formal and informal building materials.



Constructed using formal materials but with no building plan approval, i.e. two doors so close together, informal material roof, no gutters,

Informal Additional Dwellings constructed from formal building materials



A combination of both formal and informal building materials



Constructed using formal materials but with no building plan approval – i.e. balcony looks unstable, doors and windows are looking into each other

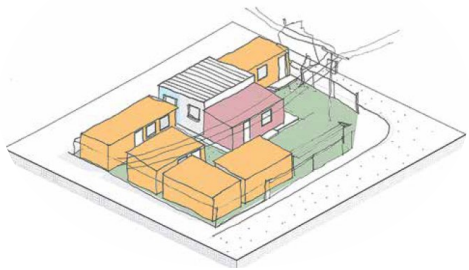
Multi-story Informal Additional Dwellings

Informal Additional Dwellings (ADIs)

INFORMAL STRUCTURES IN BNG BACKYARD

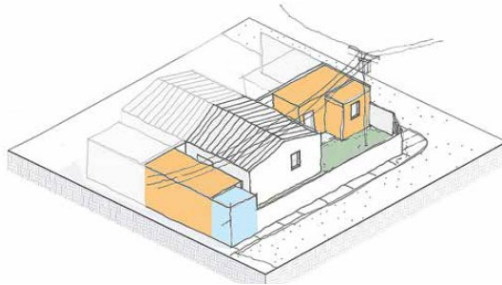
- Main dwelling
- Additional less formal structures

Subsistence Homeowners



- Main dwelling
- Additional permanent structures.

Incremental homeowner developers

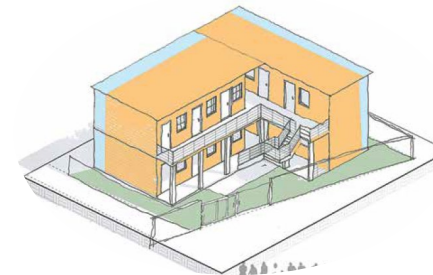


Continuum of intensification

MICRO UNITS REPLACING BNG HOUSE

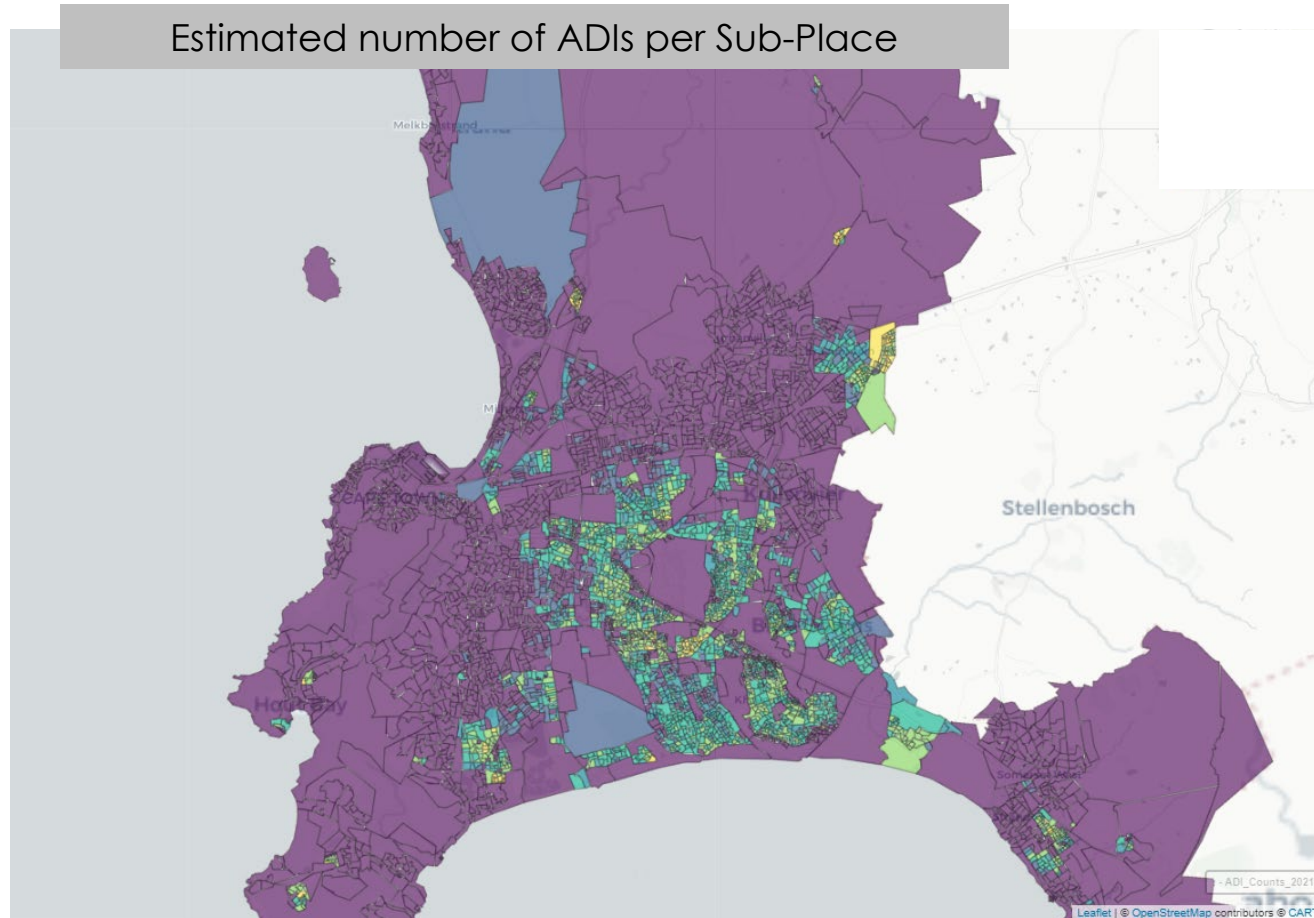
- Main dwelling demolished
- Up to 3 floors
- 4 -12 units

Micro-developers (Small Scale Rental Units)



How do we estimate Informal Additional Dwelling (ADI) numbers

The map below shows the 2021 estimated ADI dwelling count across Cape Town using various data sources to obtain the data on a sub-metro level



There are three main datasets used to obtain the sub-metro ADI estimates:

1. Visual inspection (only used in special cases and for select areas using areal photography)
2. 2017/18 Backyard Survey estimate of ADIs per SAL + growth rate
3. 2011 Census count of households living in ADIs (when no other data is available)

Assumptions regarding growth and the average household size are informed by the Stats SA surveys.

Planning on **switching over to City Maps ADI count** once complete

Projecting dwelling unit growth – Potential Housing Demand

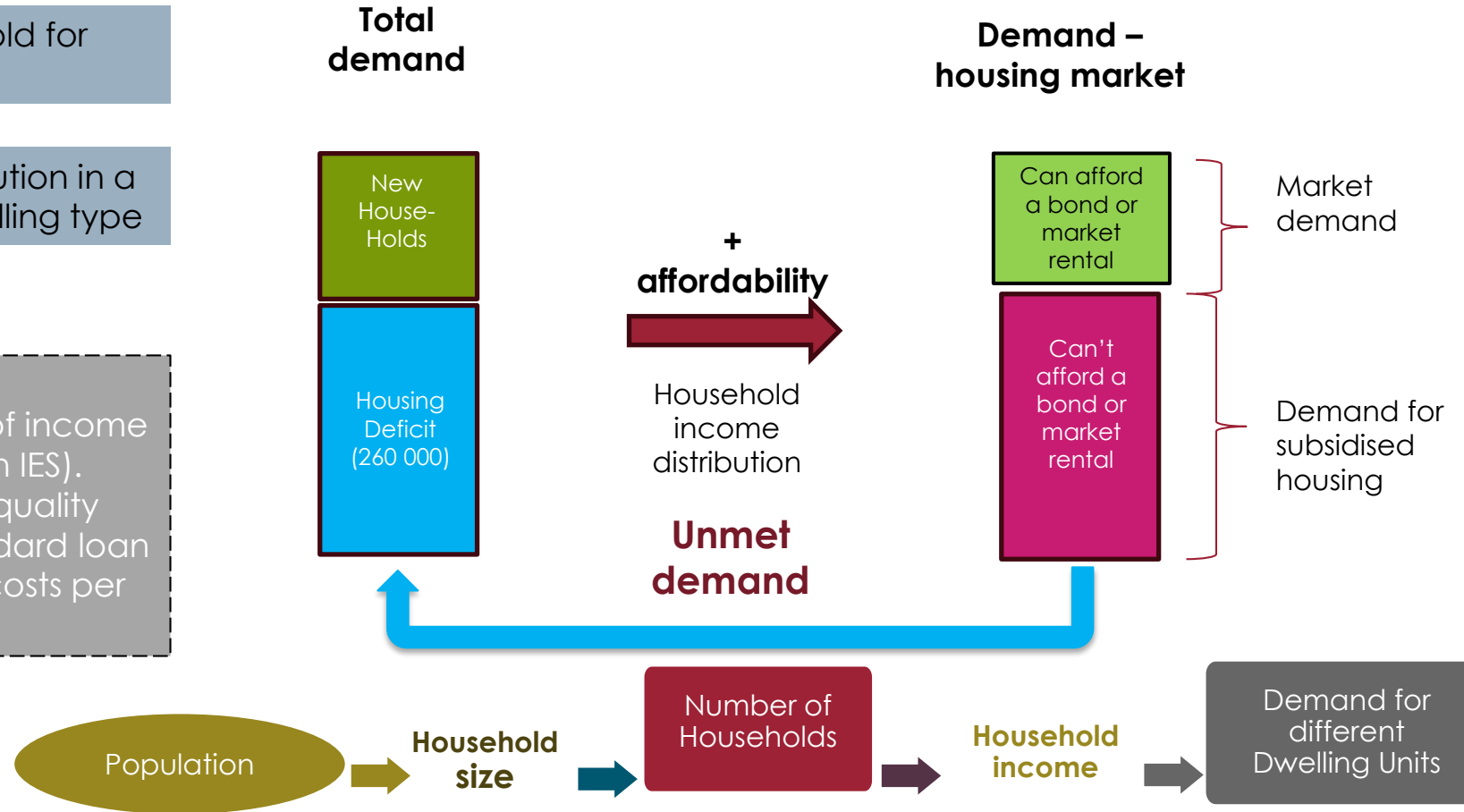
Household income is key determinant of affordability / demand across dwelling types

Step 1: Establish a minimum cost threshold for each dwelling type

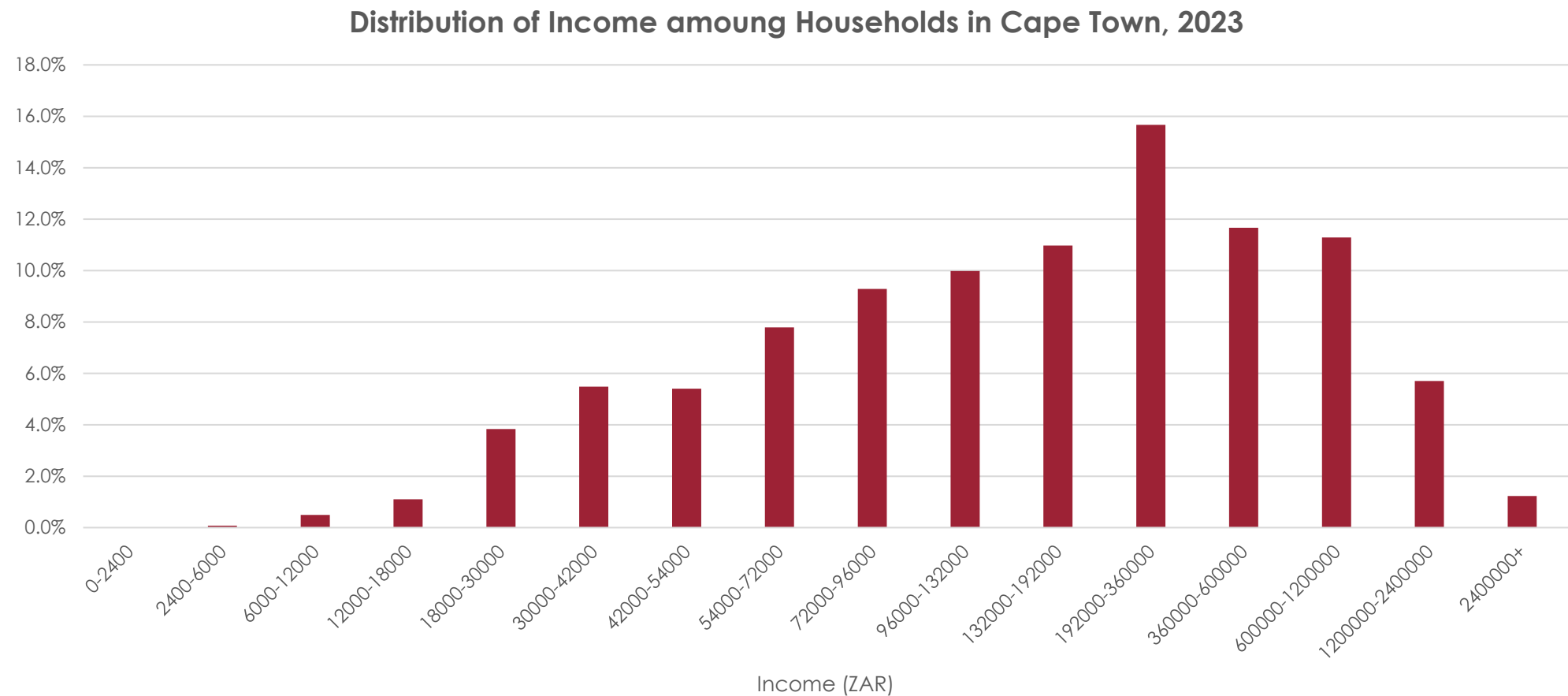
Step 2: Given household income distribution in a given year – quantify demand per dwelling type

Key Assumptions

- Households spent on average 35% of income on housing (rule-of-thumb in line with IES).
- Households will occupy the highest quality housing they can afford, given standard loan parameters and minimum housing costs per type.



Current Household income distribution (IES 2023/23)



Key factors influencing how the housing market evolves into the future

Assumptions for these elements will need to be developed and tested over-time

For some of these assumptions trend data exists to inform the plausible range of these assumptions, for others scenarios will need to be considered and adjusted year-on-year against available data

Demand

Demographic Drivers: Population and Household growth

- What will the rate of population growth be? (Fertility, Mortality and Migration)
- What will the average household size be into the future?

Economic Drivers: Household income growth and distribution

- How will household income growth be distributed across economic cohorts?
- Will loan parameters hold constant? (interest rates)

Supply

Price elasticities and supply lags per dwelling type

- How responsive is the housing market to changes in demand?

Supply side constraints

- What are the constraints to responding to demand for each dwelling type?

Market housing

- Land availability and price
- Regulatory constraints
- Access to finance
- Infrastructure capacity

Subsidised housing

- Funding and supply pipeline
- Format of govt housing programmes

Market Interactions

- How can we incorporate rules that reflect real-world interactions within the housing market (e.g. Subsidised govt housing and Informal additional dwellings)

Priorities to improve residential growth projections

What do we need to build a better understanding of?	How?
Baseline data (more frequent and accurate data on key dwelling types)	Informal additional dwellings
Developing and testing assumptions	External reference group + localised studies
Improve household income distribution data	IES / CT household survey
Continue to monitor market response parameters (price elasticities)	Building plan and price trends

Why is increased complexity useful?

We can get a better picture of the evolution of the housing market as a whole – including filtering of housing demand into lower sub-markets due to supply constraints upstream

INPUTS FROM PLENERY

10h45 - 11h00



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PRESENTATION 2:

THE ECONOMIC DETERMINANTS OF NON-RESIDENTIAL LAND USE IN CAPE TOWN:

FORECASTING THE DEMAND FOR SPACE

PAUL COURT



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- [Six core thematic areas](#)

