

APPENDIX G1 – SOCIO-ECONOMIC ASSESSMENT

Pre-Application Draft Basic Assessment Report

**Basic Assessment for Mixed-Use Development on Project
Parcels O, P, A1, And A2 on Erven 158570 RE, 149294 RE,
177854 and 179076, Breakwater Precinct, V&A Waterfront,
Cape Town by the V&A Waterfront**

2026

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**BASIC ASSESSMENT FOR MIXED-USE DEVELOPMENT ON
PROJECT PARCELS O, P, A1 AND A2 ON ERVEN 158570 RE, 149294
RE, 177854 AND 179076 BREAKWATER PRECINCT,
V&A WATERFRONT, CAPE TOWN**

SOCIO-ECONOMIC ASSESSMENT



**Final Report
August 2026**



Cover photo: A view over the Breakwater precinct of the V&A Waterfront

REPORT DETAILS

DEA&DP EA Application Ref No: 16/3/3/6/7/1/A7/4/3064/26

Project Title: Basic Assessment for Mixed-Use Development on Project Parcels O, P, A1, and A2 on Erven 158570 RE, 149294 RE, 177854, and 179076, Breakwater Precinct, V&A Waterfront, Cape Town.

Physical Location: Erven 158570 RE, 149294 RE, 177854, and 179076, Breakwater Precinct, V&A Waterfront, Cape Town.

Report Status: Socio-Economic Assessment Report

S&EIA Process Status: Pre-Application Phase

Report Date: 19 August 2026

Report prepared for/ Client: V&A Waterfront Holdings (Pty) Ltd—PO Box 50001, Waterfront, Cape Town, 8002

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EXECUTIVE SUMMARY

Introduction

Anchor Environmental Consultants (Pty) Ltd was appointed by the V&A Waterfront to undertake a Socio-Economic Assessment as part of the Environmental Authorisation Process for the proposed mixed-use development on Erven 158570 RE, 149294 RE, 177854, and 179076 within the Breakwater Precinct, Cape Town. The Department of Forestry, Fisheries and the Environment's (DFFE) Screening Tool identified socio-economic sensitivity for the site, which was confirmed through the Site Sensitivity Verification process, necessitating a discrete socio-economic specialist study.

The assessment provides a comprehensive review of the legislative and policy context, establishes the social and economic baseline for the study area and Cape Town, and evaluates the direct, indirect, induced, and cumulative impacts associated with the construction and operational phases of the development, including the No-Go Alternative. The study follows applicable EIA regulations and best-practice guidelines, applies a structured impact assessment methodology (including pre- and post-mitigation significance ratings), and prescribes mitigation and optimisation measures where appropriate. The analysis draws on demographic, spatial, and policy data, supplemented by project-specific information supplied by the Client.

Project overview

The proposed development forms part of the continued evolution of the 123 ha V&A Waterfront, a globally recognised urban regeneration precinct that has transformed a historically underutilised section of the Port of Cape Town into a premier mixed-use destination. The project entails the redevelopment of a ±1.2 ha site within the Breakwater Precinct, currently used for overflow parking and container storage, into a high-quality mixed-use node comprising hotel and/or residential components (Parcels O and P), a primarily cultural and specialist facility (Parcels a1 and a2), and the creation of a new public open space known as Atlantic Park. Together, the parcels will provide a gross building area of approximately 28,430 m², with building heights of up to 32 m, alongside a widened promenade and associated public realm upgrades designed to enhance accessibility, connectivity, and views of the ocean and Granger Bay.

The site occupies a strategically important location within Cape Town's metropolitan structure, benefiting from excellent regional connectivity via the N1 and N2, proximity to the Central Business District (CBD), access to Cape Town International Airport, MyCiTi Bus routes, and strong pedestrian linkages. Locally, the development is embedded within an established mixed-use environment comprising retail, hospitality, residential, marine tourism, and cultural facilities. Adjacent precincts such as Granger Bay, the Foreshore, Green Point, and Sea Point further reinforce the area's economic vitality and high-value urban character. The project will strengthen integration with surrounding land uses, extend promenade linkages along the coastline, and contribute to the Waterfront's ongoing role as a key tourism, commercial, and residential hub within the Cape Town metropolitan area.

Legislative and policy framework

The review of applicable national, provincial and local legislation confirms that the proposed mixed-use development is consistent with South Africa's constitutional environmental principles and the broader policy framework guiding sustainable development. At a national level, the

project aligns with the objectives of the Constitution, the National Development Plan 2030, NEMA and related environmental legislation by promoting responsible development, economic growth, job creation and environmental stewardship. The required Basic Assessment process ensures compliance with environmental management principles, while sector-specific legislation relating to air quality, waste management and coastal management provides an additional regulatory framework to safeguard socio-economic and environmental receptors.

At provincial and municipal levels, the development is well aligned with the Western Cape Spatial Development Framework, the Provincial Strategic Plan, and the City of Cape Town's Integrated Development Plan (IDP) and Spatial Development Framework (SDF), all of which promote compact urban form, economic intensification within established nodes, public space enhancement and inclusive growth. The project's location within the V&A Waterfront, a strategic, well-serviced urban precinct, supports spatial efficiency, public access to coastal resources and sustained economic activity. No policy or legislative conflicts have been identified from a socio-economic perspective, and the development is considered consistent with the applicable planning and governance framework.

Socio-economic context

Between 2011 and 2022, the City of Cape Town experienced substantial population growth, increasing from 3.74 million to approximately 4.77 million, with households rising from 1.07 million to 1.45 million. The city's population is predominantly working age (70.9%), with a modest increase in the elderly population and a slight decrease in the proportion of young children, resulting in a lower dependency ratio of 41%. Education and housing metrics improved over this period, with higher proportions of residents attaining tertiary education, living in formal dwellings, and having access to essential services such as electricity, piped water, and flush toilets. Unemployment in Cape Town remains lower than the national average but higher than the provincial average, reflecting urban labour market dynamics. At the local level, the Table Bay District having mirrored these trends, with steady population and household growth, smaller household sizes, and an educated workforce, highlighting the area's potential for economic activity and demand for mixed-use developments.

Economically, Cape Town contributes around 72% of the Western Cape's Gross Domestic Product (GDP), which grew from R410 billion in 2011 to R475 billion in 2022, demonstrating long-term expansion despite shocks such as drought and the COVID-19 pandemic. The city's economy is predominantly service-oriented, with finance, real estate, business services, trade, hospitality, and community services accounting for the largest share of Gross Value Added and employment, while manufacturing and primary sectors play smaller roles. Tourism is a critical component of Cape Town's economy, with the V&A Waterfront serving as a key attraction and driver of visitor spending, employment, and broader economic linkages. The proposed development within this precinct is strategically positioned to support Cape Town's economic and demographic trends by providing mixed-use residential, commercial, cultural, and public spaces, enhancing tourism, creating jobs, and leveraging the skilled local workforce to stimulate sustained economic growth and urban vitality.

Economic analysis

The proposed development is expected to generate significant economic benefits both during construction and throughout its operational life. During the construction phase, with a total capital expenditure of approximately R1.7 billion, the project is estimated to support total economic output of around R4.3 billion, including direct, indirect, and induced effects. This

activity is projected to contribute approximately R1.7 billion to GDP, create over 5,100 employment opportunities across skilled, semi-skilled, and low-skilled categories, and generate total household income of approximately R856 million. These impacts are temporary but provide a substantial short-term stimulus to the local and regional economy.

In the operational phase, ongoing activities are expected to sustain total annual economic output of approximately R311 million and contribute around R159 million per annum to GDP. The development will support roughly 369 jobs, generate R74 million in household income, and stimulate further economic activity through supply chains and household spending. By combining employment creation, income generation, and GDP contribution with induced effects from visitor spending, the development is expected to provide long-term, sustainable socio-economic benefits, reinforcing its role as an economic catalyst for the local and regional economy.

Impact assessment

Table I outlines the key identified positive and negative impacts that are likely to occur during the construction and operational phases of the proposed mixed-use development. Each of these impacts was assessed in detail. This analysis draws on the findings of the Draft Heritage Impact Assessment which includes the Townscape and Visual Impact Assessment prepared by Claire Abrahamse and the Archaeological Impact Assessment prepared by TerraMare (Postlethwayt 2026).

Table I: Identified impacts associated with the construction and operational phases of the mixed-use development.

Phase	Type of impact	Identified impact	Duration of impact
Construction phase	Positive	Increase in gross output and GDP	<u>Temporary</u> : impacts are temporary in nature, and are typically terminated when construction ends.
		Increase in employment	
		Increase in household income	
		Government revenue	
	Negative	Noise and dust pollution	
		Sense of place (visual)	
		Marine archaeological heritage resources	
Operational phase	Positive	Physical health and safety	<u>Sustained and compounding</u> : impacts are sustained into the future over the course of the operational period of the development.
		Increase in gross output and GDP	
		Increase in employment	
		Increase in household income	
		Government revenue	
		Skills development	
		Improved public open space and amenity value	
		Sense of place (visual)	
		Strengthened visitor economy	

The cumulative assessment indicates that the proposed mixed-use development will result in a combination of short-term negative and long-term positive impacts, with the overall cumulative effect considered positive. During the construction phase, temporary adverse impacts are anticipated, including noise and dust emissions, visual disturbance and localised health and

safety risks. These impacts are generally assessed as low in significance, short-term in duration, and largely reversible, particularly with the implementation of standard mitigation measures and compliance with applicable regulations.

In contrast, the operational phase is expected to generate sustained positive socio-economic impacts of moderate to high significance. These include ongoing contributions to gross output and GDP, long-term employment creation across skilled, semi-skilled, and entry-level positions, increased household income, and recurring government revenue at national and local levels. The development is also anticipated to stimulate the visitor economy through increased tourism potential and associated spending, reinforcing the economic vitality of the precinct. The inclusion of Atlantic Park and enhancements to the public realm will provide lasting amenity, open space, and visual benefits within a high-density urban environment, contributing positively to sense of place, social interaction, and overall urban quality.

When considered cumulatively alongside existing and planned developments within the precinct, the project is expected to integrate into an already established mixed-use and tourism-oriented node. While there may be minor incremental increases in activity levels, these are anticipated to remain within manageable limits given the existing infrastructure capacity and management systems. Overall, considering the temporary and mitigable nature of construction-related impacts and the sustained economic, social and amenity benefits during operation, the cumulative impact of the proposed development is assessed as positive and of medium to high significance in the long term. A summary of all the assessed potential construction phase and operational phase impacts is shown in Table II.

Table II: Summary of potential socio-economic impacts associated with the construction and operation of the proposed mixed-use development.

	Impact identified	Consequence	Probability	Significance	Status	Confidence
CONSTRUCTION PHASE	Impact on gross output and GDP	High	Probable	Medium-High	Positive	Medium-High
	Impact on employment	High	Probable	High	Positive	Medium-High
	Impact on household income	High	Probable	Medium-High	Positive	Medium-High
	Impact on government revenues	Medium	Probable	Medium	Positive	Medium-High
	Impact on maritime archaeological heritage resources	Very low	Definite	Very low	Negative	High
	Impact on sense of place (visual)	Very low	Probable	Very low	Negative	High
	Impact associated with noise and dust pollution	Low	Possible	Very low	Negative	High
	Impact associated with health and safety concerns	Very low	Probable	Very low	Negative	Medium-High
OPERATIONAL PHASE	Impact on gross output and GDP	High	Probable	High	Positive	Medium-High
	Impact on employment	High	Probable	High	Positive	Medium-High
	Impact on household income	High	Probable	High	Positive	Medium-High
	Impact on government revenues	High	Probable	High	Positive	Medium-High
	Impact on skills development	Medium	Probable	Medium	Positive	Medium-High
	Impact on public open space and amenity values	High	Probable	High	Positive	Medium-High
	Impact on sense of place (visual)	Very low	Probable	Very low	Positive	Medium-High
	Impact on visitor economy	High	Probable	High	Positive	Medium-High

Reasoned opinion and recommendations

From a socio-economic perspective, no fatal flaws have been identified in the assessed site area. The location is considered appropriate and well-suited to accommodate the type and scale of the proposed mixed-use development, particularly within the context of the established V&A Waterfront precinct. The site benefits from existing infrastructure, accessibility, and integration within a vibrant commercial and tourism node, which supports the feasibility and sustainability of the proposed land uses.

The assessment has identified a range of temporary, largely manageable negative impacts associated primarily with the construction phase, including noise, dust and short-term visual intrusion. These impacts are generally of low to moderate significance and can be effectively mitigated through the implementation of standard management and monitoring measures.

In contrast, the development is projected to generate sustained positive socio-economic benefits over the long term. These include contributions to gross output and GDP, permanent employment creation across a range of skill levels, increased household income, skills development opportunities, and recurring government revenue streams. The project is also expected to stimulate the visitor economy, strengthen the commercial viability of the precinct, and enhance public amenity through the inclusion of Atlantic Park and improved public realm connectivity.

While the 'No-Go' Alternative would avoid certain short-term negative impacts, it would also forfeit substantial and sustained socio-economic benefits, including job creation, income generation, fiscal contributions, and public realm improvements. On balance, the proposed development is expected to deliver a strongly positive socio-economic outcome, with benefits that are substantial and clearly outweigh any potential drawbacks.

It is recommended that the proposed development proceed, subject to the implementation of the identified mitigation measures. The optimisation measures are recommended best practice but are not mandatory. The development is considered socio-economically viable and aligned with broader regional economic development and urban regeneration objectives.

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GLOSSARY

Building bulk: The sum of the gross horizontal areas of all buildings, as measured from the interior face of exterior walls.

Cumulative impacts: Direct and indirect impacts that act together with current or future potential impacts of other activities or proposed activities in the area/region that affect the same resources and/or receptors.

Direct impact: The immediate economic effect generated by a project or activity, resulting from its own spending, investment, and employment.

Environmental Authorisation (EA): Permission granted by the competent authority for the applicant to undertake listed activities in terms of the NEMA EIA Regulations, 2014.

Environmental Impact Assessment (EIA): A process of evaluating the environmental and socio-economic consequences of a proposed course of action or project.

Fauna: General term for all the animals found in a particular location.

Flora: General term for all the plant life found in a particular location.

Government Gazette (GG): An official Government publication used to publish acts and bills, regulations and notices in terms of acts, changes of names, company registrations and de-registrations, financial statements, land restitution notices, liquor licence applications and transport permits.

Government Notice (GN): A Notice published in a Government Gazette.

Government Notice Regulation (GNR): Regulations published as a Government Notice in a Government Gazette.

Gross building area (GBA): the sum of all building/floor areas within all buildings, as measured from the outside of all exterior walls.

Gross Domestic Product (GDP): The total monetary value of all final goods and services produced within a defined geographic area (such as a country, province, or city) over a specific period, usually one year. GDP is commonly used as an indicator of the size, performance, and overall health of an economy.

Gross Value Added (GVA): The measure of the value of goods and services produced within a specific sector, industry, or geographic area, calculated as the value of output minus the value of intermediate inputs used in production. GVA indicates the contribution of a particular sector or activity to the overall economy and is a key component used to calculate Gross Domestic Product (GDP).

Indirect impact: The secondary economic effects that arise when businesses directly involved in a project purchase goods and services from suppliers within the wider economy.

Induced impact: The additional economic effects generated when employees who benefit directly or indirectly from a project spend their wages and incomes within the broader economy.

Impact: A change to the existing environment, either adverse or beneficial, that is directly or indirectly due to the development of the project and its associated activities.

Mitigation measures: Design or management measures that are intended to minimise or enhance an impact, depending on the desired effect. These measures are ideally incorporated into a design at an early stage.

Operational phase: The stage of the works following the Construction Phase, during which the development will function or be used as anticipated in the Environmental Authorisation.

Specialist study: A study into a particular aspect of the environment, undertaken by an expert in that discipline.

Total Economic Impact: The overall effect of a project, activity, or investment on the economy, including direct, indirect, and induced impacts.

ABBREVIATIONS AND ACRONYMS

Anchor	Anchor Environmental Consultants
BA	Basic Assessment
CA	Competent Authority
CAPEX	Capital Expenditure
CBD	Central Business District
CCID	Central City Improvement District
CCT	City of Cape Town
CPP	Coastal Public Property
CTICC	Cape Town International Convention Centre
DFFE	Department of Forestry, Fisheries and the Environment (formerly DEFF, DAFF and DEA)
DEA&DP	Department of Environmental Affairs and Development Planning
DEIR	Draft Environmental Impact Report
DMS	Development Management Scheme
DSDf	District Spatial Development Framework
DWAF	Department of Water Affairs and Forestry (former name, now DWS)
DWS	Department of Water and Sanitation (formerly DWAF)
EA	Environmental Authorisation
EAP	Environmental Assessment Practitioner
ECA	Environmental Conservation Act (Act 73 of 1989)
ECO	Environmental Control Officer
EGL	Existing Ground Level
EIA	Environmental Impact Assessment
EIR	Environmental Impact Report
EMF	Environmental Management Framework
EMPr	Environmental Management Programme Report
FEIR	Final Environmental Impact Report
GBA	Gross Building Area
GDP	Gross Domestic Product
GG	Government Gazette
GGP	Gross Geographic Product
GIS	Geographic Information System
GN	Government Notice
GNR	Government Notice Regulation
GVA	Gross Value Added
ha	Hectares
I&APs	Interested and Affected Parties
ICMA	Integrated Coastal Management Act, 2008 (Act No. 24 of 2008)
IDP	Integrated Development Plan
LN	Listing Notice
MOCAA	Museum of Contemporary Art Africa
MSDF	Municipal Spatial Development Framework
NDP	National Development Plan
NEMA	National Environmental Management Act (Act 107 of 1998)
NEM:AQA	The National Environmental Management: Air Quality Act (Act 39 of 2004)

NEM: WA	The National Environmental Management: Waste Act (Act 59 of 2008)
NWA	National Water Act (Act 36 of 1998)
OPEX	Operational Expenditure
PSDF	Provincial Spatial Development Framework
SDF	Spatial Development Framework
SE	Stakeholder Engagement
SPLUMA	Spatial Planning and Land Use Management Act (Act 16 of 2013)
SSV	Site Sensitivity Verification
SSVR	Site Sensitivity Verification Report
STR	Screening Tool Report
TMNP	Table Mountain National Park
USA	United States of America
WCSDf	Western Cape Spatial Development Framework
V&A	Victoria & Alfred (Waterfront)

GAZETTED REPORT REQUIREMENTS

Specialist studies completed to substantiate an Environmental Assessment (EIA) process must comply with the National Environmental Management Act (NEMA, Act 107 of 1998), and its associated regulations, under which are published protocols for conducting varying forms of studies (GN R982 of 2014). However, as Socio-Economic Studies/ Statements lack a specific gazetted protocol, they must instead follow the protocols prescribed within Appendix 6 of the EIA Regulations. This study has therefore been conducted in accordance with these prescribed protocols, with the details of this compliance being indicated in the table below.

This study has also been conducted in accordance with the “Guideline for Involving Economists in EIA Processes”, published by the Western Cape Government: Department of Environmental Affairs and Development Planning (DEA&DP, 2025).

Gazetted Specialist Report Contents, as per Appendix 6 of the EIA Regulations (GN R982 of 2014).

Required Element	Included (Y/N)	Section Numbers/ Motivation
(1) A specialist report prepared in terms of these Regulations must contain-		
• A) details of-		
○ (i) the specialist who prepared the report; and	Y	1.1
○ (ii) the expertise of that specialist to compile a specialist report including a curriculum vitae;	Y	1.2
• (b) a declaration that the specialist is independent in a form as may be specified by the competent authority;	Y	2.2
• (c) an indication of the scope of, and the purpose for which, the report was prepared;	Y	3
• (cA) an indication of the quality and age of base data used for the specialist report;	Y	6
• (cB) a description of existing impacts on the site, cumulative impacts of the proposed development and levels of acceptable change;	Y	6, 7, and 8
• (d) the duration, date and season of the site investigation and the relevance of the season to the outcome of the assessment;	Y	6.1 and 6.2
• (e) a description of the methodology adopted in preparing the report or carrying out the specialised process inclusive of equipment and modelling used;	Y	Appendix A
• (f) details of an assessment of the specific identified sensitivity of the site related to the proposed activity or activities and its associated structures and infrastructure, inclusive of a site plan identifying site alternatives;	Y	6, 7, and 8
• (g) an identification of any areas to be avoided, including buffers;	N/A	No specific areas to be avoided/ buffers identified
• (h) a map superimposing the activity including the associated structures and infrastructure on the environmental sensitivities of the site including areas to be avoided, including buffers;	Y	4.1
• (i) a description of any assumptions made and any uncertainties or gaps in knowledge;	Y	3.6

Required Element	Included (Y/N)	Section Numbers/ Motivation
(j) a description of the findings and potential implications of such findings on the impact of the proposed activity or activities;	Y	8 and 9
(k) any mitigation measures for inclusion in the EMPr;	Y	8
(l) any conditions for inclusion in the environmental authorisation;	Y	8 and 9
(m) any monitoring requirements for inclusion in the EMPr or environmental authorisation;	Y	8
(n) a reasoned opinion- (i) whether the proposed activity, activities or portions thereof should be authorised; and	Y	9
(iA) regarding the acceptability of the proposed activity or activities; and	Y	9
(ii) if the opinion is that the proposed activity, activities or portions thereof should be authorised, any avoidance, management and mitigation measures that should be included in the EMPr, and the closure plan in the case of a closure activity;	Y	8 and 9
(o) a description of any consultation process that was undertaken during the course of preparing the specialist report;	N/A	No specific consultation required.
(p) a summary and copies of any comments received during any consultation process and where applicable all responses thereto; and	N/A	No specific consultation required.
(q) any other information requested by the competent authority.	N/A	
(2) Where a government notice gazetted by the Minister provides for any protocol or minimum information requirement to be applied to a specialist report, the requirements as indicated in such notice will apply.	Y	Noise Protocols (GN R320 of 2020) must be followed.

