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## GOVERNMENT NOTICE

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### DEPARTMENT OF TRANSPORT

No. R. 954

28 November 2014

#### NATIONAL LAND TRANSPORT ACT, 2009 (ACT NO. 5 OF 2009)

#### MINIMUM REQUIREMENTS FOR THE PREPARATION OF INTEGRATED TRANSPORT PLANS

I, Dipuo Peters, Minister of Transport, in consultation with the MECs, hereby publish the Requirements in the Schedule in terms of section 36(1) and (2) of the National Land Transport Act, 2009 (Act No. 5 of 2009).

#### SCHEDULE

#### MINIMUM REQUIREMENTS FOR THE PREPARATION OF INTEGRATED TRANSPORT PLANS

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##### 1. DEFINITIONS

In these Requirements, unless the context indicates otherwise, any word or expression to which a meaning has been assigned in the Act has that meaning, and—

**“Accessible transport”** means transport that is accessible to all persons in the area, including, but not limited to, targeted categories of passengers, and includes reasonable accessibility of pedestrians and cyclists to their intended destinations in a safe and convenient manner, and in relation to infrastructure means the design of facilities that are usable by all people to the greatest extent possible, with or without the need for adaptation or specialised design;

**“Act”** means the National Land Transport Act, 2009 (Act No. 5 of 2009);

**“BRT”** means bus rapid transit;

**"CITP"** means a comprehensive integrated transport plan;

**"DITP"** means a district integrated transport plan;

**"DoT"** means the Department of Transport in the national sphere of government ("Department" as defined in the Act);

**"facilities"** means ranks, terminals, stations, holding areas, informal taxi ranks and holding areas and major boarding points in rural areas, for road and rail based public transport;

**"Guidelines"** means any technical transport planning guidelines prepared by the DoT and that are available from the DoT on request;

**"IDP"** means an integrated transport plan contemplated in section 25 of the Municipal Systems Act;

**"ITP"** means an integrated transport plan contemplated in section 36 of the Act;

**"LITP"** means a local integrated transport plan;

**"MRE"** means a Municipal Regulatory Entity;

**"Municipal Systems Act"** means the Local Government: Municipal Systems Act, 2000 (Act No. 32 of 2000) ("Systems Act" in the Act);

**"NLTSF"** means the National Land Transport Strategic Framework prepared in terms of section 34 of the Act;

**"NPTR"** means the National Public Transport Regulator;

**"OLAS"** means the Operating Licence Administrative System contemplated in section 6(5) of the Act;

**"OLP"** means an operating licences plan;

**"PA"** means a planning authority;

**"PMS"** means a pavement management system;

**"PRASA"** means the Passenger Rail Agency of South Africa established in terms of section 23 of the Legal Succession to the South African Transport Services Act, 1989 (Act No. 9 of 1989);

**"PLTF"** means a provincial land transport framework prepared in terms of section 35 of the Act;

**"PRE"** means a Provincial Regulatory Entity;

**"PTP"** means a public transport plan;

**"Requirements"** means the Requirements set out in this Schedule;

**"route"** means the roads or railway lines that are traversed by a vehicle or train from point of origin to point of final destination or, in the case of road-based transport where no roads are clearly demarcated, the route followed

by the particular vehicle as described with reference to landmarks or beacons;

"SDF" means a spatial development framework;

"services" means public transport services;

"targeted categories of passengers" means—

(a) persons with disabilities; and

(b) the elderly, pregnant women, scholars, young children and those who are limited in their movements by children;

"TDM" means travel (transport) demand management; and

"TR" means a Transport Register.

## 2. PURPOSE AND STATUS OF REQUIREMENTS

The integrated transport plans prepared by planning authorities must comply as a minimum with the provisions of the Act and the Requirements as set out in this Schedule. Planning authorities are encouraged to do additional planning if they are able to do so, as allowed by their budgets and capacities, in order better to promote the objects of the Act.

Planning authorities must also comply with any additional requirements prescribed by the relevant MEC, and may include information additional to that required by this document.

In interpreting these Requirements, the planning authority should be guided by the Guidelines. The Guidelines apply to CITPs, but should also be applied where relevant to DITPs and LITPs. Where possible, steps outlined in the Guidelines should be taken, and must be taken where specifically required by these requirements. Where there is a conflict between these Requirements and the Guidelines, these Requirements will prevail.

## 3. RESPONSIBILITY FOR THE PREPARATION OF TRANSPORT PLANS

### 3.1 Categorisation of planning authorities

For the purposes of land transport planning, three types of planning authorities are distinguished. The type of integrated transport plan to be prepared by these planning authorities is as follows:

**Schedule 1 municipalities:** Planning Authorities required to prepare a **Comprehensive Integrated Transport Plan (CITP)** are all metropolitan municipalities and also the other municipalities listed in Schedule 1 of the Act.

**District Municipalities:** All district municipalities are to prepare a **District Integrated Transport Plan (DITP)**. In the case where a local municipality has prepared a CITP, the CITP must be incorporated as part of the DITP.

**Local municipalities:** All other local municipalities are to prepare a **Local Integrated Transport Plan (LITP)**.

Those planning authorities that are not listed in Schedule 1 of the Act will be free to prepare CITPs if they so wish, provided that the costs are justified by the transport situation in the area.

The MEC may consider and negotiate assistance to a planning authority in terms of section 9(2)(c) of the Act to carry out the required planning tasks where insufficient capacity is available. Such assistance could include—

- assistance by the MEC to carry out part, or the whole, of the planning to be done by a particular planning authority;
- assistance by a local municipality to a district municipality, to do part, or the whole, of the planning to be done by the particular district municipality; and
- assistance by a district municipality to a local municipality, to carry out part, or the whole, of the planning to be done by the particular local municipality.

The MEC must document the final agreement on any arrangements for assistance to carry out the required planning tasks. The MEC must publish such agreement in the *Provincial Gazette* by not later than 31 March of any particular year, which must also be included in the provincial land transport framework (PLTF) of the province.

The above agreement must be reviewed annually and should amendments be made to it, the revised agreement must again be published in the *Provincial Gazette* and reflected in the province's PLTF.

The MEC must ensure the co-ordination of the planning processes of all planning authorities under the jurisdiction of the province and, in doing so, must ensure that all plans address—

- (a) public transport services operating across the boundaries of the areas of planning authorities; and
- (b) rivalry or lack of co-ordination between neighbouring planning authorities that may result in the duplication of planning, or the duplication or over-supply, or under-supply, of transport services, facilities and infrastructure in the region.

### **3.2 Strategy in Relation to Operational Planning Responsibilities**

Comprehensive and District Integrated Transport Plans (CITPs and DITPs) must contain a long term component, which identifies the long term vision and objectives for the transport system in the region, and the

strategy for developing the transport system over time to achieve the set objectives.

The long term strategy can, however, only be achieved over time and in an incremental fashion and, therefore, the ITPs must include annual action plans specifying the projects to be implemented. Only projects for which funding is likely to be available for implementation must be included in the annual action plans.

The execution of the preliminary and detailed design of projects included in the action plans are not to be part of the ITP, but will logically follow its approval. Such design could relate to both infrastructure and services and would be undertaken by that authority or agency responsible for the execution of the work. For example, in the case of road-based public transport contracts it would be the planning authority itself for the planning authority with the assistance of the Province that would design and put out to tender such services. In the case of rail services, the rail operator (e.g. PRASA/Metrorail) would be in the best position to design the rail services in accordance with the service levels specified by the planning authority. In the case of roads, the design function could be undertaken by either the planning authority, or by an agent or contractor appointed by the municipality concerned.

### **3.3 DoT Public Transport Strategy of 2007**

The Cabinet approved the national Public Transport Strategy in January 2007. The Strategy has two thrusts: Accelerated Modal Upgrading, and Integrated Rapid Public Transport Networks (IRPTNs). Modal Upgrading focuses on improving the quality of the public transport fleet and its current operations. Introduction of IRPTNs focuses on implementing high quality networks of car-competitive services, namely Rapid Rail and Bus Rapid Transit systems, in major cities. It should be noted that IRPTNs are not separate from ITPs and their public transport plan, but form an integral part of the ITP of the relevant planning authority. The cities have been eligible to prepare business plans in order to apply for funding from the Public Transport Infrastructure and Systems Grant (PTIS) to introduce quality networks in a phased way. Municipalities listed in Schedule 1 of the Act are typically those that are targeted for this type of support.

Institutionally, the Public Transport Strategy envisages for these targeted municipalities the phasing in of an authority-controlled network at municipal level of integrated, quality public transport services, many under contract to it. They may also request assignment of the operating licensing function to them and thus establish a Municipal Regulatory Entity (MRE) to administer the issuing of operating licences for services within their areas. This requires:

- A robust integrated network plan which also includes integrating the road-based and non-motorised systems with the rail priority corridors (if relevant).
- A process of creating the skills and capacity to manage the network in terms of performance contracts with fare revenues accruing to

the authority (road-based system) and managing performance agreements with the Passenger Rail Agency for the rail priority corridors in particular.