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PLEASE NOTE

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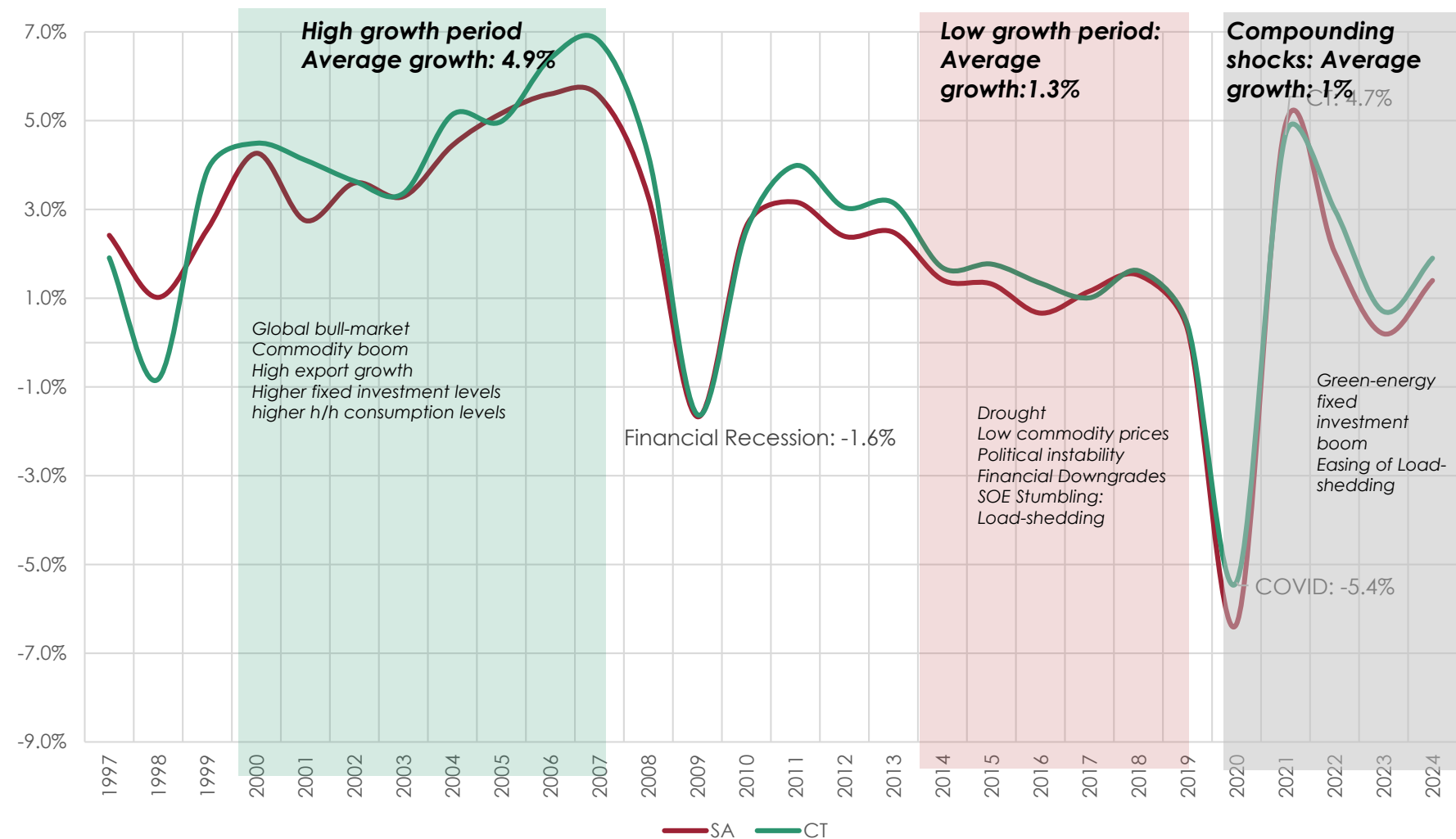
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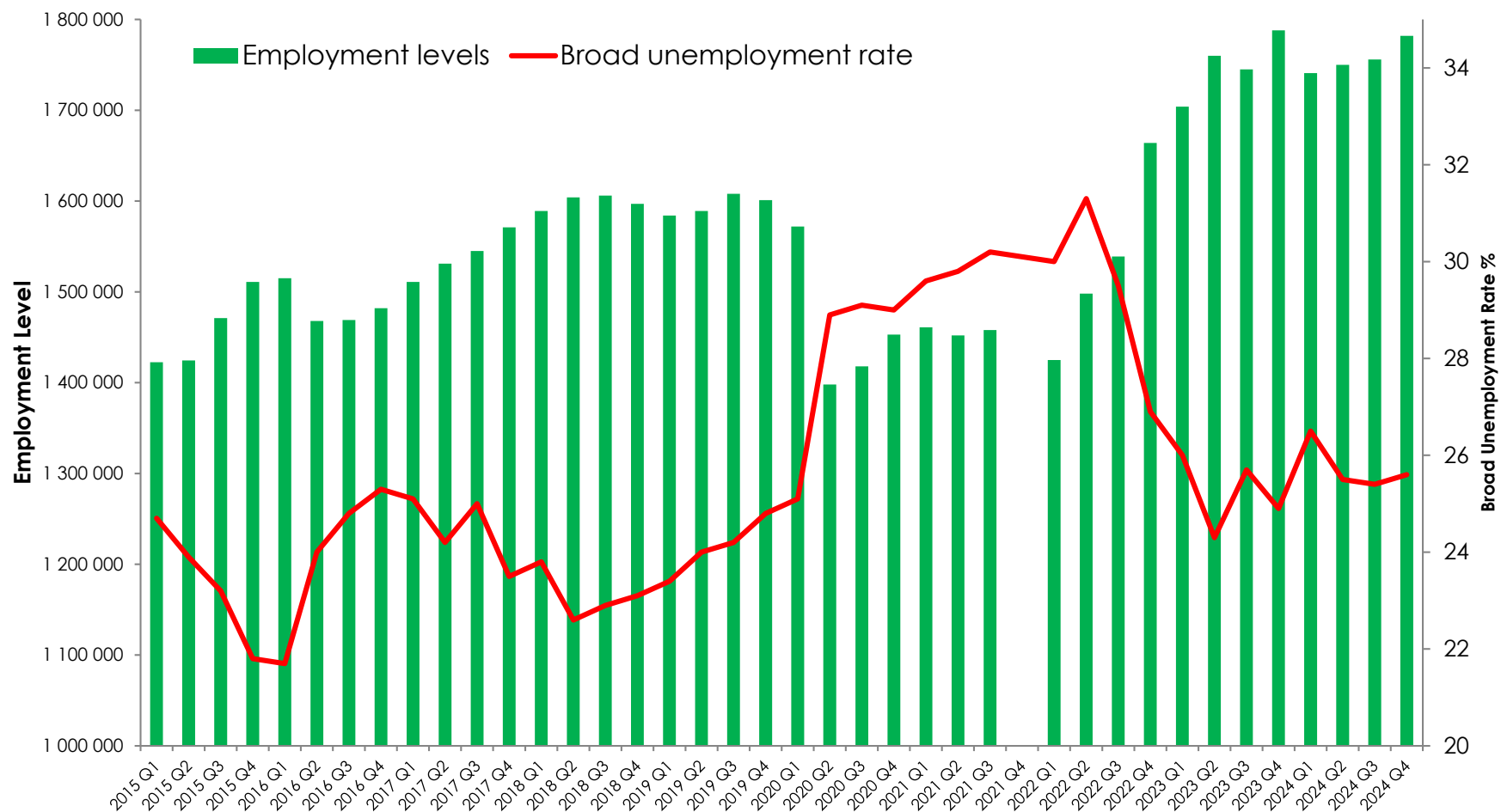
Overview

1. CT Economic Trends Overview
2. Modelling different scenarios of future economic growth
3. Sectoral drivers of growth
4. Forecasting land use demand
5. Spatial dynamics of economic activity over time
6. Emerging trends affecting demand for land use

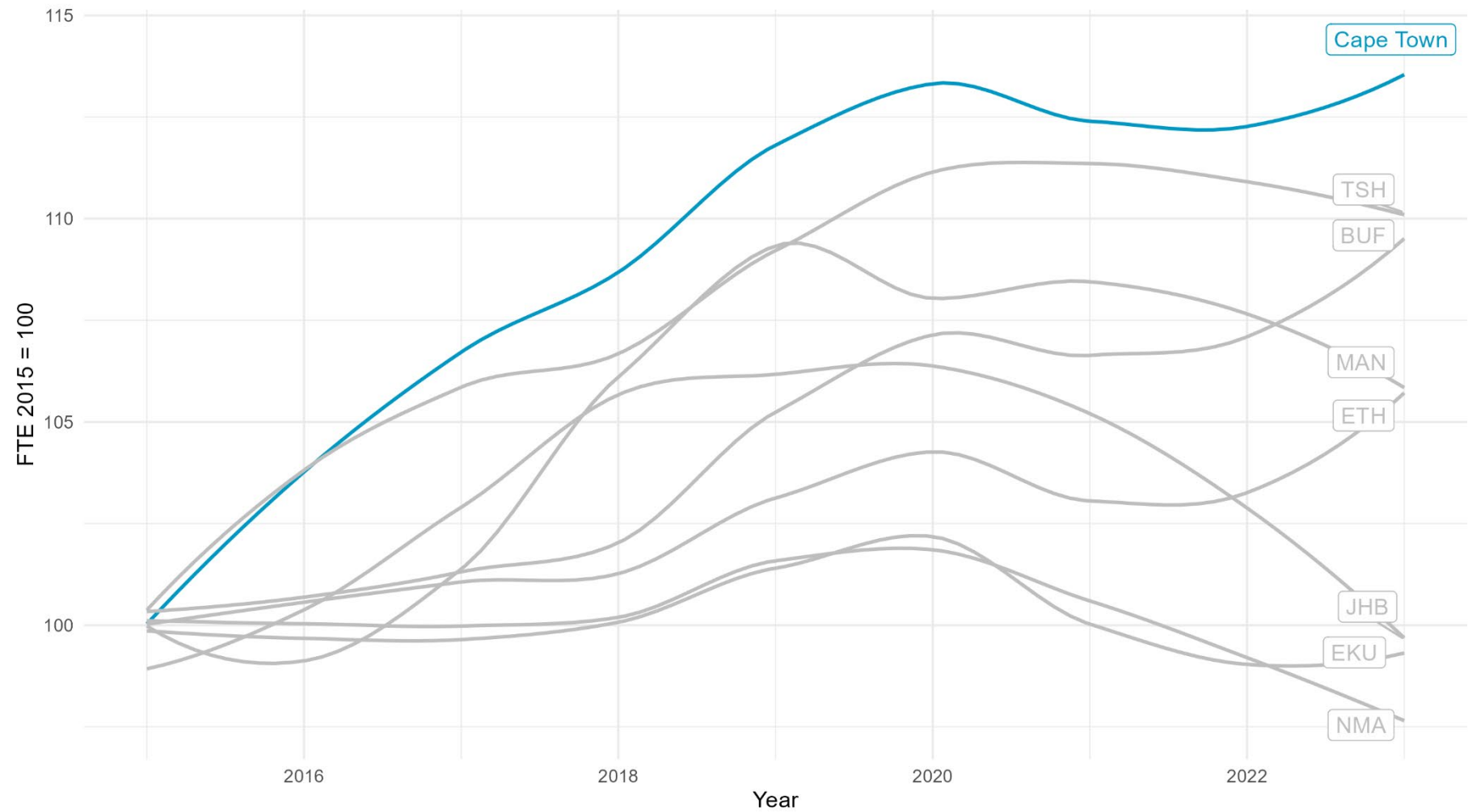
Cape Town and South Africa Economic Growth Trends – A Bumpy Ride



Employment in Cape Town has shown impressive resilience



And formal employment has clearly outperformed other metros

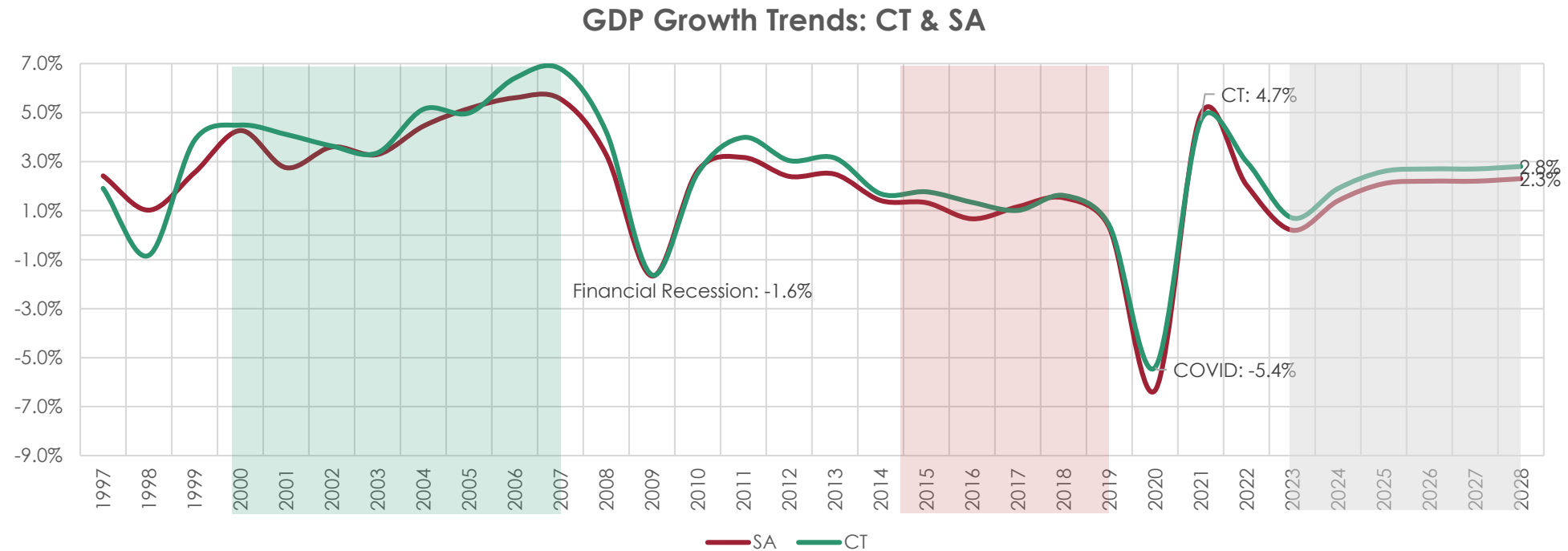


Source: SARS, 2024

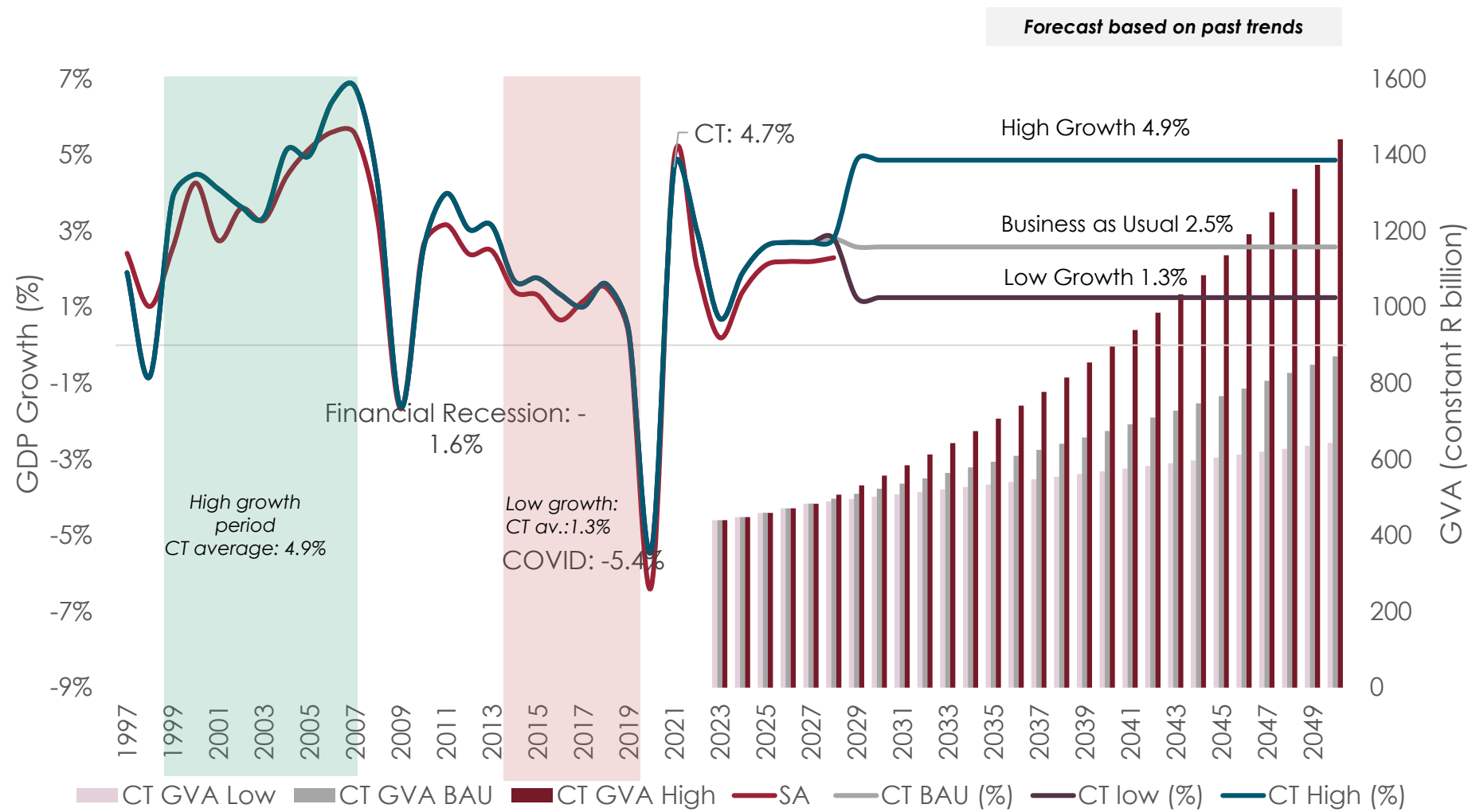
So how do we plan for land/space requirements of future levels of economic activity in Cape Town

The land use model has typically used economic forecasts and scenario analysis to envision future land use patterns into 2050 for planning purposes.

To do this, the Economic Analysis team use BER GDP growth forecasts for SA, adjusting these to CT estimates, using a historical average differential. We then use scenario modelling, based on historic trends to come up with three scenarios of growth, up to 2050.