1 DETAILS AND EXPERTISE OF SPECIALIST CONSULTANTS

1.1 DETAILS OF THE SPECIALIST CONSULTANTS WHO PREPARED THIS SPECIALIST ASSESSMENT

Name	Role/expertise	Key Qualifications and Registrations	Years of experience
Gwyneth Letley	Lead Socio-Economic Specialist	MSc Conservation Biology PC Applied Environmental Economics BSc (Hons) Zoology	16
Steve September	Candidate Environmental Assessment Practitioner (EAP) 2023/7868	MCom Public and Development Management BCom (Hons) Public and Development Management	4
Michael Armitage	Candidate EAP 2024/7978	MSc Environmental and Geographical Science (EGS) BSc (Hons) EGS	8

1.2 EXPERTISE OF SPECIALIST CONSULTANTS

1.2.1 GWYNETH LETLEY: LEAD SOCIO-ECONOMIC SPECIALIST

Gwyneth Letley has an MSc in Conservation Biology from the University of Cape Town and a postgraduate certificate in Applied Environmental Economics from the University of London. She is an environmental economist and socio-economic specialist with over 12 years of professional experience in environmental consulting, with a strong focus on the social and economic dimensions of natural resource management, conservation, and large-scale development projects. She has extensive experience in delivering socio-economic assessments as part of Environmental Impact Assessments, particularly in contexts where development intersects with tourism, coastal and marine resources, and high-value urban environments. Gwyneth has led and contributed to tourism-focused socio-economic impact assessments for major infrastructure projects, including the proposed Sasol Offshore Pipeline and Floating Storage and Offloading (FSO) facility in Mozambique, the Batoka Gorge Hydropower Project on the Zambezi River, and the Kalungwishi River Hydropower Project in northern Zambia, where her work assessed the economic value of tourism and potential impacts on local and regional economies. In South Africa, she has undertaken the Economic Assessment of Recreational Sailing in Cape Town, supporting the investment case for the proposed Granger Bay Marina, a study directly relevant to waterfront development, recreational use, and marine-based economic activity. Her work spans South Africa, Namibia, Botswana, Zambia, Zimbabwe, Mozambique, Angola, Kenya, and Sierra Leone, and includes quantitative analysis of socio-economic impacts, ecosystem service valuation, and the assessment of trade-offs between development, livelihoods, and environmental sustainability. Gwyneth has expertise in translating technical findings into clear, policy- and decision-relevant inputs for regulators, developers, and stakeholders.

1.2.2 STEVE SEPTEMBER: CANDIDATE EAP

Steve has a MCom and BCom. Hons. degrees in Public and Development Management and a BA Development and Environmental Studies degree from the University of Stellenbosch. He is a Consultant for Environmental Management at Anchor Environmental and a professionally registered Candidate Environmental Assessment Practitioner (EAPASA: 2023/7868). He is an environmental manager with spatial planning, public administration, public management and public participation experience on local government level within the Western Cape of South Africa. Furthermore, he has a geographic information systems background in the local government sphere, as well as required for the National Environmental Management Act (NEMA). As an Environmental Consultant, his responsibilities include the conducting of environmental impact assessments, water use license applications, heritage applications, and specialist reports.

1.2.3 MICHAEL ARMITAGE: CANDIDATE EAP

Michael holds an MSc degree in Environmental and Geographical Science, BSc. Hons degree in Environmental and Geographical Sciences, and a BSc in Environmental and Geographical Science and Archaeology from the University of Cape Town. His MSc research involved field research and comparative analysis on heavy metal contamination in the Knysna Estuary in South Africa and the Yangtze Estuary in China. His key focus areas are the integrated management of the environment, estuaries and water resources, with strong interests in pollution issues and archaeology. He is invested in pursuing integrated, “nature-based” solutions to problems traditionally solved with grey infrastructure design choices. Michael thrives on unpacking the complexities of dynamic systems and using this knowledge to optimise integrated management strategies. Prior to working at Anchor, he analysed water quality data from the Breede River on behalf the Breede-Gouritz Catchment Management Agency and the South African National Biodiversity Agency (SANBI). Within Anchor Environmental Consultants, his primary responsibilities include Estuarine Specialist Studies, Management Plans, and work on Environmental Impact Assessments (EIAs) in marine, coastal, estuarine, and terrestrial environments. Michael is registered with the Environmental Assessment Practitioners Association of South Africa (EAPASA) as a Candidate Environmental Assessment Practitioner (EAP), Registration no. 2024/7978, and is a full member of the International Association for Impact Assessments South Africa (IAIAsa), Registration no. 7619.

Full professional CVs have been appended to this report, as Appendix B.

2 DECLARATION BY CONSULTANTS

2.1 BUSINESS DECLARATION OF INDEPENDENCE

Anchor Environmental Consultants (Pty) Ltd is an independent consultant and has no business, financial, personal or other interest in the activity, application or appeal in respect of which the company was appointed other than fair remuneration for work performed in connection with the activity, application or appeal. No circumstances arose during the course of the project that compromised the objectivity of the specialists that performed the work.

2.2 CONSULTANT DECLARATION

We, Gwyneth Letley, Steve September, and Michael Armitage declare that we:

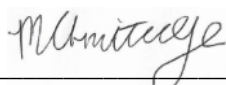
- i. Act as the independent specialists in this application;
- ii. Have performed the work relating to the application in an objective manner, even if this results in views and findings that are not favourable to the applicant;
- iii. Declare that there are no circumstances that may compromise our objectivity in performing such work;
- iv. Have expertise in conducting the specialist report relevant to this application, including knowledge of the Act, Regulations and any guidelines that have relevance to the proposed activity;
- v. Will comply with the Act, Regulations and all other applicable legislation;
- vi. Have not, and will not engage in, conflicting interests in the undertaking of the activity;
- vii. Undertake to disclose to the applicant and the competent authority all material information in our possession that reasonably has or may have the potential of influencing any decision to be taken with respect to the application by the competent authority and the objectivity of any report, plan or document to be prepared by ourselves for submission to the competent authority;
- viii. The particulars furnished in this form are true and correct; and
- ix. Realise that a false declaration is an offence in terms of regulation 48 and is punishable in terms of section 24F of the NEMA.



Signed: Gwyneth Letley; Date: 12 February 2026



Steve September; Date: 12 February 2026



Michael Armitage; Date: 12 February 2026

3 INTRODUCTION

3.1 PREAMBLE

The Victoria & Alfred (V&A) Waterfront has appointed Anchor Environmental Consultants (Pty) Ltd. (Anchor) to conduct the Environmental Impact Assessment (EIA) process required for the construction and operation of the proposed mixed-use development on Erven 158570 RE, 149294 RE, 177854, and 179076, Breakwater Precinct, V&A Waterfront, Cape Town. The formally gazetted Department of Forestry, Fisheries and the Environment's (DFFE's) Screening Tool Report (STR) identified the site to have Socio-Economic sensitivity. The Site Sensitivity Verification (SSV) processes conducted by the Environmental Assessment Practitioner (EAP), was in alignment with the STR, with respect to the Socio-Economic Theme. Consequently, a discrete report, considering both the potential impacts and benefits associated with the development was prescribed.

This report is the "Draft Socio-Economic Assessment for the Proposed Mixed-Use Development on Project Parcels O, P, A1, and A2 on Erven 158570 RE, 149294 RE, 177854 and 179076, Breakwater Precinct, V&A Waterfront".

3.2 SCOPE OF WORK

The purpose of this study is to provide a comprehensive background on the socio-economic context within which the proposed development will occur and thereafter to identify and assess the significance of any potential socio-economic impacts arising from the proposed development. Consequently, the individual tasks contained within this report are as follows:

- To detail the legislative context within which socio-economic economic studies fall under with specific reference to Cape Town, and the V&A Waterfront; and to detail the alignment of the proposed development with relevant legislation and policy.
- To detail the social, demographic, and economic baseline context of the study area, as well as that of Cape Town more generally.
- To identify any potential socio-economic impacts (direct, indirect and induced) arising from the proposed development and associated with the project's construction and operational phases which includes assessment of the "No-Go" (do nothing) alternative.
- To prescribe mitigation measures to minimise any potential negative impacts arising from the proposed development (in accordance with the mitigation hierarchy).
- To recommend enhancement measures to increase the significance of potential socio-economic benefits arising from the proposed development.
- To provide an impartial conclusion and reasoned opinion of the proposed development from a socio-economic perspective, and to give a specialist recommendation as to whether the development should be approved (including all necessary supporting motivations).

3.3 METHODOLOGY

The following methodology has been formulated to comply with Appendix 6 of the EIA regulations (the primary gazetted requirement), the DEA&DP Guideline for Involving Economists in EIA Processes (2014), as well as general best practice. The key methods are as follows:

1. All relevant information was requested from the Client and Environmental Assessment Practitioner (EAP), pertaining to the proposed development, including the project description, relevant economic data, as well as information on the relevant social context, service provision, etc.
2. The EAP was consulted as to the conditions present on the site (from their site visit). This was also confirmed through the provision of photographs from the EAP and Client and was substantiated through the analysis of satellite imagery.
3. The legislative and policy framework applicable to this study was formulated: including a motivation for the relevance of each item. Where relevant, a motivation for the alignment of the proposed development with cited legislation or policy was also provided.
4. A comprehensive baseline description of the socio-economic context of the study area (and Cape Town in general) has been provided, which considered information from various sources, principally from the 2012 and 2022 National Census, the Western Cape Spatial Development Framework (SDF, 2014), and the City of Cape Town's IDP (2022-2027) and SDF (2023).
5. An assessment of all potential impacts and benefits has been conducted, with mitigation measures (for negative impacts) prescribed, and recommended enhancement measures (for positive benefits) provided.

The assessment process was divided into two main components/individual assessments, with the first being to assess the significance of each impact on the assumption that mitigation/enhancement measures will not be applied (the "Worst Case Scenario"). The second assessment assumes that mitigation/enhancement measures will be applied. This post-mitigation significance rating is the primary metric ultimately informing the conclusions and recommendations of the study.

This assessment includes direct, indirect, and cumulative impacts, as well as an assessment of the do nothing "No-Go Alternative" and has been conducted in accordance with Anchor's detailed impact assessment methodology (appended to this report as Appendix A).

6. An impartial conclusion and reasoned opinion of the proposed development from a socio-economic perspective, has been provided. This includes a specialist recommendation as to whether the development should be approved and includes all necessary supporting motivations.

3.4 DATA

This report draws on information from online sources, relevant spatial datasets, applicable guidelines and policy documents issued by various government authorities, and demographic data primarily derived from the 2011 and 2022 National Census. Data provided by the Client and the EAP were used to inform the project-specific context, including forecasts of key financial indicators, employment levels, and other relevant metrics across all phases of the proposed development.

The data available for this assessment are of high quality, with recent information available for many key metrics. Where current data were not available, the most recent information was used, recognising that this introduces an unavoidable level of uncertainty.

3.5 IDENTIFICATION OF NO-GO AREAS.

This assessment has not identified any areas which must be avoided from a socio-economic perspective.

3.6 ASSUMPTIONS AND LIMITATIONS

- It is assumed that all information provided by the EAP and Client is correct, and that this assessment may be invalidated should significantly contradictory information arise following the assessment's completion.
- The baseline information used to formulate the social and demographic context for this project may be imperfect, out of date, or lack the resolution required to address specific concerns pertaining to this development. Consequently, this has been used to contextually frame this development within the broader socio-economic context of the area (and Cape Town in general) but should not be assumed to perfectly represent the conditions on the ground.
- This assessment only considers information that was available (or was made available) at the time of the conclusion of the assessment. Should additional information subsequently be made available, and a revision of the report be required, such a revision falls outside of the scope of work of this study. Anchor cannot be held liable for inaccuracies in this assessment that are based on information made available after the report's completion.
- There is inevitably a degree of subjectivity and limitation in impact assessment and data interpretation. While this assessment is informed by extensive project experience and a high level of confidence in both the available information and its integration, some uncertainty remains in the resulting findings and the recommendations derived from them.

3.7 PERMITTING REQUIREMENTS

This study has identified no additional permits that are required from a socio-economic perspective.

3.8 STRUCTURE OF THE REPORT

The remainder of report is structured as follows:

- **Chapter 4: Project Overview** provides a description of the development concept and a detailed situational analysis.
- **Chapter 5: Legislative and policy framework** provides a legislative and policy review of the proposed mixed-use development and its alignment with national, provincial, and local frameworks.
- **Chapter 6: Socio-economic context** provides a description of the socioeconomic characteristics (population, households, income etc.) as context for the study.
- **Chapter 7: Economic analysis** describes and assesses the potential economic impacts associated with the proposed development, arising from both capital investment and ongoing operational expenditure.
- **Chapter 8: Specialist impact assessment** describes the assessment of the socio-economic impacts that are expected to ensue because of the proposed development and evaluates the no-go alternative.
- **Chapter 9: Reasoned opinion and recommendations** present a reasoned opinion on the proposed development, drawing together the findings of the assessment and setting out key recommendations for decision-making.

4 PROJECT OVERVIEW

4.1 DEVELOPMENT CONCEPT

The Victoria & Alfred (V&A) Waterfront in Cape Town is a 123 hectare (ha) unique urban regeneration project that, over the past thirty years, has transformed a historic and previously under-utilised section of the Port of Cape Town into the City's premier tourist, retail, entertainment, commercial, and residential destination. The V&A Waterfront is now proposing a mixed-use development within its Breakwater Precinct, on Erven 158570 RE, 149294 RE, 177854 and 179076 situated north of the Table Bay Hotel (see Figure 4.1). The site earmarked for redevelopment is approximately 1.2 ha in size and currently used as an overflow parking area and container storage site (Figure 4.1). The site is currently zoned as Mixed Use 3 (MU3) in terms of the City of Cape Town's Municipal Planning Bylaw (2025 as amended). This zoning allows for primary uses such as Business premises, industry, dwelling house, second dwelling, boarding house, flats, place of instruction, place of worship, institution, hospital, place of assembly, place of entertainment, hotel, conference facility, authority use, utility service, rooftop base telecommunication station, transport use, multiple parking garage, private road, open space, chancery, electric vehicle charging stations, micro wind turbine, structure mounted energy system and filming.

The project involves the redevelopment of the site into a mixed-use precinct with a total development footprint of approximately 12 711 m². It will comprise three primary development parcels, namely Parcels O, P and a1 and a2, as well as the expansion of the existing promenade and the creation of a new public open space, to be called Atlantic Park. The proposal also includes all associated infrastructure and structures located between these components. Information pertaining to each project component are detailed as follows:

- **Parcel O: Residential/Hotel.** Parcel O is intended for residential and/or hotel development (with around 100 rooms). The land parcel is situated in a prominent, sea and north-facing location, alongside the proposed Atlantic Park. The building's proximity to the promenade will allow for access to public amenities and Waterfront attractions.
- **Parcel P: Hotel.** Parcel P is planned as a hotel, with approximately 60–80 rooms. The site is located at the end of the existing seawater revetment and will be adjacent to Parcel A. The hotel will enjoy north aspect views over the Atlantic and is in walking proximity to a range of Waterfront facilities and services. It is intended that the ground floor of the hotel will accommodate a restaurant attraction or similar land use.
- **Parcels a1 and a2: Mixed Use (Primarily Cultural).** Parcels a1 and a2 are relatively small parcels which have been combined into one building and will likely accommodate a mixed-use of primarily cultural and specialist/educational facilities. The upper levels could include restaurant, hotel or residential facilities.
- **Atlantic Park: Open Space/Park.** Development of Atlantic Park is proposed at a key junction of the Promenade end, Breakwater Boulevard, Victoria Wharf Shopping Centre, and the pedestrian link between Table Bay Square and the proposed Atlantic Park. The open space, at the level of the promenade, offers views of the ocean and mountain to the

south, and of the broader Granger Bay area. This is an accessible space for the public to enjoy and complements the surrounding V&A buildings and open space areas in the precinct. As a public space, Atlantic Park, together with a widened (nine metres) Promenade, will provide for improved vistas of the water.

Together, the three parcels have an approximate gross building area (GBA) of 28,500 m² (Table 4.1), while a maximum bulk of ±19,800 m² is envisaged for the development. The maximum building height will be 32 m above existing ground level (EGL) for Parcel O. Project Parcel O and Parcel P will have a building footprint of ±1,750 m² and ±4,200m², respectively, both to be developed for mixed use purposes (hotel and/or residential and associated uses). Project Parcels a1 and a2 will be developed as a cultural and park area, which may include specialist and educational facilities and will have a building footprint of ±1,200 m².

Table 4.1 Land use and building information for the different land parcels/ blocks forming part of Phase GB01B.

Building block	Max height from ground level (m)	Building footprint (m ²)	Proposed land use	Gross building area (GBA, m ²)
Block P	+21 m	4,200	Mixed Use, Primarily Hotel/Residential	14,270
a1 and a2	+17 m	1,200	Mixed Use, Primarily Cultural	4,200
Block O	+32 m	1,750	Mixed Use, Primarily Hotel/Residential	10,000
Total/Max	+32 m	7,150		28,470

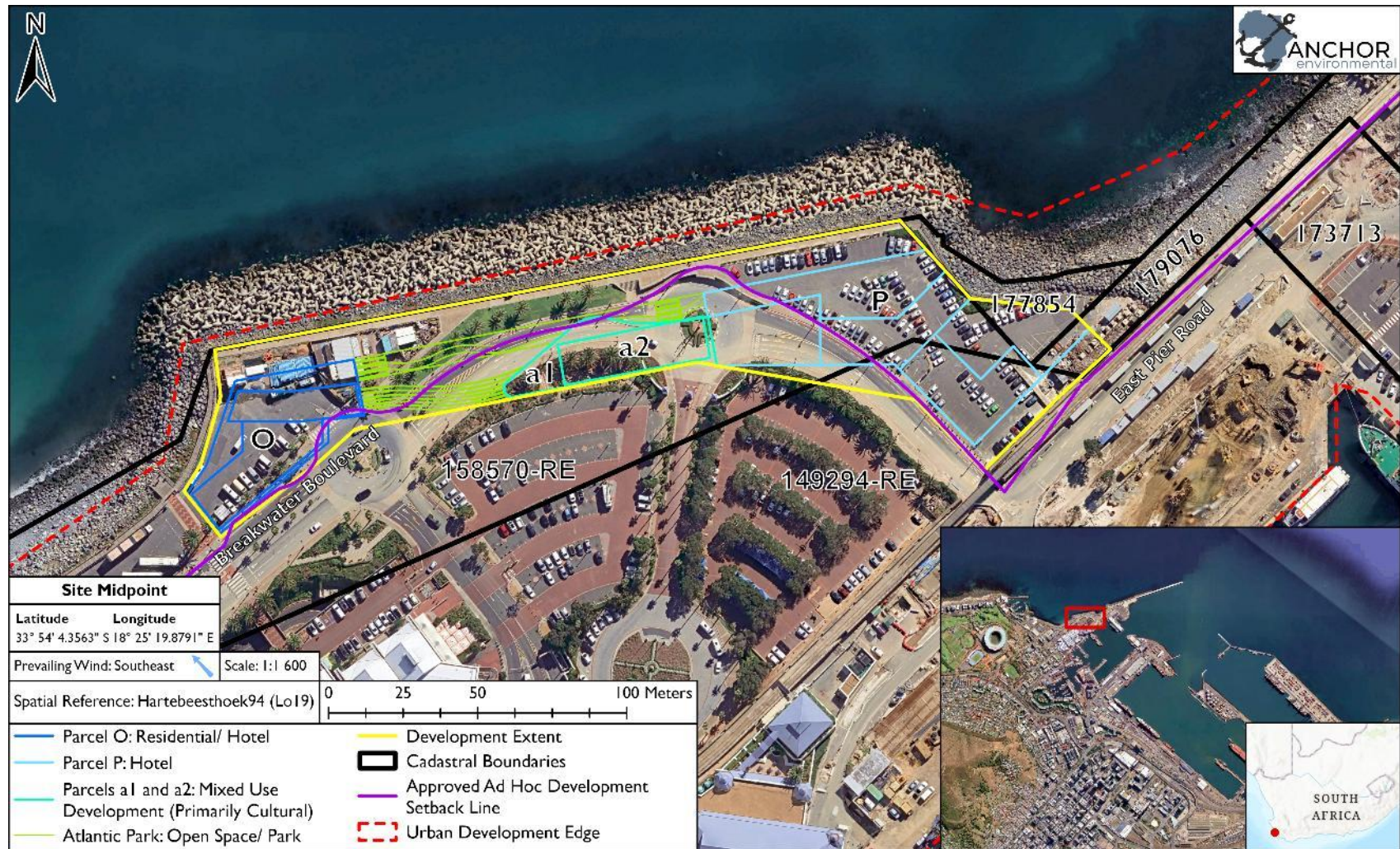


Figure 4.1. Location of the proposed mixed-use development on Erven 158570 RE, 149294 RE, 177854 and 179076 within the V&A Waterfront, Cape Town. The original layout and land use of the site are also visible, including existing infrastructure such as roads, parking areas, landscaped lawns with palm trees, and storage containers.

4.2 REGIONAL CONTEXT

The V&A Waterfront precinct occupies a highly strategic location within Cape Town's metropolitan structure, with strong regional connectivity that underpins its role as a major economic, tourism, and employment hub. The precinct is directly connected to the city's primary road network, including the N1 and N2 national routes via the Foreshore freeway system, providing efficient access to the broader Cape Town metropolitan area, the Cape Winelands, and regional destinations. Proximity to the Cape Town Central Business District further enhances accessibility, enabling seamless integration with commercial, financial, and government services. Cape Town International Airport, located approximately 20 km away, provides national and international connectivity, reinforcing the Waterfront's function as a gateway for both domestic and international visitors.