- A process of business planning and negotiation to include existing operators and their employees (especially minibus-sector) in the network (for both road-based and rail-based priority corridors).

### **3.4 Rail Planning**

Section 11 of the Act provides that municipalities are responsible for service level planning for passenger rail on a corridor network basis in agreement with the Passenger Rail Agency (PRASA) or other rail service providers.

Intermodal Planning Committees must be established in terms of Section 15 of the Act by each municipality that is establishing an integrated public transport network (IPTN) or has significant passenger rail services in its area. This must comprise municipal officials and representatives of state-owned rail operators. The functions of an intermodal planning committee are to co-ordinate and integrate public transport, as well as all other aspects relating to the integrated transport plan of the municipality. Where there are significant passenger rail services in the area, the intermodal planning committee must facilitate the conclusion of appropriate service level agreements between the municipality and PRASA.

PRASA prepared a Strategic Plan in 2012 which built upon the Passenger Rail Transport Plan of 2006. It is a plan for developing rail over the next 40 years up to 2050 and is based on planned government investment in new rolling stock, new signalling, stations and three modernisation corridors. It brings together four individual Strategic Plans (for Gauteng, the Western Cape, KwaZulu-Natal and the Eastern Cape).

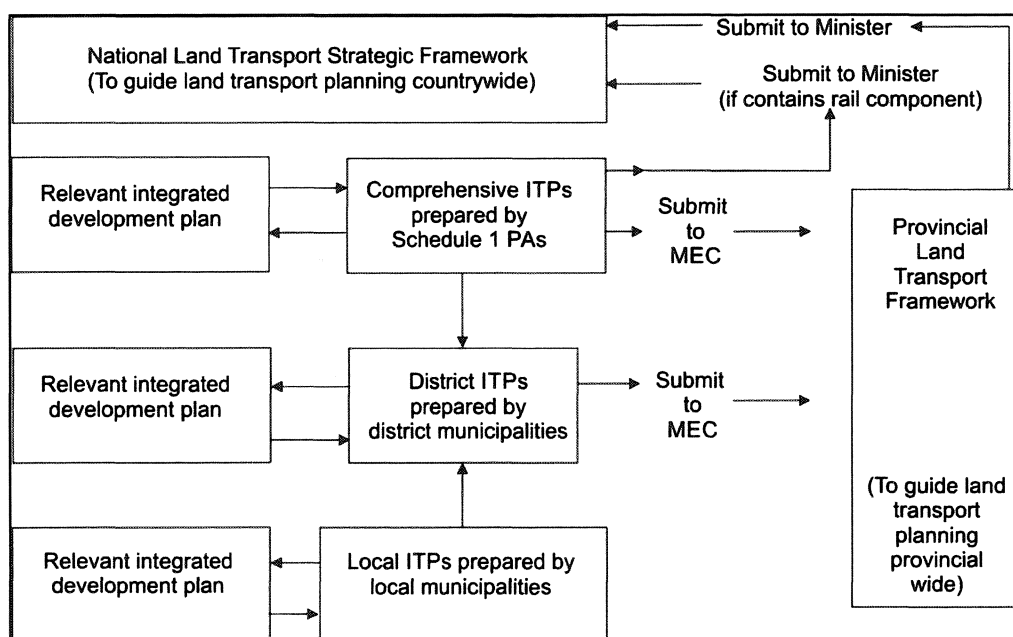
### **3.5 Preparation of Public Transport Plans and Transport Registers**

All CITPs and DITPs must contain as annexures, as well as summarise, a Transport Register and Public Transport Plan, the minimum requirements for which are described later in this document. The Transport Register requirements incorporate, but expand upon, those previously contained in the Current Public Transport Record requirements (see Annexure 1). The Public Transport Plan requirements incorporate and replace those previously set out in the regulations for preparing a Rationalisation Plan and an Operating Licence Strategy. Transport Registers and Public Transport Plans must not be prepared at both district and local levels as this will lead to duplication. Only one is required for any particular geographical area.

Where a Schedule 1 local municipality has prepared a Transport Register and Public Transport Plan as part of its CIP, the district municipality of which it is part is responsible to ensure that the entire area is covered and to include these into its DITP in the format as required by this document.

#### 4. INTER-RELATIONSHIP BETWEEN TRANSPORT PLANS AND FRAMEWORKS

The inter-relationship between the plans and frameworks is shown diagrammatically in **Figure 1**.



**Figure 1: Inter-relationship between transport plans and frameworks**

The National Land Transport Strategic Framework (NLTSF) will provide the policy and over-arching transport strategy for the country. Particular planning initiatives of the DoT will be taken up and reflected in the NLTSF where appropriate and where these have been approved. These will include, but not be limited to:

- The National Transport Master Plan, 2010
- The National Public Transport Strategy and Action Plan, 2007
- The National Rail Plan, 2006 and National Strategic Plan, 2012
- The National Freight Logistics Strategy, 2006
- The National Transport Master Plan (NATMAP), 2011

Each Province must prepare a Provincial Land Transport Framework (PLTF) for a five-year period in terms of Section 35 of the Act. The primary objectives of the PLTF are:

- To provide a transport framework as an overall guide to transport planning within the province, guided by the NLTSF.
- Summarise all the ITPs in the province.
- Include the planning of intraprovincial and interprovincial long-distance services.

Integrated Transport Plans (ITPs) have to be prepared by all municipalities.

From **Figure 1** it should be noted that ITPs must be submitted to the MEC in terms of section 36 of the Act for notification and approval, and will also be reflected in the PLTF. Approval by the MEC relates only to matters listed in section 36 (4) of the Act, such as procedures and financial issues that affect the province. ITPs must be submitted to the Minister for approval of the rail component where there is one. All ITPs must be made available to the National Public Transport Regulator (NPTR) and the relevant Provincial Regulatory Entity (PRE) by planning authorities and they must make recommendations to them relevant to applications for new operating licences. In the case of LITPs, they will be submitted to the MEC as part of the relevant DITP and not separately. In addition, these transport plans also need to become part of the integrated development plans (IDPs) of the applicable metropolitan, district and local municipalities.

LITPs will thus be included in a summarised format by the district municipalities in their transport plans, and will also serve as input into the IDPs of the applicable local municipality and district municipality.

## **5. FREQUENCY OF PLAN PREPARATION AND UPDATE**

ITPs are prepared for a five-year period, thus a new ITP must be prepared every five years. On an annual basis, updating of selected aspects must be carried out.

The minimum frequency of plan preparation and updating is shown in Table 1.



**TABLE 1: MINIMUM FREQUENCY OF PLAN PREPARATION AND UPDATE**

PLAN	FREQUENCY		COMMENTS
	PREPARATION	UPDATE	
1. Comprehensive ITP (CITP) and District ITP (DITP)	Total overhaul every 5 <sup>th</sup> year	Annual update of selected aspects, in synchronisation with IDP	Update to focus on action programme and budget. Prerogative of PA to do more comprehensive update
2. Local Integrated Transport Plan (LITP)	Prepare every five years, as input to new DITP in the case of local authorities that fall within a district council.	Update the budget and programme for the following year annually, in synchronisation with IDP	
3. Transport Register (forms part of ITP)	Total overhaul every 5 <sup>th</sup> year	Update the TR if any significant new data collection occurs. GIS, databases and information systems to be updated on an ongoing basis as and when new information is collected.	Update to concentrate on gaps and information of poor quality

4. Public Transport Plan (forms part of ITP)	Total overhaul every 5 <sup>th</sup> year	Report annually on contracts that have been awarded or which have expired and any changes or additions to the proposed contracted services network. Database of operating licences should be updated on an ongoing basis as OLs are awarded, lapse, or are renewed.	
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### 5.1 Overhauling the plan

The overhauling of a plan every fifth year means that every aspect of the plan must be re-examined to see if it is still up to date, revised and updated where necessary, and relevant new aspects must be added. A new Transport Register must be prepared every five years, ahead of the new five-year ITP, and this needs to be reflected in Chapter 3 of the new ITP. Revisions to the municipality's Spatial Development Framework must be reflected. Stakeholder engagement must be carried out, and the needs assessment updated accordingly.

The Public Transport Plan must be revised to plan for any new contracts that will be issued over the next five years and to reflect the sequencing of any proposed restructuring of the network. The new ITP should reflect progress made in the previous five years with the implementation of the various strategies and programmes, and update all strategies and programmes for the next five years. DITPs that reflect LITPs must be updated to summarise the new five-year LITPs of its constituent local authorities.

The list of projects, programmes and budgets in Chapter 12 must be completely revised for the next five year period of the new plan, and a detailed budget and programme prepared for the following year.

### 5.1 Annual updates

On an annual basis, the ITP should be updated where necessary, and this may take the form of a supplementary annual report, rather than the issuing of a new ITP document each year.