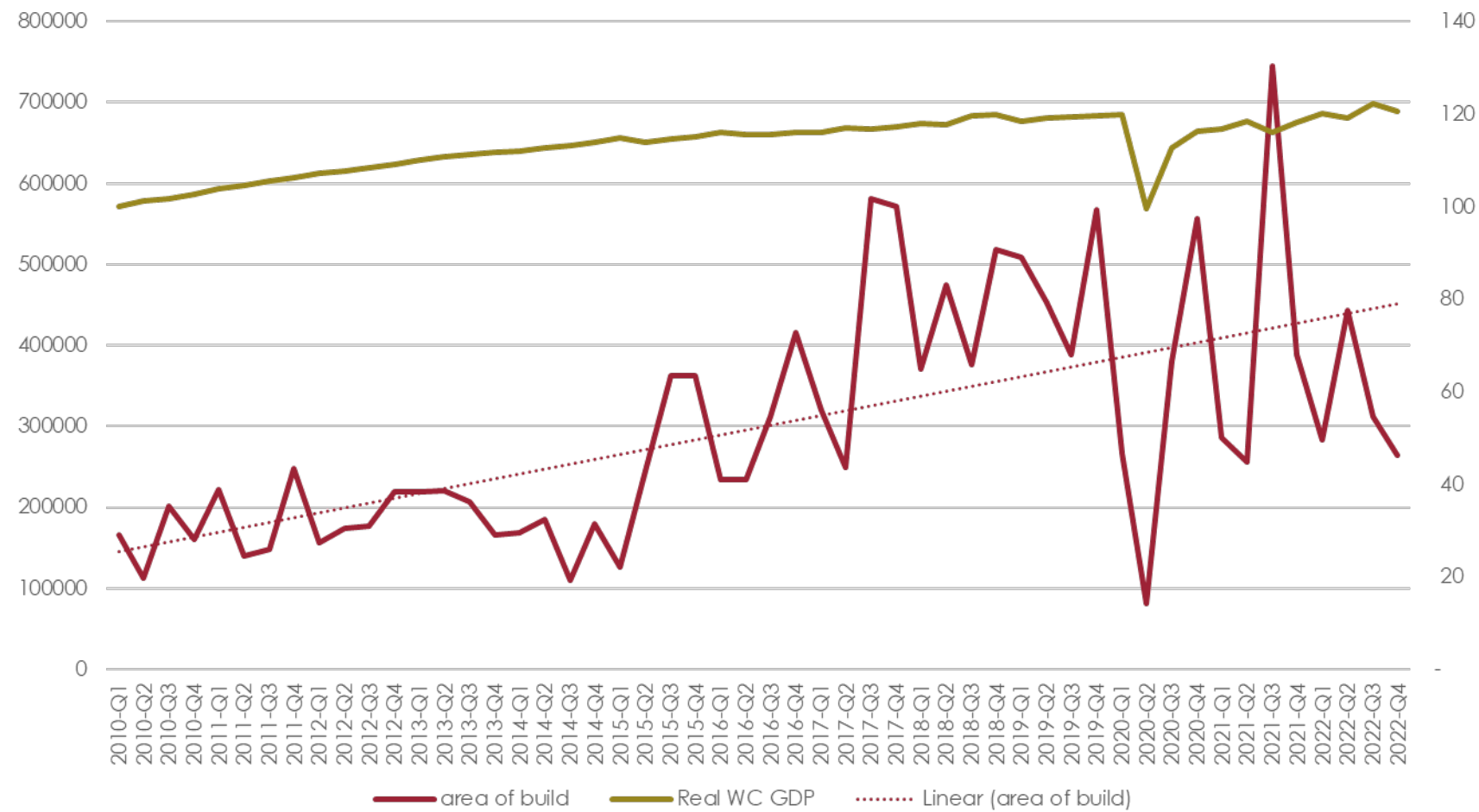


Scenarios for Future Economic Growth



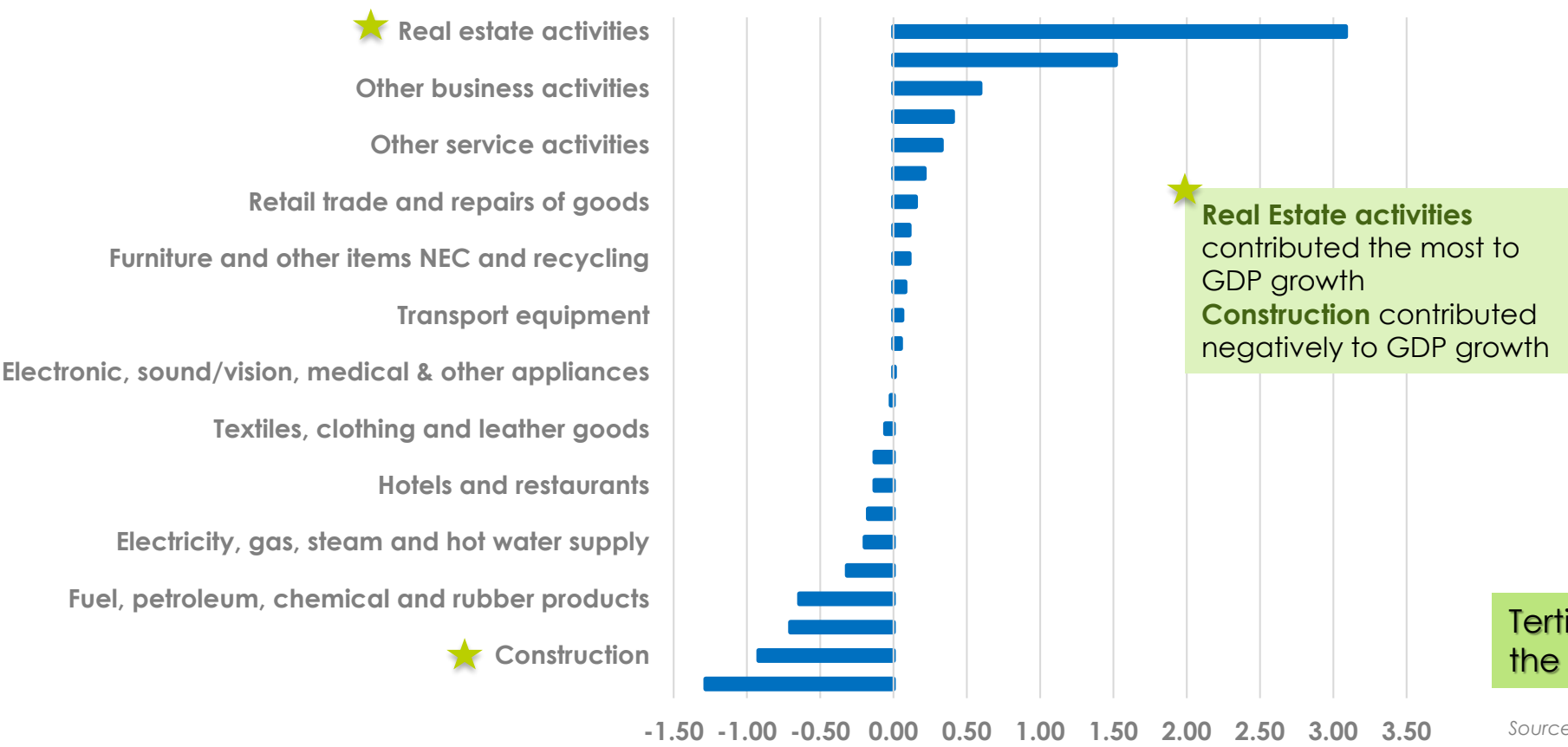
The three forecast scenarios of aggregate GDP growth in Cape Town use historic averages since 2001, a high growth period and a low growth period

Historic Relationship between GDP and non-residential Floor Area



But it's not sufficient to look at the quantum of expected growth, we also need to understand the sectoral drivers of growth

Percentage point contribution to GVA growth 2019-2023
Top and bottom growers



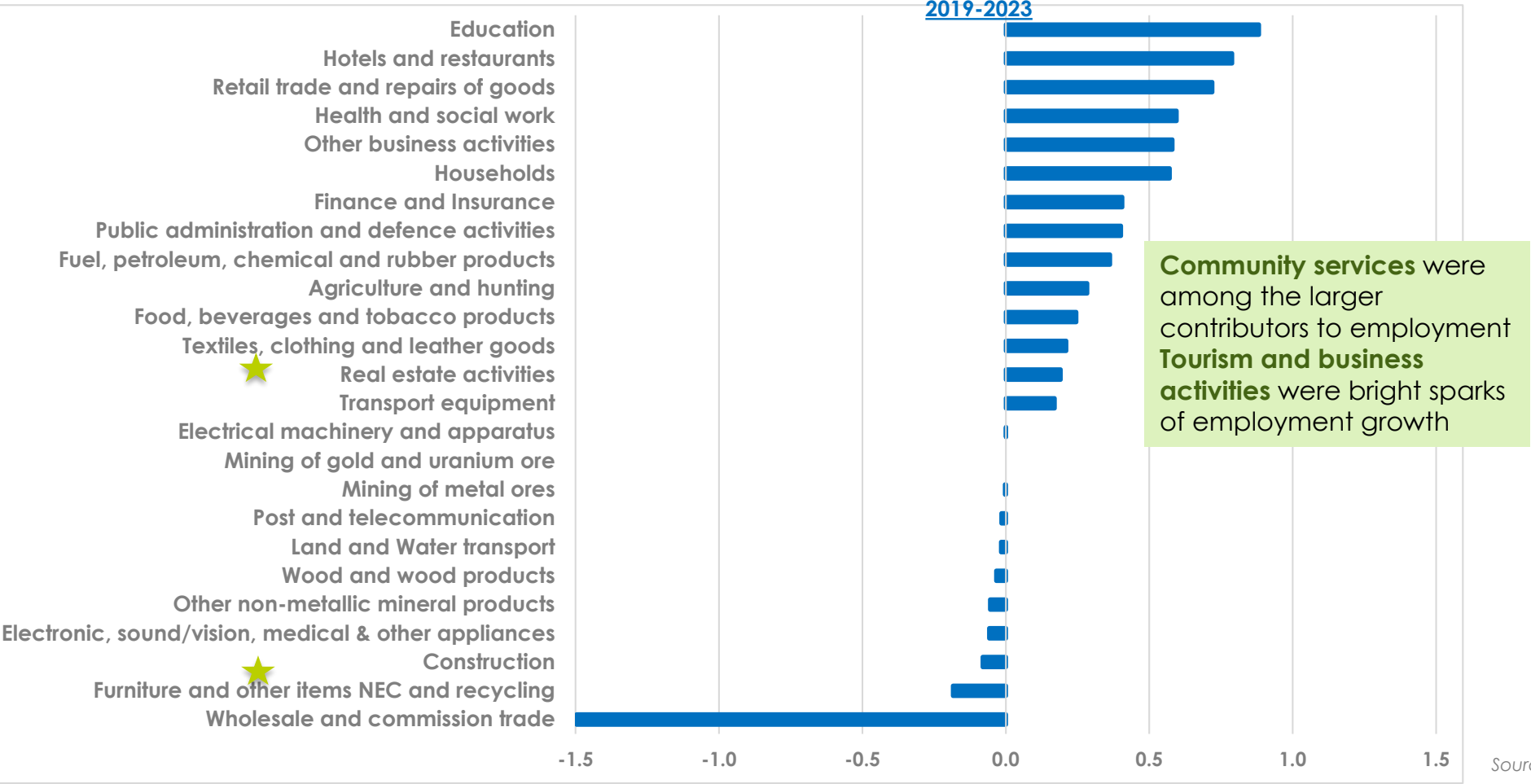
Tertiary economic activities were the dominant growth drivers

Source: S&P Global Regional eXplorer, 2025

Employment Growth Contribution – Strong role for government

Percentage point contribution to growth 2019-2023, 2014-2023

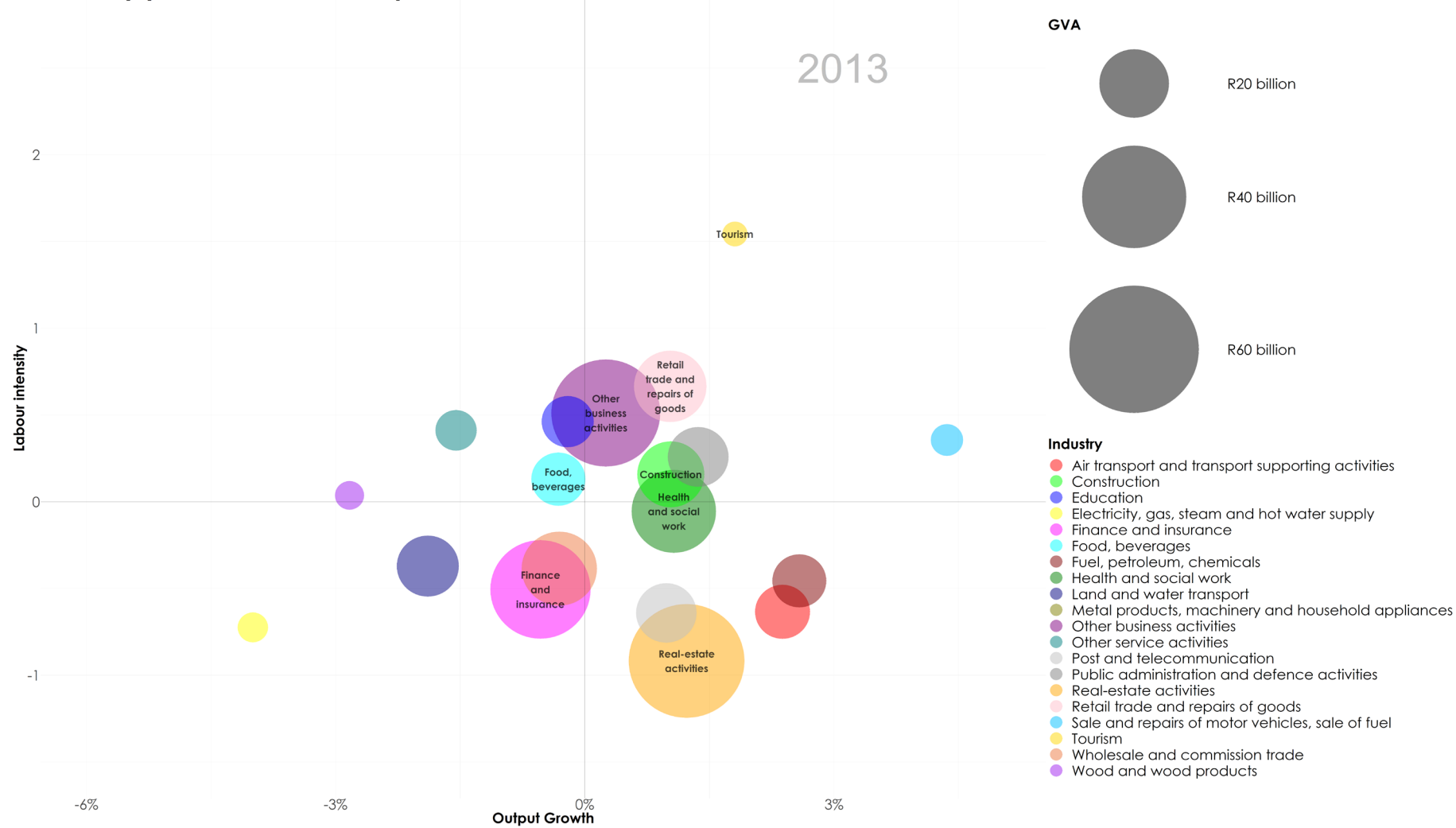
Top and bottom growers



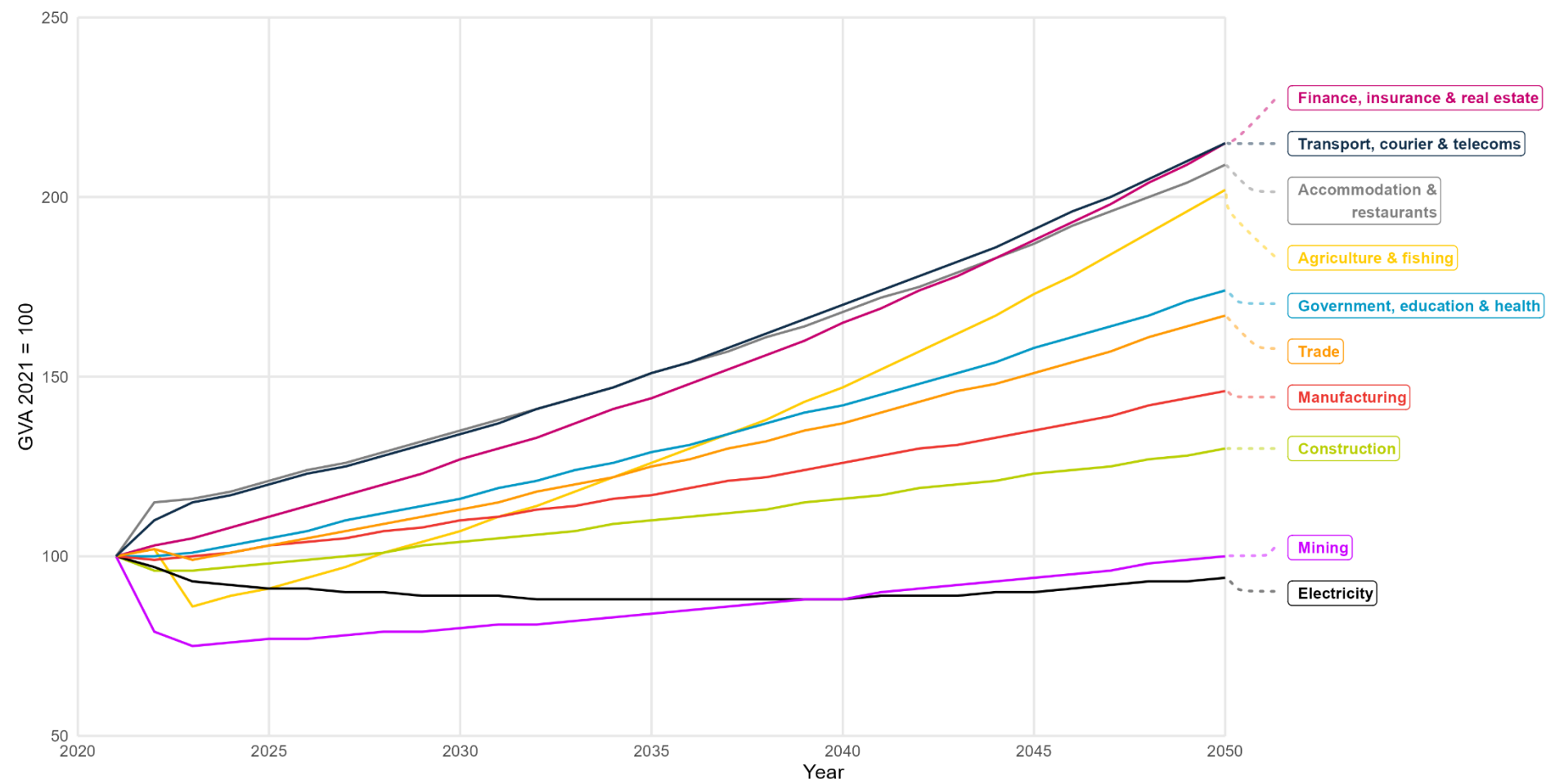
Source: S&P Global Regional eXplorer, 2025

Putting it all together – output and employment growth by sector in Cape Town

Industry performance for Cape Town, 2013-2022



Sector Growth Projections

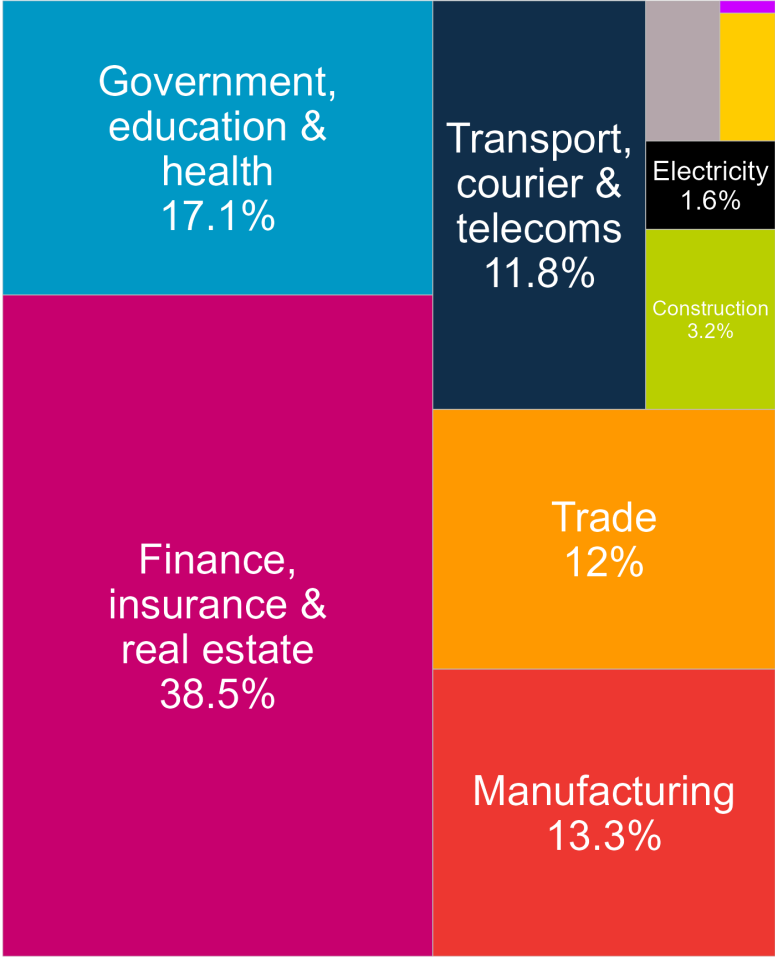


[2021 = 100]