Public transport connectivity is also strong, with the precinct serviced by MyCiTi Bus routes linking the Waterfront to the Central Business District (CBD), Table View, and surrounding residential areas, as well as pedestrian and cycling connections that integrate it with the broader inner-city movement network. The Waterfront's harbour location further supports maritime connectivity, including cruise tourism and marine-based transport and recreation. Collectively, this high level of regional accessibility supports sustained visitor flows, facilitates labour mobility from across the metropolitan area, and enhances the precinct's attractiveness for investment, reinforcing its significance within the regional economy.

4.3 LOCAL CONTEXT AND SURROUNDING LAND USES

The V&A Waterfront is a large, integrated mixed-use destination integrated into the Cape Town harbour, accommodating more than 450 retail stores alongside a diverse range of restaurants, hotels, craft and art markets, leisure and entertainment facilities, conference venues, and premium office space. It plays a central role in the city's tourism economy and is formally identified as one of Cape Town's flagship attractions, together with Table Mountain, Kirstenbosch Botanical Gardens, Robben Island, Cape Point, and the Constantia Wine Route (City of Cape Town 2024b).

The proposed development site forms part of the land holdings of the V&A Waterfront Company and is situated in the Breakwater Precinct in the northwestern area of the V&A Waterfront. This area functions as a mixed-use space, dominated by retail, hotel, landscaped parking and recreational areas.

Immediately west of the development site, is the Granger Bay Precinct, which currently consists of temporary land uses such as the demountable parking garage, the Grand Café and Beach restaurant as well as large areas of fill. Further to the west lies the Water Club Residential Complex and Marina, offering luxury apartments and private moorings. To the south and east of the development site is the Pierhead Precinct. This is the harbour section of V&A property and is on the water's edge. It is also home to important marine tourism activities including harbour cruises, and charter boating.

The other V&A Waterfront precincts include New Basin Precinct, Upper Basin Precinct, Outer Basin Precinct, Canal District, Clock Tower Precinct, Portswood Precinct, and the East Pier and South Arm Precincts. The activities and use of space vary across these precincts and include retail, restaurants, residential, offices, parking, the Two Oceans

Aquarium, the Zeitz MOCAA Museum, recreation, craft markets, and fishing industry-related activities (Figure 4.2).



Figure 4.2. A map of the V&A Waterfront layout. Figure Source: V&A Waterfront, 2025. The yellow dot indicates the location of the proposed development.

The development site lies adjacent to key business, residential and recreational suburbs such as Green Point, Sea Point, Mouille Point, and the Foreshore. This prime location ensures integration with the surrounding urban environment and facilitates strong economic and social linkages. The neighbouring Foreshore Precinct remains the dominant residential node in the City Centre with more than a third of all residential apartments located here. In 2025 three residential builds valued at R1.01 billion were under construction here and work on a mixed-use development worth R1.1 billion which will include a luxury high-rise hotel and residential apartments, had also started (CCID 2025).

To the south-west, across Beach Road, are Somerset Hospital and Fort Wynyard, situated near the Cape Town Stadium and Green Point Park. Slightly further west is the Sea Point Promenade. The proposed development will strengthen pedestrian linkages within this well-connected and accessible urban space by tying into existing public walkways and extending the promenade-style route along the reclaimed coastline. This will enhance walkability and encourage non-motorised transport, while reinforcing the Waterfront's mixed-use development objectives and supporting the broader vision for inclusive and accessible urban development.

4.4 SUMMARY

The proposed development forms part of the ongoing evolution of the V&A Waterfront as a premier mixed-use urban precinct and entails the redevelopment of a 1.2 ha site within the Breakwater Precinct into a high-quality, integrated mixed-use destination. The project comprises residential and hotel components, cultural and specialist facilities, and significant public realm enhancements, including an expanded promenade and the creation of Atlantic Park as a new publicly accessible open space. Strategically located within a highly accessible regional and local context, the site benefits from strong road, public transport, pedestrian, and maritime connectivity, as well as proximity to key economic, tourism, residential, and recreational nodes. The development is intended to reinforce the Waterfront's role as a major economic and tourism hub, enhance pedestrian connectivity and non-motorised transport, and support Cape Town's broader objectives for inclusive, accessible, and sustainable urban growth.

5 LEGISLATIVE AND POLICY FRAMEWORK

5.1 APPLICABLE NATIONAL LEGISLATION

5.1.1 THE CONSTITUTION OF THE REPUBLIC OF SOUTH AFRICA, 1996

The Constitution of the Republic of South Africa, 1996 (the Constitution), serves as the highest legal authority and upholds the right of all South Africans to an environment free from harm to health and well-being. It obligates the protection of this right for the well-being of both present and future generations, achieved through appropriate legislative and other actions. As such, the Constitution forms the fundamental legal basis for environmental management in South Africa, with various laws at the national, provincial, and local levels aligning with its legal principles.

Consequently, compliance with the Constitution is critical in framing this assessment.

5.1.2 NATIONAL DEVELOPMENT PLAN (NDP) 2030

The South African National Development Plan (NDP) 2030 aims to eliminate poverty and reduce inequality by the year 2030. It envisions a country where all citizens have access to opportunities that enable them to lead dignified and productive lives. The plan sets out a comprehensive strategy to grow the economy, improve infrastructure, expand employment, and enhance the quality of education and healthcare. By addressing the root causes of poverty and inequality, the NDP seeks to create a more inclusive and equitable society.

To achieve its goals, the NDP emphasizes building a capable and developmental state that works effectively with citizens and all sectors of society. It promotes active citizenry, social cohesion, and accountability in government institutions. The plan also outlines key reforms in public service delivery, economic policy, and governance to support long-term development. Ultimately, the NDP serves as a roadmap for transforming South Africa into a nation where everyone can access opportunities and improve their quality of life.

The NDP focuses on creating a conducive environment for public and private investments to drive job creation and increase income levels, aiming to create additional jobs by 2030, particularly for young and low-skilled South Africans. The NDP further seeks to eliminate poverty and reduce inequality while boosting economic growth.

This development therefore aligns with the NDP's priorities by promoting economic growth, enhancing investment, and increasing job opportunities (at a variety of skill and income levels).

5.1.3 NATIONAL ENVIRONMENTAL MANAGEMENT ACT (NEMA, ACT 107 OF 1998)

The National Environmental Management Act (NEMA) establishes principles for decision making on matters that affect the environment, to provide for cooperative environmental governance. It establishes statutory environmental duty of care obligations, imposing

responsibilities to prevent and address pollution or environmental degradation. Activities that have the potential to impact on the environment, socio-economic conditions, and cultural heritage, need to be identified and assessed prior to their implementation. These activities should be reported to the responsible organ of state, known as the “Competent Authority” (CA), and receive Environmental Authorisation (EA) prior to their commencement. An application for EA is conducted either by means of a Basic Assessment (BA) process, or by means of a Scoping and Environmental Impact Assessment (S&EIA) process.

As Listed Activities would be triggered by the proposed development’s commencement, an EIA process (specifically a BA process) is required. This socio-economic specialist assessment has been drafted in support of the BA process and has been conducted in accordance with Appendix 6 of the EIA Regulations, which have been published under NEMA (GN R982 of 2014).

5.1.4 NATIONAL ENVIRONMENTAL MANAGEMENT: AIR QUALITY ACT (ACT 39 OF 2004)

The National Environmental Management: Air Quality Act (NEM:AQA) established the law regulating the control of air quality, to protect the environment. The act provides measures for the prevention of air pollution and associated ecological degradation, whilst still enabling ecologically sustainable development. Environmental and social justice are key informers of this act, with it being acknowledged that the health impacts of air pollution are typically most heavily felt by the poor within South African Society. Consequently, the act established the national norms and standards regulating air quality monitoring, management, and control within South Africa.

Consideration of potential air quality impacts on socio-economic receptors is important during any large-scale development, particularly when lengthy construction periods are involved. While potential air quality impacts were not considered to be sufficiently significant to warrant a discrete specialist study, they have been considered in the Impact Assessment section of this report.

5.1.5 NATIONAL ENVIRONMENTAL MANAGEMENT: WASTE ACT (ACT 59 OF 2008)

The National Environmental Management: Waste Act (NEM:WA) makes provision for measures to improve waste management practices, including: (a) minimising the consumption of natural resources; (b) prevention and minimising the generation of waste; (c) reducing, re-using, recycling and recovering waste; (d) treating and safely disposing of waste as a last resort; (e) preventing pollution and ecological degradation; (f) promoting and ensuring the effective delivery of waste services; (g) rehabilitating land where contamination presents, or may present, a significant risk of harm to health or the environment; and (h) achieving integrated waste management reporting and planning. To achieve the objectives of this Act, a national waste management strategy is required (which must be established by the Minister) as well as the adoption of national norms and standards and waste service standards. Local authorities must also adopt waste management norms and standards. The Act further provides, among other things, for waste collection, licensing of waste management activities, identification and rehabilitation of contaminated land, and transport, storage and other handling of hazardous waste.

Waste management within Cape Town is typically handled by CCTs Solid Waste Management Department. However, elements of the process within the V&A are handled independently of the city with sufficient capacity available to support the additional load introduced by this development. The production of waste, particularly during construction, is nevertheless an important consideration for this study.

5.1.6 NATIONAL ENVIRONMENTAL MANAGEMENT: INTEGRATED COASTAL MANAGEMENT ACT (ACT 4 OF 2008)

The National Environmental Management: Integrated Coastal Management (Act 24 of 2008; NEM:ICMA) aims to promote the sustainable use, development, and protection of South Africa's coastal environment. It provides the legal framework for coordinated management of the coastline, ensuring that natural coastal resources are used responsibly, while preserving their ecological integrity. The Act supports the implementation of practices across all levels of government and encourages cooperation between stakeholders, including communities, businesses, and public institutions.

Key provisions of the Act include defining and managing coastal public property, establishing coastal management lines, regulating activities that may affect the coast, and developing coastal management programs. The Act also empowers authorities to prevent or remedy environmental degradation in coastal areas, and emphasizes public participation and transparency in decision-making processes. Overall, ICMA seeks to balance environmental conservation with social and economic needs, ensuring the long-term sustainability of South Africa's coastal zone.

As the proposed development will take place within a coastal area (and within 50 m of the sea), coupled with the fact that Cape Town itself deriving a great deal of value from its proximity to the sea, alignment with ICMA is critical for this development. **This alignment is detailed as follows, with the following provisions of the act being directly applicable:**

- **Section 2 (Objectives of Integrated Coastal Management):** As the development will take place in an existing urban centre, on land that is entirely artificial (being the product of previous land reclamation operations), and is currently underutilised, it is anticipated that the economic value of this coastal space will increase significantly—while avoiding the destruction of additional intact coastal habitat. It is also contextually appropriate within the surrounding area, and is not anticipated to negatively impact the area's "sense of place". **Consequently, the project is predicted to support the sustainable economic development of South Africa's coastline, assuming environmental considerations are incorporated.** Key economic outputs are anticipated to derive from job creation, tourism growth, and access to coastal opportunities for a wider population.
- **Section 13 (Protection of Coastal Public Property):** While the development will not take place within Coastal Public Property (CPP), **the development is predicted to be in alignment with the purpose of the CPP**, with improved public access to coastal areas being a key design consideration. This includes the proposed creation and upgrading of integrated public spaces and walkways (Atlantic Park and the Promenade), which should also enhance the accessibility and inclusivity of the development for a wider range of CCTs population.

- **Section 56 (Environmental Authorisation):** The project is subject to an EIA process, thus ensuring that any potential negative impacts are identified, and suitably mitigated—therefore avoiding undue impacts on the coastal resources and ecosystem services that local communities and the regional economy rely upon.
- **Section 58 (Promotion of Socio-Economic Development):** By facilitating employment, supporting local businesses, and enhancing the economic value of the Waterfront precinct, the development aligns with the Act’s aim of improving socio-economic conditions through sustainable coastal use.

This development, and the integrated approach employed in its formulation, therefore aligns closely with the ethos of ICMA, and should support the goal of balancing environmental care with inclusive economic growth.

5.1.7 SPATIAL PLANNING AND LAND USE MANAGEMENT ACT (ACT 16 OF 2013)

The purpose of the Spatial Planning and Land Use Management Act (Act 16 of 2013; SPLUMA) establishes a framework for managing planning permissions and approvals, setting guidelines for new developments, and defining legal land uses in South Africa. It functions as a foundational law, outlining general principles for provincial laws that will manage spatial planning within the country. Additionally, SPLUMA clarifies how planning law interacts with other legal regulations and policies.

SPLUMA is foundational to land use throughout the country, with land use management being further refined at a regional and local-level, through the publication of various policies, provincial acts, and by-laws—which must all ultimately be compliant with SPLUMA.

Spatial planning in the Western Cape is managed in terms of the Western Cape Land Use Planning Act (LUPA, 2014). Management in Cape Town, within which the development will take place, falls under the CCTs Municipal Planning By-law (2015). This By-law further contains the CCTs “Development Management Scheme” (DMS), which prescribes the various forms of land zoning to be used within the metro, and indicates what land uses are appropriate within.

The portion of the V&A Waterfront within which the study will take place, is currently zoned as Mixed Use 3 (MU3) in terms of the City of Cape Town's Municipal Planning Bylaw (2025 as amended). This zoning allows for primary uses such as Business premises, industry, dwelling house, second dwelling, boarding house, flats, place of instruction, place of worship, institution, hospital, place of assembly, place of entertainment, hotel, conference facility, authority use, utility service, rooftop base telecommunication station, transport use, multiple parking garage, private road, open space, chancery, electric vehicle charging stations, micro wind turbine, structure mounted energy system and filming. **The approved land uses within the V&A do not strictly follow those prescribed within the DMS, but instead follow those within the CCT-approved “Package of Plans”, with this development aligning with the land use requirements for the V&A.**

5.2 PROVINCIAL LEGISLATION AND POLICY APPLICABLE TO SOCIO-ECONOMIC RECEPTORS

5.2.1 WESTERN CAPE PROVINCIAL SPATIAL DEVELOPMENT FRAMEWORK (2014)

The Western Cape Provincial Spatial Development Framework (WCSDF) is a strategic planning instrument designed to guide land use and spatial development across the province. Its primary objective is to facilitate sustainable, equitable, and efficient growth by aligning development initiatives with environmental, social, and economic priorities. The framework articulates a long-term vision for land and resource management, supporting the coordinated delivery of infrastructure, the protection of critical natural assets, and the promotion of spatially balanced urban and rural development. It aims to reduce inequality and enhance overall quality of life through informed, strategic, spatial planning.

The WCSDF advocates for compact, connected, and resilient settlements that enable inclusive economic opportunities and promote environmental sustainability. It prioritizes development in areas with existing infrastructure and high growth potential, while discouraging urban sprawl and environmentally damaging practices. In addition, it supports rural development, climate change resilience, and the preservation of biodiversity and cultural heritage. As a guiding tool, the WCSDF informs land-use decisions made by municipalities and government entities to foster integrated and sustainable development throughout the Western Cape.

The proposed mixed-use development exemplifies the objectives of the WCSDF. Strategically positioned within a high-potential urban node, the development advances spatial efficiency, promotes sustainability, and facilitates targeted investment by leveraging existing infrastructure and enabling economic intensification.

The proposed development aligns well with the Western Cape SDF by promoting spatial efficiency, sustainability, and strategic investment. Located within a high-potential urban node, the development should optimise existing infrastructure, support economic intensification, and enhance public access to the coastline. It should therefore positively contribute to human development, by providing a mix of residential, commercial, and recreational spaces in a well-connected area.

5.2.2 WESTERN CAPE PROVINCIAL STRATEGIC PLAN (2025–2030)

“The Western Cape Provincial Strategic Plan (WCPSP) outlines the Western Cape Government’s (WCGs) strategic goals and priorities for the period 2025 to 2030. Developed every five years following provincial elections, the WCPSP outlines the overarching strategic direction for the provincial government over the medium term.”

The WCPSP is described as fundamentally “resident-centric” plan, which focusses on “enabling residents to access economic opportunities and live the lives they value”. This is further defined as follows: “The strategic anchor of the PSP is shared, resident-centric impact that cuts across department and portfolio plans. This shared impact defines our seamless response to the evolving needs and opportunities of individuals at different stages of their lives. It emphasises residents’ agency to take advantage of opportunities and progress. *For residents, this means responsive government services that are more relevant, effective, and aligned with their life circumstances over time*”. **This is further**

clarified in the stated apex priority of the development, which is “helping businesses grow and create jobs – equipping you to get those jobs.”

The proposed development should therefore support the WCPSP by contributing to key government priorities, such as economic transformation, job creation, and spatial integration. Through the provision of mixed-use spaces, including residential, tourism retail, and public amenities the project should stimulate investment, support inclusive urban growth, and enhance access to quality infrastructure. Its location within a key urban node should further align with the goal of building a capable and sustainable city region that offers opportunities for employment, improved mobility, and social cohesion. In summation, this development is predicted to closely align with, and support, the apex priority of the WCPSP, quoted above.

5.2.3 CITY OF CAPE TOWN INTEGRATED DEVELOPMENT PLAN (IDP; 2022–2027)

The CCTs Integrated Development Plan (IDP) is the CCTs central strategy. The IDP “communicates to residents, businesses and investors the City’s long-term vision, and how the City plans to achieve it. It is required in terms of the Municipal Systems Act 32 of 2000, which defines the IDP as a municipality’s principal strategic planning instrument that guides all municipal planning. The IDP is made up of two parts – a strategic plan and an implementation plan:

- The strategic plan is informed by community needs, stakeholder inputs, a contextual analysis, and an evaluation of the existing state of Cape Town, all of which help identify the challenges that the City needs to address to achieve its vision. Priorities and objectives provide focus in addressing the most critical strategic challenges.
- The implementation plan, in turn, focuses on only those key strategic programmes, projects and initiatives that are critical to support the achievement of the strategic priorities during the current five-year term of office. The implementation plan also sets out which City departments are accountable for each programme.

The IDP specifies the vision for the City, which is for the City to be “a City of Hope for all – a prosperous, inclusive and healthy city where people can see their hopes of a better future for themselves, their children and their community become a reality. Furthermore, it states that the local government is “focused on creating the conditions for meaningfully faster economic growth, resulting in more Capetonians lifting themselves out of poverty. Everything we do over the next five years will be geared towards this outcome.

Further priorities relevant to this development include:

- Economic Growth—which is considered the “The guiding Development Plan priority for everything the City does is to support meaningfully faster economic growth that enables people to lift themselves out of poverty. Economic growth is needed to rekindle our hope in a more prosperous future for all”;
- Maintaining, and improving public spaces, the quality of the environment, and available amenities;
- Developing a resilient city that is sustainable, responds to climate change, and disaster events; and

-
- Creating a more spatially integrated and inclusive city, where “people have more equitable access to economic opportunities and social amenities, and the barriers to inclusion and well-being are reduced.”

The proposed development is anticipated to be in close alignment with (and to contribute meaningfully towards) the objectives of the CCT IDP. This is based on the development’s focus on Economic growth (which is likely sustainable), the creation of jobs for individuals of varying skill levels, the plan to create additional public amenities and open spaces (which could contribute towards creating a more inclusive city). The consideration of sustainability and disaster/ climate resilience in the planning of this development also aligns with the objective of creating a more spatially integrated and inclusive city.

5.2.4 CITY OF CAPE TOWN SPATIAL DEVELOPMENT FRAMEWORK (SDF; 2023)

The CCT Spatial Development Framework (MSDF) is published as a component of the CCT IDP (detailed above), and is further aligned with the WCSDF and SPLUMA principles and guides spatial planning to ensure the promotion of efficient, inclusive, and sustainable urban growth within the city of Cape Town. The framework emphasises spatial transformation, aiming to rectify historic inequities by providing historically disadvantaged and/or vulnerable communities with improved access to housing, economic opportunities, public transport, and basic services. Key economic nodes, urban integration areas, and growth corridors are also specified. These should be developed to provide employment and social inclusion opportunities, while ensuring sustainable development through the protection of environmental and heritage resources. The MSDF further identifies socio-economic receptors which provide the policy basis to manage and evaluate impacts on local economies, communities and livelihoods, with the goal of ensuring that land-use and development decisions contribute to a more resilient, equitable and spatially just city.

The CCT SDF has been divided into 8 district level SDFs (DSDFs), which governs spatial development at a more localised, and contextually appropriate scale. The DSDF applicable to this development is the Table Bay DSDF, and is detailed in the following section.

The proposed development appears to align with the CCT SDFs spatial strategies, by contributing to the area’s role as a vibrant coastal destination. It should support diverse land uses, enhance the tourism offering, improve public access to the waterfront, and should promote responsible coastal development. This approach reinforces the SDFs objectives of sustainable intensification, spatial efficiency, and maintaining the social and economic value of Cape Town’s coastal assets.

5.2.5 CITY OF CAPE TOWN: TABLE BAY DISTRICT SPATIAL DEVELOPMENT FRAMEWORK (2023)

The Table Bay District Spatial Development Framework (TBDSDF) provides medium- to long-term guidance for spatial transformation and land use planning specifically within the Table Bay District. The TBDSDF provides guidance on spatial vision, guidance on applicable policy, and a land-use framework specific to the Table Bay District. Furthermore, the DSDF integrates both spatial planning and environmental management considerations, in the form of the local Environmental Management Framework (EMF),

which supports sustainable development, economic growth, and resilience in the strategically significant Table Bay Area.

The Table Bay Area contains the economic “heart” of Cape Town, encompassing the Central Business District (CBD), the V&A Waterfront, major transport hubs, and significant tourism assets. The DSDF recognises this centrality and aims to guide development in a manner that promotes efficient land use, protects environmental and heritage resources, and enhances social equity.

The proposed development is predicted to align closely with the objectives of the TBSDF, as it promotes land use compatibility through a blend of residential, commercial, and public spaces in a high-value, economically strategic area. Its location within the V&A Waterfront supports the TBSDFs emphasis on accessibility and transit-oriented development, while also reinforcing the Waterfront’s role in Cape Town’s visitor economy. By fostering job creation and enabling diverse commercial activity, the project should advance the district’s economic development goals. Furthermore, the development will support spatial integration by enhancing the existing urban fabric without contributing to urban sprawl.