The annual updating of the plan must at least involve the following:

- Update the TR if any significant new data collection occurs. The transportation GIS, databases and information systems must be updated on an ongoing basis as and when new information is collected.
- Describe progress with implementing the ITP in the previous year (e.g. new infrastructure built and contracts awarded).
- Document which contracts have been awarded or which have expired and any changes or additions to the proposed contracted services network. In Schedule 1 municipalities in particular, the annual plan submitted in support of PTIS grant and other national funding must be documented.
- The database of operating licences, where a municipality has established such, should be updated on an ongoing basis as OLs are awarded, lapse, or are renewed. Any adjustments necessary to the Operating Licences Plan based on representations or new developments should be documented.

Revising and updating the projects, programmes and budgets in Chapter 12, so that a three-year period ahead is maintained, along with a detailed programme and budget for the next financial year. The expected sources of revenue to fund the budget must be documented. This chapter will serve as the basis for the municipality's annual transport sector component of the Integrated Development Plan (IDP). The budget and programme for the following year contained in each LITP must also be updated by the local municipality concerned, and summarised annually in the DITP for the district municipality in whose area they fall, in synchronisation with the preparation of the annual IDP.

## **6. DATE FOR SUBMISSION OF INTEGRATED TRANSPORT PLANS**

ITPs must be prepared by the date determined by the MEC in terms of section 36(1) of the Act. The date so determined by the MEC must be published in the *Provincial Gazette* of the province concerned.

If no date has been determined the planning authority must prepare and update plans in accordance with Table 1.

## **7. PROCESS FOR PREPARATION AND APPROVAL BY MEC**

After the date of publication of these requirements, but not later than the date mentioned in 6 above, every planning authority must complete its integrated transport plan consisting of at least the matters set out in 8 below.

On completion of the transport plan, the planning authority responsible for its preparation must submit it to the MEC in terms of section 36(4) of the Act and, if it has rail commuter components, also to the Minister under section 36(5).

If the MEC is of the opinion that the transport plan does not comply with any of the issues listed in section 36(4)(a) to (d) of the Act, he or she may request the planning authority to adjust the plan, and the planning authority must either adjust the plan or negotiate with the MEC to resolve the matter. If the MEC and planning authority cannot agree on the issue, they must resolve the matter in terms of Chapter 4 of the Intergovernmental Relations Framework Act 13 of 2005. If the MEC does not request the planning authority to adjust the plan within 60 days of receiving it, the planning authority may assume that the MEC has approved it.

If the Minister is of the opinion that rail aspects have not been adequately accommodated in the transport plan as contemplated in section 36(5) of the Act, he or she may request the planning authority to adjust the plan, and the planning authority must either adjust the plan or negotiate with the Minister to resolve the matter. If the Minister and planning authority cannot agree on the issue, they must resolve the matter in terms of Chapter 4 of the Intergovernmental Relations Framework Act 13 of 2005. If the Minister does not request the planning authority to adjust the plan within 60 days of receiving it, the planning authority may assume that the Minister has approved it.

## 8. MINIMUM CONTENTS

In addition to the requirements specified in the Act, integrated transport plans (ITPs) must contain at least the minimum contents as set out below.

### 8.1 Comprehensive integrated transport plans (CITPs)

The CITP must be prepared with due regard to relevant integrated development plans, and must comply with the Spatial Planning and Land Use Management Act, 2013 (Act No. 16 of 2013) and other applicable national and provincial laws.

The CITP must consist of at least the chapters schematically indicated in Figure 2 and as specified below. All ITPs must be done in the sequence prescribed in these requirements.

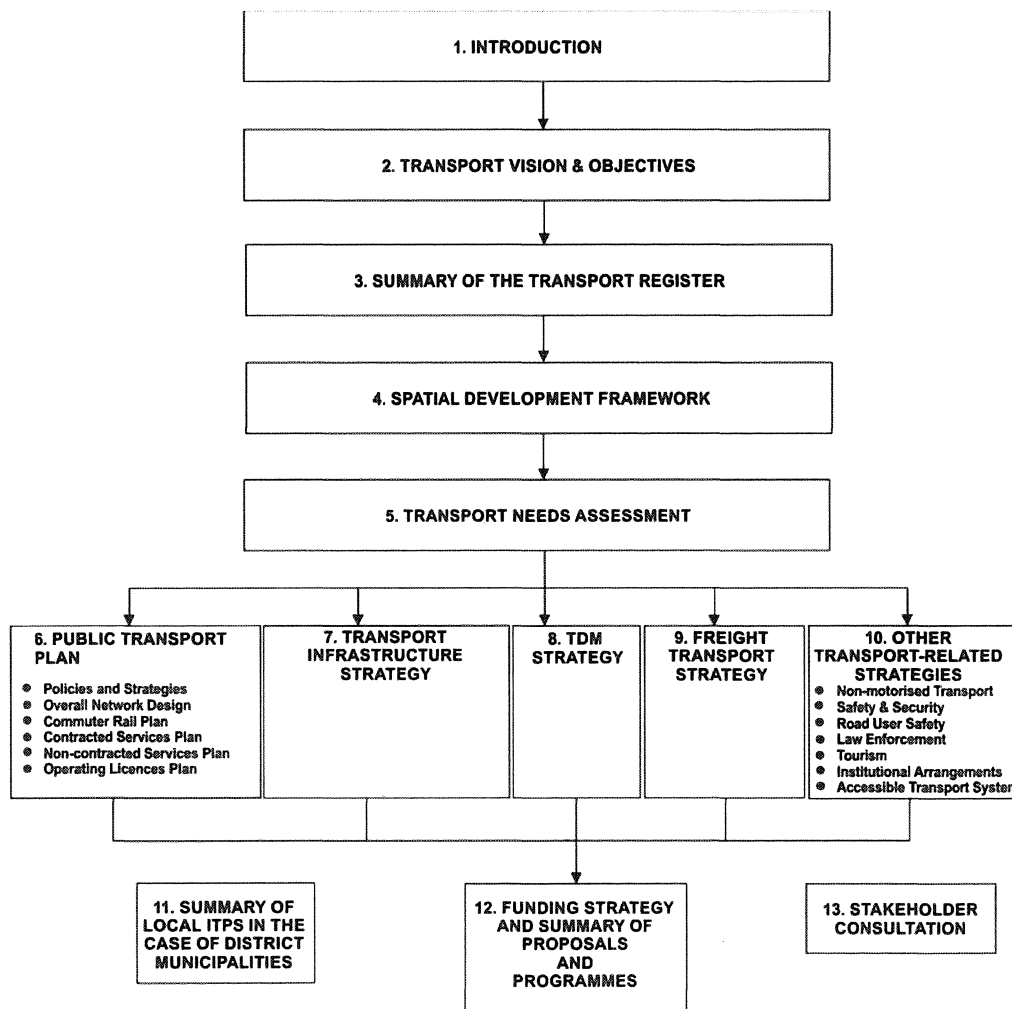


Figure 2: Minimum Contents of a Comprehensive ITP

## EXECUTIVE SUMMARY

An executive summary must be provided which summarises the status quo, transport trends in the area, objectives and proposed interventions and projects.

### Chapter 1: Introduction

The introduction must describe and illustrate the area covered by the CITP, mention the entity responsible for the preparation of the CITP and refer to any requirements made by the MEC. The status of the plan and the period over which the plan is to be implemented must be indicated.

Any relevant institutional and organisational arrangements affecting the functioning of the planning authority, such as the establishment or planned establishment of a municipal entity to undertake transport functions, should be described as well as the liaison and communication mechanisms available to co-ordinate the planning task with other responsibilities of the municipality and those of other stakeholders.

### Chapter 2: Transport vision and objectives

The vision statement for transportation in the ITP area should be formulated within the framework of the *White Paper on National Transport Policy*, 1996, other approved national and provincial transport policies and strategies, as well as relevant local policies and strategies.

The vision statement should be a concise statement guiding transport development in the area in terms of both the long and short-term components of the transport plan.

Specific objectives should be formulated, related to the overall vision. Objectives should be measurable, understandable and achievable.

### Chapter 3: Transport Register

As part of preparing the ITP, a Transport Register must be compiled. Annexure 1 describes the Minimum Requirements for a Transport Register. Chapter 3 of the ITP should provide a summary and analysis of the data collected. The transport register should cover the full spectrum of data collection necessary for the planning of all types of transport infrastructure and operations.

A summary description and analysis of the results of the TR for the particular area must be contained in this section, and maps of the area showing the major road network, public transport routes and location of facilities must be included and referred to. The following information should be included in this section:

- (a) **Demographic and socio-economic:** State population and provide profile of population by income, age, education and car ownership.
- (b) **General overview of transportation system:** Indicate modal split between private, public transport (by mode) and non-

motorised transport modes for work, education and other trips made during a typical weekday morning peak period. Reflect levels of dissatisfaction with the different aspects of the transport system and different modes of transport in the area, including travel times, costs, availability and accessibility, safety and the reliability of public transport services. Reflect average travel time to work and education, travel time for public transport trips to work, walking times to public transport by mode, and percentage of households spending more than 10% of income on public transport. Describe the main transport problems in the municipality towards which the policies, strategies and projects in the 5-year ITP will be addressed.