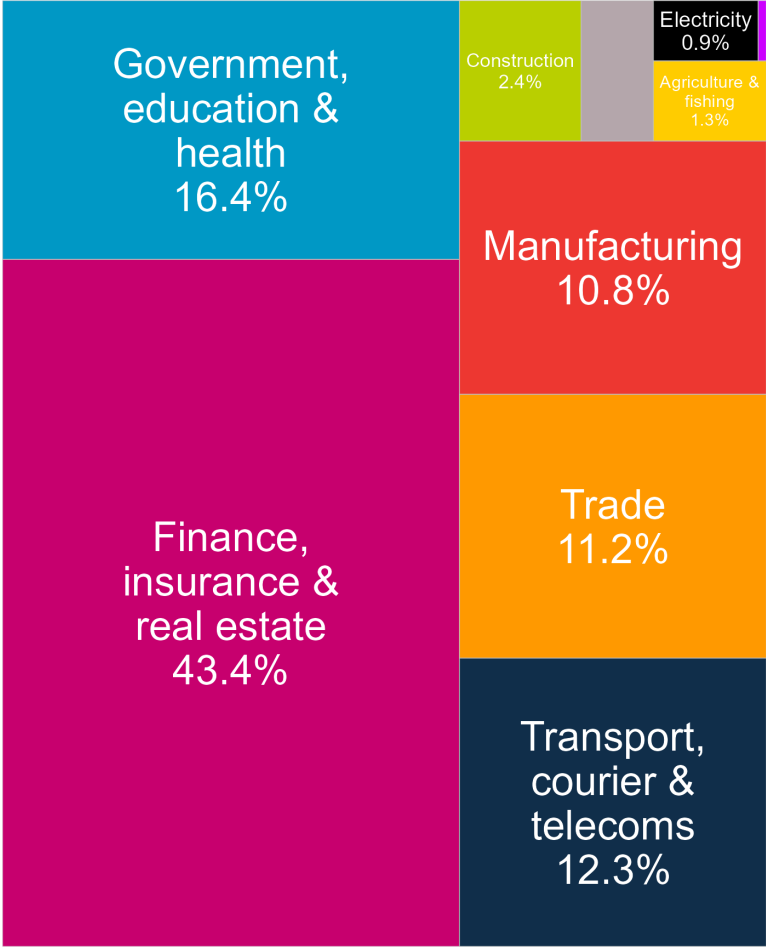
Source: SA Regional eXplorer, 2024; own calculations, 2024; *BAU scenario is most likely

Sector GVA Projections

2023



2050



How do these translate into demand for land use – Matching Sectors/Industries and Land Use Categories

The average growth rates for the sectors (32 sectors using SIC classification) were determined for each of the scenarios together with their forecast 2050 GVA. The SIC codes were then matched to their corresponding land use

The valuations data from the City was used to determine the square meters allocated to each sector in 2022. The valuations data is separated into Land Uses (LUs), which were categorised according to the Standard Industry Classifications (SIC codes) depending on their described uses. Eg:

2018 Land Use Categories			
Land use category	Property sector/ underlying economic sector(s)	Current m² GFS (2022)	LU included
Manufacturing	30 Food, beverages and tobacco products 31 Textiles, clothing and leather goods 32 Wood and wood products 33 Fuel, petroleum, chemical and rubber products 34 Other non-metallic mineral products 35 Metal products, machinery and household appliances 36 Electrical machinery and apparatus 37 Electronic, sound/vision, medical & other appliances 38 Transport equipment 39 Furniture and other items NEC and recycling	12 639 057	Factory, Heavy Industrial, Industrial (Park), Light Industrial Service Industrial
Retail & Wholesale	61 Wholesale and commission trade 62 Retail trade and repairs of goods	7 244 117	Retail, Shop, Shopping Centres, Nursery
Includes: • 40% of Mixed Use: Retail & Office • Non-Residential: Commercial (Retail & Office) • 20% of Mixed Use: Multi-Residential & Retail			
Adds 4% to overall category			

2050 Forecasts based on GVA

The GVA/GFS ratios are shown below. These ratios are used to **forecast total GFS** in 2050 for the following sectors:

GVA/GFS Ratios			
Property/Economic sector	GVA/GFS 2022 (R/m ²)	Total GFS in 2050 BAU* m ²	Additional GFS in 2050 in BAU* m ²
Manufacturing	4 476	18 628 960	5 989 903
Hospitality Industry	4 706	2 311 881	1 041 617
Warehousing & Storage	921	15 632 196	6 907 478
Office (Business Services)	21 867	15 393 988	7 978 281

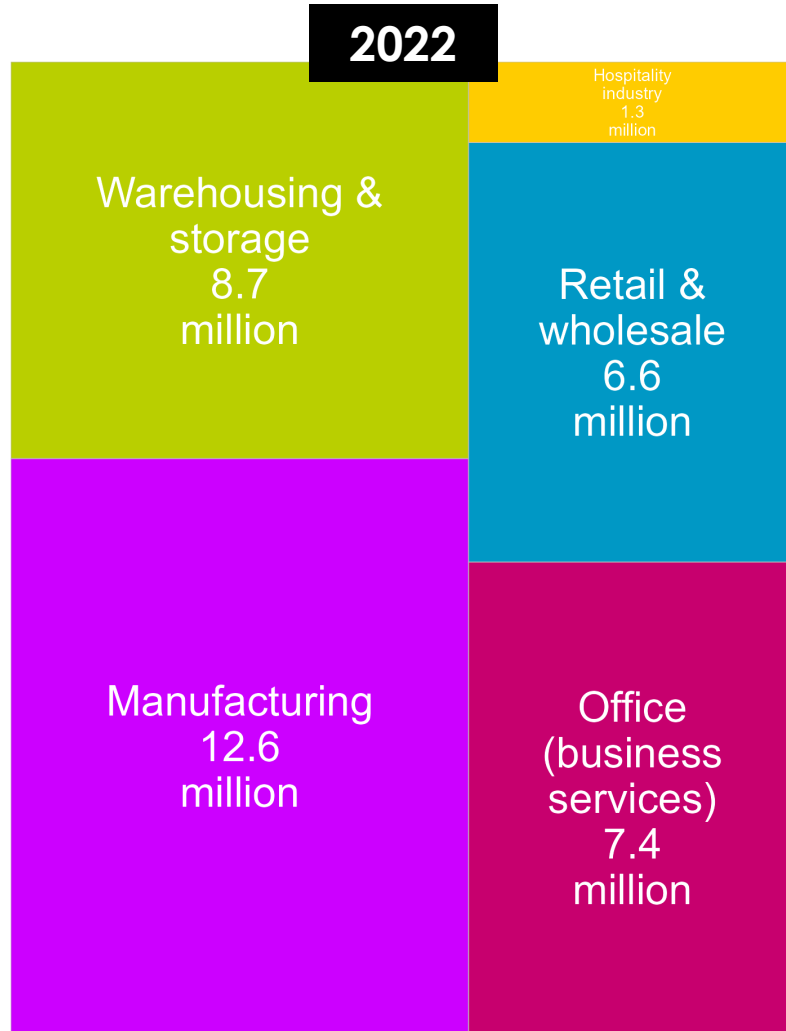
2050 Forecasts based on population: Retail space

- The population in Cape Town is expected to grow from 4.7 to 6.99 in 2050.
- Retail spending per square meter in 2022 can be calculated as R27 109/m² (excluding fuel sales).

Retail Ratios					
	Cape Town Population	Retail Spending (ZAR)	Ratio: Spending per person	m of Retail Land Use	Retail Spending per sqm.
2022	4 772 846	179 005 501 770	37 505	6 603 072	27 109
2050	6 992 287	262 245 607 354	37 505	9 673 594	27 109
2050 (additional retail space)				3 070 522	

Assumptions: retail spending per person will remain constant as well as retail spending per square meter

2050 GFS Forecasts based on GVA and population (m2)



Source: SA Regional eXplorer, 2024; own calculations, 2024; *BAU scenario is most likely

How do these translate into demand for land use – Matching Sectors/Industries and Land Use Categories

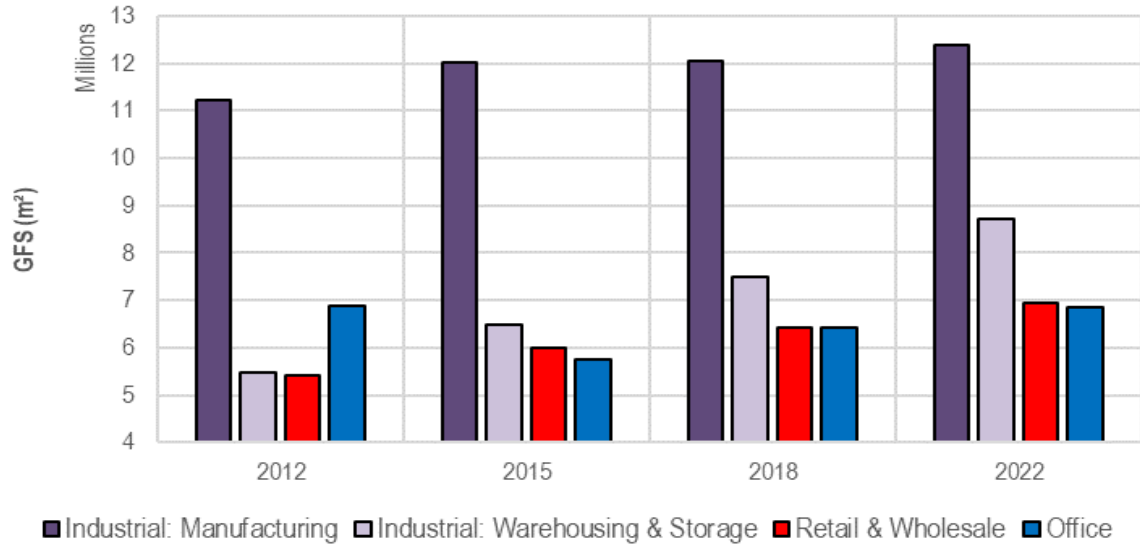
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Land use category	Property sector/ underlying economic sector(s)	Current m² GFS (2022)	LU included
Manufacturing	30 Food, beverages and tobacco products 31 Textiles, clothing and leather goods 32 Wood and wood products 33 Fuel, petroleum, chemical and rubber products 34 Other non-metallic mineral products 35 Metal products, machinery and household appliances 36 Electrical machinery and apparatus 37 Electronic, sound/vision, medical & other appliances 38 Transport equipment 39 Furniture and other items NEC and recycling	12 639 057	Factory, Heavy Industrial, Industrial (Park), Light Industrial, Service Industrial
Retail & Wholesale Includes: 40% of Mixed Use: Retail & Office - Non-Residential: Commercial (Retail & Office) 20% of Mixed Use: Multi-Residential & Retail Adds 4% to overall category	61 Wholesale and commission trade 62 Retail trade and repairs of goods	7 244 117	Retail, Shop, Shopping Centres, Nursery
Hospitality Industry	64 Hotels and restaurants	1 270 264	Hotel, guest house, bar/ restaurant/ taverns/title hotel, hotel room, multiple sec. hotel room, restaurant, resort/caravan park
Warehousing & Storage	73-74 Air transport and transport supporting activities	8 724 718	Cold Storage, Warehouse, Open Storage Self-Storage Premises, Storeroom, Warehouse, Self-Storage Unit, Aviation Facility
Office Includes: - Non-Residential: Information & Communication Technology - Non-Residential: Service 60% of Mixed Use: Retail & Office and 60% of Non-Residential: Commercial (Retail & Office) and 20% - Mixed Use: Multi-Residential & Office	81-83 Finance and Insurance 84 Real estate activities 85-88 Other business activities	8 945 277	s/title business, s/title bus & flats, res mixed bus >40%, research facility, offices & retail, offices, flats & offices, conference facility

New Buildings Completed

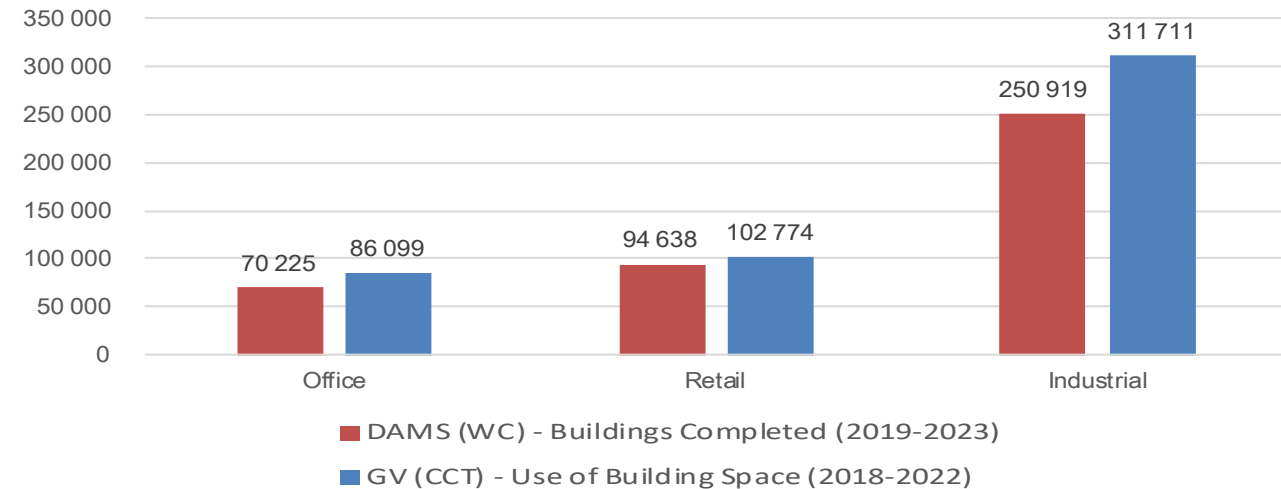
Land Use / Property Sectors: Space Allocation



Source: GV (2012, 2015, 2018, 2022) , CCT

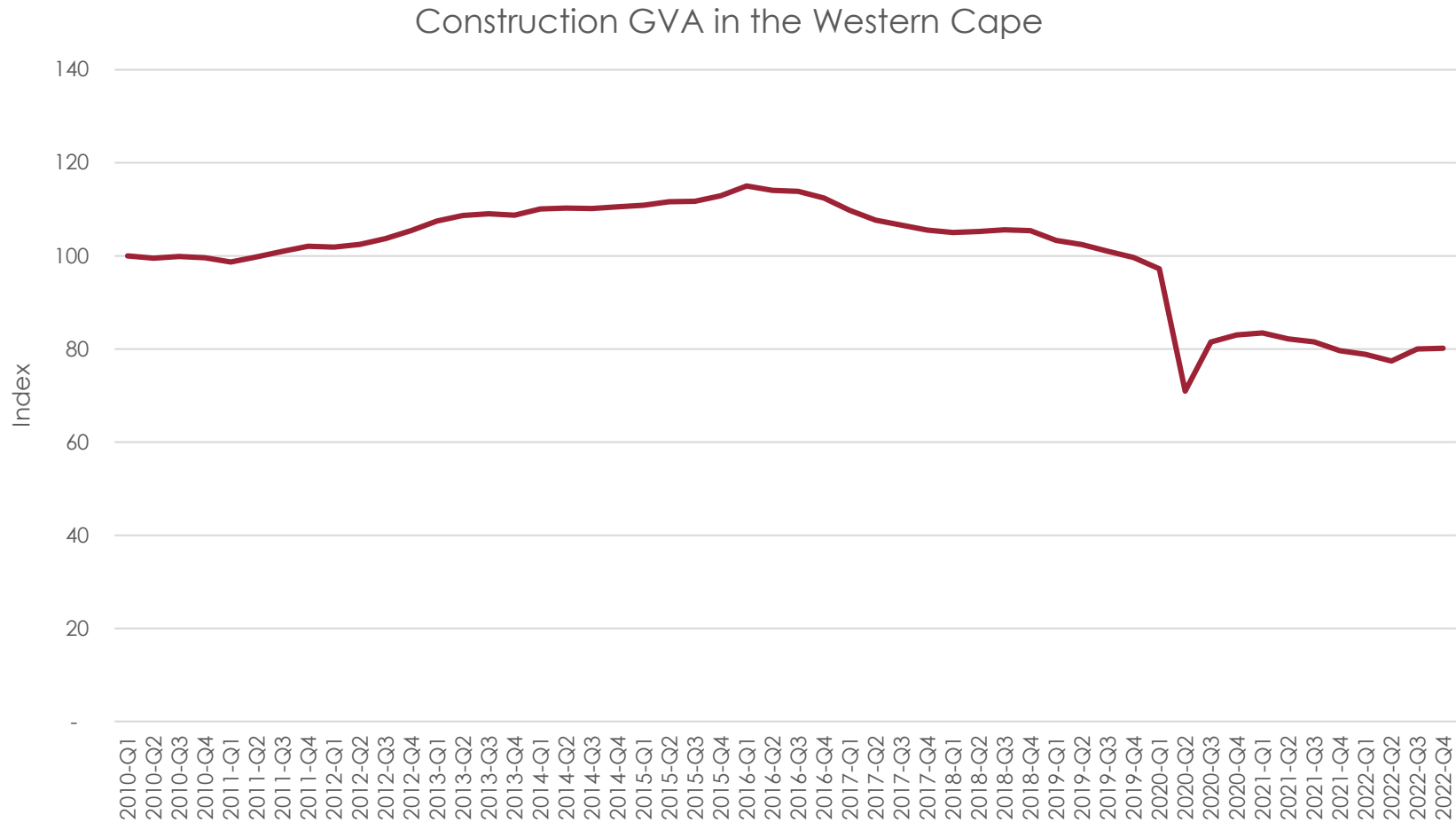
- Trends show slow growth in manufacturing and retail
- Larger growth in warehousing esp in 2022
- Office declined and is only now back to 2012 levels

Average Annual GFS



Note: years not aligned precisely

The performance of the Construction Industry is concerning – can it deliver the expected demand for non-residential space?