5.2.6 CITY OF CAPE TOWN MUNICIPAL PLANNING BY-LAW (2015)

The City of Cape Town Municipal Planning By-Law (2015) regulates the development, management, and use of land and buildings located within the municipal area. These regulations are prescribed within the Development Management Scheme (DMS), which determines what activities are permitted per property according to its zoning (e.g. residential, agriculture, community, etc.) and sets specific development control measures such as floor area, building height, coverage, building lines, parking requirements, and density. The scheme ensures that land use aligns with the CCT MSDF and broader planning instruments, and promotes orderly development, spatial efficiency, and compatibility between neighbouring land uses. Furthermore, the scheme provides a legal basis for regulating and evaluating planning applications, including departures, rezoning, and consent use applications, to balance economic growth with environmental sustainability and community well-being.

As described in Section 5.1.7, The portion of the V&A Waterfront within which the study will take place, is currently zoned as Mixed Use 3 (MU3) in terms of the City of Cape Town's Municipal Planning Bylaw (2025 as amended). This zoning allows for primary uses such as Business premises, industry, dwelling house, second dwelling, boarding house, flats, place of instruction, place of worship, institution, hospital, place of assembly, place of entertainment, hotel, conference facility, authority use, utility service, rooftop base telecommunication station, transport use, multiple parking garage, private road, open space, chancery, electric vehicle charging stations, micro wind turbine, structure mounted energy system and filming. **The approved land uses within the V&A do not strictly follow those prescribed within the DMS, but instead follow those within the CCT-approved “Package of Plans”, with this development aligning with the land use requirements for the V&A.**

5.2.7 CITY OF CAPE TOWN MUNICIPALITY: INTEGRATED WASTE MANAGEMENT BY-LAW (2009)

The CCT Integrated Waste Management By-law aligns with NEM:WA and the National Waste Management Strategy, to promote sustainable waste management practices. It

regulates waste generation, storage, collection, transportation, recycling, treatment and disposal.

The responsible management of waste generated from both the construction and operation of the proposed Mixed-Use Development must therefore be compliant with this by-law. As the development will be located adjacent to a sensitive marine environment and falls within a populous city. **Therefore, it is crucial that any waste generated during construction or operation, is handled responsibly, and that any associated impacts are mitigated or avoided.**

5.3 SUMMARY

The legislative and policy review confirms that the proposed mixed-use development aligns well with the key objectives and priorities across national, provincial, and local frameworks. The development supports broader goals of economic growth, job creation, spatial integration, and sustainable urban development. Located within a strategic, well-serviced urban node, the proposed development promotes efficient land use, enhances public accessibility, and contributes to Cape Town's long-term vision of a compact, inclusive, and resilient city. There are no apparent conflicts between the proposed development and the reviewed policies.

6 SOCIO-ECONOMIC CONTEXT

6.1 OVERVIEW

This chapter presents an overview of the key demographic and economic characteristics of the study area, including population, household structure, age profile, education levels, employment status, and income and expenditure patterns. The economic overview examines indicators such as Gross Value Added (GVA), sectoral contributions and employment, providing insight into the area's economic structure and development trajectory. Together, these analyses provide the context necessary to assess the potential impacts of the proposed development on the local community and economy.

The Victoria & Alfred (V&A) Waterfront is situated within the City of Cape Town, under the municipal jurisdiction of the City of Cape Town Municipality (CCT). Located in Ward 115, the site forms part of the Table Bay District, the historic “heart” and economic centre of the city (Figure 6.1).

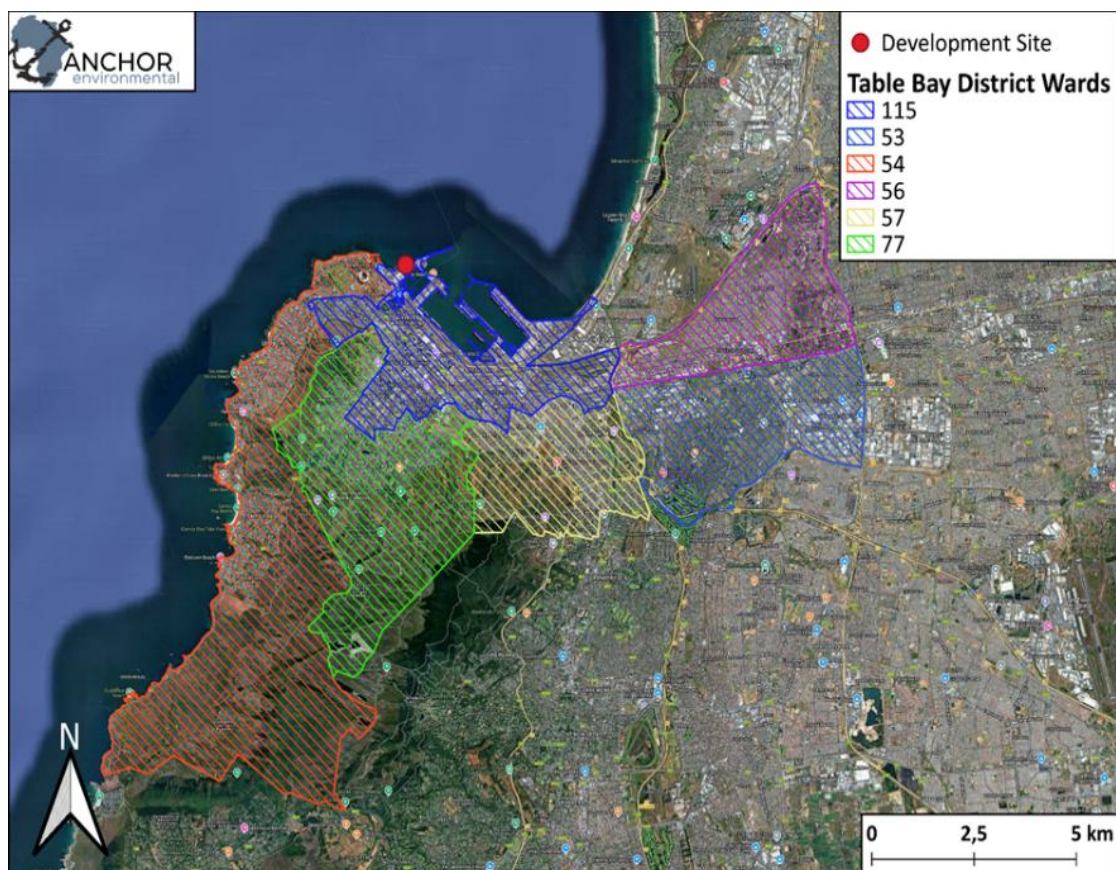


Figure 6.1. Locality of the Project site within Ward 115 of the Table Bay District.

The Table Bay District encompasses key urban nodes such as the Cape Town CBD, Sea Point, Green Point, and Woodstock, making it a focal point for commerce, tourism, and urban activity. Within the Central City the V&A Waterfront borders ‘Precinct 1: The Foreshore’ with the geographical gap between the CBD and the V&A having been closed

over recent years through developments which have transformed these precincts from isolated, single-use areas into a connected system of dynamic, mixed-use neighbourhoods, improving citywide mobility and accessibility, promoting social and economic inclusion, and fostering functional linkages between urban areas (CCID 2025). The Foreshore precinct is not only the hub of the Central City’s eventing and business tourism economies but is also the residential hub with more people living in this precinct than any other in the Central City (CCID 2025).

6.2 DATA

Information on population, income, livelihoods and living conditions was derived from StatsSA Census data for 2011 and 2022 and City of Cape Town planning documents such as the Table Bay District SDF. Where census data had been disaggregated into mesozones by StepSA (2016, 2018; see Figure 6.2), these were used to obtain summaries at the local level. The Mesozone set is a demarcation of South Africa into a complete grid of 25,000 spatial units. These mesozones are not uniform in shape but aim to be approximately the same size (~50km²). These mesozones were created in such a way that they fit completely within the current municipalities and other significant geo-economic and historic area demarcations.

This dataset also includes information on demographic, education, poverty, and other socio-economic attributes over time. Estimates of gross value added (GVA) and employment per sector were made (StepSA 2018). These were based on the

spatial disaggregation of GVA and employment data by mesozone from the CSIR StepSA website (StepSA 2018). These figures were based on original data provided by Quantec at the Local Municipality level and disseminated to Mesozone level using the dasymetric map method. The Settlement-Mesozone Geo-Frame was created and refined through more than two decades of dedicated research to overcome the limitations of geographically arbitrary administrative boundaries used in official data collection and reporting. It offers a consistent framework for aligning spatially incompatible national datasets, supporting improved place-based profiling, mapping, analysis, and long-term monitoring across space and time (Arnold et al. 2025).

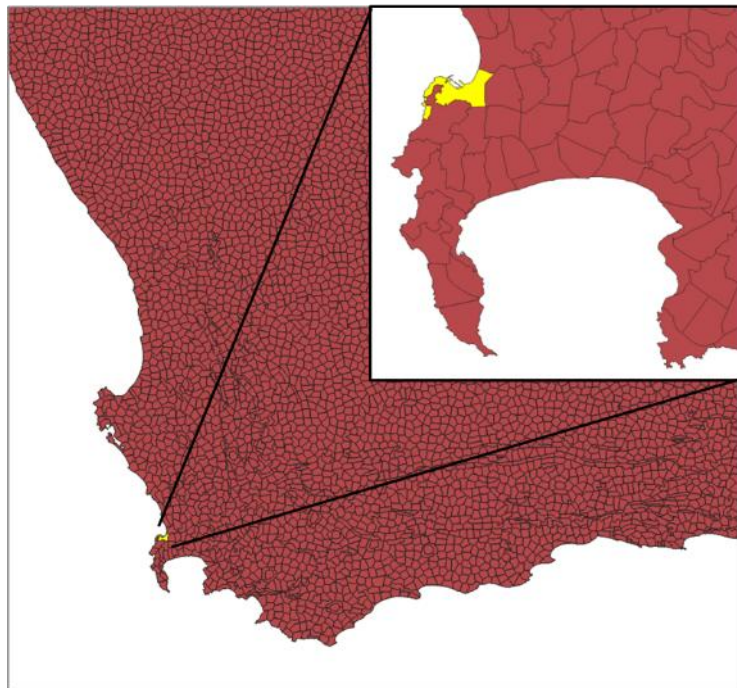


Figure 6.2. Mesozones across the Western Cape and the mesozone within which the proposed development falls (inset) which aligns with Ward 115 in the Table Bay District.

6.3 POPULATION, HOUSING, AGE, EMPLOYMENT AND EDUCATION PROFILE

6.3.1 MUNICIPAL, PROVINCIAL AND NATIONAL TRENDS

The CCT had a total population of approximately 4.77 million in 2022, which increased from 3.74 million in 2011, a 27.6% increase (Table 6.1). This represents 64% of the Western Cape population and 7.7% of the national population. Of the 2022 population, 51.7% were female. In 2022 there were around 1.45 million households in the city, compared to 1.07 million households in 2011.

Table 6.1. A comparison of population metrics between 2011 and 2022, for the City of Cape Town Metropolitan Municipality, the Western Cape Province and South Africa. Data source: South African National Department of Statistics 2025. Note that green indicates an improvement or positive change, red indicates a deterioration or negative change and no colour indicates no noticeable change.

Criteria	National		Western Cape		Cape Town	
	2022	2011	2022	2011	2022	2011
Total Population	62 027 503	51 770 560	7 433 020	5 822 734	4 772 846	3 740 031
Young children (0-14 y)	26.4%	29.2%	22.4%	25.1%	22.4%	24.8%
Working age (15-64 y)	67.2%	65.5%	70.3%	69.0%	70.9%	69.6%
Elderly (65+ y)	6.5%	5.3%	7.3%	5.9%	6.7%	5.5%
Dependency ratio	48.8	52.7	42.2	45.0	41.0	43.6
Sex Ratio	94.1	94.8	94.0	96.4	93.6	95.9
No Schooling (20+ y)	6.9%	8.6%	2.3%	2.7%	1.9%	1.8%
Higher education (20+ y)	12.2%	11.7%	17.6%	14.0%	20.0%	16.2%
Number of households	17 828 778	14 449 664	2 264 032	1 633 925	1 452 845	1 068 515
Average household size	3.5	3.6	3.3	3.6	3.3	3.5
Formal dwellings	88.5%	77.6%	88.0%	80.4%	87.5%	78.4%
Flush toilets connected to sewerage	70.8%	60.1%	93.9%	89.6%	93.4%	90.2%
Weekly refuse disposal service	66.3%	62.1%	88.7%	89.9%	90.2%	94.3%
Access to piped water in the dwelling	59.7%	46.5%	85.5%	75.1%	85.4%	75.0%
Electricity for lighting	94.7%	84.7%	96.5%	93.4%	96.7%	94.0%

In the City of Cape Town in 2022, approximately 22.4% of the population were classified as “Young Children” (0-14 years); 70.9% were classified as “Working Age” (15-64 years); and the remaining 6.7% were classified as “Elderly” (65+ years; Table 6.1). This represents a small decrease in the percentage of young children, and a small increase in the percentage of the elderly, since 2011. The dependency ratio the ratio which is the ratio of dependents to working age individuals decreased slightly to 41.0% in 2022 compared to 43.6% in 2011. This is recognised as a positive change as it means that a larger proportion of the population is of working age, leading to an increase in economic productivity which reduces pressure on social services. Positively, the CCT also saw improvements in education metrics; the percentage of formal dwellings; percentage of the population with access to flush toilets; access to piped water; and access to electricity for purposes of lighting, over the 2011-2022 period. This trend was similar to

that seen in both the Western Cape Province, and nationally. The CCT has, however, seen a decrease in the percentage of the population having access to weekly refuse disposal services, from 94.3% in 2011, to 90.2% in 2022.

South Africa's labour market remains under significant pressure, with nearly one in three working-age individuals unemployed. The official unemployment rate was approximately 31.9% in the third quarter of 2025 for South Africa. While this figure reflects a slight decline from earlier in the year it remains very high by international standards. The Western Cape continues to record the lowest official unemployment rate among South African provinces, with about 19.7% in the third quarter of 2025. This is well below the national average and highlights relatively stronger labour market performance in the province. Cape Town's unemployment rate is lower than the national figure but higher than the provincial average, reflecting urban labour market dynamics and a mix of opportunities and challenges. According to Statistics South Africa's Quarterly Labour Force Survey for Quarter 1 of 2025, the City of Cape Town's unemployment rate stood at around 24.7% on the broad measure.

6.3.2 TRENDS AT THE LOCAL LEVEL

In a similar trend to Cape Town more generally, the Table Bay District also experienced an increase in total population between 2011 to 2016, from approximately 206 805 in 2011 to 236 010 at the end of 2016. This represents approximately 5.7% of Cape Town's total population. The total number of households within the district increased from around 70 500 in 2011 to just under 81 400 at the end of 2016, with an average household size of 2.9 which is lower than the City average and is suggestive of a mix of family and non-family households (City of Cape Town 2023). Within the V&A Mesozone which aligns with Ward 115 and includes the V&A Waterfront and immediate surrounds, the population increased by 7% to just over 135 000 people in 2016. This represents around 57% of the Table Bay District population, highlighting the importance of this space as a residential node. Household size of 2.7 is slightly lower than the District and City average.

The Table Bay District has experienced steady population and household growth, reflecting broader demographic trends across Cape Town. Population increases, coupled with relatively small average household sizes, point to rising demand for housing, services, employment opportunities, and well-located mixed-use environments. Growth within the V&A Mesozone in particular underscores its emerging role as a key residential and activity node. In this context, developments of this nature are important for accommodating future population growth, optimising land use in accessible urban locations, and supporting the provision of infrastructure, amenities, and economic opportunities aligned with evolving demographic needs.

Table 6.2. Population trends between the City of Cape Town, the Table Bay District and Mesozone 24573 (which aligns with Ward 115 and covers the V&A Waterfront and immediate surrounds) between 2011 and 2016.

	City of Cape Town		Table Bay District		V&A Mesozone	
	2011	2016	2011	2016	2011	2016
Population	3 740 023	4 174 510	206 805	236 010	126 154	135 044
Households	1 068 573	1 230 590	70 467	81 337	35 464	46 131
Ave. household size	3.5	3.4	2.9	2.9	2.6	2.7

An analysis of the age structure of the study area is important for evaluating both current and future socio-economic requirements of the population. The age profile indicates the proportion of residents who are likely to be economically active, those who are dependent, such as children and older persons, and the resulting implications for employment opportunities, service delivery, and infrastructure needs. The population can be broadly divided into three age-based socio-economic groups. Individuals younger than 15 years form the junior population, which is generally not economically active and is dependent on adults for financial support and the provision of basic needs. Those aged between 15 and 64 years represent the potentially economically active population and constitute the primary workforce and main income-generating group, typically supporting both younger and older dependants. People aged 65 years and older make up the senior population, who are largely retired from formal employment and are often reliant on government support or assistance from family members.

The largest share of the population falls within the economically active age group (15–64 years), at 70.3% (Table 6.3), which aligns with the provincial and city average but is higher than the national average. This indicates a substantial workforce and active consumer population, highlighting the area’s significant economic potential. The demographic composition of the study area is dominated by working-age residents. This creates demand for jobs, retail services, and housing. The proposed development is strategically located to serve this economically active population, which includes a range of age groups from young professionals to young families and more mature residents. Its combination of mixed-use spaces and pedestrian-friendly design aligns with the lifestyle needs of these groups, while also providing accessible infrastructure and public amenities to support an ageing population.

Table 6.3 Age, employment and education profile for the V&A Mesozone.

V&A Mesozone	% of population
Age profile: 0-14 y	23.5%
Age profile: 15-64 y	70.3%
Age profile: >65 y	6.2%
Employed	55.1%
Unemployed	4.9%
Not economically active	40.0%
Education: No schooling	0.8%
Education: Primary school	2.6%
Education: High school	14.1%
Education: Grade 12	35.9%
Education: Higher	46.6%

The local employment profile indicates that 55.1% of the population is employed, 4.9% unemployed, and 40.0% not economically active, highlighting a substantial base of residents who could benefit from new job opportunities (Table 6.3). The proposed development is expected to generate a range of direct and indirect employment across sectors such as retail, hospitality, cultural services, and professional activities. In addition to serving the local workforce, the development will create opportunities for workers from surrounding areas and the broader metropolitan region, supporting income

generation, reducing unemployment pressures, and contributing to economic growth both within the immediate community and in neighbouring districts.

Indeed, the Table Bay District accounts for more than 30.9% of the total job opportunities in Cape Town, which is considerably higher than the second highest district, Tygerberg, which accounted for 22.2%, followed by the South Peninsula District with 12.4% (Figure 6.3).

The proportion of residents within the V&A Mesozone with no schooling is very low at 0.8% and is below the provincial and City averages. This indicates widespread access to basic education. Around 36% of the population has completed high school and has a Grade 12 certificate. Of importance is that a significant portion of the population, some 46.6%, have attained higher education qualifications which much higher than the City average of 20% and Western Cape average of 17.6% (Table 6.3).

A population with significantly higher levels of tertiary education than the city or provincial average has important socio-economic implications. Such a highly educated workforce is better equipped to fill professional, managerial, and specialised roles, supporting productivity, innovation, and economic growth. Higher educational attainment is also associated with greater income-earning potential, which in turn drives demand for quality housing, goods, services, and leisure facilities. This skilled labour pool makes the area more attractive to investors and businesses, particularly in knowledge-based and service-oriented sectors. Additionally, higher education levels are linked to improved social outcomes, including better health, civic participation, and community engagement. Collectively, these factors support the success of mixed-use developments, as they create a market for a diverse range of residential, commercial, cultural, and recreational opportunities.

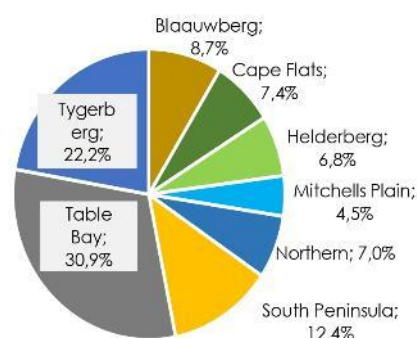


Figure 6.3. Percentage contribution to employment between Cape Town's various districts. Table Bay DSDF, 2023.

6.4 ECONOMIC CONTEXT

6.4.1 GROSS DOMESTIC PRODUCT (GDP)

The Western Cape's real Gross Domestic Product (GDP) in 2024 was R666.75 billion (constant 2015 prices) accounting for 14% of South Africa's total GDP (City of Cape Town 2025). Cape Town typically contributes around 72% of the provincial GDP annually, amounting to some R480 billion (City of Cape Town 2025).

Figure 6.4 illustrates trends in real GDP (at constant 2015 prices) for the City of Cape Town alongside annual GDP growth rates for both Cape Town and South Africa between 2011 and 2022. Over the period, Cape Town's real GDP shows a clear upward trajectory, increasing steadily from around R410 billion in 2011 to approximately R475 billion by 2022, despite periods of economic stress (City of Cape Town 2024a).