(c) **Description of the regular, daily public transport system:** A summary should be provided of the TR information about:

- Passenger rail infrastructure, rolling stock, and line capacity and utilisation
- Road-based public transport (namely Bus Rapid Transit (BRT), bus and minibus-taxi) infrastructure
- Road-based routes per mode and per major operator or taxi association
- Summary and analysis of the fare systems (structure, levels, fare collection systems and concessions) of different services in the area
- Passenger rail service capacity and capacity utilisation per line in the peak period
- Road-based public transport service capacity and capacity utilisation per route in the peak period
- Summary of area to area movements based on cordon counts
- Analysis of condition of transport infrastructure, facilities and rolling stock
- Extent of over-crowding in public transport services

(d) **Description of other public transport services and modes of transport:** Provide a summary of the location and size of operations where available, infrastructure and/or any contractual arrangements for:

- Metered taxis
- Long-distance and cross-border transport (excluding services covered under the regular daily transport described under (c))
- Transport for learners

- Non-motorised transport
- (e) **Description of institutional and organisational make-up of public transport industry:** Provide detail of companies and associations making up the BRT, bus, minibus-taxi and metered taxi industries in terms of:
- Name of company / association
  - Fleet composition and sizes under its control
  - Areas or corridors in which services are rendered
- (f) **Roads and traffic:** This information would typically be obtained from the Pavement Management System (PMS) and traffic counting programme of the planning authority, and transportation models if available:
- A table providing detail of the major road network in relation to road authority, including national, provincial and municipal roads, and giving detail of the length of road by functional class of road.
  - A table showing the condition of major roads in terms of the length of road which is in a very poor, poor, fair, good or very good condition. Also changes in the condition over time.
  - A table showing the level of congestion of the major road system, stating length of road operating at or over capacity in the peak hour. Also changes in the levels of congestion over time.
- (g) **Freight transport:** Provide a description of the main freight traffic routes in the municipality and describe problems caused by or inhibiting freight movement. Include routes identified for travel by vehicles transporting abnormal loads and dangerous goods. State measures in place to deal with overloading.
- (h) **Financial information:** State sources of income and expenditure by the relevant planning authority on all transport services and infrastructure within its area. Annual expenditure by state-owned entities in the ITP area on infrastructure and operational subsidies should also be included (SANRAL, PRASA, Province, PTIS grants etc).

#### Chapter 4: Spatial development framework

Integrated Development Plans (IDPs) encapsulate all aspects of development planning and service delivery in municipalities. A spatial development framework (SDF) must form an essential component of every IDP, reflecting geographically the municipality's strategy for delivering infrastructure and services in a sustainable and cost-effective manner. Transport and travel is an essential and costly component of life for individuals, households, business and government, and so transport efficiency is an important consideration in the development and updating



of the SDF. The SDF must be aligned with the ITP for the area, and in turn the SDF must be taken up in the ITP, clearly showing existing and intended transport corridors and nodes, and areas earmarked for mixed land use and densification in support of public transport. The SDF should also indicate the municipal land use strategies that will be used to discourage urban sprawl and the dispersal of activities making them dependent on travel by car.

The CIP should indicate the specific measures proposed in the SDF to support public transport and to ensure that transport services may be carried out in a sustainable and cost-effective manner.

The SDF so included in the CIP will give explicit effect to section 38 of the NLTA, which empowers the planning authority to manage any change or intensification of land use which deviates from that specified in the SDF.

### **Chapter 5: Transport needs assessment**

This chapter must determine and adequately describe the transport-related issues, problems, and needs of the municipality and its residents based on the following:

- assessment of issues, problems, trends and performance standards revealed by the Transport Register;
- processes of public participation and stakeholder feedback aimed at identifying the needs of the community; and
- present and future transport demand estimation, determined by extrapolation from current trends, modelling, and/or other estimations (see the Guidelines in this regard).

The upgrading and maintenance needs of all roads and public transport facilities for which the planning authority is responsible must be identified. The need for new roads and facilities must also be identified. This should include reference to any pavement management system (PMS) and other infrastructure management systems which may be employed by the authority.

### **Chapter 6: Public Transport Plan**

A Public Transport Plan (PTP) must be developed in the process of preparing the ITP. Chapter 6 of the ITP should provide a summary of the PTP, and the comprehensive PTP is to be attached as an annexure. The PTP must be based on all relevant data and information available, including the TR, the Subsidy Information System, the Operating Licencing Administration System (OLAS), business plans submitted to DoT in support of applications for PTIS grant funding and other funding, and existing contract documents.

All Schedule 1 and district municipalities are required to develop a PTP, whether the services in the area covered by the plan are contracted or not,

subsidised or not, or whether there are many modes or only a single mode of transport in operation.

The focus of the PTP should be to integrate the public transport network, services and modes. The plan needs to provide the basis for rationalising and restructuring the public transport system, designing contracts for contracted services and awarding of operating licences to non-contracted services.

The PTPs will encompass and incorporate plans referred to in the 2007 Public Transport Strategy and Action Plan as “Integrated Rapid Public Transport Network Plans” (IRPTNs) or as “Integrated Public Transport Network Plans” (IPTN plans). These referred to plans for the high quality networks of rapid rail and bus rapid transit (BRT) corridors to be prepared by targeted municipalities implementing “catalytic” projects. These IRPTNs or IPTN plans must be contained in the PTP of their ITPs, and not prepared as separate plans.

These municipalities have been preparing operational and business plans which they submit annually to the DoT and National Treasury seeking funding for these “IRPTNs”. Guidelines on the format and contents of these submissions have been circulated to the relevant municipalities. The public transport network plans so developed must be incorporated in the PTP and synchronised with the overall ITP process..

The PTP must comprise six parts:

**(a) Policies and strategies:** This should cover–

- A broad perspective of the future development of the public transport system in practical terms, including a policy and strategy for the role of each public transport mode;
- Policies in relation to the packaging of contracts, the type of contracting that will be employed, rail service level agreements, levels of service, modal integration, land use development and the fare system;
- Determining where and to what extent subsidies should be paid. In the case of gross cost contracts these will take the form of covering the difference between system cost and fare revenue collected by the contracting authority;
- A description must be included of relevant policies and principles guiding the disposal of operating licences, including but not limited to roles of modes and preferred modes, parallel-subsidised services and commercial service contracts;
- Policies in relation to the regulation of non-regular modes of transport such as metered taxis, two- or three-wheeler vehicles such as tuk-tuks, and long-distance services; and

- Public transport fleet policy in relation to reducing carbon emissions and air pollution and also in relation to providing universal access.

The policies and strategies should be directed at designing a network of contracted and non-contracted services that –

- cater for the needs of all potential users including targeted categories of passengers such as learners, and so that they are universally accessible;
- maximise access to services by pedestrians;
- minimise duplication between services;
- reduce under-or over-utilisation of available capacity;
- are cost-effective;
- employ the appropriate mode for the requirements of the route or corridor;
- are convenient to passengers;
- support the objectives of the SDF;
- integrate public transport services in and between modes by developing a network and schedules (where relevant) and service frequencies in such a fashion that passengers can move optimally from origin to destination with the minimum number of transfers, waiting times and fare-paying transactions. It also requires integrating transport infrastructure and passenger information across services and modes;
- incrementally use interoperable electronic fare systems (common fare medium), and charge affordable fares;
- avoid destructive competition between different services on the same route or corridor;
- put any financial support (subsidy) to optimum use, by taking into consideration the cost-performance ratio of modal alternatives before any new contract is designed and awarded, and
- are given priority over private transport.

#### **(b) Overall Network Design**

An Overall Network Design must be described which sets out the high-level view of the future system for rail and road-based services, contracted and non-contracted. This is particularly important when the planning authority is proposing to restructure the system - the contracted and/or

non-contracted services – for the purposes of creating the type of quality corridors envisaged in the national *Public Transport Strategy*. The Overall Network Design should include the following aspects:

- The overall network design must identify the preferred mode or modes with regard to the particular routes or corridors in the area, including transport into or from the areas of other planning authorities, and interprovincial transport.
- Proposals must be developed, based on the assessment of the status quo and the policies, for the rationalisation and restructuring of the existing contracted services, the development of new contracted services, and the restructuring of the non-contracted services.
- The planned sequencing of network implementation should be described, including the timeframes for the conversion of any expired interim, negotiated and tendered contracts, and the introduction of new contracts. A short-term and long-term plan for contracted services should be set out. In the short term, its focus must be on transforming interim subsidised contracts and tendered contracts into negotiated 12-year contracts in accordance with the NLTA. The longer-term plan should deal with the introduction of tendered contracts and the overall restructuring of the subsidised public transport system as a whole, including rail, after the initial new contracts have run their course.

The MEC must facilitate arrangements regarding the responsibility for the rationalisation of interprovincial and intra-provincial services.

The overall network design must be detailed in component five-year plans for the commuter rail services (where relevant), the contracted services, and the non-contracted services as follows.