MAPPING ECONOMIC TRENDS IN CAPE TOWN

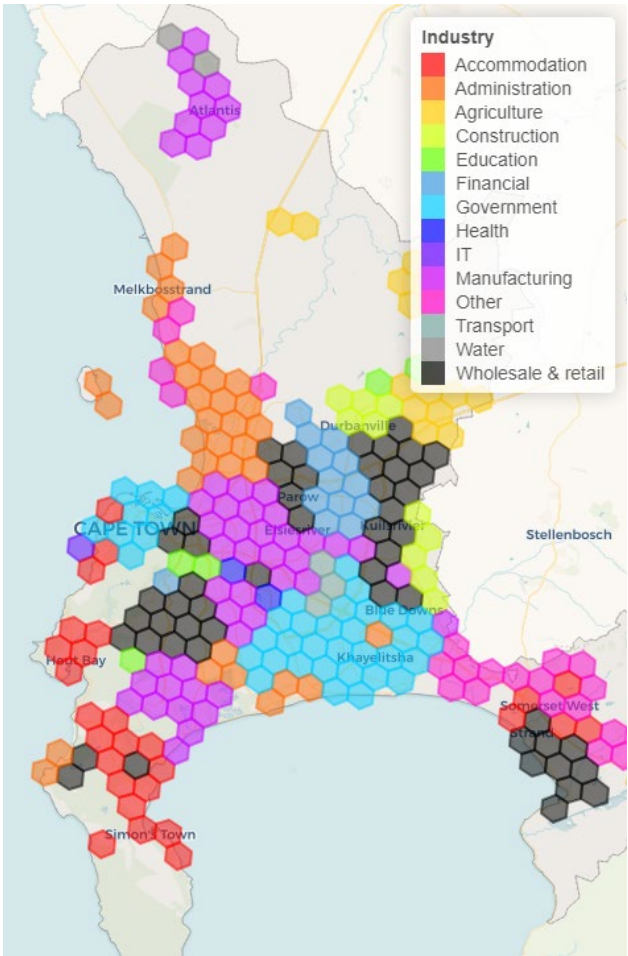
INSIGHTS FROM SARS DATA



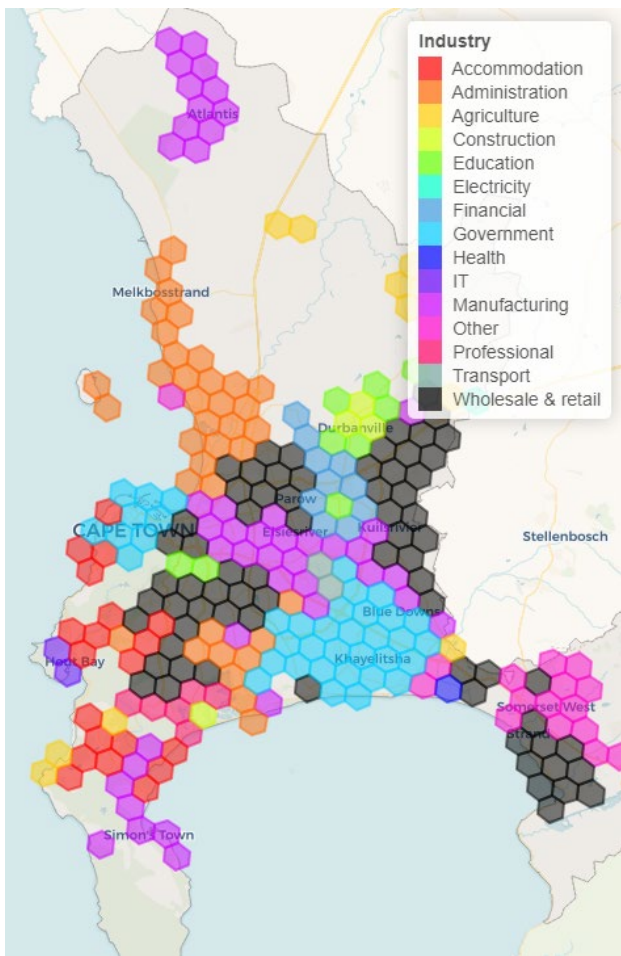
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Mapping pockets of sectoral dominance 2015 vs 2023

2015



2023



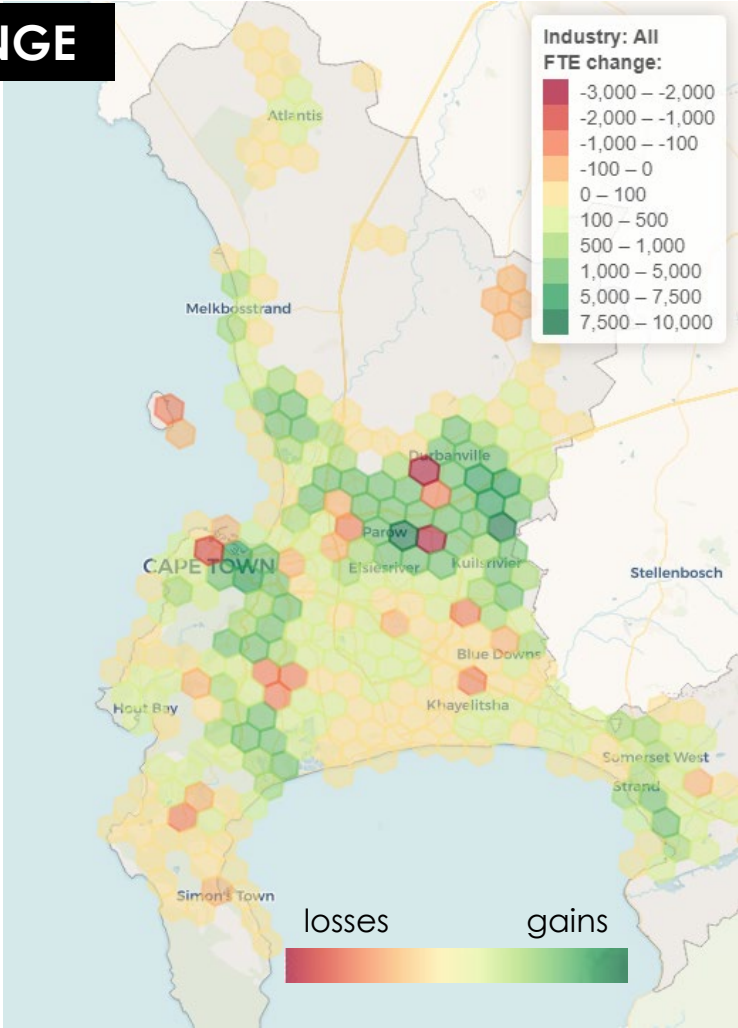
CT
TOTAL

2015	2023
●○ FTEs ○● (full-time equivalent employees)	
① Wholesale & retail 308,242	① Wholesale & retail 346,313
② Manufacturing 150,296	② Government 162,739
③ Government 136,694	③ Manufacturing 146,212
●○ Establishments ○●	
① Wholesale & retail 9,280	① Wholesale & retail 9,574
② Manufacturing 7,119	② Manufacturing 6,575
③ Professional 5,109	③ Professional 6,436