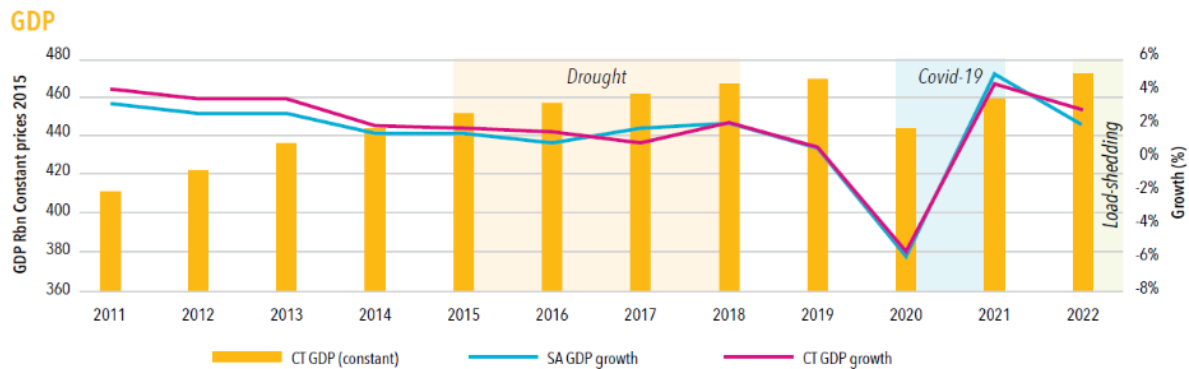


Figure 6.4 Trends in real GDP for the CCT alongside annual GDP growth rates for Cape Town and South Africa between 2011 and 2022. Source: City of Cape Town 2024a.

GDP growth rates for both Cape Town and South Africa were relatively stable in the early years, followed by a moderation during the drought period between 2015 and 2017. Growth strengthened again in 2018 before declining sharply in 2020 as a result of the COVID-19 pandemic, when both the city and national economy experienced significant contraction. This was followed by a strong rebound in 2021, with growth rates peaking above pre-pandemic levels, before easing slightly in 2022. The growth slowed again in 2023 and 2024 (to about 0.5%), highlighting ongoing challenges such as load-shedding, constrained investment, and global uncertainty. Overall, the graph highlights Cape Town’s long-term economic expansion, its sensitivity to external shocks such as drought and COVID-19, and its capacity for recovery in the post-crisis period.

As illustrated in Figure 6.4, periods of subdued and volatile growth, particularly during the drought years and the sharp contraction associated with COVID-19, underscore the need for targeted investment to support sustained economic recovery and expansion. Against this backdrop, the proposed development has the potential to serve as a strategic economic catalyst by introducing substantial capital investment during the construction phase and supporting longer-term growth through expanded residential, commercial, and tourism activities. In the context of Cape Town’s upward but shock-sensitive GDP trajectory, well-located and integrated mixed-use developments within high-value urban precincts can play an important role in strengthening economic resilience, supporting GVA growth, and advancing more inclusive urban development.

Based on the Gross Geographic Product (GGP) for 2018, the Table Bay District was the largest contributor to the City’s GDP, with 28.9% (Figure 6.5). This is due to the very high concentration of business and commercial activities within the Cape Town CBD, as well as the presence of important tourist attractions, such as the City Bowl, Atlantic Seaboard, Cape Town International Convention Centre (CTICC), and the V&A Waterfront all of which fall within the Table Bay District.

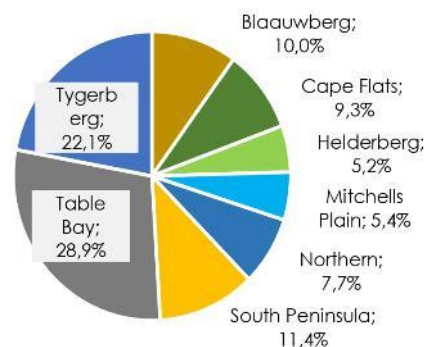


Figure 6.5. Cross geographic product (GGP) contributions at current prices, 2018. Source: Table Bay DSDF, 2023.

6.4.2 SECTORAL GROSS VALUE ADDED

The key economic sectors in the City of Cape Town are Finance, Real Estate and Business Services, Community and Personal Services, Trade and Hospitality, Manufacturing, and Transport and Communication. These sectors have contributed the largest share of GVA between 2011 and 2022 (City of Cape Town 2024a).

Figure 6.6 compares the sectoral composition of Gross Value Added (GVA) in the City of Cape Town with that of South Africa as a whole, highlighting clear structural differences between the two economies. Cape Town's economy is strongly services-oriented, with finance, real estate and business services making the largest contribution to city GVA (about 34%), substantially higher than the national share (around 23%). Community and personal services also account for a significant portion of economic activity in the city, exceeding the national average.

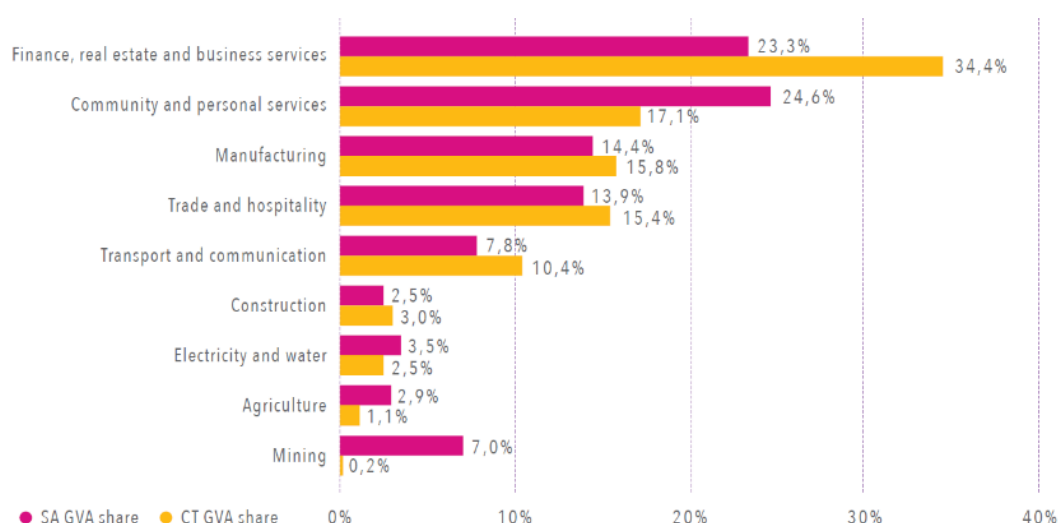


Figure 6.6 Cape Town gross value added (GVA; yellow) versus national GVA (pink), 2024.

Trade and hospitality, as well as transport and communication, contribute a slightly larger share to Cape Town's GVA than to the national economy, reflecting the city's role as a tourism hub and logistics and services centre. Manufacturing plays a more modest role in the city compared to South Africa overall, indicating a lesser reliance on industrial production. In contrast, primary sectors such as mining and agriculture contribute very little to Cape Town's GVA relative to their national importance, underscoring the city's limited resource-based activity.

Overall, Figure 6.6 illustrates Cape Town's position as a diversified, service-led urban economy, driven by high-value business services, tourism, and associated activities, in contrast to the more resource- and industry-dependent structure of the national economy.

The sectoral profile shown in Figure 6.6 aligns closely with the nature and objectives of the proposed development. Cape Town's strong reliance on finance, real estate, business services, and community services highlights the importance of high-quality, mixed-use urban projects that can support these dominant sectors. The proposed

development, with its combination of residential, hotel, cultural, and public open space components, directly reinforces the city's service-led economy by creating space for property investment, hospitality activity, and professional and creative services.

The relatively higher contribution of trade, hospitality, and transport-related sectors in Cape Town compared to the national economy further underscores the relevance of the development's tourism- and leisure-oriented elements. By expanding hotel accommodation, improving public amenities, and enhancing pedestrian connectivity, the project is likely to stimulate visitor spending and associated supply chains, generating value across multiple service industries. At the same time, construction activity will provide short-term support to the construction sector, which, although a smaller contributor to GVA, plays an important enabling role in unlocking longer-term economic benefits.

Table Bay District was the highest contributor in terms of total GVA, for most sectors in Cape Town (Figure 6.7). Dominant sectors included Transport (34.7% contribution), Trade (30.6% contribution) and Finance sectors. The high transport contribution is principally due to the presence of the Port of Cape Town, Cape Town's only seaport, whereas the Trade and Finance sectors are driven by the presence of the CBD, the City's most important retail hub, and the district's highly active tourist economy.

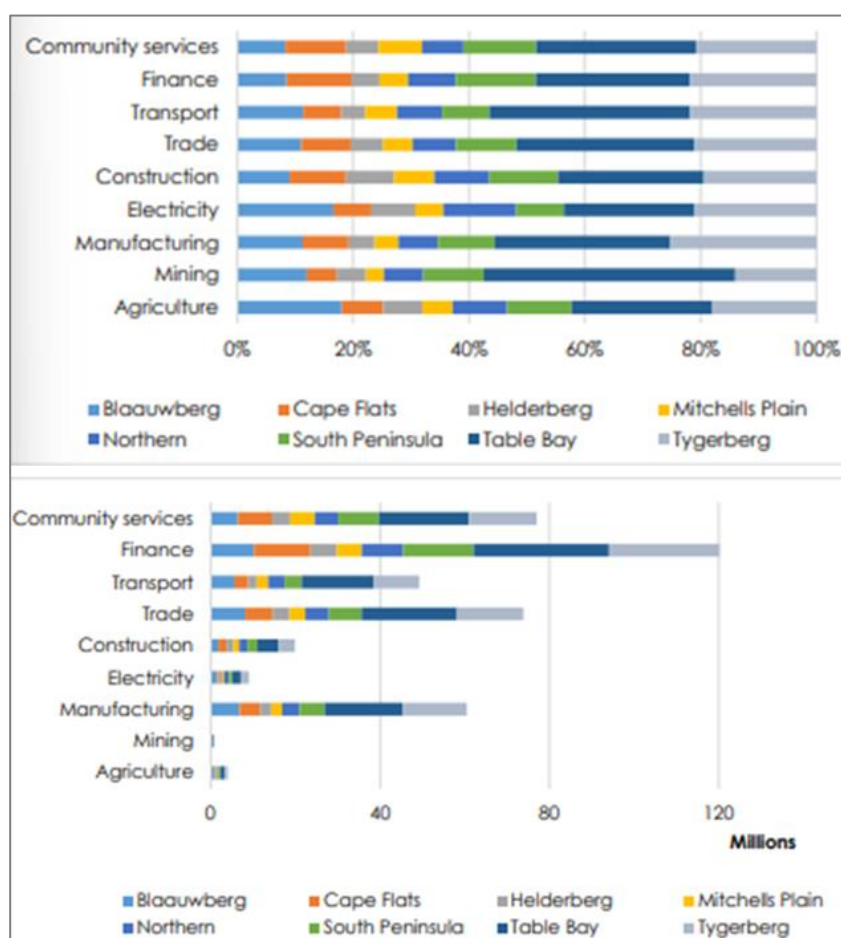


Figure 6.7. Top: Gross Value Added (GVA) contribution by sector in 2018 by city district. Bottom: GVA rand value (in millions) for each sector by city district in 2018.

In summary, the proposed development is well aligned with Cape Town’s economic structure, strengthening sectors in which the city has a comparative advantage and contributing to sustained GVA growth through property-led investment, tourism, and service-sector expansion.

6.4.3 SECTORAL EMPLOYMENT

Figure 6.8 illustrates the sectoral distribution of employment across the Western Cape, the City of Cape Town, and the Table Bay District, highlighting both regional similarities and localised differences in labour absorption. Across all three geographies, employment is concentrated in service-oriented sectors, reflecting the broader structure of the provincial and metropolitan economy.

Trade is the single largest contributor to employment, particularly in the City of Cape Town where it accounts for roughly a quarter of total jobs. Finance and business services also make a substantial contribution, with especially high shares in the City and Table Bay District, underscoring the importance of professional, financial, and real-estate related activities. Community services similarly represent significant sources of employment across all three areas.

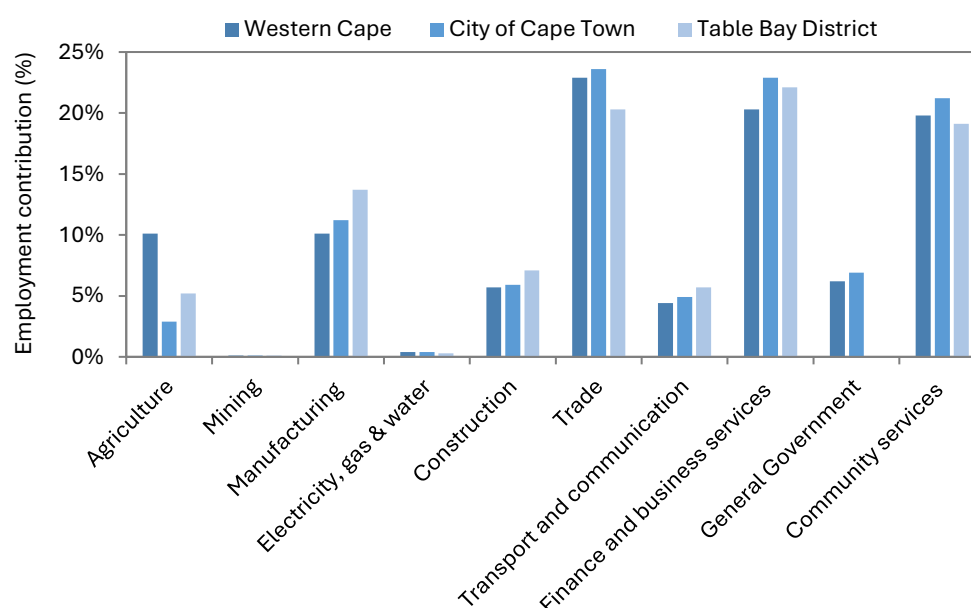


Figure 6.8. Sectoral contributions to employment in the Western Cape, City of Cape Town and Table Bay District.

Manufacturing contributes a moderate share of employment, with a slightly higher importance at the district level, while construction provides a smaller but notable proportion of jobs, reflecting its role as a cyclical and project-based employer. Transport and communication employ a modest share of the workforce, aligned with the logistics and connectivity functions of the metropolitan economy. In contrast, primary sectors such as agriculture and mining contribute very little to employment in the City of Cape Town and the Table Bay District, though agriculture remains more relevant at the

provincial level and is relevant at the district level with regards to the fishing industry and fishing related activities that operate within the Port of Cape Town.

This demonstrates that employment in the study area is predominantly driven by service sectors, particularly trade, finance, business services, and community services, highlighting the relevance of mixed-use, service-led developments in supporting and expanding local employment opportunities.

6.5 TOURISM PROFILE

Cape Town's distinctive setting and geological features have made it one of the most visually striking and globally recognisable cities (City of Cape Town 2025). The city offers a wide range of internationally renowned attractions, supported by high service quality and an established hospitality industry. Together, these factors have sustained a strong and resilient tourism sector over time. Tourism continues to play a critical role in the local economy, not only because of its capacity to generate employment as one of the city's most labour-intensive sectors, but also due to its wider multiplier effects, stimulating growth in related industries such as property development, the creative economy, and transport services (City of Cape Town 2025).

The V&A Waterfront remains a cornerstone of the local and regional tourism economy. The proposed development site forms part of this highly visited and economically significant node, which consistently ranks among the top points of interest (POIs) for both domestic and international visitors (Figure 6.9). According to Wesgro's 2022 Cape Town Visitor Trends Report, the V&A Waterfront was the most visited attraction by both domestic and international tourists, with an average dwell time of 2.7 hours, indicating its sustained draw and economic value within the city's visitor economy (WESGRO, 2023). During the first quarter of 2025, six of Cape Town's major tourist attractions welcomed close to 984,000 international tourists with the V&A Waterfront being the most visited of the six attractions (Figure 6.9).

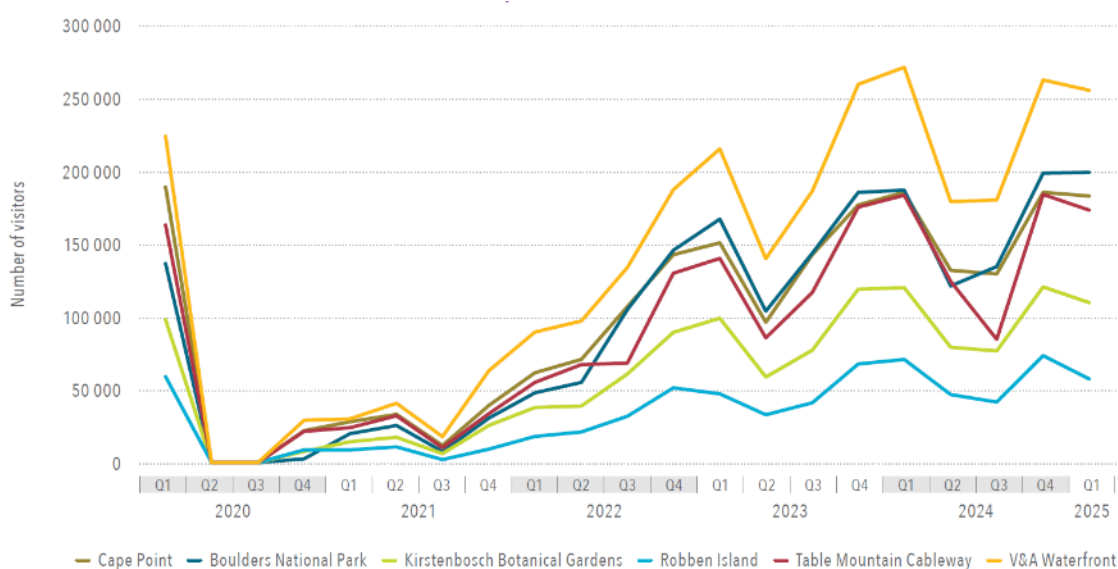


Figure 6.9 Number of International tourist visits to six tourist destinations of Cape Town, 2020 Q1 to 2025 Q1. Visitors to the V&A Waterfront is shown as the yellow line on the graph. Source: City of Cape Town 2025.

In 2024 (January-December), 44.5% of domestic, and 36.0% of international tourists to Cape Town were repeat visitors, highlighting the City's strong tourist loyalty base (WESGRO 2025a). Both domestic and international tourists stayed an average of 2.8 days, with most choosing to stay overnight, further increasing local spend on accommodation, food, and services (WESGRO 2025a). In 2024, Cape Town International Airport experienced a record-breaking year, processing roughly 10.5 million total two-way passengers, a 7% increase from 2023. International air arrivals saw significant growth, with a record 3 million two-way passengers in 2024, marking a 10% rise from 2023. Key, consistent, international markets included Germany, the United Kingdom, USA, and Netherlands (Figure 6.10).

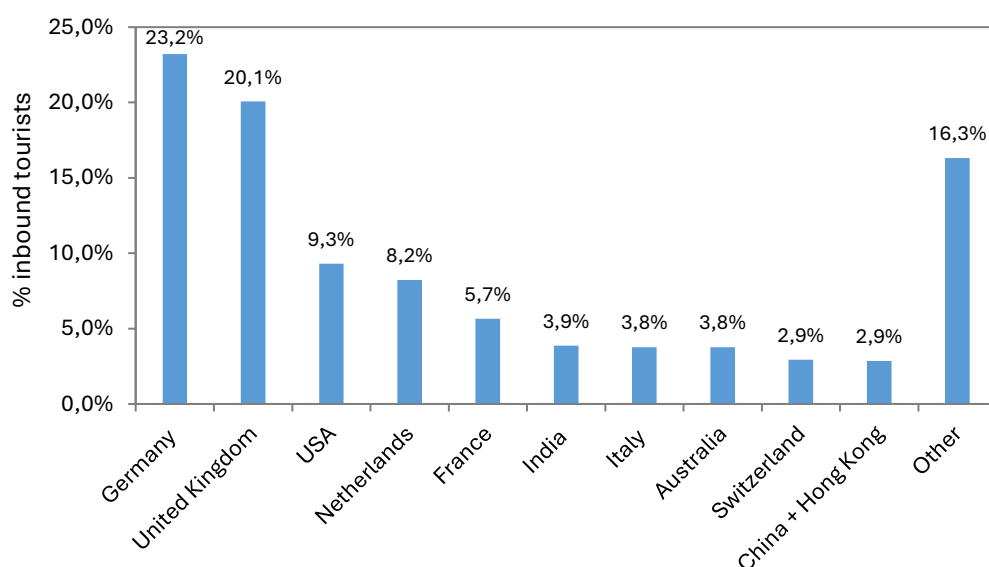


Figure 6.10. Inbound international tourists to Cape Town. Source: (WESGRO 2025b)

The V&A Waterfront's close location to the CTICC and other major event venues positions the precinct as a key hub for business and event-driven tourism. By integrating with and enhancing the established commercial and hospitality network in the area, the proposed development is well placed to reinforce and expand this segment of the tourism market. As the sector continues its post-pandemic recovery, the project's prime location and mixed-use design are likely to draw increased visitor numbers, generate employment across the tourism value chain, and contribute to the sustained expansion of Cape Town's visitor economy (WESGRO, 2023).

The proposed development is positioned to further strengthen Cape Town's tourism appeal. By extending the promenade, enhancing pedestrian infrastructure, and integrating retail and leisure spaces, the development directly supports the V&A Waterfront's position as a tourist attraction. Further, the inclusion of accessible public spaces aligns with key tourism trends, prioritising hospitality, coastal recreation, and experiential travel. The development is expected to support Cape Town's status as a leading urban tourism destination through enhancing experiential quality, supporting infrastructure, and expanding the City's signature attractions. This aligns with both the City's tourism growth objectives and the Western Cape Government's vision for a vibrant, inclusive visitor economy.

6.6 SUMMARY

Between 2011 and 2022, the City of Cape Town experienced substantial population growth, increasing from 3.74 million to approximately 4.77 million, with households rising from 1.07 million to 1.45 million. The city's population is predominantly working-age (70.9%), with a modest increase in the elderly population and a slight decrease in the proportion of young children over the past decade, resulting in a lower dependency ratio of 41%. Education and housing metrics improved over this period, with higher proportions of residents attaining tertiary education, living in formal dwellings, and having access to essential services such as electricity, piped water, and flush toilets. Unemployment in Cape Town remains lower than the national average but higher than the provincial average, reflecting urban labour market dynamics. At the local level, the Table Bay District having mirrored these trends, with steady population and household growth, smaller household sizes, and an educated workforce, highlighting the area's potential for economic activity and demand for mixed-use developments.