#### **(c) Commuter Rail Plan**

Where the municipality has passenger rail services, a five-year plan specifying service levels must be developed in agreement with PRASA or other rail service providers. The intermodal planning committee must facilitate the conclusion of appropriate service level agreements between the municipality and PRASA, in terms of Section 15 of the Act.

In the event of rail services operating across the boundaries of two or more planning authorities, the relevant planning authorities must liaise with each other to ensure proper integration of rail issues into their respective plans.

#### **(d) Contracted Services Plan**

This part of the plan should describe the existing contracts in the area as well as set out the proposed plan for the new contracts that the planning authority will enter into in the ITP 5-year period. These new contracts may

replace – wholly or partially - an existing interim contract or an expired negotiated or tendered contract or any such contracts that will expire. They may also create a new set of routes and/or introduce a new mode of transport such as BRT. They may also replace a network of previously non-contracted, non-subsidised services. They may be negotiated contracts or tendered contracts. They may be subsidised or commercial service contracts.

The Contracted Services Plan must describe the process for rationalising the existing operations and enabling the participation of affected operators in these new contracts. For each contract, the plan will describe the proposed routes, the frequencies and fleet requirements per route, and the contract duration. It will also describe the restructuring and changes to be made to the current contracted and non-contracted services in order to implement the proposed plan. It will describe the estimated impacts and benefits, both positive and negative, and include an implementation programme and budget (to be reflected in Chapter 12 as well).

The plan for contracted services will also describe the nature of the intended contracts (such as gross cost or net cost contracts) and the fare system that will be applicable for these contracts.

#### **(e) Non-contracted Services Plan**

This five-year plan should describe in detail the routes where operating licences will be granted for non-contracted services. It should describe the capacity requirements of these routes, and the modes that will be considered suitable. It must contain a determination of the required supply of vehicles of a particular mode on each route, based on modal policy, an analysis of data collected for the TR, needs identified through public and stakeholder involvement forums, and records of current legitimate services as reflected in the OLAS.

This plan must also cover non-regular modes of transport such as metered taxis, two- or three-wheeler vehicles such as tuktuks, and long-distance services. The quality and other requirements must be set out in the plan and any restrictions on numbers or geographical locations.

#### **(f) Operating Licences Plan (OLP)**

The PTP must contain an Operating Licences Plan guiding the award of operating licences. This will be determined by the above-described Contracted Services Plan and Non-Contracted Services Plan. The OLP should ideally take the form not only of a document, but of an active database linked in a “live” way to the Operating Licences Administration System (OLAS).

This is essential for the planning authority to comply with section 55 of the Act. Operating licences are required for all public transport service

vehicles, whether they are contracted or non-contracted. The NPTR or the PRE will be required to refer any application for operating licences to the applicable planning authority within whose area the services being applied for will operate, or the planning authority which was responsible for the preparation of the PTP for that particular area. Should the service being applied for fall into more than one municipal area then the application will be referred to all the municipalities that will be affected, each reacting to the application in terms of the implications this may have on its area.

The Operating Licences Plan must provide clear guidance to the planning authority as to which operating licence applications should be recommended or rejected by it. As these recommendations are binding on the NPTR or PRE in terms of section 55(5) of the Act, the PTP must provide the planning authority with a reliable and accurate basis for its decisions.

The successful implementation of the Operating Licences Plan requires that the Operating Licences Administration System (OLAS) is updated continuously, so that the database accurately and reliably reflects the details of all active operating licences pertaining to the area at the time any new application is being considered. The routes described in the OLAS must be the same as or at least relatable to, the routes or route groups described in the planning authority's TR, PTP and Operating Licences Plan.

The Operating Licences Plan must describe the operating licences required for all proposed new contracts (route descriptions, duration, conditions, etc).

In respect of non-contracted regular, daily services in the area, it should describe the defined public transport routes or specified groups of routes on which non-contracted services may operate, and the number of vehicles of each capacity-type that the planning authority will authorise, having taken into account demand. The PTP should also describe the number of operating licences already active on each route or route group (as per the data in the OLAS) and the additional number of operating licences that could be granted on each route where there is an under-supply, or the surplus number of operating licences on each route where there is over-supply.

If a planning authority proposes that operating licences are to be awarded authorising operation on a group of routes, in order that operators may rotate between routes, or have flexibility in case of vehicle breakdowns, then the OLP must set out the maximum vehicle requirements with respect to each route group. These route groups need to be specified and agreed with stakeholders prior to the preparation of the OLP, and the OLP then determined accordingly.

In the case of over-supply the OLP should contain a proposal as to what action the planning authority proposes to pursue to reduce this (e.g. refuse renewal applications).

The plan should also describe the public transport facilities that are associated with the particular routes in the OLAS that may be authorised for use by operating licence holders on the routes, taking into account their capacity as determined in the TR.

The OLP must also provide guidance for recommendations the planning authority will make about applications for operating licences for non-regular modes of transport such as metered taxis, two- or three-wheeler vehicles such as tuktuks, and long-distance services. The quality conditions that will be attached to such operating licences and other requirements must be set out in the plan and any restrictions on numbers or geographical locations.

The OLP should also describe any conditions which should be imposed by the PRE in respect of operating licences, such as duration. For example, duration may be shortened on routes where a new BRT service will be introduced in the near future. Tuk-tuks may have a set of special conditions such as a limited length radius of operation.

The OLAS should be made available on-line to the planning authorities so that they can extract information about the number of operating licences active on each route, the vehicles and their capacity and the validity period of each operating licence. If the OLAS is not available on-line, the regulatory entity must provide such information to the planning authority at its request so that recommendations are always based on current data.

The OLP must describe law enforcement strategies for maintaining the operating licencing system, including institutional arrangements, the interrelationship with traffic law enforcement and the setting of targets and measuring performance.

## **Chapter 7: Transport infrastructure strategy**

The transport infrastructure strategy must deal with the development and maintenance of all types of transport infrastructure, including major roads, public transport facilities, BRT networks, dedicated lanes for public transport, depots, freight corridor measures, non-motorised transport infrastructure, and rail infrastructure.

The transport infrastructure strategy must include proposals for new facilities and for the improvement of existing public transport facilities and major roads. Only firm schemes on which work will commence within the five-year ITP planning period must be included in the strategy.

The transport infrastructure strategy must include measures aimed at giving priority to public transport where such measures are practical and economically justified.

In the case of those municipalities participating in the DoT's IPTN strategy and receiving PTIS Grant funding for infrastructure development, the infrastructure strategy must include the plan for the progressive implementation of the rapid rail or BRT corridors over the next five-year

period. This will also be reflected in the business plans submitted to the DoT annually in this regard.

### **Chapter 8: Travel demand management (TDM) Strategy**

The objective of travel demand management (TDM) is to manage congestion by reducing the demand for car use in peak periods, especially single-occupancy car use. TDM also aims to bring about environmental improvements through reduced car use. TDM measures are primarily aimed at changing the behaviour of the users of the transport system.

The TDM strategy must set out appropriate measures aimed at managing travel demand. These include measures such as high-occupancy vehicle lanes, park and ride facilities, and employer-based car trip reduction programmes, such as telecommuting, teleconferencing, lift-clubs (ridesharing), financial incentives for public transport use in lieu of free parking for employees, etc. Other measures discouraging car use such as tolls, levies and parking charges or limitations on parking availability may be considered.

To be effective, TDM needs to be supported by significant improvements to the public transport system. The TDM Strategy must accordingly describe how the proposed measures are to be phased in over the 5-year life of the ITP to coincide with public transport and non-motorised transport improvements. Proceeds from tolls, levies or parking charges should be applied to further improvements in public transport and non-motorised transport in the municipality.

### **Chapter 9: Freight transport strategy**

The planning authority must develop a freight transport strategy covering the transporting of goods to, from and through the area by road or rail. The strategy must identify routes for moving goods so as to promote their seamless movement and, in the case of road freight transport, to avoid conflict with other road traffic.

The freight transport strategy must include a plan for the movement of hazardous substances contemplated in section 2(1) of the Hazardous Substances Act 15 of 1973, by road along designated routes, as required by section 37(3) and (4) of the Act in accordance with the strategy or plan in the provincial transport framework.

In the case of coastal provinces, maritime transport links must be considered where appropriate and in particular movements to and from ports. In preparing this strategy planning authorities should have regard to the *National Freight Logistics Strategy, 2005* which is available from the DoT.