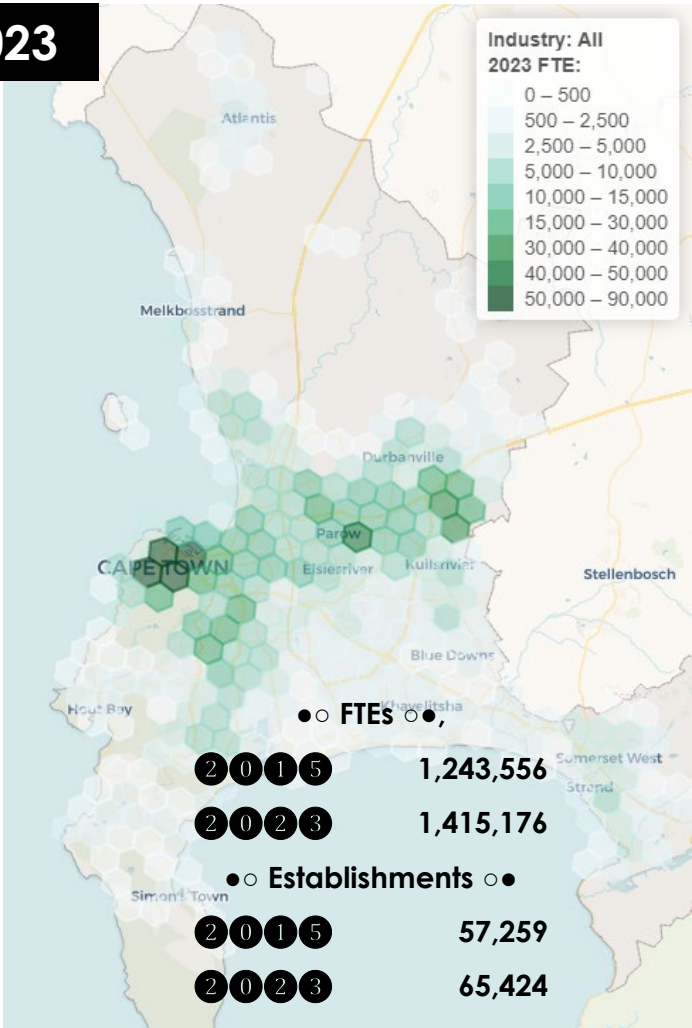


Growth of jobs in CT 2015-2023

CHANGE



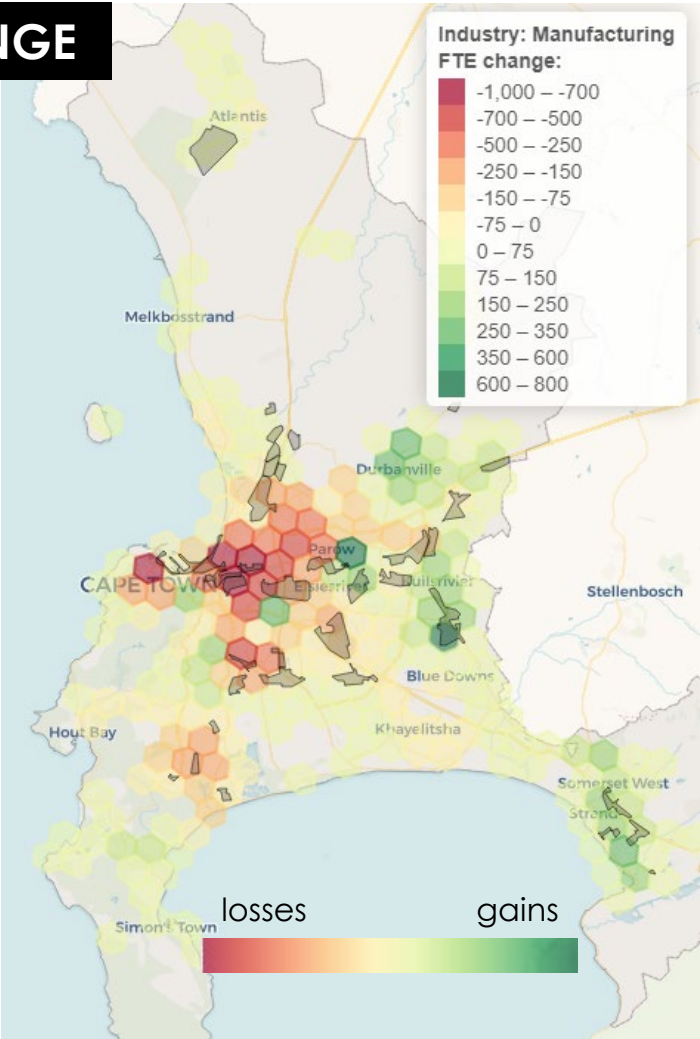
2023



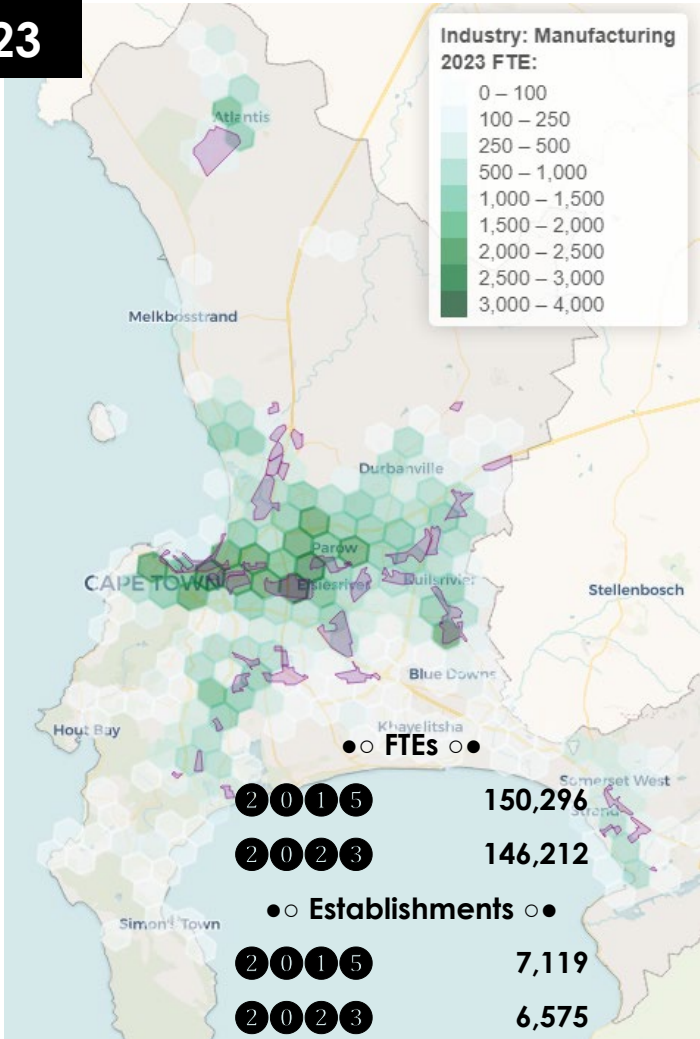
Source: SARS, 2024

Growth of manufacturing jobs in CT 2015-2023

CHANGE



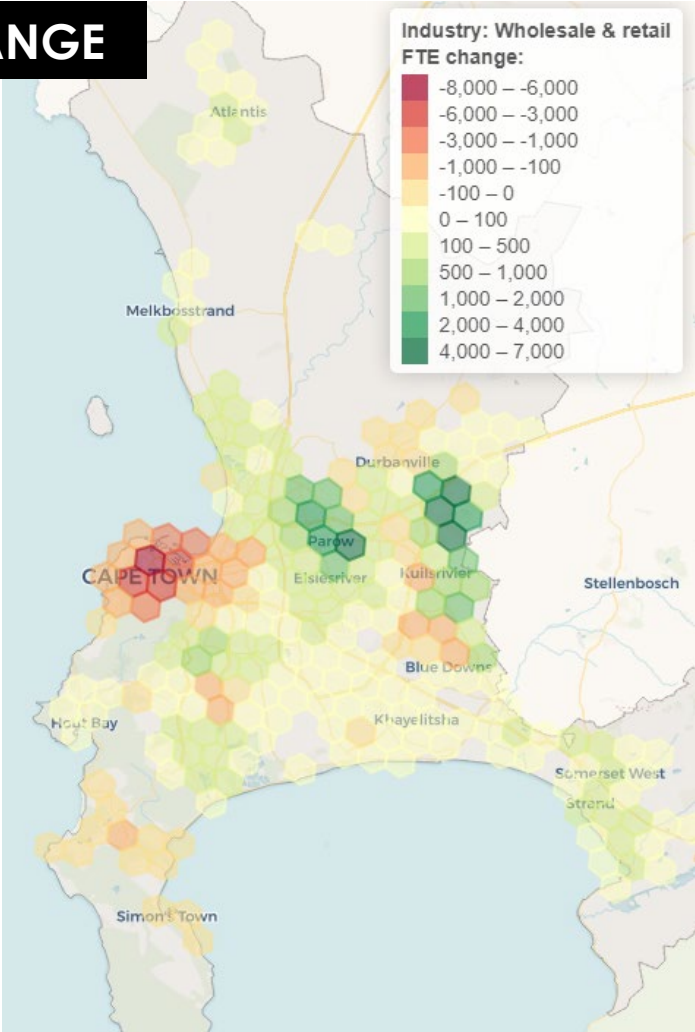
2023



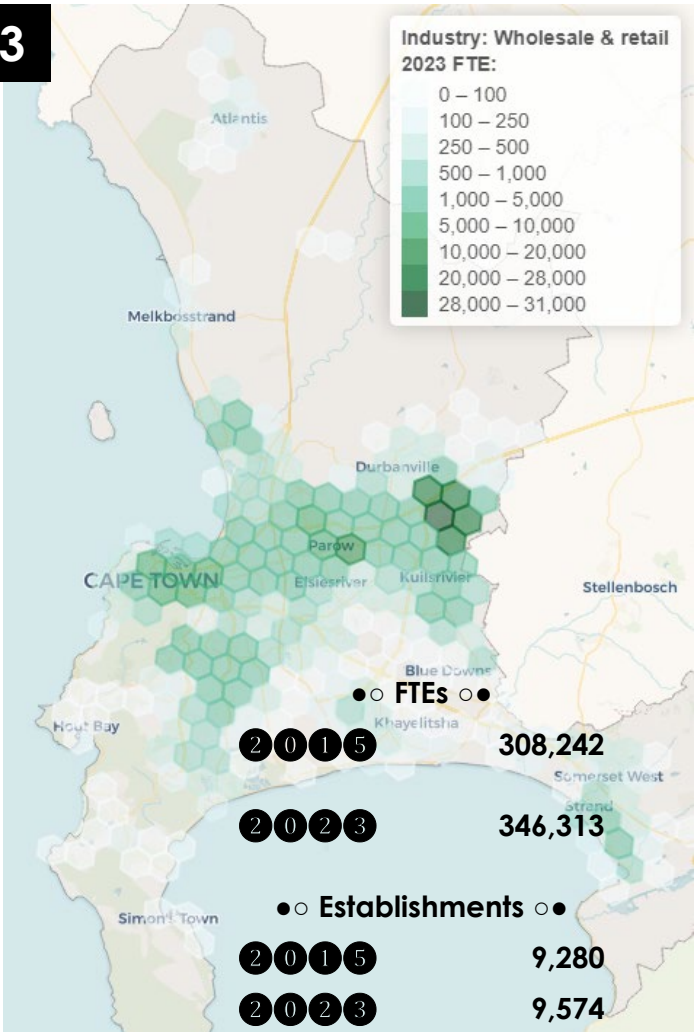
Source: SARS, 2024

Growth of wholesale and retail jobs in CT

CHANGE



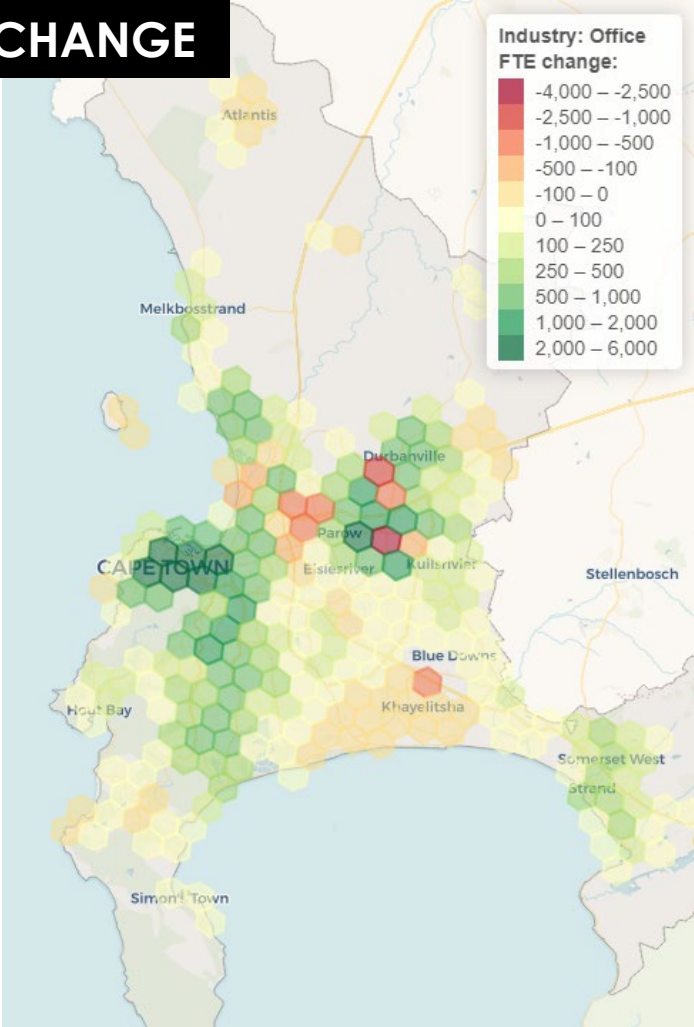
2023



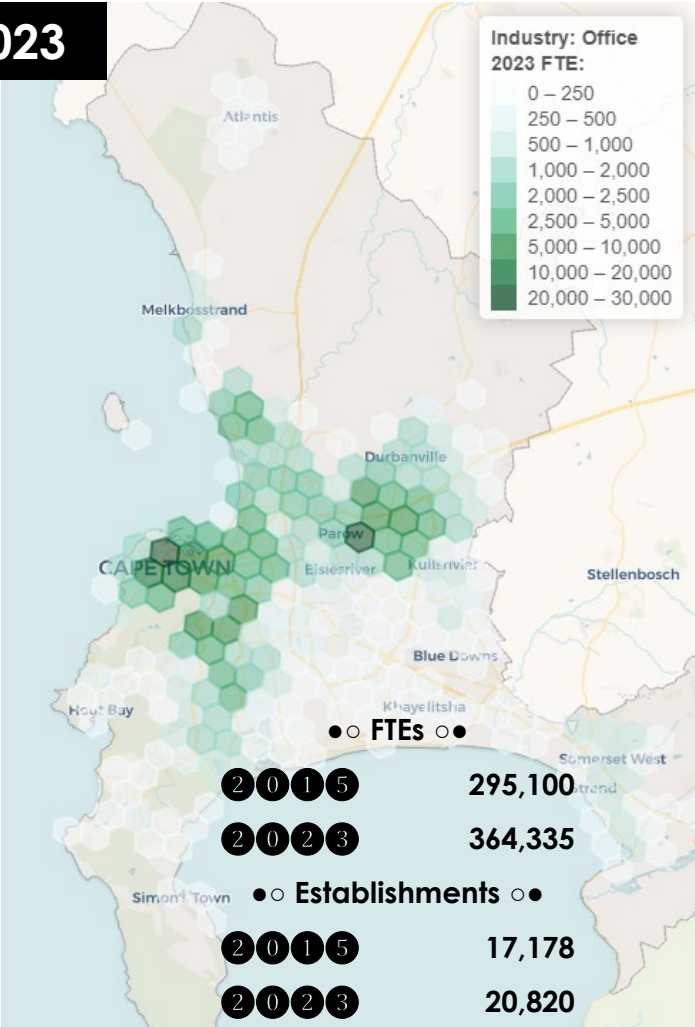
Source: SARS, 2024

Growth of office-related industry jobs in CT

CHANGE



2023



Source: SARS, 2024

Trends to consider that might disrupt the relationship between economic output and demand for floor space

TREND	KEY POINTS	POTENTIAL IMPACT ON FUTURE LU DEMAND [INFERENCES MADE FROM TRENDS]
Fourth Industrial Revolution 	Increased technological advancement/automation Artificial Intelligence, the Internet of Things Sharing Economy Online staffing Peer-to-peer accommodation Music and video streaming	Less demand for manufacturing floor space (technological advances) Less demand for office space (AI) Less demand for hospitality (Air bnb) Less demand for retail due to ecommerce Greater demand for warehousing space (servers, e-tailing) and BPO space (support services) Less demand for agricultural space
New Ways of Working 	Remote working International competition for talent/skills Rise of the gig economy 24 hour work-day	Less demand for office space Greater demand for co-working office space Increasing demand for mixed use (both residential and commercial; and commercial and warehousing) Differing use of spaces at different times of day – night-time economy

Trends to consider for future land use

TREND	KEY POINTS	POTENTIAL IMPACT ON FUTURE LU DEMAND [INFERENCES MADE FROM TRENDS]
Rapid Urbanisation 	Population growth Increasing semigration Increased densification/congestion	Lower demand per employee for office space Greater demand for mixed use buildings Greater demand for retail space Growing need for economic activity hubs in high density, low income areas Increasing work from households
Climate Change and Resource Scarcity 	Dematerialisation Environmental Awareness Water scarcity	Lower demand for retail space Greater demand for green manufacturing in CT Need for large sites business to accommodate renewable energy and water re-use facilities Pressure on water intensive industries
Regulatory Environment 	Land reform Inclusionary housing Any changes to urban edge	Lower demand for agricultural or manufacturing Lus Increasing costs of holding vacant land

INPUTS FROM PLENERY

11h15 – 11h30



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PRESENTATION 3:

COMMUNITY FACILITIES GROWTH ESTIMATES

BRADLEY BURGER, WESLEY VORSATZ &
GRAHAM NEVIN



QR CODE TAKES YOU TO THE INDABA LANDING PAGE
ONCE ON LANDING PAGE SCROLL DOWN TO THE COMMENTS SESSION



Submit your comments

Provide your input, comments or suggestions for the:

- Three growth estimate presentations
- Six core thematic areas

You are welcome to email your written comments related to the Planning Indaba to Future.CapeTown@capetown.gov.za.



PLEASE NOTE

The closing date for written comments is Friday, 28 March 2025.



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Contents

- 1.Community Services & Health: Intro
- 2.Areas of Need & Capital Investment
- 3.Infrastructure Plan

COMMUNITY SERVICES AND HEALTH

INTRODUCTION



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Community Services and Health

Contributes to the health and well-being of communities and individuals by developing and maintaining a range of community facilities, public spaces, services and implementing development programmes that promote social inclusion and community wellbeing.



Asset Portfolio:

The Community Services and Health Directorate is responsible for the community facilities that fall within the mandate of local government.

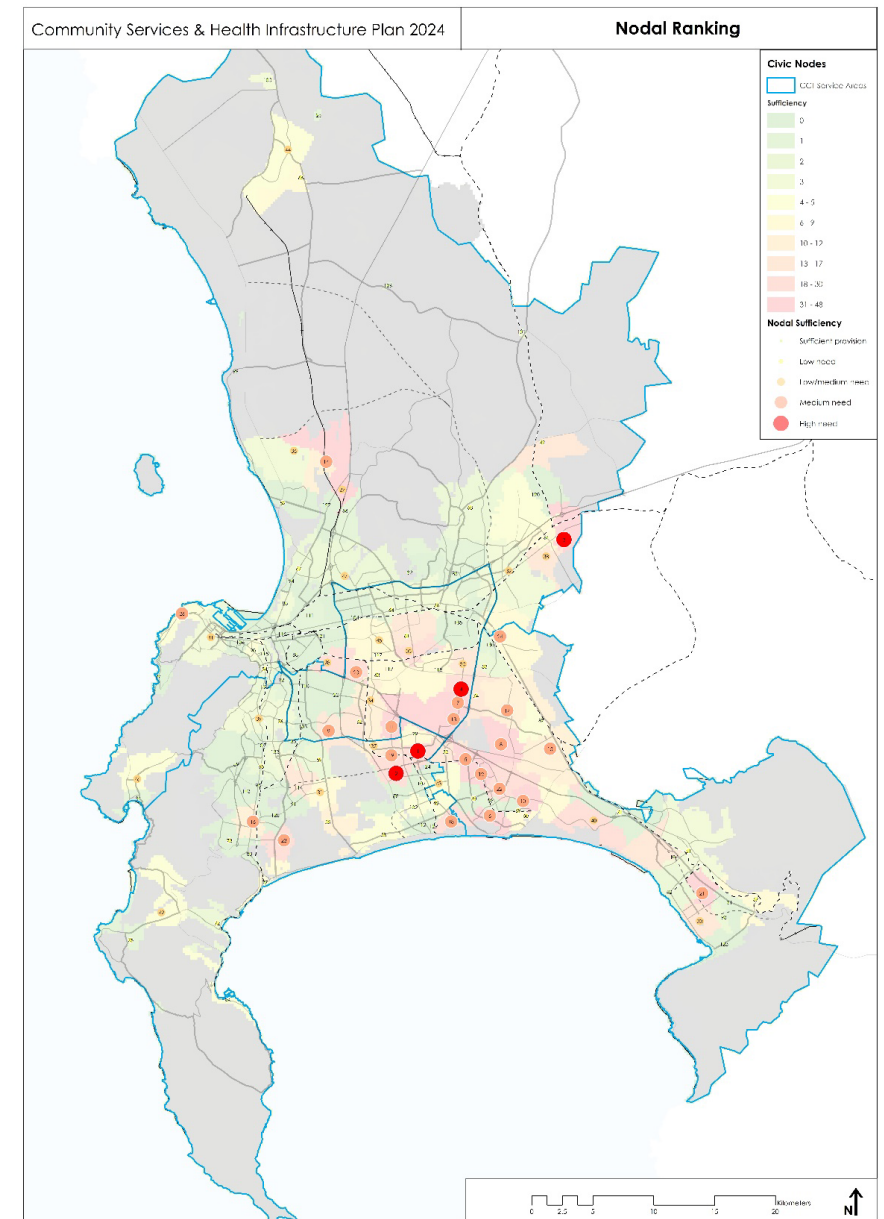
The Directorate has a large portfolio (more than 30% of entire CCT) of existing facilities across the city to deliver services.

City Health	CACD	LIS	Rec & Parks
91 Facilities:	58 Facilities:	102 Libraries:	7 863 Facilities:
14 CDCs	41 Early Childhood Development Centres	2 City-wide	201 Community Halls, Centres, Rec Hubs & Multi-purpose centres
57 Clinic	11 Arts & Culture Facilities	23 Regional	11 Public Ablutions
5 Mobile Clinics	4 Safe Spaces (run by the department)	76 Community	8 Stadia
11 Satellite Clinics	2 leased-out Safe Spaces(maintained by CACD)	1 Satellite	13 Resorts
4 Specialist Clinics			13 District Parks
			159 Sports Fields
			6 Spray Parks
			35 Swimming Pools
			1996 Hectares of Road Reserves
			1341 Underdeveloped Open Spaces
			1 Crematorium
			1 Mausoleum
			10 Biodiversity Sites
			40 Cemeteries
			3562 Community Parks
			1 Nursery
			352 Greenbelts
			9 Bath Houses
			1 Outdoor Adventure Centre

Composite Facility Sufficiency

Need & challenges

- Ailing infrastructure
- Constrained budget
- Limited land
- High burden of disease
- Facilities not fit for purpose
- Vandalism, theft and safety concerns
- Significant backlogs
- Growing demand for facilities



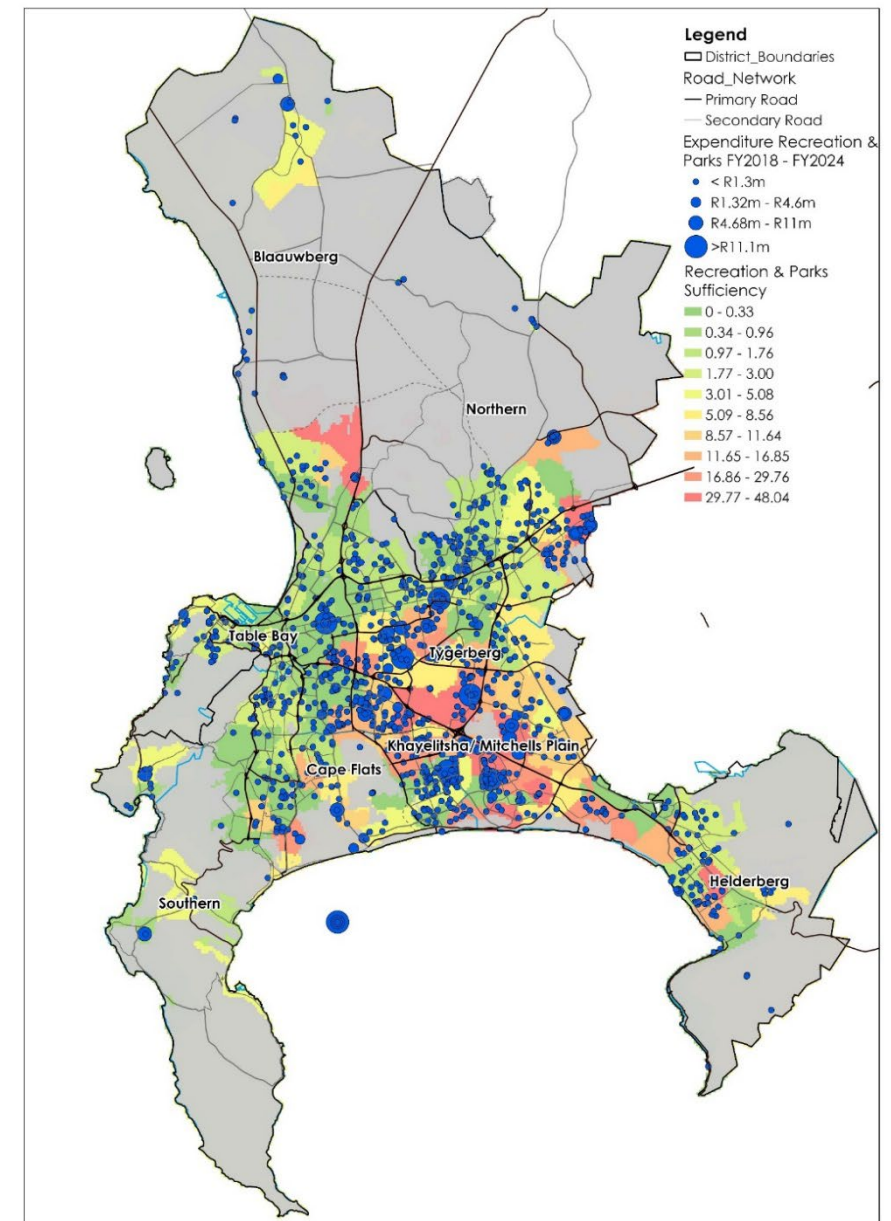
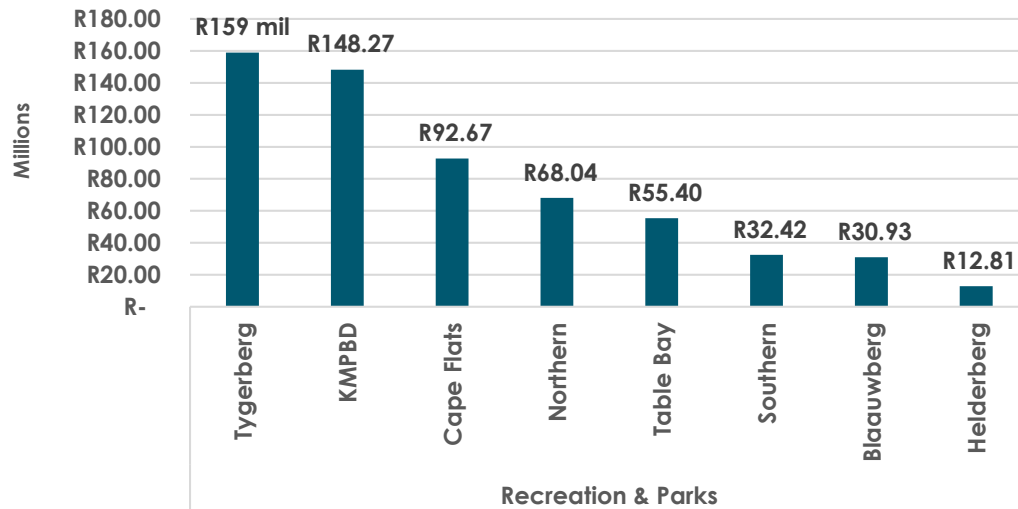
TRACKING CAPITAL SPEND VS AREAS OF NEED



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Recreation & Parks: expenditure 2018-2024

- Approx. **R599 mil** spent between 2018 and 2024
- Data management improved
- Optimization and rationalised proof of concept project initiated (Wynberg)
- Sports Asset Management Policy drafted
- Implementation programmes refined
- Lease regularisation process streamlined
- Partnerships (e.g. Friends of Parks) strengthened
- R&P Area Plan preparation