Economically, Cape Town contributes around 72% of the Western Cape's GDP, which grew from R410 billion in 2011 to R475 billion in 2022, demonstrating long-term expansion despite shocks such as drought and the COVID-19 pandemic. The city's economy is predominantly service-oriented, with finance, real estate, business services, trade, hospitality, and community services accounting for the largest share of Gross Value Added and employment, while manufacturing and primary sectors play smaller roles. Tourism is a critical component of Cape Town's economy, with the V&A Waterfront serving as a key attraction and driver of visitor spending, employment, and broader economic linkages. The proposed development within this precinct is strategically positioned to support Cape Town's economic and demographic trends by providing mixed-use residential, commercial, cultural, and public spaces, enhancing tourism, creating jobs, and leveraging the skilled local workforce to stimulate sustained economic growth and urban vitality.

7 ECONOMIC ANALYSIS

7.1 OVERVIEW

This section examines how the proposed development may influence economic activity within the study area and beyond. The assessment considers how new investment introduced through the project could stimulate economic flows, employment, and business activity, with effects extending from the local context to the wider regional economy. The analysis is concerned with identifying and describing the nature and scale of potential changes in economic conditions and community outcomes associated with the development.

7.2 ECONOMIC IMPACT

7.2.1 OVERVIEW

Figure 7.1 presents a conceptual framework for assessing the total economic impact of the proposed development, showing how different types of economic effects are generated and how they relate to one another. At the centre of the diagram is the idea that the overall contribution of a development to the economy extends well beyond its immediate footprint, unfolding through a series of direct, indirect, and induced effects that together determine the total economic impact.

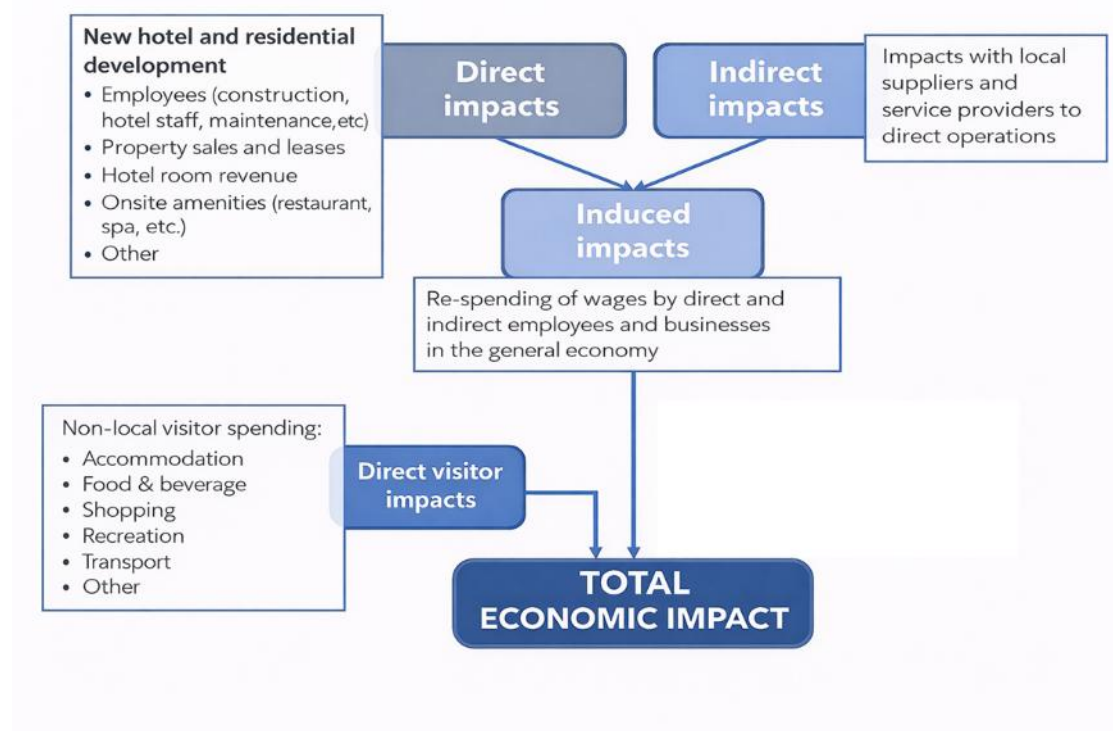


Figure 7.1. Economic impact associated with mixed-use developments such as the one proposed.

Direct impacts capture the immediate economic activity generated by the development itself. For a hotel and residential project, this includes employment created during operation (such as hotel staff, facilities management, security, and administration), operational expenditure on goods and services, and revenues generated through accommodation, residential sales or rentals, food and beverage services, and on-site amenities. These impacts represent the most visible and easily measurable effects associated with the development.

Indirect impacts arise through the development's supply chain and upstream linkages. These include economic activity generated by suppliers and service providers that support hotel and residential operations, such as food and beverage suppliers, laundry services, maintenance contractors, utilities, professional services, and property management firms. Although these activities occur off-site, they are directly linked to the operation of the development and reflect how spending by the project circulates through the wider regional economy.

Induced impacts result from the re-spending of income earned through both direct and indirect employment. Wages paid to hotel employees, residential management staff, and supplier businesses are spent in the broader economy on goods and services such as housing, transport, retail, education, and healthcare. This household spending supports additional economic activity and employment across multiple sectors, further amplifying the development's contribution to the local and regional economy.

Figure 7.1 also highlights **direct visitor impacts**, which are particularly important for hotel developments. These relate to expenditure by non-local visitors attracted to the area, including spending on accommodation, food and beverage, transport, recreation, retail, and other services. Visitor spending represents an injection of new money into the local economy and plays a key role in strengthening tourism-related value chains.

Together, these direct, indirect, induced, and visitor-related effects combine to form the total economic impact of the development. The diagram illustrates how a hotel and residential project can act as an economic catalyst, supporting employment, business activity, and income generation well beyond the site itself, and reinforcing its significance within the broader urban and regional economy.

7.2.2 ASSESSING ECONOMIC IMPACT

Economic impacts can be considered in terms of their timing and the stage of the development life cycle: (1) the construction phase (capital expenditure; CAPEX) and (2) the operational phase (operational expenditure; OPEX). The construction phase generates temporary economic effects, reflecting the short-term nature of activities such as building and infrastructure installation. In contrast, the operational phase extends over several decades, producing long-lasting and sustainable economic benefits through ongoing activities, services, and revenue generation associated with the project.

Given the differing timeframes of these phases, the impacts are distinguished between those arising during the construction stage and those occurring throughout the operational stage. The economic effects associated with both the construction and operational phases can be assessed in terms of changes in the following indicators:

-
- **Gross output** (or additional production) that is generated by the new development. Construction of the infrastructure and buildings will stimulate increased turnover for existing firms within the local economy. This impact is reflected as additional revenue generated as a direct result of the capital investment in the development. During operation, the ongoing demand for goods and services required to support the functioning of the development and its various activities will generate sustained economic activity and continued business revenue within the broader economy.
 - **Contribution to GDP** is the total monetary value of all final goods and services produced within a defined geographic area over a one-year period, arising as a direct, indirect, and induced effect of activities associated with the new development during its planning, construction, and operational phases.
 - **Employment** impacts are measured in terms of the total number of jobs generated as a result of the development, including direct employment on-site, indirect employment within supporting industries and supply chains, and induced employment arising from increased household spending. These impacts are further analysed by skill category, distinguishing between skilled, semi-skilled, and unskilled positions to reflect the range of labour opportunities created across different segments of the workforce.
 - **Income** impacts refer to the total wages and salaries generated through employment associated with the new development. This includes earnings from direct, indirect, and induced jobs, which in turn contribute to increased household income and enhanced spending power within the local and regional economy.

Each of these indicators was assessed for the construction phase and operational phase of the proposed development based on standard South African input-output multipliers. All the Rand values in this report represent 2025 Rand values. The various measures of economic impact, such as employment, GDP, and additional business sales represent distinct effects and should not be combined. Each indicator should be considered separately to understand the specific type of economic contribution it reflects.

7.3 CAPITAL EXPENDITURE

The construction-phase economic impacts of the proposed development were estimated using the total development cost of approximately R1.7 billion, applied as a proxy for capital expenditure associated with construction activities. It is assumed that the majority of this expenditure will be directed towards construction-related goods and services, including labour, materials, plant, and professional services. Industry-specific standard construction-phase multipliers were used to estimate employment, GDP and income impacts.

Total economic output supported by the construction phase is estimated at approximately R4.3 billion, including indirect and induced effects (Table 7.1). Of this total, approximately R2.6 billion represents secondary (indirect and induced) economic activity generated through supply-chain linkages and household spending.

The contribution to GDP is measured in terms of value added, which represents the net increase in economic value after accounting for intermediate inputs. The construction

phase is estimated to generate direct GDP contribution of approximately R651 million over the construction period, and the total GDP contribution supported by the construction phase is estimated at approximately R1.7 billion, including indirect and induced effects (Table 7.1).

Based on typical construction-sector employment intensities in South Africa, the construction phase is estimated to support approximately 1335 direct job-years over the construction period. Total employment supported by construction activities is estimated at approximately 5136 jobs, including indirect and induced employment. Based on the total estimated employment, approximately 20% of jobs are expected to be skilled, 45% semi-skilled, and 35% low-skilled or unskilled.

Direct household income generated during the construction phase is estimated at approximately R342 million. Total household income supported across the economy during the construction period is estimated at approximately R856 million, of which approximately R513 million represents indirect and induced income effects.

Table 7.1 Estimated economic impact during the construction phase of the proposed development. All rands in R million 2025.

Indicator	Direct	Indirect	Induced	Total
Economic output (R million)	1,712	1,541	1,027	4,280
Contribution to GDP (R million)	651	616	411	1,678
Total employment (jobs)	1,335	2,568	1,233	5,136
Skilled	267	514	247	1,027
Semi-skilled	601	1,156	555	2,311
Low-skilled/unskilled	467	899	431	1,798
Household income (R million)	342	308	205	856

The construction phase is expected to result in a high positive but temporary socio-economic impact, reflected in substantial contributions to economic output, GDP, employment, and household income. While these impacts are time-bound and limited to the construction period, they represent a significant short-term stimulus to the local and regional economy.

The construction-phase estimates are indicative and based on standard South African construction-sector multipliers. Actual impacts will depend on the final construction programme, procurement practices, skills composition of the workforce, and the extent of local sourcing. Where portions of the total development cost relate to non-construction items such as land acquisition or financing costs, the construction-phase impacts may be marginally overstated. The results should therefore be interpreted as order-of-magnitude estimates intended to inform impact significance rather than precise forecasts.

7.4 OPERATIONAL EXPENDITURE

The operational-phase economic impacts of the proposed mixed-use development were estimated using projected annual operating revenues and expenditures expressed in opening-year prices, and information on the likely number of rooms to be operational as part of the hotel and luxury residential apartment block. Gross operating revenue of approximately R148.0 million per annum was applied as a proxy for direct economic output, while operating expenditure of R48.7 million per annum represents intermediate inputs to the economy. Standard South African input-output multipliers for service-oriented activities were applied to estimate indirect and induced effects.

The operational phase is expected to generate direct output of approximately R148.0 million per annum (Table 7.2). The development is estimated to support total annual economic output of approximately R311 million, including indirect and induced effects. Of this total, approximately R163 million per annum is attributable to secondary (indirect and induced) economic activity within the wider economy.

Contribution to GDP, representing the net contribution to the economy after accounting for intermediate inputs, is estimated at approximately R99 million per annum, and the total contribution to GDP is estimated at approximately R159 million per annum, highlighting the development's role in adding net economic value to the regional economy (Table 7.2).

Table 7.2 Estimated economic impact during the operational phase of the proposed development. All rands in R million 2025.

Indicator	Direct	Indirect	Induced	Total
Economic output (R million)	148	70	93	311
Contribution to GDP (R million)	99	24	36	159
Total employment (jobs)	211	53	106	369
Skilled	42	11	21	74
Semi-skilled	95	24	47	166
Low-skilled/unskilled	74	18	37	129
Household income (R million)	44	13	17	74

Based on typical employment intensities for service-based developments such as the proposed mixed-use development which include hotel rooms and luxury residential apartments, the operational phase is estimated to directly support approximately 211 employment opportunities (Table 7.2). Direct jobs are created on-site for day-to-day operations and would include front desk, housekeeping, concierge, security, maintenance, administration, management, and hospitality staff. For service-oriented developments like hotels and luxury apartments, these operational needs are labour-intensive, so a single hotel or apartment building can generate a significant number of direct jobs relative to its size. Indirect jobs, by contrast, are in the supply chain and would include food and beverage suppliers, laundry services, utilities, contractors, maintenance firms, etc. The number of these jobs is typically proportional to the operational expenditure on goods and services, which is often less than the total labour needed on-site. Total employment supported by the development is estimated at approximately 369 jobs, including supply-chain and household-spending effects.

Direct household income generated during operations is estimated at approximately R44 million per annum with total income supported across the economy estimated at approximately R74 million per annum, of which approximately R30 million represents indirect and induced income effects. (Table 7.2).

The operational phase of the proposed development is expected to make a substantial positive contribution to the regional economy through sustained output generation, direct and indirect employment creation, household income support, and contribution to GDP. These impacts are ongoing in nature, representing longer-term socio-economic benefits relative to the short-term construction phase.

The estimates presented above are indicative and are based on standard South African input-output multipliers. Actual impacts will depend on factors such as the final operational arrangement in terms of the number of hotel rooms and number of residential units as well as procurement practices, the extent of local sourcing, and prevailing economic conditions at the time of operation. The results should therefore be interpreted as order-of-magnitude estimates intended to inform impact significance rather than precise forecasts.

7.5 SUMMARY

The proposed development is expected to generate significant economic benefits both during construction and throughout its operational life. During the construction phase, with a total capital expenditure of approximately R1.7 billion, the project is estimated to support total economic output of around R4.3 billion, including direct, indirect, and induced effects. This activity is projected to contribute approximately R1.7 billion to GDP, create over 5,100 employment opportunities across skilled, semi-skilled, and low-skilled categories, and generate total household income of approximately R856 million. These impacts are temporary but provide a substantial short-term stimulus to the local and regional economy.

In the operational phase, ongoing activities are expected to sustain total annual economic output of approximately R311 million and contribute around R159 million per annum to GDP. The development will support roughly 369 jobs, generate R74 million in household income, and stimulate further economic activity through supply chains and household spending. By combining employment creation, income generation, and GDP contribution with induced effects from visitor spending, the development is expected to provide long-term, sustainable socio-economic benefits, reinforcing its role as an economic catalyst for the local and regional economy.

8 SPECIALIST IMPACT ASSESSMENT

8.1 OVERVIEW

The assessment and rating procedure described in Appendix 1 of this report were used to assess the socio-economic impact of the proposed development. To reduce negative impacts, precautions referred to as ‘mitigation measures’ are set, and attainable mitigation actions are proposed. Mitigation measures were classified as either:

- Essential: Mandatory measures that must be implemented and are non-negotiable; or
- Best Practice / Recommended: Non-mandatory measures that should be implemented where feasible and appropriate.

To further enhance positive impacts, a set of optimisation measures are proposed. These are best practice broader enhancement measures aimed at optimising potential socio-economic benefits associated with the project and are non-mandatory. Impacts have been divided into those pertaining to the construction phase (referring to impacts occurring as a result of the construction of the mixed-use development, as well as all supporting infrastructure), while operational phase impacts refer to those impacts occurring as a result of the post-construction operation of the facility. Cumulative impacts and the assessment of the ‘No-Go’/Do Nothing alternative have also been assessed.

This analysis draws on the findings of the Draft Heritage Impact Assessment which includes the Townscape and Visual Impact Assessment prepared by Claire Abrahamse and the Archaeological Impact Assessment prepared by TerraMare (Postlethway 2026).

8.2 IDENTIFIED IMPACTS

Table 8.1 outlines the key identified positive and negative impacts that are likely to occur during the construction and operational phases of the proposed mixed-use development. Each of these impacts are assessed below in detail.

Table 8.1 Identified impacts associated with the construction and operational phases of the mixed-use development.

Phase	Type of impact	Identified impact	Duration of impact
Construction phase	Positive	Increase in gross output and GDP	<u>Temporary:</u> impacts are temporary in nature, and are typically terminated when construction ends.
		Increase in employment	
		Increase in household income	
		Government revenue	
	Negative	Marine archaeological heritage resources	
		Sense of place (visual)	
		Noise and dust pollution	
Operational phase	Positive	Physical health and safety	<u>Sustained and compounding:</u>
		Increase in gross output and GDP	
		Increase in employment	

Phase	Type of impact	Identified impact	Duration of impact
		Increase in household income	impacts are sustained into the future over the course of the operational period of the development.
		Government revenue	
		Skills development	
		Improved public open space and amenity value	
		Sense of place (visual)	
		Strengthened visitor economy	

8.3 CONSTRUCTION PHASE: TEMPORARY POSITIVE IMPACTS

8.3.1 POSITIVE IMPACT ON GROSS OUTPUT AND GDP

The proposed development is anticipated to generate direct, indirect, and induced effects on overall production and business turnover within the economy. This will be a temporary stimulation during the construction phase. The economic analysis considered the following:

- Direct impacts measure the immediate economic activity associated with the development. These relate to changes occurring in the primary businesses that undertake the initial expenditure and generate revenue during the construction phase. Such impacts include spending on labour, construction materials, equipment, professional services, and other capital inputs.
- Indirect impacts reflect changes in economic activity among suppliers and service providers that support these primary businesses. This includes the procurement of goods and services and the employment of additional labour by suppliers in response to increased demand generated by the project.
- Induced impacts result from the re-spending of labour income earned through both direct and indirect employment. After accounting for taxes, savings, and commuting costs, household expenditure by employees circulates through the broader economy, generating additional production and business activity across multiple sectors.

The construction phase is estimated to support total economic output of approximately R4.3 billion, including indirect and induced effects, of which around R2.6 billion arises from secondary supply-chain and household-spending impacts. In terms of value added, the development is expected to contribute approximately R651 million directly to GDP, with total GDP contribution increasing to about R1.7 billion once indirect and induced effects are included. Table 8.2 highlights the temporary impact of the proposed development on gross output and GDP.

Table 8.2. Potential temporary positive impact associated with gross output and contribution to GDP during the construction phase.

	Extent	Intensity	Duration	Consequence	Probability	Significance	Status	Confidence
Without optimisation measures	Regional	Medium	Short term	Medium	Probable	Medium	Positive	Med-High
Optimisation measures (best practice/recommended):								
- Promote local procurement and prioritise the employment of local labour, where feasible. - Source construction materials, goods and services from local suppliers wherever practical.								
With optimisation measures	Regional	Medium-High	Short term	High	Probable	Medium-High	Positive	Med-High

8.3.2 POSITIVE IMPACT ON EMPLOYMENT

The proposed development is expected to generate temporary employment during the construction phase. According to the economic analysis, approximately 5136 jobs will be supported through direct, indirect, and induced effects. These opportunities will extend across multiple sectors, including construction, and business and retail services.

Employment opportunities typically span a range of skill levels, reflecting the diverse technical, supervisory, and labour requirements of the project. The analysis indicates that around 20% of jobs will be allocated to skilled workers, 45% to semi-skilled workers, and 35% to low-skilled/unskilled workers. Together, these employment categories enable broad labour absorption during the construction phase, providing opportunities across different qualification and experience levels within the local workforce:

- **Skilled employment** generally includes technical, supervisory, and specialist roles that require formal qualifications, apprenticeships, or significant industry experience. These may include civil engineers, construction managers, site supervisors, quantity surveyors, architects, health and safety officers, electricians, plumbers, carpenters, bricklayers, heavy machinery operators, and specialised plant technicians. These roles involve planning, coordination, quality control, compliance, and the execution of complex construction tasks.
- **Semi-skilled employment** typically comprises workers with some level of training or practical experience but without advanced professional qualifications. Examples include general construction workers with trade-related experience, assistant artisans (e.g. assistant electricians or plumbers), scaffolders, steel fixers, concrete workers, tilers, painters, drivers, and equipment operators for smaller machinery. These roles support skilled trades and contribute directly to construction activities under supervision.
- **Low-skilled or unskilled employment** includes entry-level positions that require minimal formal training and are often task-based. These may include general labourers, material handlers, site cleaners, security personnel, flag operators, and basic landscaping workers. Such roles are essential for site preparation, manual handling, basic support functions, and maintaining site operations.

In addition to direct on-site employment, the project will indirectly support jobs across a range of linked sectors through supply chain and expenditure effects. These include manufacturing of construction materials (e.g. cement, steel, bricks, glass, and fittings),

transport and logistics services, plant and equipment hire, wholesale and retail trade, fuel supply, and professional services such as engineering, environmental consulting, legal, and financial services.

Table 8.3 highlights the temporary impact on employment during construction phase.

Table 8.3. Potential temporary positive impact associated with employment during the construction phase.

	Extent	Intensity	Duration	Consequence	Probability	Significance	Status	Confidence
Without optimisation measures	Regional	Medium	Short term	Medium	Probable	Medium	Positive	Med-High
Optimisation measures (best practice/recommended):								
- Promote local procurement and prioritise the employment of local labour, where feasible. - Where practical, support subcontracting opportunities for local SMMEs. - Where possible, promote inclusive hiring practices.								
With optimisation measures	Regional	High	Short term	High	Probable	High	Positive	Med-High

8.3.3 POSITIVE IMPACT ON HOUSEHOLD INCOME

The construction phase of the proposed mixed-use development is expected to generate positive impacts on household income through the creation of direct, indirect, and induced employment opportunities. As individuals secure work on-site and within associated supply chains, wages earned will increase disposable income within local communities. This additional income can improve households' ability to meet basic needs, access services, and invest in education, health care, and small-scale enterprises. The circulation of earnings within the local economy further stimulates secondary economic activity, supporting broader income generation. Collectively, these effects contribute to enhanced livelihoods, improved living standards, and overall socio-economic wellbeing during the construction period. The outcomes from economic analysis estimate the increase in total income to be approximately R856 million because of the capital expenditure of the construction phase. Table 8.4 highlights the temporary impact on household income during the construction phase.