## Chapter 10: Other transport-related strategies

In addition to the above minimum requirements, the planning authority must in addition develop in its CITP strategies and plans relating to the following topics:

- Non-motorised transport (NMT): the NMT strategy must describe the measures to promote walking and cycling in the municipality, and map the proposed walking and cycling network (where it is intended to establish a network), plans to upgrade the existing road network to better accommodate walking and cycling, measures to encourage residents to walk or cycle instead of using motorised transport, and the five-year programme for building NMT networks and promoting behaviour change. The strategy should also focus on infrastructure, e.g. measures to accommodate NMT in new property developments.
- Public transport safety and security: the strategy must describe the measures that will be implemented to improve the safety from accidents and security from crime of public transport users. This must be based on a data-driven analysis of the causes and location of the problems. Generally safety is protection from unintentional harm such as accidents, while security is protection from intentional harm such as crime and terrorism.
- Road user safety: the strategy must describe the measures that will be implemented by the municipality to decrease the rate of injuries and fatalities of road users. The strategy must be based on data collected about the causes and location of crashes in the municipal area.
- Law enforcement (road traffic and public transport regulation): the strategy must describe the concrete measures and organisational arrangements that will be put in place to improve the enforcement of road traffic violations. It must also describe the measures that will be taken to ensure that only public transport vehicles with operating licences and complying with the conditions of those licences are allowed to operate. Municipalities with high numbers of operators without operating licences must set out their strategy to address this problem so that public transport regulation can be meaningfully implemented. The strategy should mention any measures taken under section 85 of the Act.
- Tourism if relevant: the strategy must describe transport improvements and measures that will serve tourists specifically, and facilitate an increase in tourism in the area.
- New institutional arrangements if required to establish the network authority envisaged in the Public Transport Strategy to manage and regulate the public transport system.

- Accessible transport system: All municipalities must describe their proposed strategies to implement universally accessible transport services on their public transport networks in terms of infrastructure, systems, passenger information, and vehicles.

### **Chapter 11: Summary of local integrated transport plans in the case of district municipalities**

In the case of a district municipality this Chapter is a summary of the transport implementation budgets and programmes (including construction and maintenance of their transport infrastructure) over a five-year period, as prepared by the constituent local planning authorities (local municipalities). This chapter does not apply to CITPs prepared by metropolitan municipalities.

### **Chapter 12: Funding strategy and summary of proposals and programmes**

This Chapter must contain the following components:

#### **12.1 Summary of proposals**

It must contain a summary of all the proposals, projects and programmes provided for in the plan, together with the financial implications of each, including subsidies and operational costs. Proposals and programmes should be realistic in financial terms and with regard to the capacity of the authority. Where appropriate, projects should be phased over a realistic period or relegated to a future year or planning cycle.

The proposals and programmes must link with the integrated development plan (IDP) process of the municipality concerned and form the sectoral transport component of the IDP as required by section 31 of the Act.

#### **12.2 Funding strategy**

This part of Chapter 12 must deal with sources of income and funding constraints.

The funding strategy must include a financial programme giving expected sources of revenue and estimates of expenditure arising out of the preparation, implementation and operation of the different transport strategies, proposals, projects and plans, over the five-year period in which the plan is to be implemented. The focus must be on actions that are possible in the light of secured financial resources.

#### **12.3 Prioritisation of projects**

All actions identified in the different strategies and plans must be subject to a process of prioritisation and allocation of funds, which will depend on budgetary constraints.

## **12.4 Budget per project and programme**

The funding strategy must be concluded by the preparation of a budget and programme for a five-year period, of which the first year will be in substantially greater detail than the following four years of this period.

## **Chapter 13: Stakeholder consultation**

The extent of and the results of consultation with all stakeholders, including operators, commuters and communities must be described. Interaction and consultation with government institutions and other organs of state, such as the Provincial Department, PRE, SANRAL, PRASA etc. must be included.

The preparation of a transport plan or transport programme must include the consultation and participation of interested and affected parties required for the preparation of integrated development plans in terms of Chapter 4 and section 29(1)(b) of the Municipal Systems Act or replacing legislation. There must also be compliance with the Promotion of Administrative Justice Act 3 of 2000.

The public participation process must provide for adequate advertising and presentation of the draft ITP and allow all stakeholders an adequate opportunity to make representations or objections. The authority must consider all representations and objections received, and revise the draft ITP if necessary, before finalising it.

## **8.2 District Integrated Transport Plans (DITPs)**

All district municipalities are to prepare a **District Integrated Transport Plan** (DITP). In the case where a local municipality has prepared a CITP, the CITP must be incorporated as part of the DITP.

The DITP should largely reflect the same structure and contents as the CITP described in Section 8.1 and illustrated in Figure 3, namely:

### **EXECUTIVE SUMMARY**

#### **Chapter 1: Introduction**

#### **Chapter 2: Transport vision and objectives**

#### **Chapter 3: Transport Register**

#### **Chapter 4: Spatial Development Framework**

#### **Chapter 5: Transport Needs Assessment**

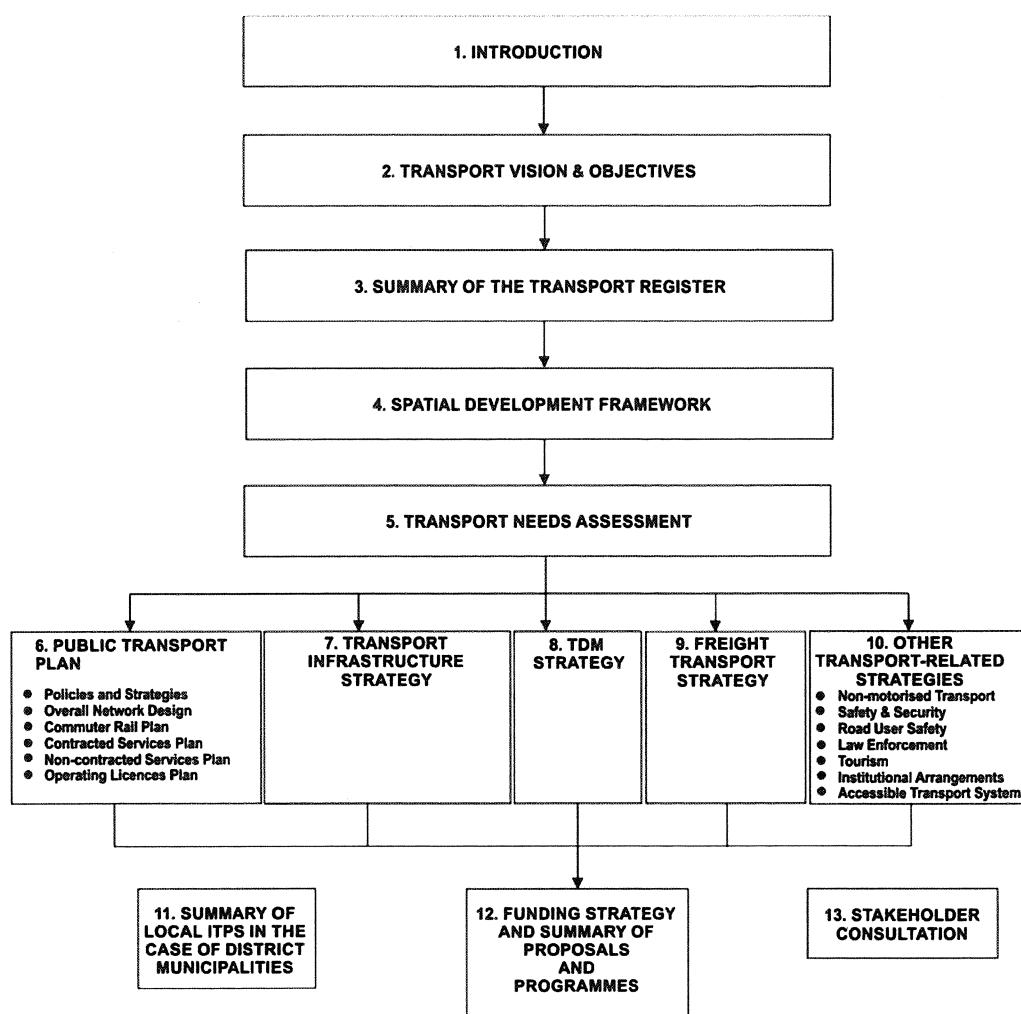
#### **Chapter 6: Public Transport Plan**

#### **Chapter 7: Transport Infrastructure Strategy**

Summary of infrastructure proposals from the local integrated transport plans of the local municipalities within the district.

**Chapter 8: Travel Demand Management****Chapter 9: Freight Transport strategy****Chapter 10: Other transport-related strategies****Chapter 11: Summary of local integrated transport plans prepared by the constituent local municipalities of the district****Chapter 12: Funding strategy and summary of proposals and programmes****Chapter 13: Stakeholder consultation.**

However, some chapters may be in far less detail than those that may be prepared by a Schedule 1 municipality, and sections required as per Section 8.1 must be omitted if they are not relevant to the particular context of the district municipality. For example, there may be no subsidised services in the area, there may be no rail services in the area, or the municipality may not be planning to contract any new services. TDM strategies may be irrelevant in a rural district municipality where the system has no capacity problems and where car use is limited. The content of the DITP should thus be modified accordingly.