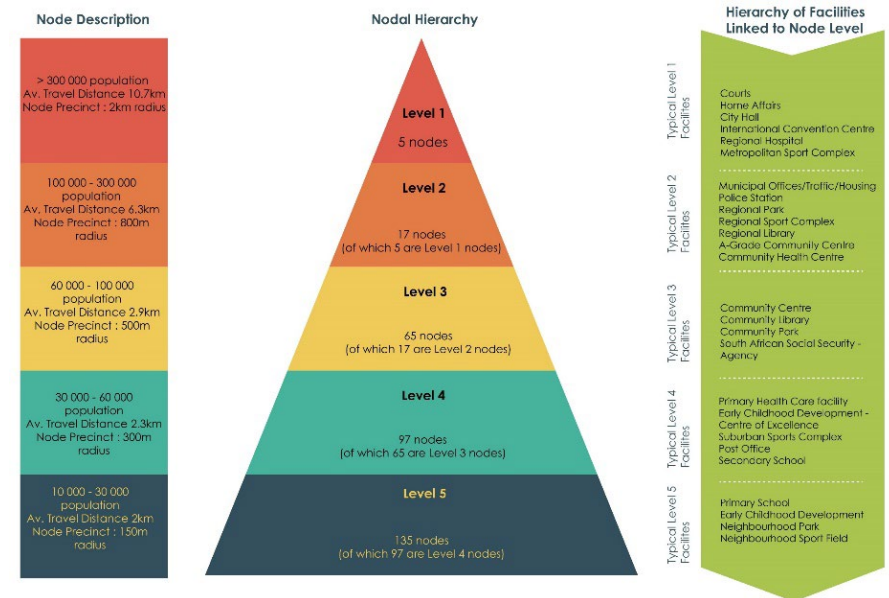
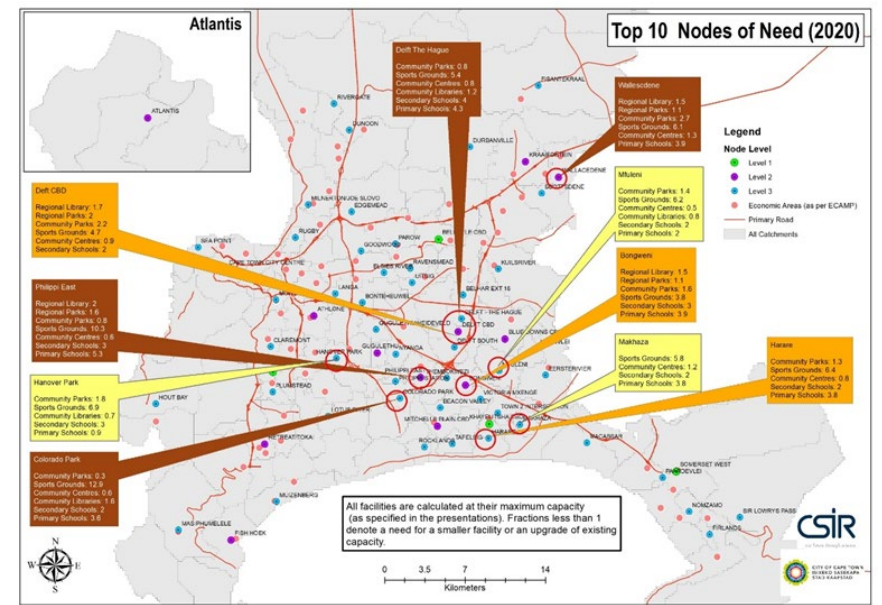
COMMUNITY SERVICES AND HEALTH INFRASTRUCTURE PLAN



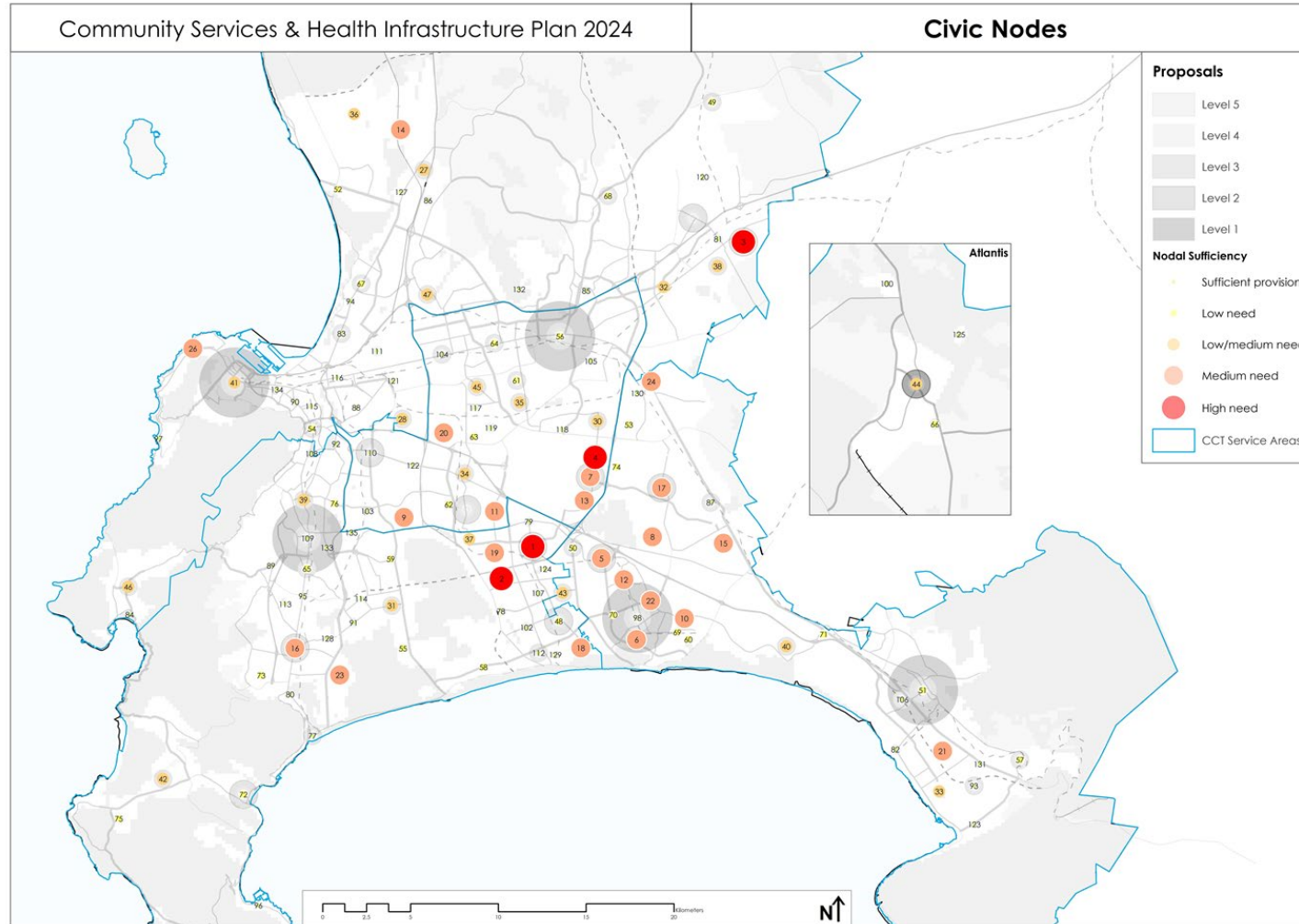
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Community Services and Health Strategy

- Targeted investment in the 135 civic nodes
- Integrated precinct planning
- Expand capacity (upgrade/new facilities)
- Provide facilities to Informal Settlements
- Optimization & rationalization

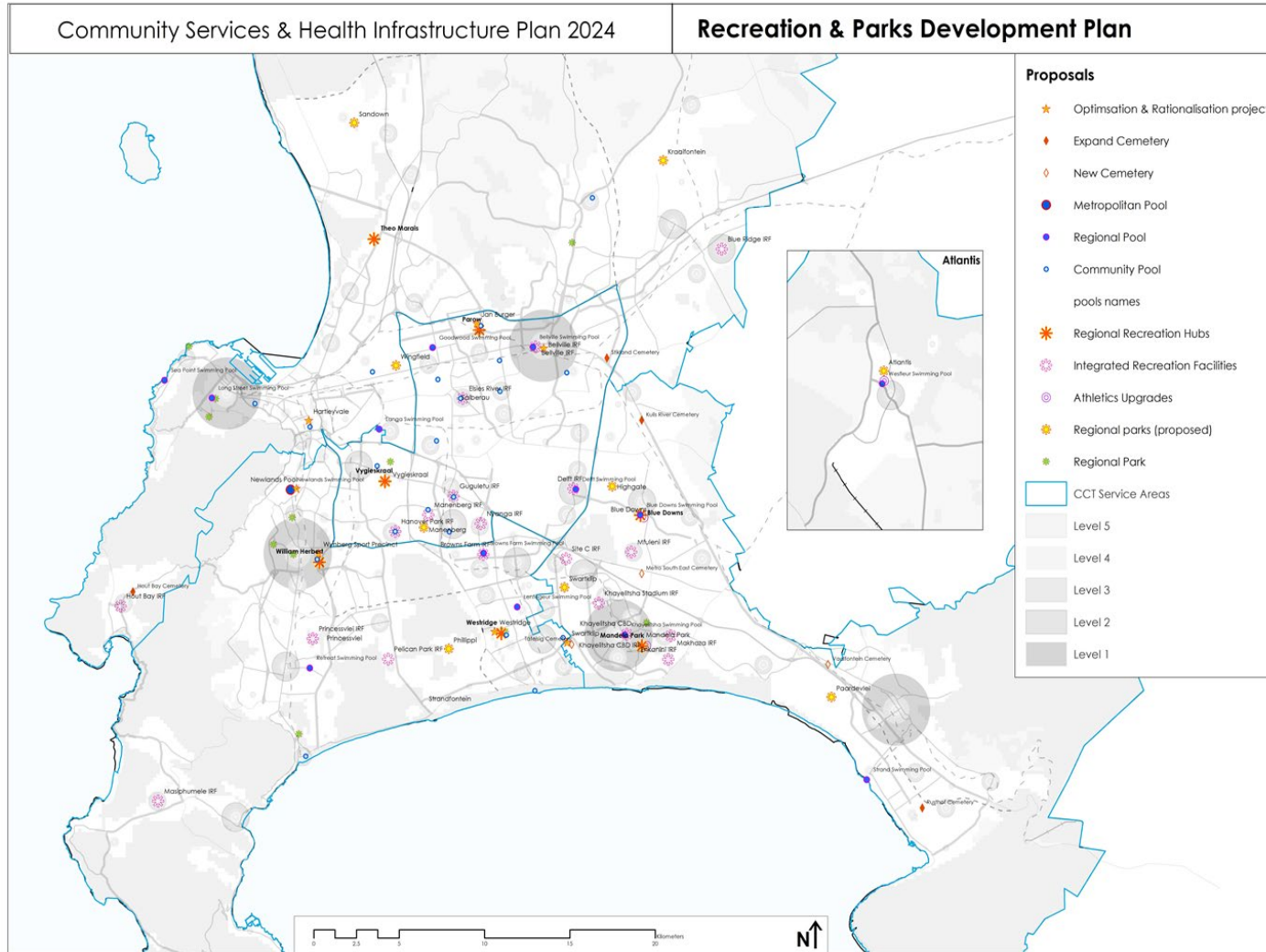


Community Services and Health Infrastructure Plan



- Phillippi
- Wallacedene
- Delft
- Khayelitsha Site C
- Enkanini
- Delft South
- Mfuleni
- Hanover Park
- Makhaza
- Nyanga
- Khayelitsha Site B
- Blue Downs
- Du Noon
- Eersteriver
- Retreat/Lavender Hill
- Tafelsig
- Elsies River
- Claremont CBD/ Newlands Pool
- Wynberg/ Wynberg Sports Precinct
- Bellville/ Jan Burger Sports Ground
- Mitchells Plain/ Westridge Sports
- Khayelitsha CBD

Recreation and Parks Programmes



- Swimming Pools
- Regional Recreation Hubs
- Integrated Rec Facilities
- Community Halls
- Regional Parks
- Informal Settlements
- Rationalisation of Open Space
- Cemetery Development

Implementation Framework

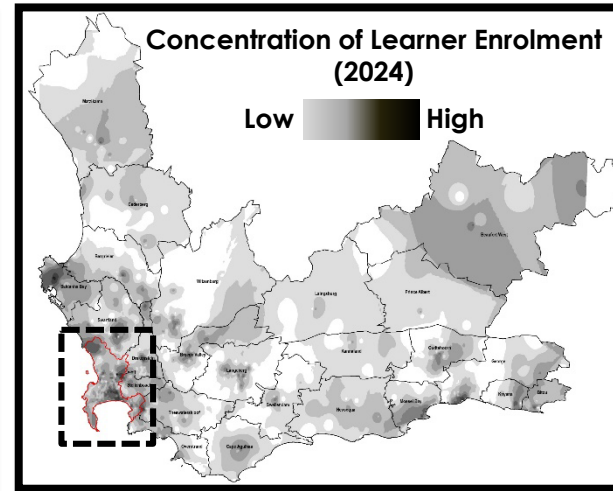
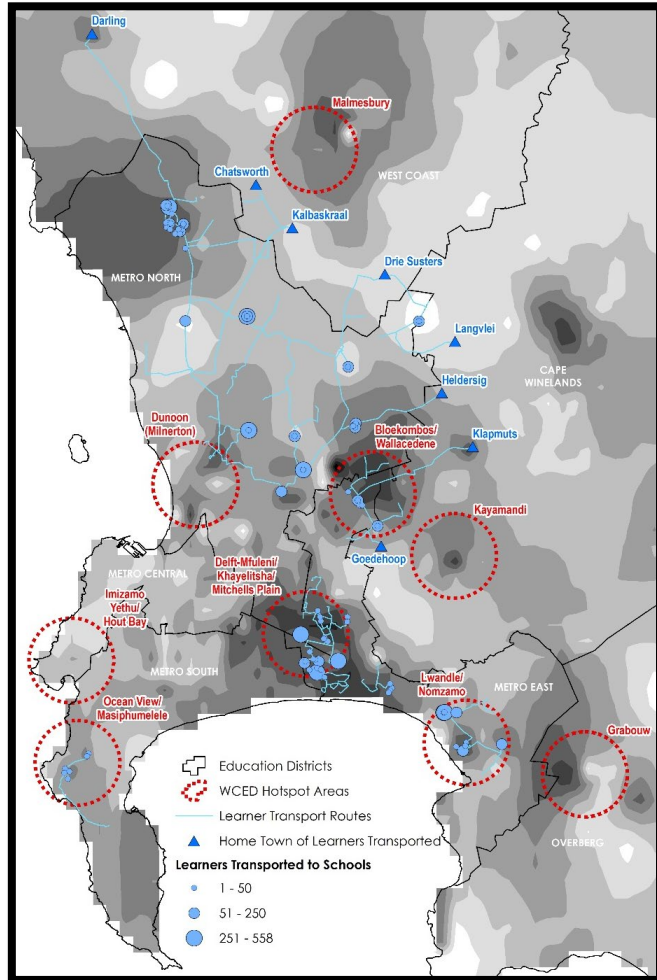
"A balanced approach to budget allocation between the creation of new infrastructure & maintenance of existing infrastructure is essential for the long term sustainability of infrastructure assets"

Link Strategy with Delivery

- CS&H Portfolio & Project Pipeline (& its expression in SAPPM)
- Long Term Financial Plan (LTFP)
- Medium Term Revenue & Expenditure Framework (MTREF) or Budget
- Demand Plan & Tenders

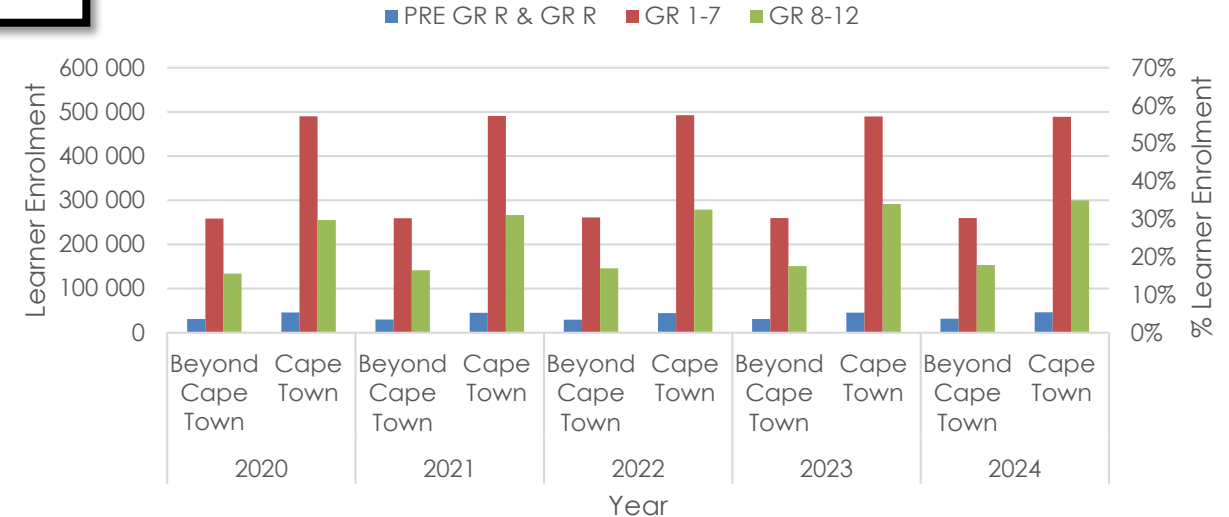


Historic and current learner enrolment trends (2020-2024) and prioritised areas (hotspot areas)

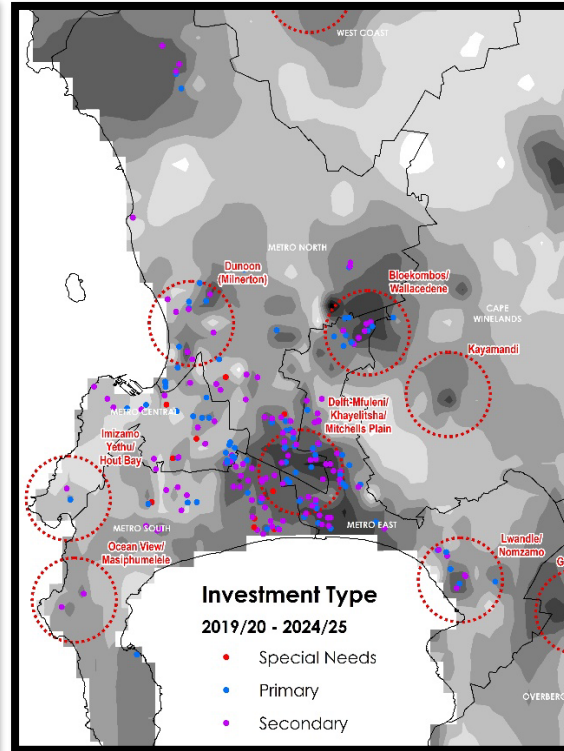
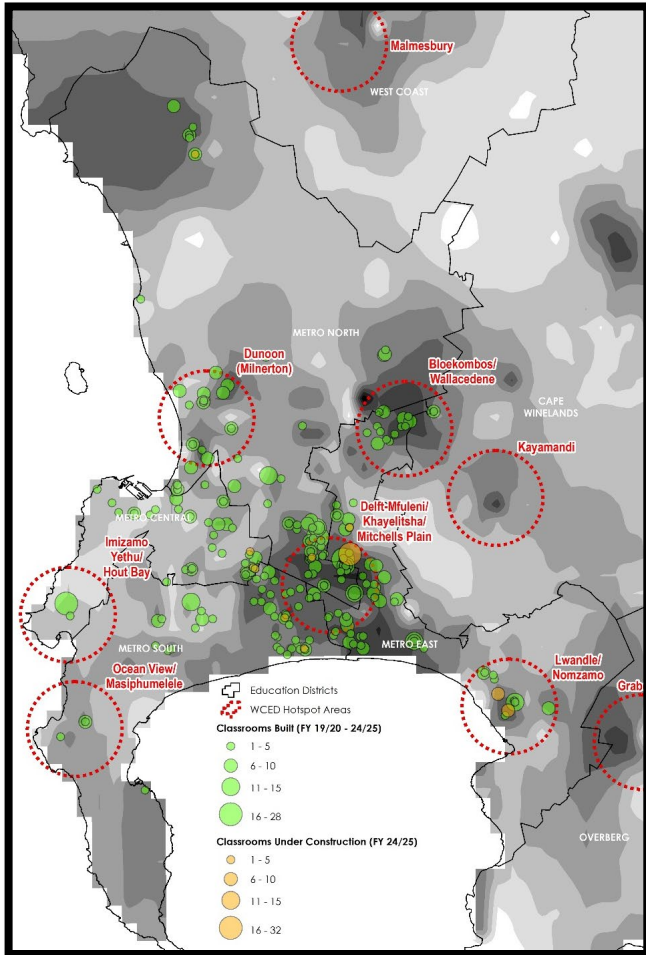


- As at 2024, $\pm 1,25$ million learners are enrolled across the province (public and private schools) with 65% (835 000) learners enrolled at Cape Town schools.
- Of the 835 000 learners, private schools accommodates 6,5% of this total.
- The graph indicates a 2:1 ratio in favour of primary schools to high schools.
- Of the $\pm 7\,800$ learners being transported to Cape Town schools, ± 800 are being transported from towns beyond Cape Town.