Table 8.4. Potential temporary positive impact on household income during the construction phase.

	Extent	Intensity	Duration	Consequence	Probability	Significance	Status	Confidence
Without optimisation measures	Regional	Medium	Short term	Medium	Probable	Medium	Positive	Med-High
Optimisation measures (best practice/recommended):								
- Where feasible, maximise local employment opportunities. - Where practical, support opportunities for local SMMEs. - Where possible, promote the participation of women, youth, and historically disadvantaged groups.								
With optimisation measures	Regional	Medium to High	Short term	High	Probable	Medium-High	Positive	Med-High

8.3.4 POSITIVE IMPACT ON GOVERNMENT REVENUES

Government revenue impacts arise through a combination of taxes, levies, and service charges generated during both the construction (CAPEX) and operational (OPEX) phases. These impacts occur at national, provincial, and local government levels.

During the construction phase, government revenue is primarily once-off in nature and linked directly to capital expenditure and the associated economic activity generated by the project. At the national level, revenue is derived from value-added tax (VAT) on construction materials and professional services, corporate income tax on profits earned by construction firms and their suppliers, and personal income tax (PAYE) deducted from construction workers' wages. Additional fiscal inflows may arise from fuel levies associated with transport and logistics, as well as customs duties where imported materials or equipment are utilised. Given the scale of a R1.7 billion development, VAT and PAYE alone are likely to represent an important fiscal contribution during the construction period.

At the provincial and local levels, revenue is generated through building plan approval fees, development and bulk infrastructure contributions, and increased municipal service charges during construction. Following completion, property rates may also increase if the land and improvements are reassessed at a higher value. Overall, while construction-phase fiscal impacts can be moderate to substantial, they are temporary in nature and largely aligned with the duration of the construction programme.

Table 8.5 highlights the temporary impact on increased government revenue during the construction phase.

Table 8.5. Potential temporary positive impact on government revenue during the construction phase.

	Extent	Intensity	Duration	Consequence	Probability	Significance	Status	Confidence
Without optimisation measures	National	Medium	Short term	Medium	Probable	Medium	Positive	Med-High
Optimisation measures: N/A								
With optimisation measures	National	Medium	Short term	Medium	Probable	Medium	Positive	Med-High

8.4 CONSTRUCTION PHASE: TEMPORARY NEGATIVE IMPACTS

8.4.1 NEGATIVE IMPACTS UPON MARITIME ARCHAEOLOGICAL AND/OR SUBMERGED PRE-COLONIAL ARCHAEOLOGICAL HERITAGE RESOURCES

The site has no other intrinsic heritage significance and is significant largely in its relationship to surrounding heritage resources and contextual character, particularly its position along the coastline. Maritime archaeological and submerged pre-colonial archaeological resources in or on the former seabed, below the fill that comprises the

current land surface of the project area may be expected. Terrestrial historical archaeological resources are not expected on the project site. Although historical artefacts may be present within the fill, these will have little archaeological value, because they will lack both their original context and provenance. Table 8.6 outlines the potential negative impact on the maritime archaeological heritage resources during the construction phase (see Postlethwayt 2026).

Groundworks at the Breakwater North Precinct Phase 1B site that reach levels intersecting the former seabed should be subject to archaeological monitoring, with appropriate contingencies in place to enable the mitigation of any shipwreck remains or pre-colonial archaeological material encountered. Monitoring should be undertaken by a suitably experienced archaeologist on at least a weekly basis, or more frequently if required. Archaeological awareness must also be incorporated into the environmental training programme for all site staff and machine operators. In the event that construction personnel uncover any material of potential archaeological significance, work in the immediate area should cease and the find must be reported immediately to the project Environmental Control Officer (ECO) and site manager, with the monitoring archaeologist called to site to assess the discovery and determine whether further mitigation is necessary.

Table 8.6. Potential negative impacts upon maritime archaeological and/or submerged pre-colonial archaeological heritage resources below the modern fill, in or on the former seabed during the construction phase. Source: Extracted from the Heritage Impact Assessment (Postlethwayt 2026).

	Extent	Intensity	Duration	Consequence	Probability	Significance	Status	Confidence
Without mitigation measures	Local	High	Long term irreversible	High	Possible	Med	Negative	Low
Mitigation measures (essential):								
- Any groundworks on the Breakwater North Precinct Phase 1B site, to levels that may intersect with the former seabed must be subject to archaeological monitoring, with the necessary contingencies in place to allow the mitigation of shipwreck remains or pre-colonial archaeological material, should they be encountered - Monitoring visits should be conducted by a suitably experienced archaeologist at least once per week, or as required - Archaeological information should be presented as part of the environmental training programme for all site staff and machine operators - Should anything of interest be found by construction staff, this must immediately be reported to the project ECO and site manager, and the monitoring archaeologist called to site to assess the find and establish whether any form of mitigation is required.								
With mitigation measures	Local	Low	Short term	Very low	Definite	Very low	Negative	High

8.4.2 NEGATIVE IMPACT ON SENSE OF PLACE (VISUAL RESOURCES)

During the construction phase, the visual character of the site and its surroundings will be temporarily altered, which may negatively affect the sense of place for nearby residents, visitors, and users of the V&A Waterfront precinct. Construction activities, including the presence of scaffolding, cranes, machinery, stockpiles of building materials, and temporary fencing, can create visual clutter and reduce the aesthetic

quality of the area. Views to and from the waterfront, as well as sightlines of adjacent public spaces and heritage features, may be partially obscured, diminishing the overall visual experience. Although these impacts are temporary and confined to the construction period, they may affect the enjoyment of the public realm, the perceived attractiveness of the precinct, and the local identity during this time. However, it is important to acknowledge that the current character of the site is already impacted by construction works on the immediately adjacent land parcels.

Effective on-site construction management should mitigate other anticipated impacts during the construction phase by ensuring that all activities are confined to demarcated and boarded areas, implementing appropriate site rehabilitation and management measures upon completion of the works, and safeguarding elements identified for retention, including existing palm trees within the central street island. Table 8.7 outlines the temporary impact on the sense of place during the construction phase.

Table 8.7. Potential temporary negative impact on the sense of place (visual) during the construction phase. Source: Extracted from the Visual Impact Assessment (Abrahamse 2026).

	Extent	Intensity	Duration	Consequence	Probability	Significance	Status	Confidence
Without mitigation measures	Local	High	Short term	Low	Probable	Low	Negative	High
Mitigation measures (essential): Effective on-site construction management shall mitigate other anticipated impacts during the construction phase, including: • Limiting construction to within boarded areas; • Site rehabilitation and management following completion of the works; and • Where possible green elements such as the existing palm trees in the central street island should be retained.								
With mitigation measures	Local	Med	Short term	Very low	Probable	Very low	Negative	High

8.4.3 NEGATIVE IMPACT ASSOCIATED WITH NOISE AND DUST POLLUTION

The construction phase will result in temporary increases in noise and dust levels associated with site clearance, excavation, material transport, and general building activities. These impacts are typical of construction projects of this nature and are expected to be localised and short term. With the implementation of standard mitigation measures, such as dust suppression, appropriate storage of materials, vehicle speed controls, and adherence to regulated working hours, noise and dust effects are anticipated to remain within acceptable limits. Overall, the impacts are expected to be relatively minor and confined to the construction period, with no significant long-term consequences once activities are completed.

Although construction activities will generate noise and dust that may be noticeable to residents and visitors nearby, the overall impact is expected to be low, largely confined to the construction site and its immediate vicinity. The closest building is approximately 60 metres south of the development, while surrounding structures are predominantly

parking facilities, further limiting potential disturbance. By implementing the proposed mitigation measures, these impacts can be reduced to a point of very low (Table 8.8).

Table 8.8. Potential temporary negative impact associated with noise, dust and pollution during the construction phase.

	Extent	Intensity	Duration	Consequence	Probability	Significance	Status	Confidence
Without mitigation measures	Local	Low	Short term	Low	Probable	Low	Negative	High
Mitigation measures (essential): • Ensure full compliance with all relevant national and municipal policies, regulations, and guidelines regarding noise and dust management, particularly when working near roads, sensitive receptors, and existing infrastructure. • Implement regular cleaning and maintenance of the construction site to prevent dust accumulation on surfaces, access roads, and surrounding areas. • Cover or securely store loose construction materials, soil, and debris to prevent windblown dust.								
With mitigation measures	Local	Low	Short term	Low	Possible	Very low	Negative	High

8.4.4 NEGATIVE IMPACT ASSOCIATED WITH PHYSICAL HEALTH AND SAFETY CONCERNS

Construction of the proposed mixed-use development presents potential physical health and safety risks for workers, site visitors, and the surrounding community. These include occupational hazards such as falls, machinery accidents, and exposure to dust, noise, and construction-related materials, as well as public safety risks from falling debris, site traffic, and uncontrolled access. While these impacts are typically short-term and confined to the construction phase, they require careful management through strict adherence to occupational health and safety regulations, use of personal protective equipment, implementation of site access controls, dust and noise mitigation measures, and regular safety training for all personnel as per the health and safety plan. With these precautions in place, the risks can be effectively minimised, ensuring a safe environment for workers and the public. Table 8.9 highlights the temporary associated with physical health and safety during the construction phase.

Table 8.9. Potential temporary negative impact associated with physical health and safety during the construction phase.

	Extent	Intensity	Duration	Consequence	Probability	Significance	Status	Confidence
Without mitigation measures	Local	Medium	Short term	Low	Probable	Low	Negative	High
Mitigation measures (essential): • Adhere to occupational health and safety regulations as per the Health and Safety Plan for the project. • Use personal protective equipment, implement site access controls, and dust and noise mitigation measures. • Ensure regular safety training for personnel on site.								

	Extent	Intensity	Duration	Consequence	Probability	Significance	Status	Confidence
With mitigation measures	Local	Low	Short term	Very low	Probable	Very low	Negative	High

8.5 OPERATIONAL PHASE: SUSTAINED POSITIVE IMPACTS

8.5.1 POSITIVE IMPACT ON GROSS OUTPUT AND GDP

Once operational, the proposed development is expected to generate sustained positive economic impacts through increased gross output and contribution to GDP. The provision of hotel accommodation, luxury residential units, and associated commercial and leisure facilities will stimulate ongoing demand for goods and services, supporting both direct business revenues and the broader supply chain. This activity contributes net economic value by creating jobs, generating household income, and circulating money through the local and regional economy. The resulting increase in production and service provision enhances overall GDP, reflecting the development's role in strengthening the economic base, promoting investment, and supporting long-term growth within the V&A Waterfront precinct and the wider metropolitan area.

Beyond direct output, the operation of the development will generate additional economic benefits through indirect and induced effects. Indirect effects arise from the increased activity of suppliers and service providers supporting the development, including food and beverage suppliers, maintenance and cleaning contractors, utilities, and professional services. Induced effects occur as employees and business owners spend their wages within the local economy on housing, retail, transport, and other services. Together, these multiplier effects amplify the development's contribution to gross output and GDP, creating a broader and more sustained uplift in economic activity, supporting employment, household income, and the prosperity of surrounding communities over the long term.

The economic analysis suggests that the operational phase of the proposed development will generate some R311 million in gross output and contribute around R159 million to GDP annually. Table 8.10 highlights the positive sustained impact on output and GDP during operation.

Table 8.10. Potential sustained positive impact associated with gross output and contribution to GDP during operation.

	Extent	Intensity	Duration	Consequence	Probability	Significance	Status	Confidence
Without optimisation measures	Regional	Medium	Long term	High	Probable	Medium-High	Positive	Med-High
Optimisation measures (best practice/recommended):								
- Promote local procurement and prioritise the employment of local labour, where feasible. - Where practical, encourage partnerships with local businesses, tourism operators and cultural or event initiatives. - Where feasible, promote workforce development programmes.								

	Extent	Intensity	Duration	Consequence	Probability	Significance	Status	Confidence
With optimisation measures	Regional	Medium	Long term	High	Probable	High	Positive	Med-High

8.5.2 POSITIVE IMPACT ON EMPLOYMENT

The operational phase of the mixed-use development is expected to generate a sustained positive impact on employment by providing long-term job opportunities across a range of skill levels. Direct employment will include hotel staff, residential management personnel, security, cleaning, and administrative roles, while indirect employment will arise within the development's supply chain, including food and beverage suppliers, maintenance contractors, utilities, and professional services. Induced employment will result from household spending by employees and business owners throughout the local economy, supporting additional jobs in retail, transport, education, and community services. Employment opportunities will span skilled, semi-skilled, and low-skilled or unskilled categories, reflecting the diverse operational requirements of the development. This broad-based employment contribution not only enhances household income and economic resilience in the surrounding community but also strengthens the overall regional labour market by supporting a mix of professional, technical, and entry-level roles.

An estimated total of 369 permanent jobs will be created through direct, indirect, and induced mechanisms as a result of the proposed development. The optimisation measures aim to maximise the number, quality, and sustainability of jobs generated by the mixed-use development, support household incomes, strengthen local supply chains and enhance the long-term contribution of the project to the regional economy.

Table 8.11. Potential sustained positive impact associated with employment during operation.

	Extent	Intensity	Duration	Consequence	Probability	Significance	Status	Confidence
Without optimisation measures	Regional	Medium	Long term	High	Probable	Medium-High	Positive	Med-High
Optimisation measures (best practice/recommended): - Promote local procurement and prioritise the employment of local labour, where feasible. - Where practical, support subcontracting opportunities for local SMMEs. - Where possible, promote inclusive hiring practices.								
With optimisation measures	Regional	Medium	Long term	High	Probable	High	Positive	Med-High

8.5.3 POSITIVE IMPACT ON HOUSEHOLD INCOME

The operational phase of the proposed mixed-use development is expected to generate sustained household income, albeit with a smaller overall employment impact compared to the construction phase. Based on estimates from the economic analysis, the development is projected to support approximately R74 million in household income.

This income will be derived from a diverse range of employment opportunities created across the various components of the development.

Jobs will be generated in administration, professional services, and business support roles; in guest services, housekeeping, food and beverage, and hotel management, while the residential components will create positions in property management, security and caretaking, and cleaning services. Cultural and public facilities will generate employment in administration, event coordination, tourism, and facility operations, complemented by ongoing roles in maintenance, security, and groundskeeping across the development.

The mixed-use nature of the project ensures that employment opportunities span a wide range of skill levels, from entry-level service positions to specialised technical and managerial roles, contributing to a stable and sustained flow of household income within the local and regional economy. In addition to the direct earnings of employees, the operational phase will support indirect and induced income effects as wages are spent within local supply chains and households. This circulation of income amplifies the economic benefits, generating further employment, business activity, and household spending in the surrounding community. Table 8.12 highlights the potential sustained positive impact on household impact during operation.

Table 8.12. Potential sustained positive impact on household income during operation.

	Extent	Intensity	Duration	Consequence	Probability	Significance	Status	Confidence
Without optimisation measures	Regional	Medium	Long term	High	Probable	High	Positive	Med-High
Optimisation measures (best practice/recommended):								
- Where feasible, maximise local employment opportunities. - Where practical, support opportunities for local SMMEs. - Where possible, promote the participation of women, youth, and historically disadvantaged.								
With optimisation measures	Regional	Medium	Long term	High	Probable	High	Positive	Med-High

8.5.4 POSITIVE IMPACT ON GOVERNMENT REVENUES

During the operational phase, government revenues become recurring and longer-term, often providing a more stable and sustainable fiscal contribution than the one-off inflows associated with construction. At the national level, revenue is generated through corporate income tax from hotel operations and property management companies, as well as PAYE from permanent staff employed across the development. Value-added tax VAT collected on accommodation, food and beverage sales, retail, and service provision further contributes to national revenue. Dividends tax may also apply where profits are distributed to shareholders. With the development expected to generate annual turnover in the region of R148 million, VAT and PAYE are anticipated to provide consistent and predictable revenue streams each year.

At the local government level, operational revenue arises primarily through property rates, which can be substantial for high-value luxury apartments, as well as municipal service charges for water, electricity, refuse, and sewerage. Additional revenues may

include tourism levies, where applicable, and business licensing fees. Collectively, these operational-phase fiscal contributions reflect the long-term benefits of the development to both national and local government budgets, supporting municipal services and regional economic stability. Table 8.13 highlights the potential sustained impact on government revenue during the operational phase.

Table 8.13. Potential sustained positive impact on government revenue during operation.

	Extent	Intensity	Duration	Consequence	Probability	Significance	Status	Confidence
Without optimisation measures	National	Medium	Long term	High	Probable	High	Positive	Med-High
Optimisation measures: N/A								
With optimisation measures	National	Medium	Long term	High	Probable	High	Positive	Med-High

8.5.5 POSITIVE IMPACT ON SKILLS DEVELOPMENT

During the operational phase of the proposed development, ongoing employment opportunities will provide a platform for local skills development across multiple sectors. Positions in hospitality including front-of-house staff, cleaners, kitchen personnel, and guest services alongside roles in facilities and property management, such as building maintenance, security, and administration, offer entry points into the formal labour market and the chance to acquire practical, transferable skills.

Specific opportunities for skills development include on-the-job training in customer service, sales, stock control, and digital point-of-sale systems; front-desk and guest service competencies in hospitality and short-term accommodation; and basic facilities and property management skills for operational staff. The development may also provide workplace exposure for students, interns, or trainees. By facilitating these experiences, the project can strengthen local workforce readiness, enhance career progression, and contribute to the growth of Cape Town's urban services economy. These outcomes are particularly valuable for youth and first-time job seekers in surrounding communities, supporting broader regional goals of employability and skills development. Table 8.14 outlines the positive impact associated with skills development during the operational phase.

Table 8.14. Potential sustained positive impact on skills development during the operational phase.

	Extent	Intensity	Duration	Consequence	Probability	Significance	Status	Confidence
Without optimisation measures	Regional	Low	Long term	Medium	Possible	Low	Positive	Med-High
Optimisation measures (best practice/recommended): - Where feasible, prioritise recruitment of residents from surrounding communities. - Where possible and feasible, implement formal training modules and offer ongoing professional development courses.								
With optimisation measures	Regional	Medium	Long term	Medium	Probable	Medium	Positive	Med-High

8.5.6 POSITIVE IMPACT ON PUBLIC OPEN SPACE AND AMENITY VALUE

The inclusion of Atlantic Park within the proposed mixed-use development is expected to generate a sustained positive impact by enhancing open space and amenity value for the precinct and the wider community. Strategically located at the junction of the Promenade, Breakwater Boulevard, Victoria Wharf Shopping Centre, and the pedestrian link connecting Table Bay Square to the proposed Atlantic Park, the park provides a highly accessible public space at promenade level. Visitors and residents will be able to enjoy expansive views of the ocean and the mountain to the south, as well as the broader Granger Bay area. By offering a landscaped, open environment for recreation, relaxation, and social interaction, Atlantic Park complements existing V&A Waterfront buildings and open spaces while strengthening the pedestrian experience. The park, together with a widened nine-metre Promenade, improves connectivity and visual access to the water, contributing to the aesthetic quality of the area and supporting the long-term cultural, recreational, and economic vitality of the precinct. These features are especially important in densely built urban areas where public open space is scarce.

Research suggests that public open spaces offer numerous benefits, and Atlantic Park is well-positioned to deliver these within the high-density V&A Waterfront precinct. By providing accessible green space with ocean and mountain views, the park will support physical and mental well-being, offer opportunities for recreation and leisure, and create a venue for social interaction and community events. Environmentally, the park contributes to urban cooling, enhances biodiversity, and improves the aesthetic quality of the area. Economically, attractive public spaces such as Atlantic Park can increase surrounding property values, stimulate visitor spending, and complement the commercial and cultural activities of the area.

Ensuring that Atlantic Park is well-lit and incorporates appropriate safety and inclusive design measures is critical to creating an accessible, inclusive, safe, and comfortable public space for all users. Adequate lighting improves visibility during evening hours, deters anti-social behaviour, and enhances the perception of safety for all users. By prioritising lighting, safety, and inclusivity, the development not only promotes greater use of the park but also fosters a sense of community, wellbeing, and belonging for residents and visitors.

Table 8.15. Potential sustained positive impact on amenity value during the operational phase.

	Extent	Intensity	Duration	Consequence	Probability	Significance	Status	Confidence
Without optimisation measures	Regional	Medium	Long term	High	Probable	Medium-High	Positive	Med-High
Optimisation measures (best practice/recommended):								
Where practical, prioritise lighting, safety, and inclusivity in the design of the park space.								
With optimisation measures	Regional	Medium	Long term	High	Probable	High	Positive	Med-High

8.5.7 POSITIVE IMPACT ON SENSE OF PLACE (VISUAL RESOURCES)

The preferred development option is expected to result in a positive impact on sense of place by introducing a high-quality, publicly accessible waterfront environment that strengthens visual and physical connections to the sea. The development will enhance the character and identity of the area through the creation of an active promenade, improved public realm and sensitively designed urban form that responds to its coastal setting. While changes to the existing townscape will occur, these are considered low in intensity and largely confined to the immediate and local context, with benefits arising from increased accessibility, amenity and urban cohesion.

This positive impact can be further reinforced through adherence to established urban design indicators and architectural guidelines (Table 8.16), alongside targeted investment in public realm upgrades, particularly at Atlantic Park, to reflect the site's coastal identity. Incorporating coastal vegetation, water's edge elements, and coherent landscape and elevation planning will ensure that the development meaningfully contributes to a distinctive and enduring sense of place.

Table 8.16. Potential sustained positive impact on the sense of place (visual resources) during the operational phase. Source: Extracted from the Visual Impact Assessment (Abrahamse 2026).