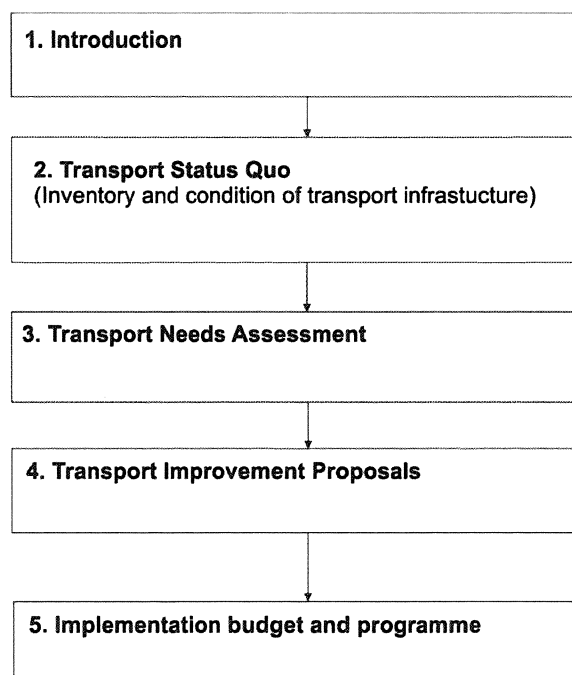


\* Plans, strategies or sections reflected in this diagram may be omitted if the particular context of the District Municipality means they have no relevance.

**Figure 3: Minimum Contents of a District Integrated Transport Plan**

### 8.3 Local Integrated Transport Plan (LITP)

A Local Integrated Transport Plan (LITP) must be prepared every five years by each local municipality and submitted to its district municipality. The plan should be updated annually where appropriate. (Local municipalities listed in Schedule 1 of the Act must prepare a CITP.) The plan must be prepared as an input to the DITP and synchronised with the timing of the DITP preparation. The LITP must consist of the chapters as schematically indicated in Figure 4 and as specified below:



**Figure 4: Minimum Contents of a Local Integrated Transport Plan**

#### Chapter 1: Introduction

The introduction must indicate the responsibility for the preparation of the LITP, the status of the plan and the period over which the plan is to be implemented.

#### Chapter 2: Transport *status quo*

The transport *status quo* must consist of—

- An inventory of the roads which are the responsibility of the local municipality, including their condition; and
- An inventory of public transport facilities which are the responsibility of the local municipality, including their condition (this inventory may

be taken over from the TR prepared by the district municipality within whose area the local municipality is situated).

### **Chapter 3: Transport needs assessment**

The process that was followed to identify the upgrading and maintenance needs of all roads and public transport facilities for which the local municipality has responsibility should be described. The information may be taken from the municipality's IDP, if available. If not available in the IDP, it should be obtained from stakeholder consultation or other methods.

### **Chapter 4: Transport improvement proposals**

The different projects identified through the process in Chapter 3 above must be listed and prioritised. Non-motorised transport and private transport should be included.

### **Chapter 5: Implementation budget and programme**

A budget and programme for a five-year period must be prepared of all the high priority projects identified in Chapter 4, of which the first year will be in substantially greater detail than the following four years. Both new facilities as well as the maintenance of existing facilities must be covered.

Only projects for which a budget has been allocated during the five-year planning period and for which there is a realistic chance of implementation, are to be included, including national and provincial projects in the municipal area.

Chapter 5 must be updated on an annual basis.

## **9. REPLACEMENT OF PREVIOUS REQUIREMENTS**

The document titled "Integrated Transport Plans: Minimum Requirements in terms of the National Land Transport Transition Act" published in *Government Gazette* number 30506 on 30 November 2007 under Government Notice No.R 1119 is hereby replaced by this Schedule in terms of section 36(2) of the National Land Transport Act, 2009 (Act No.5 of 2009), as agreed to in consultation with the MECs.

## **10. TRANSITIONAL PROVISIONS**

As from the date that these Requirements come into operation, planning authorities must comply with these Requirements in updating or overhauling their ITPs, or in developing them if not already developed. Any planning done in terms of the previous requirements will be valid as planning done in terms of these Regulations, unless clearly in conflict with the Act or these Regulations.

**NATIONAL LAND TRANSPORT ACT, 2009 (ACT NO. 5 OF 2009)****REGULATIONS IN TERMS OF SECTION 29(1) OF THE NATIONAL LAND TRANSPORT TRANSITION ACT**

In terms of section 38(1) of the National Land Transport Act, 2009, (Act No. 5 of 2009), I, Dipuo Peters, Minister of Transport, have made the regulations in the Schedule.

**Dipuo Peters MP  
MINISTER OF TRANSPORT**

**SCHEDULE****Definitions**

1. In these regulations, unless the context indicates otherwise, any word or expression to which a meaning has been assigned in the Act bears that meaning and "the Act" means the National Land Transport Act, 2009, (Act No. 5 of 2009).

**Particulars of transport plans to be published**

2.(1) On approval of the national land transport strategic framework (NLTsf), the Minister must publish the following particulars in the *Government Gazette*:

- (a) A statement that the NLTsf has been approved and is available for inspection during office hours at a specified place and that copies may be obtained, either free of charge or at a price specified in the notice;
- (b) a brief statement of the purpose and objectives of the NLTsf;
- (c) where the NLTsf has been published in the *Government Gazette*, a reference to the *Gazette* concerned.

(2) On approval of a provincial land transport framework, the MEC must publish the following particulars in the *Provincial Gazette*:

- (a) A statement that the plan has been approved and is available for inspection during office hours at a specified place and that copies may be obtained,



either free of charge or at a price specified in the notice; and

- (b) a brief statement of the purpose and objectives of the plan.

(3) On approval of an integrated transport plan, the planning authority must publish the following particulars in the *Provincial Gazette*:

- (a) A statement that the plan has been approved and is available for inspection during office hours at a specified place and that copies may be obtained, either free of charge or at a price specified in the notice;
- (b) a brief statement of the purpose and objectives of the plan; and
- (c) a summary of projects and programmes provided for in the plan.

### **Repeal of previous regulations**

3. The National Land Transport Regulations on Publication of Transport Plans, 2007 published under Government Notice R.1120 in Government Gazette 30506 of 30 November 2007 are hereby repealed.

### **Short title and commencement**

4. These regulations are called the National Land Transport Regulations for the Preparation of Integrated Transport Plans, 2014 and come into operation on the date of their publication in the *Government Gazette*.

## **Annexure 1**

### **MINIMUM INFORMATION REQUIREMENTS FOR THE TRANSPORT REGISTER**

The information described in this annexure comprises the Minimum Requirements for compiling a Transport Register.

#### **1. Introduction**

The introduction must provide a clear description of the area for which the Transport Register (TR) is prepared, the identity of the relevant planning authority and the period over which the data has been collected. It must also indicate the dates and extent of any updating of the data. In the case of a district municipality, it must state whether such municipality or a named local municipality or municipalities have prepared the TR.

#### **2. Process**

A brief description of the process followed in developing the TR must be given, including—

- the various surveys and interviews conducted to assemble the primary data;
- liaison with other persons and bodies, such as the Provincial Regulatory Entity (PRE) and public transport operators and associations;
- a description of information obtained from the PRE, the Operating Licence Administration System (OLAS), municipal pavement management systems (PMS), the national census, and other databases and bodies; and
- procedures followed to check it for reliability and accuracy.

The information obtained, including the surveys, must be dated clearly.

#### **3. The record**

##### **3.1 *Demographic information***

Provide demographic and socio-economic information for the area: population and the profile of the population by income, age, education and car ownership, and trends and changes.

##### **3.2 *General overview of transportation system***

This section must provide a general overview of the transportation system. It must indicate modal split between private, public transport (by mode) and non-motorised transport modes for work, education and other trips

made during a typical weekday morning peak period. It must reflect levels of dissatisfaction with the different aspects of the transport system and different modes of transport in the area, including with travel times, costs, availability and accessibility, safety and the reliability of public transport services. It must reflect average travel time to work and education, travel time for public transport trips to work, walking times to public transport by mode, and percentage of households spending more than 10% of their income on public transport. It must reflect road safety statistics for the area. Much of the data will need to be obtained via household travel surveys.

Schedule 1 municipalities should undertake a household travel survey of a representative sample of a minimum of one percent of households in the ITP area at least every ten years, and their TRs should reflect the origins and destinations by strategic traffic zone of morning peak period trips by travel mode and by trip purpose.

For all information, changes compared to the previous TR findings should be reflected and trends analysed.

### ***3.3 Description of the regular, daily public transport system***

#### **3.3.1 Introduction**

Information about the supply and utilisation of all public transport in the ITP area should be described. This should be captured in tables (spreadsheets or databases), in both detailed and summarised formats, and the spatial information, such as public transport facilities and routes, should be captured in a Geographic Information System (GIS) so that all data may be geo-referenced, and cross-referenced with other municipal GIS data.

#### **3.3.2 Commuter rail information**

##### ***3.3.2.1 Rail Infrastructure***

The passenger rail infrastructure in the area should be described and mapped, indicating the location of all railway stations, the number and location of different lines and the length of each, and the line capacities (peak hour and peak period).

The rolling stock in use per line should also be described (number of coaches per type, size and age).