5 YEAR TRENDS ANALYSIS OF LEARNER ENROLMENT ACROSS THE WESTERN CAPE IN RELATION TO CAPE TOWN



Investment trends by school type and location between 2019 - 2025



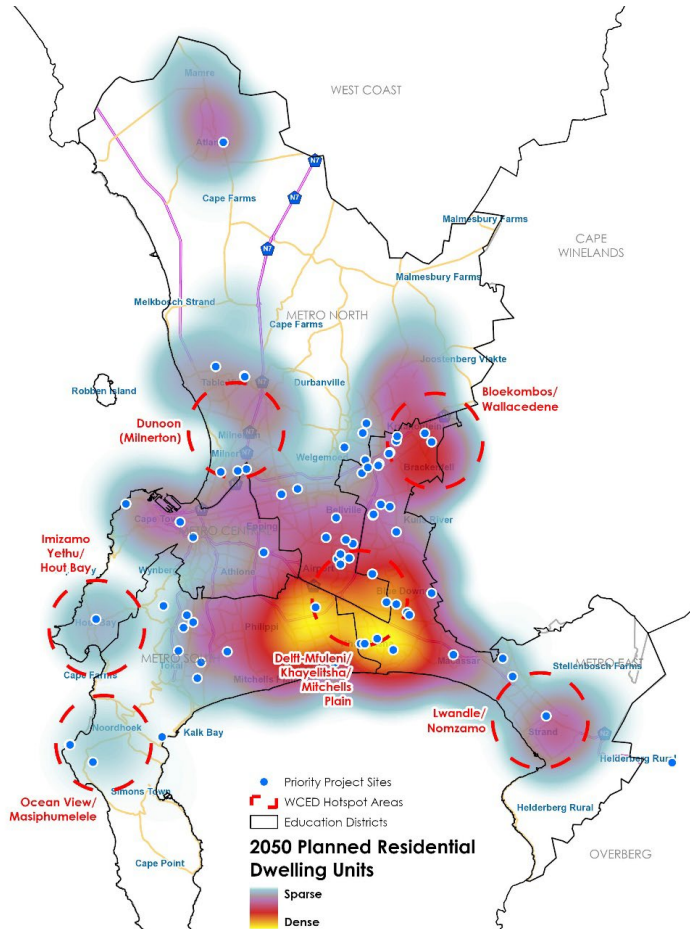
CLASSROOMS COMPLETED/UNDER CONSTRUCTION 2019/2020 - 2024/2025

Hotspot Area	Special Needs	Primary School	Secondary/ High School	Total
Bloelombos/Wallacedene		52	27	79
Delft-Mfuleni/Khayelitsha/Mitchells Plain	24	293	483	800
Dunoon/Milnerton		74	104	178
Imizamo Yethu/Hout Bay		5	17	22
Lwandle/Nomzamo		34	47	81
Ocean View/Masiphumelele			13	13
All other areas	43	294	235	572
Grand Total	67	752	926	1 745

- There has been a clear intent targeting investment within hotspot areas with a combine total of 1073 classrooms built between 2019 till 2024 with a further 140 classrooms currently under construction.
- While past and current investments may not immediately address the overall challenges and current backlogs, there is a clear intent to build more high school classrooms across the metro area. This can be seen more prominent in hotspot areas.

Project pipeline in relation to future growth areas

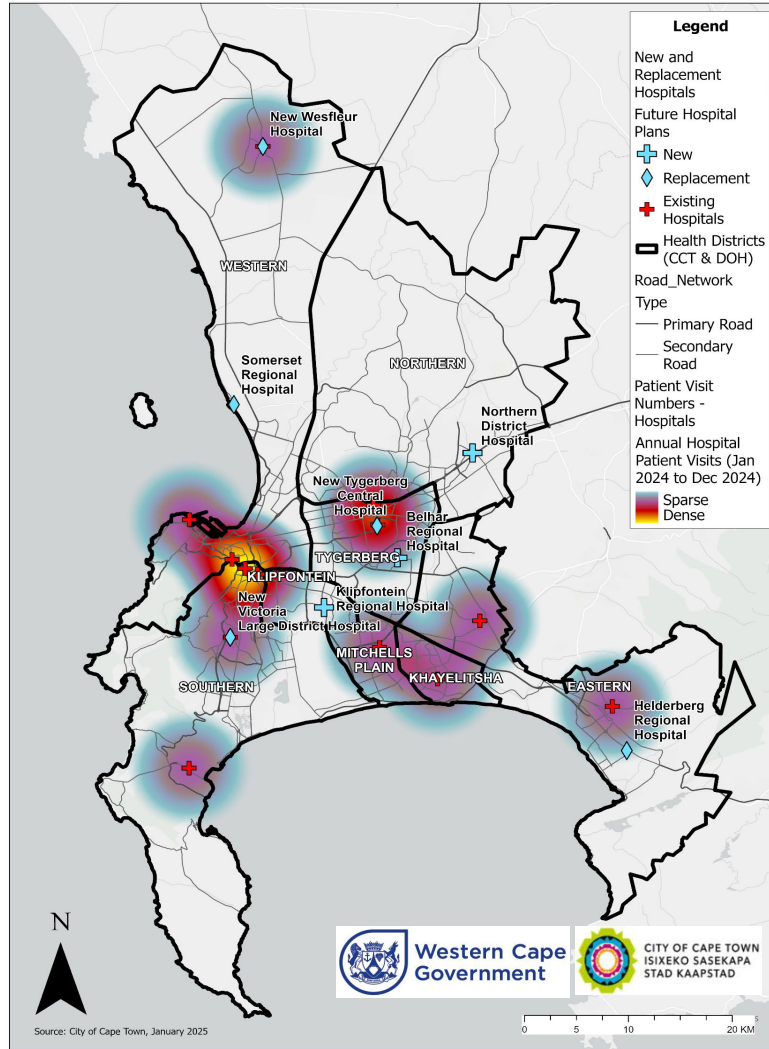
Prioritised school locations and strategy



The Western Cape Education Department's strategic approach to determining the allocation and expansion of school capacity is underpinned by the following:

- Overall assessment of learner enrolment/movement patterns in relation to learner applications received on an annual basis used to direct funding in ensuring placement of all learners.
- Over the next 5 years, WCED's objective is to stabilize current infrastructure by incorporating environmentally conscious practices and championing proactive maintenance protocols alongside targeted school expansions.
- In the face of economic constraints, WCED's priority remains instilling resilience and sustainability through its facilities to support progressive educational methodologies (i.e. Technical schools and subjects offerings at main stream schools). This includes partnering with private education entities.

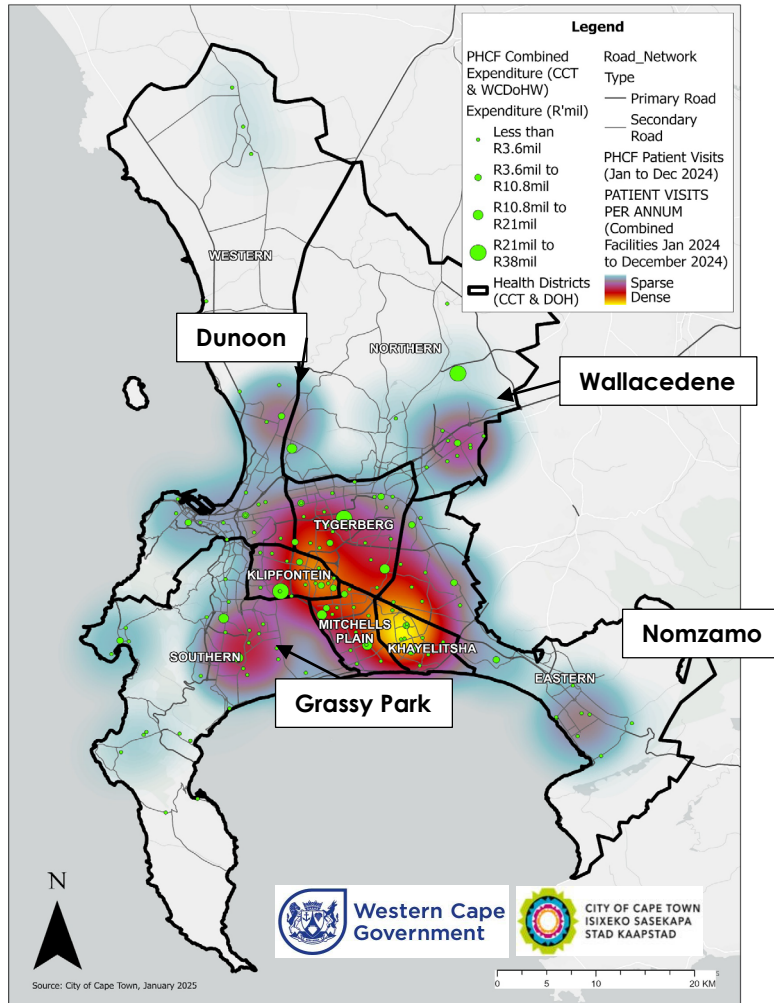
Hospitals: Acute hospital plan (2025 vs 2050)



Western Cape Department of Health & Wellness Acute Hospital Plan by 2050:

- The WCDHW plans to develop the following **new hospitals by 2050**:
 - Belhar Regional Hospital
 - Klipfontein Regional Hospital
 - Northern District Hospital
- Additionally the WCDHW also plans on the **replacement or expansion of the following hospitals by 2050**:
 - Helderberg Regional Hospital (currently a district hospital)
 - New Somerset Regional Hospital
 - New Atlantis Wesfleur Hospital
 - New Tygerberg Central Hospital
 - New Victoria Large District Hospital (currently a district hospital)
- The **WCDHW** is expected to **invest heavily** in the development of **new hospitals and the replacement of existing hospitals over the next ten years**.
- Active **maintenance and upgrading projects** currently being undertaken at the following hospitals:
 - Eerste River Hospital
 - False Bay Hospital
 - Groote Schuur Hospital
 - Helderberg Hospital
 - Karl Bremer Hospital
 - New Somerset Hospital
 - Red Cross Children's Hospital
 - Tygerberg Hospital
- Addressing existing backlogs** at all acute care hospitals is a key strategic objective of the WCDHW.

Primary health care facilities 2025 needs vs Expenditure: 2018-24



2025 Need:

- An **estimated 7.6 million patient visits** were recorded at **primary health care facilities** in the Metro (CCT & WCDHW) between January and December 2024.
- 56% of need** can be observed in the: **Tygerberg (19%), Klipfontein (11%), Mitchells Plain (11%) and Khayelitsha (15%)** Health Districts.
- The **Southern Health District** represents **14%** of the total need.
- Smaller Concentrations observed in:
 - Wallacedene;
 - Dunoon
 - Grassy Park
 - Nomzamo
- Need is concentrated in Metro South-East sub-region**, and in surrounding areas with **high levels of informality**.

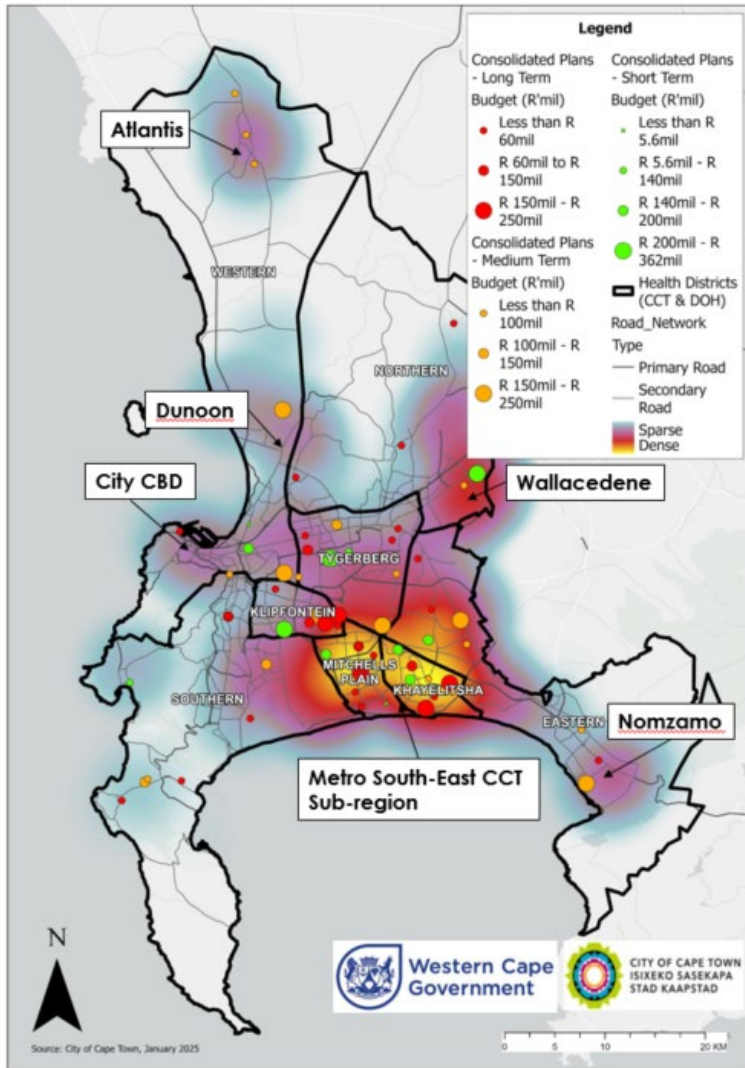
Combined Expenditure of CCT & WCDHW 2018 to 2024:

- Expenditure 2018 - 2024 exceeded R450 mil.**
- More than half (58% or R260mil)** of expenditure was **concentrated** in the: **Tygerberg, Klipfontein, Mitchells Plain and Khayelitsha** Health Districts.
- 13%** of total **expenditure** occurred in the **Northern District**.
- Significant expenditure observed in:
 - Wallacedene (R12.1 mil)
 - Dunoon (R24.4 mil)
 - Grassy Park (R19.7 mil)
 - Nomzamo (R12.2 mil)
- Expenditure is spatially well-distributed** to address need, but **scale not sufficient** to address backlogs and current need.
- CCT Expenditure: R 126 mil (28%), WCDHW Expenditure: R 326 mil (72%)**

Service Improvements Achieved:

- 103 clinics** achieved **Platinum Ideal Clinic Status**.
- Appointment booking & records management systems** implemented.
- Fisantekraal Clinic** completed and transferred to the **Province**.
- City & Provincial Health Collaboration: 11 facilities** transferred.
- New/replacement Wallacedene clinic** planned, land transfer initiated.

Primary health care facilities: Combined budgets 2050 (long term budgets need)



2050 Primary health care needs:

- **Concentrations** of residential dwelling units observed in the **Metro South-East (CCT Sub-region)** or **Klipfontein, Mitchells Plain and Khayelitsha Health Districts**.
- **Concentrations** of residential dwelling units also observed in the **Northern** and **Southern Health Districts**.
- Above excludes estimated increases in backyards and informal settlements
- **Smaller concentrations** observed at:
 - Wallacedene
 - Dunoon
 - Nomzamo
 - Atlantis
 - Cape Town Central Business District (CBD)

2050 Investment patterns for primary health care facilities (new, replacement, expansion) :

- **Half (48%, or R 3.5 billion)** of **future budget** allocations by CCT and DOH is **concentrated** in **Metro South-East** (Khayelitsha, Klipfontein and Tygerberg) Health Districts.
- **Short Term:** Budget concentrated in **Khayelitsha, Klipfontein and Tygerberg Health Districts** accounting for **52% (or R 1.4 billion)** of the total short term budget.
- **Medium Term:** **76% (or R 1.7 billion)** of the budget allocations in the medium term are **concentrated** in the **Eastern, Tygerberg and Western Health Districts**.
- **Long Term:** Budgets (R 1.7 billion) are **concentrated** in the **Klipfontein, Mitchells Plain and Khayelitsha Health Districts**.
- **Future budget allocations** are **directed to areas** where it is estimated that increased residential growth will lead to **highest concentrations of demand on primary health care facilities**.
- **Budget allocations for new facilities** account for **24%**, while the **replacement, rehabilitation and upgrading and expansion of existing facilities** account for **76%** of the overall budget. **Indicating strategic alignment** with WCDHW **UAMP 2024/25** strategy of limiting development of new facilities that stretches resources.

INPUTS FROM PLENERY

12h00 – 12h20



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LUNCH BREAK

12h30 – 13h15



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