### 3.3.2.2 Rail services and their utilisation

The different passenger rail services (routes) must be described and mapped per each line, including the length of the route, train frequencies (peak hour, peak period and off-peak), the passenger capacity per train, the resulting service capacity per line (peak hour and period), and the number of passengers carried on each line (peak hour and period). The line capacity utilisation and the service capacity utilisation per line should be calculated and tabulated.

PRASA should provide the planning authority with information on commuter rail corridors, line capacities, service capacities and capacity utilisation in accordance with their latest rail census.

### 3.3.3 Road-based public transport information

#### 3.3.3.1 Bus Rapid Transit, Bus and Minibus-taxi infrastructure and route information

##### Bus Rapid Transit, bus and minibus-taxi infrastructure:

List all facilities (all ranks, terminals, modal interchanges, stations, holding areas, informal taxi ranks, and holding areas and major boarding points in rural areas) with details as shown in Table 1. Additional details should be provided and the table modified accordingly where relevant.

**TABLE 1: Listing of road-based public transport facilities**

No.	Facility Name	Code	Physical Location (Description)	Mode*	Type of Service*	Holding/ Loading/ Combined ***	Formal or informal (F/I)	On-street/ off-street	No. of bays (formal only)
1.									
2.									
3.									
4.									
N									

\* As regard modes, distinguish between BRT, minibus-taxi, and bus services

\*\* As regards type of service, distinguish between commuter, long-distance, interprovincial and cross-border services

\*\*\* Indicate if facility is for loading of passengers, vehicle holding, or both combined

**BRT, bus and minibus-taxi route descriptions**

A detailed description must be provided of each route on which public transport services are operated, including a description of the route starting point and destination and all the street names along the route, as well as all points where passengers are picked up and set down. The description must be in sufficient detail that it can be captured on a GIS system, and also used in operating licences and on the OLAS. The following example is provided:

Wynberg to Grosvenor Crossing Mall: From Pan Africa Taxi Rank (on Watt Ave, Wynberg between 3rd and 2nd Str), L-Watt Ave, L – Pretoria Main Road, R – Andries Street South, L – Grayston Drive, R- Rivonia Rd, L – Summit Rd ... Bryanston Drive, L- Main Rd, R-Grosvenor Crossing Mall (cnr Grosvenor, William Nicol Dr and Main Rd)

Where no street names are known, use must be made of township zone names or numbers and land marks, such as schools, churches, magistrates' offices, filling stations, sports and recreational centres, places of interest or even house numbers. Route descriptions are not required for metered taxi or any other area or radius based services, but where there are permits for services in the area that are radius and area based and have not yet been converted to route-specific operating licences as required by the Act, the routes and/or networks actually being operated must be identified and taken into account.

Routes and networks used for services operating without operating licences or permits (i.e. illegally) must also be included.

The following tables must be completed:

**TABLE 2: Route Descriptions (all day)\***

No.	Mode*	Route Code	Origin	Destination	Route Description
1.					
2.					
3.					
4.					
N					

\* These should be the same as the route descriptions to be contained or already contained in operating licences, and the descriptions in the OLAS should mirror these descriptions.

\*\* Mode refers to BRT service, minibus-taxi type service, or bus service and should include information on regular daily ("commuter", scholar etc.), long distance, interprovincial and cross-border services.

In addition, the information shown in Table 3 should be collected and provided for each route.

**TABLE3: Routes as identified by facility**

No.	Mode*	Origin Rank/Terminus		Destination Rank/Terminus		Route Code	Route Distance (km)	Trip Time (One way)**	Turnaround Time (Cycle Time)***
		Name	Code	Name	Code				

\* As regards mode, distinguish between BRT, minibus-taxi, or bus

\*\* Trip time in minutes, one direction only

\*\*\* Including the time at the origin facility, trip time outbound, time at the destination facility and trip time of the return trip.

### Fares

The TR should provide information about the fare system applied by each operator. The fare structure, levels, and fare collection system as well as discount types or concessionary fares should be described. Information about the fares charged per route should be obtained from the operators or from taxi association personnel or during taxi rank surveys, and tabulated as shown in Table 4:

**TABLE 4: Fares per route**

No.	Route code	Mode	Operator (taxi association or bus company name)	Route origin	Route destination	Route distance	Single trip fare	Weekly fare per trip	Date

If fares are distance-based rather than per route, Table 4 should be adjusted accordingly to reflect distance ranges rather than route code, origin and destination.

### **3.3.3.2 Service capacity and capacity utilisation of road-based modes in the peak period**

#### **Route-based data collection and surveys**

The service capacity of each road-based route (BRT, bus (commuter), minibus-taxi (commuter), minibus-taxi (long distance if applicable) should be established through obtaining the following information:

Road-based public transport per route:

- fleet size (number of minibus taxis and number of buses by type)
- minibus taxi and bus frequencies (peak period)
- service capacity by mode between origin and destination on each route

Frequencies (number of trips) on each route and the service capacity (the number of seats and standing spaces available in the total number of vehicles provided) must be documented from timetables (in the case of scheduled services) or surveys (unscheduled services). Each road-based public transport route must be surveyed for the duration of the three-hour peak period, at the point or section (e.g. rank starting point in case of minibus-taxis usually, or at a point along the route in the case of buses) of maximum utilisation, to establish utilisation information per route. The data shown in Table 5 should be collected in the surveys, and captured in spreadsheets or a database, preferably geo-referenced to a GIS database. It should be summarised for the TR as per Table 6.

**TABLE5: Road-based vehicle supply and utilisation in peak period per route**

Facility name*	Facility code*	Route origin	Route destination	Route code	Operator (taxi association or company)	Vehicle reg. no	Vehicle capacity (seats)	No. of passengers on departure	Time of departure	Date


\*Or describe location of the survey point if not at a facility

**TABLE6: Summary of total public transport capacity and maximum utilisation per route in three-hour peak period (road-based)**

N o.	Ro ute Co de	Surv ey Loca tion*	Mo de	No. of vehi cle trips	Avera ge vehicl e capac ity	Service capacity	No. of pass	% utilisa tion **	Time of survey (AM or PM)

#### Area-based Cordon Surveys

- The purpose of this survey is to ensure that all public transport trips are surveyed, in particular those that do not originate from identified public transport ranks. They can provide control totals for vehicles originating in a total area. They can supplement the route-based surveys, but cannot replace them as they will not detect the route any particular vehicle is on when it passes through the survey point.
- Survey points must be carefully selected in order to capture all trips starting from the selected area.
- The registration and occupancy of vehicles must be surveyed along major access roads serving the origin side of the trip(s).
- All vehicles departing from the trip origin must be observed.
- The following table must be completed.

**TABLE 7: Cordon Survey**

N o.	Tim e*	Vehicle registr ation no.	Type of vehicle			Vehicle Capaci ty	Estimated no. of passengers
			Articul ated bus	Standard bus	Mini bus		




\* *Time of observation at 15 minute intervals*

### **3.3.4 Additional Surveys**

The planning authority may collect additional information as it requires. For example, while surveying vehicle departures on routes it may be economical to conduct passenger interviews per route at the same time about waiting times or problems with the particular route. Waiting time surveys may be conducted during taxi rank surveys as an optional extra to supplement information about under- or over-supply on routes. Information about the condition of facilities, and the amenities available at each, may also be collected during passenger surveys if desired, and included in a facilities database. Weekend and off-peak data may also be collected if required.

### **3.4 Other public transport services**

Description of other public transport services and modes of transport: Provide a summary of the location and size of operations where available and infrastructure provision for:

- Metered taxis
- Long-distance and cross-border services (excluding services described under Section 3.3 above)
- Transport for learners (excluding services described under Section 3.3 above)
- Non-motorised transport
- Two- and three-wheeler public transport vehicles

### **3.5 Public transport companies and associations**

Description of the organisational set-up of the public transport industry: The register should include details of companies and associations making up the BRT, bus, minibuss-taxi, metered taxi and any other industries in terms of:

- Name of company / associations
- Fleet composition and sizes and fleet age under its control
- Areas or corridors in which services are rendered

### **3.6 Roads and traffic**

Roads and traffic information should be obtained from the Pavement Management System (PMS) and traffic counting programme of the planning authority and transportation models where they exist. The following should be recorded:

- Details of the major road network in relation to ownership (road authority), and length of road by functional class of road.
- Condition of major roads in the municipal network (very poor, poor, fair, good or very good condition). Changes in road condition over time.
- Level of congestion of the major road system, stating length of road operating at or over capacity in the peak hour. Also changes in the levels of congestion over time.

### ***3.7 Freight transport***

The main freight traffic routes in the municipality and any problems caused by or inhibiting freight movement should be described. Include routes identified for travel by vehicles transporting abnormal loads and dangerous goods. Describe measures in place to deal with overloading.

### ***3.8 Financial information***

Describe sources of transport system income and expenditure by the municipality. Annual expenditure by state owned entities in the ITP area on infrastructure and operational subsidies (SANRAL, PRASA, Province) should be described.