	Extent	Intensity	Duration	Consequence	Probability	Significance	Status	Confidence
Without optimisation measures	Site Local	Low	Long term	Low	Probable	Low	Positive	Med-High
Optimisation measures: Essential: - Adherence to the Urban Design Indicators (see document entitled "Urban Design Informants: Granger Bay Phase 1 Parcels O, P. a1 & a2", dated March 2026, as summarized in Section 6 of this Visual and Townscape Impact Assessment study). - Adherence to the Recommendations/Commitments Relating to Townscape and Architecture (Section 8.2 of this report). Best practice/recommended: - It is encouraged that the space at Atlantic Park, both on the lower edge and the upper/promenade edge, receive special design and landscaping attention and treatment, in a way that reflects its unique sense of place, incorporating vegetation and public amenity elements that reflect the positioning of this space at the waters' edge. - That a Landscape Plan and Elevations incorporating these aspects be produced for any future SDP applications (to be assessed by the local authority, the City of Cape Town Municipality).								
With optimisation measures	Site Local	Low	Med term	Very low	Probable	Very low	Positive	Med-High

8.5.8 POSITIVE IMPACT ON THE VISITOR ECONOMY

The operation of the proposed mixed-use development is expected to provide a sustained positive impact on the visitor economy by attracting additional domestic and international visitors to the area. The inclusion of a hotel, luxury apartments, retail spaces, dining outlets, and public amenities such as Atlantic Park will create a vibrant destination that encourages longer stays and increased visitor spending. Visitors will generate economic activity not only through accommodation and food services on-site but also through retail, entertainment, transport, and leisure activities in the surrounding

precinct. By enhancing the attractiveness of the V&A Waterfront area as a high-quality, accessible urban destination, the development will support local businesses, strengthen tourism-related supply chains, and contribute to Cape Town's broader visitor economy over the long term.

To optimise this impact, several enhancement measures can be implemented. The development could actively partner with local tourism operators, cultural institutions, and event organisers to create packages or experiences that encourage extended visits. Investment in informative wayfinding, signage, and digital engagement tools could improve visitor navigation and experience, increasing the likelihood of repeat visits. Hosting regular cultural, recreational, or food and beverage events within the development and public spaces can further drive footfall and local spending. Additionally, promoting sustainable and inclusive tourism practices will enhance the reputation of the precinct as a welcoming and responsible destination, ensuring long-term economic benefits.

Table 8.17. Potential sustained positive impact on the visitor economy during the operational phase.

	Extent	Intensity	Duration	Consequence	Probability	Significance	Status	Confidence
Without optimisation measures	Regional	Medium	Long term	High	Probable	Medium-High	Positive	Med-High
Optimisation measures (best practice/recommended):								
- Where practical, partner with local tourism operators, cultural institutions and event organisers, and align with V&A Waterfront tourism initiatives. - Where practical, investment in informative wayfinding, signage, and digital engagement tools.								
With optimisation measures	Regional	Medium	Long term	High	Probable	High	Positive	Med-High

8.6 THE NO-GO ALTERNATIVE

The No-Go Alternative refers to the potential impacts associated with not pursuing this development, or “doing nothing”.

From a socio-economic perspective, should this development not occur, a few minor negative construction and operation phase impacts would be avoided. Given the “Very Low” and “Insignificant” nature of the negative construction phase impacts (assuming mitigation) the avoidance of such impacts would likely be an insignificant benefit.

If the no-go alternative were to proceed, and the proposed mixed-use development were not implemented, the area would forgo a range of sustained positive socio-economic and amenity-related benefits. These avoided benefits would include the long-term contribution to GDP through operational activities, ongoing employment opportunities across skilled, semi-skilled, and entry-level positions, and the associated household income generation within the regional economy. The stimulus to the visitor economy through increased accommodation capacity, retail and hospitality spending, and enhanced destination appeal would likewise not materialise, limiting the precinct's potential to strengthen Cape Town's tourism offering. In addition, government would not

realise the recurring fiscal benefits associated with property rates, VAT, PAYE, and corporate income taxes generated during operation. From an urban design and amenity perspective, the opportunity to introduce green open space and an enhanced public realm, including improved vistas and pedestrian connectivity, would be lost, reducing the potential to expand accessible open space within a high-density urban environment. Collectively, the no-go alternative would represent a missed opportunity for sustained economic growth, skills development, public realm enhancement, and long-term value creation within the precinct and the broader regional economy.

Should the 'no-go' alternative be deemed favourable, the site will remain the same, and none of the above-mentioned negative impacts on the local environment would take place. However, none of the socio-economic benefits of the project would be realised (contribution to GDP, employment, household income, skills development, government revenues, visitor expenditure, and amenity value) with the lost benefits outweighing the avoided impacts. This alternative is therefore a net loss in terms of opportunity cost. Since positive impacts would outweigh the negative impacts, the construction and operation of the proposed mixed-use development is the preferred option over the 'no-go' alternative (i.e., it is preferable from a socio-economic perspective that the proposed mixed-use development be authorised). Consequently, the combined impact of doing nothing has been rated to be of "Med" negative significance (Table 8.18).

Table 8.18. Assessment of the No-Go Alternative.

	Extent	Intensity	Duration	Consequence	Probability	Significance	Status	Confidence
Without mitigation	Local	Med	Long Term	Med	Probable	Med	Negative	Medium

8.7 CUMULATIVE IMPACTS

The cumulative assessment indicates that the proposed mixed-use development will result in a combination of short-term negative and long-term positive impacts, with the overall cumulative effect considered positive. During the construction phase, temporary adverse impacts are anticipated, including noise and dust emissions, visual and heritage disturbance, and localised health and safety risks. These impacts are generally assessed as low in significance, short-term in duration, and largely reversible, particularly with the implementation of standard mitigation measures and compliance with applicable regulations.

In contrast, the operational phase is expected to generate sustained positive socio-economic impacts of moderate to high significance. These include ongoing contributions to gross output and GDP, long-term employment creation across skilled, semi-skilled, and entry-level positions, increased household income, and recurring government revenue at national and local levels. The development is also anticipated to stimulate the visitor economy through increased tourism potential and associated spending, reinforcing the economic vitality of the precinct. The inclusion of Atlantic Park and enhancements to the public realm will provide lasting amenity, open space, and visual benefits within a high-density urban environment, contributing positively to sense of place, social interaction, and overall urban quality.

When considered cumulatively alongside existing and planned developments within the precinct, the project is expected to integrate into an already established mixed-use and tourism-oriented node. Overall, considering the temporary and mitigable nature of construction-related impacts and the sustained economic, social, and amenity benefits during operation, the cumulative impact of the proposed development is assessed as positive and of medium to high significance in the long term.

A summary of all the assessed potential construction phase and operational phase impacts has been included in Table 8.19 indicating their significance rating with the assumption that optimisation measures and mitigation measures are put in place.

Table 8.19. Summary of potential socio-economic impacts associated with the construction and operation of the proposed mixed-use development.

	Impact identified	Consequence	Probability	Significance	Status	Confidence
CONSTRUCTION PHASE	Impact on gross output and GDP	High	Probable	Medium-High	Positive	Medium-High
	Impact on employment	High	Probable	High	Positive	Medium-High
	Impact on household income	High	Probable	Medium-High	Positive	Medium-High
	Impact on government revenues	Medium	Probable	Medium	Positive	Medium-High
	Impact on maritime archaeological heritage resources	Very low	Definite	Very low	Negative	High
	Impact on sense of place (visual)	Very low	Probable	Very low	Negative	High
	Impact associated with noise and dust pollution	Low	Possible	Very low	Negative	High
	Impact associated with health and safety concerns	Very low	Probable	Very low	Negative	Medium-High
OPERATIONAL PHASE	Impact on gross output and GDP	High	Probable	High	Positive	Medium-High
	Impact on employment	High	Probable	High	Positive	Medium-High
	Impact on household income	High	Probable	High	Positive	Medium-High
	Impact on government revenues	High	Probable	High	Positive	Medium-High
	Impact on skills development	Medium	Probable	Medium	Positive	Medium-High
	Impact on public open space and amenity values	High	Probable	High	Positive	Medium-High
	Impact on sense of place (visual)	Very low	Probable	Very low	Positive	Medium-High
	Impact on visitor economy	High	Probable	High	Positive	Medium-High

9 REASONED OPINION AND RECOMMENDATIONS

From a socio-economic perspective, no fatal flaws have been identified in the assessed site area. The location is considered appropriate and well-suited to accommodate the type and scale of the proposed mixed-use development, particularly within the context of the established V&A Waterfront precinct. The site benefits from existing infrastructure, accessibility and integration within a vibrant commercial and tourism node, which supports the feasibility and sustainability of the proposed land uses.

The assessment has identified a range of temporary, largely manageable negative impacts associated primarily with the construction phase, including noise, dust and short-term visual intrusion. These impacts are generally of low to moderate significance and can be effectively mitigated through the implementation of standard management and monitoring measures.

In contrast, the development is projected to generate sustained positive socio-economic benefits over the long term. These include contributions to gross output and GDP, permanent employment creation across a range of skill levels, increased household income, skills development opportunities, and recurring government revenue streams. The project is also expected to stimulate the visitor economy, strengthen the commercial viability of the precinct, and enhance public amenity through the inclusion of Atlantic Park and improved public realm connectivity.

While the 'No-Go' Alternative would avoid certain short-term negative impacts, it would also forfeit substantial and sustained socio-economic benefits, including job creation, income generation, fiscal contributions, and public realm improvements. On balance, the proposed development is expected to deliver a strongly positive socio-economic outcome, with benefits that are substantial and clearly outweigh any potential drawbacks.

It is recommended that the proposed development proceed, subject to the implementation of the identified mitigation measures. The optimisation measures are recommended best practice but are not mandatory. The development is considered socio-economically viable and aligned with broader regional economic development and urban regeneration objectives.

10 REFERENCES

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11 APPENDIX A: ENVIRONMENTAL IMPACT ASSESSMENT METHODOLOGY

IMPACT ASSESSMENT METHODOLOGY

The significance of all potential impacts that would result from the proposed project is determined in order to assist decision-makers. The significance of an impact is defined as a combination of the consequence of the impact occurring and the probability that the impact will occur. The significance of each identified impact was thus rated according to the methodology set out below:

Step 1 – Determine the consequence rating for the impact from the following three criteria:

Rating	Definition of Rating	Score
A. Extent – the area over which the impact will be experienced.		
Local	Confined to project or study area or part thereof (<2km from site)	1
Regional	The region (withing 30km of the site)	2
(Inter) national	Significantly beyond and adjacent land areas (>30km from site)	3
B. Intensity – the magnitude of the impact in relation to the sensitivity of the receiving environment		
Low	Site-specific and wider natural and/or social functions and processes are negligibly altered (negligible change)	1
Medium	Site-specific and wider natural and/or social functions and processes experience a notable change	2
High	Site-specific and wider natural and/or social functions or processes experience a severe or significant change	3
C. Duration – the time frame for which the impact will be experienced and its reversibility.		
Short-term	Up to 2 years	1
Medium-term	2 to 15 years	2
Long-term	More than 15 years (state whether impact is irreversible)	3

The combined score of these three criteria corresponds to a Consequence Rating, as follows:

Combined Score (A+B+C)	3 – 4	5	6	7	8 – 9
Consequence Rating	Very low	Low	Medium	High	Very High

Example:

Extent	Intensity	Duration	Consequence
Regional 2	Medium 2	Long-term 3	High 7

Step 2 – Assess the probability of the impact occurring according to the following definitions:

Probability – the likelihood of the impact occurring	
Improbable	< 40% chance of occurring
Possible	40% - 70% chance of occurring
Probable	70% - 90% chance of occurring
Definite	> 90% chance of occurring

Example:

Extent	Intensity	Duration	Consequence	Probability
Regional 2	Medium 2	Long-term 3	High 7	Probable

Step 3 – Determine the overall significance of the impact as a combination of the consequence and probability ratings, as set out below:

PROBABILITY					
CONSEQUENCE		Improbable	Possible	Probable	Definite
	Very Low	INSIGNIFICANT	INSIGNIFICANT	VERY LOW	VERY LOW
	Low	VERY LOW	VERY LOW	LOW	LOW
	Medium	LOW	LOW	MEDIUM	MEDIUM
	High	MEDIUM	MEDIUM	HIGH	HIGH
	Very High	HIGH	HIGH	VERY HIGH	VERY HIGH

Example:

Extent	Intensity	Duration	Consequence	Probability	Significance
Regional 2	Medium 2	Long-term 3	High 7	Probable	HIGH

Step 4 – Note the status of the impact (i.e. will the effect of the impact be negative or positive?)

Example:

Extent	Intensity	Duration	Consequence	Probability	Significance	Status
Regional 2	Medium 2	Long-term 3	High 7	Probable	HIGH	-‘ve

Step 5 – State the level of confidence in the assessment of the impact (high, medium or low).

Impacts are also considered in terms of their status (positive or negative impact) and the confidence in the ascribed impact significance rating. The prescribed system for considering impacts status and confidence (in assessment) is laid out in the table below. Depending on the data available, a higher level of confidence may be attached to the assessment of some impacts than others. For example, if the assessment is based on extrapolated data, this may reduce the confidence level to low, noting that further ground-truthing is required to improve this.

Confidence rating	
Status of impact	+ ve (beneficial) or – ve (cost)
Confidence of assessment	Low, Medium or High

Example:

Extent	Intensity	Duration	Consequence	Probability	Significance	Status	Confidence
Regional 2	Medium 2	Long-term 3	High 7	Probable	HIGH	-‘ve	High

The significance rating of impacts is considered by decision-makers, as shown below. Note, this method does not apply to minor impacts which can be logically grouped into a single assessment.

INSIGNIFICANT: the potential impact is negligible and will not have an influence on the decision regarding the proposed activity.

VERY LOW: the potential impact is very small and should not have any meaningful influence on the decision regarding the proposed activity.

LOW: the potential impact may not have any meaningful influence on the decision regarding the proposed activity.

MEDIUM: the potential impact should influence the decision regarding the proposed activity.

HIGH: the potential impact will affect a decision regarding the proposed activity.

VERY HIGH: The proposed activity should only be approved under special circumstances.

Step 6 – Identify and describe practical mitigation and optimisation measures that can be implemented effectively to reduce or enhance the significance of the impact. Mitigation and optimisation measures must be described as either:

- Essential: must be implemented and are non-negotiable; and
- Best Practice: must be shown to have been considered and sound reasons provided by the proponent if not implemented.

Essential mitigation and optimisation measures must be inserted into the completed impact assessment table. The impact should be re-assessed with mitigation, by following Steps 1-5 again to demonstrate how the extent, intensity, duration and/or probability change after implementation of the proposed mitigation measures.

Example 6:

	Extent	Intensity	Duration	Consequence	Probability	Significance	Status	Confidence
Without mitigation	Regional 2	Medium 2	Long-term 3	High 7	Probable	HIGH	-ve	High
Essential mitigation measures Xxxx Xxxxx								
With mitigation	Local 1	Low 1	Long-term 3	Low 5	Improbable	VERY LOW	-ve	High

Step 7 – Prepare a summary table of all impact significance ratings as follows:

Phase	Impact identified	Severity	Probability	Significance	Status	Confidence
xxxxxx	Impact 1: xxx	Medium	Improbable	LOW	-ve	High
	With mitigation	Low	Improbable	VERY LOW		High
	Impact 1: xxx	Very Low	Definite	VERY LOW	-ve	Medium
	With mitigation	Very Low	Improbable	INSIGNIFICANT	-ve	Medium

Indicate whether the proposed development alternatives are environmentally suitable or unsuitable in terms of the respective impacts assessed by the relevant specialist and the environmentally preferred alternative.

12 APPENDIX B: CVS OF SPECIALIST CONSULTANTS

Curriculum Vitae

GWYNETH KAY LETLEY

Date of Birth: 25 November 1985
Maiden Name: Wilson
Nationality: South African
Present occupation: Practice Manager: Ecosystem Services & Natural Capital at Anchor Environmental Consultants (part of SLR)
Academic qualifications: MSc Conservation Biology, PC Environmental Economics
Work address: 8 Steenberg House, Silverwood Close, Tokai 7945, South Africa.
Tel. (021) 701 3420 Fax. (021) 701 5280
Email: gwyn@anchorenvironmental.co.za

Summary profile

Gwyn has an MSc in Conservation Biology from the University of Cape Town and a postgraduate certificate in Applied Environmental Economics from the University of London. Over the past 16 years Gwyn has worked on the social and economic aspects of natural resource management and conservation, including the quantitative socio-economic aspects of conservation-development problems in South Africa, Namibia, Botswana, Zambia, Zimbabwe, Mozambique, Angola, Kenya, DRC, Gabon, Liberia and Sierra Leone. Gwyn is experienced in the economic appraisal of nature-based solutions, natural climate solutions and ecosystem restoration and has recently been involved in designing effective nature-based solutions for achieving water security in Tamale, Ghana; Freetown, Sierra Leone; Mombasa, Kenya and in the Cubango-Okavango River Basin in Angola where scenario analyses were undertaken to evaluate the net benefits and return on investment that would be generated through investing in conservation interventions. Gwyn has been deeply involved in the review and update of South Africa's Ecosystem-Based Adaptation (EbA) Strategy and Plan 2024-2034 and has recently undertaken an assessment of the feasibility of supporting interventions to the key challenges to natural climate solutions in the DRC and Kenya. She has extensive experience in valuing ecosystem services at various spatial scales, from basin-level to sub-national and national level assessments. Studies include the valuation of selected ecosystem services for input into a first set of monetary ecosystem accounts for the province of KwaZulu-Natal in South Africa and for Uganda's ecosystem services accounts, national assessments of Namibia and South Africa's ecosystem services, regional assessments of ecosystem services in the Cubango-Okavango River Basin in Botswana and Angola, valuation of wildlife resources in selected transboundary wildlife areas of East Africa, the valuation of selected urban ecosystem services in Durban, Kampala and Dar es Salaam. Gwyn is also experienced in spatial analysis and systematic and integrated conservation and development planning.

TERTIARY EDUCATION & QUALIFICATIONS:

- PC Applied Environmental Economics (with Distinction) - University of London, School of Oriental and African Studies (SOAS) 2013-2014
- MSc Conservation Biology - University of Cape Town 2009-2010
- BSc Honours (Zoology) - University of Cape Town 2008
- BSc (Zoology & Marine Biology) - University of Cape Town 2005-2007
- Matriculated in 2003 Pietermaritzburg Girls' High School

Selected projects

Period	Country	Client	Project, Tasks
2026 - ongoing	South Africa	WWF-SA	Project: Valuation of Marine Ecotourism in the southern seascape region: False Bay and Cape Whale Coast. Position and tasks: Project management, environmental economist undertaking the socio-economic assessment of marine ecotourism across the proposed marine Other Effective Area-based Conservation Measures (OECMs) pilot sites in False Bay, Kogelberg, and Dyer Island within the broader

Period	Country	Client	Project, Tasks
			Cape Whale Coast region of Cape Town and Overstrand Local Municipality. The assessment quantifies the economic contributions, social benefits, and non-market ecosystem values associated with key marine wildlife tourism activities, including viewing of the African penguin, boat-based whale watching, shark cage diving and other marine wildlife experiences.
2026 - ongoing	South Africa	GIZ and City of Joburg	Project: Green Infrastructure options to reduce flooding in the upper Jukskei catchment in Johannesburg Position and tasks: Environmental economist undertaking the socioeconomic elements and the selection and evaluation of GI interventions and valuation of ecosystem services components for input into Cost-benefit analysis.
2025-2026	Angola	GWPSA	Project: Economic valuation of the ecosystem goods and services provided by the Angolan highlands within the Cuvelai and Kunene River Basins. Position and tasks: Environmental economist, undertaking the valuation of ecosystem services, reporting.
2025-2026	Guinea, Cote d'Ivoire & Togo	World Bank	Project: Forest Ecosystem Accounts. Develop Ecosystem Accounts for three countries, build capacity and facilitate national dialogues on the role and mainstreaming of natural capital and biodiversity. Position and tasks: Environmental economist, undertaking the valuation of ecosystem services, accounts and final reporting.
2025 - 2026	Sierra Leone and Liberia	World Bank	Project: Forest Ecosystem Accounts for Sierra Leone and Liberia. Position and tasks: Environmental economist, helping to develop Ecosystem Accounts for two countries, including the valuation of selected forest provisioning, regulating and cultural ecosystem services.
2025-2026	Gabon	The Nature Conservancy	Project: Scoping study for the development of a National Payments for Ecosystem Services Programme. Position and tasks: Environmental economist undertaking the review of PES, ecosystem assessment and scenario analysis for the prioritization of areas for investment in PES.
2025	Zambia	World Bank	Project: Developing a background note on Ecosystem Services for Zambia's Country Climate and Development Report. Position and tasks: Environmental economist undertaking the evaluation of ecosystem services in Zambia and scenario analysis and cost benefit analysis to compare a Green Economy Scenario with a BAU approach. This as input into the Zambia CCDD.
2024-2025	Kenya	World Bank	Project: Catchment-scale mapping and prioritisation of opportunities for land and ecosystem restoration. Position and tasks: Environmental economist and NbS expert. Tasks included review of restoration activities, extent and costing of activities, valuation of ecosystem services, cost-benefit analysis and the development of an excel investment prioritisation tool.
2024 - 2025	Kenya	World Bank	Project: Developing Kenya's CIF Nature People Climate Investment Plan. Position and tasks: Environmental economist, valuation and multicriteria analysis as well as stakeholder consultation to identify priority areas for nature-based solutions and assisting with the development of a financing and investment plan.
2024	Kenya, DRC	The Nature Conservancy	Project: Mapping and costing of solutions to key constraints on Natural Climate Solutions in Kenya and the Democratic Republic of Congo. Position and tasks: Environmental economist and CC specialist. Identification of high-level costing of a feasible integrated suite of near-term supporting actions in DRC and Kenya to address the key constraints to NCS in those areas, taking a range of criteria into account.
2023-2025	Congo Basin 6 countries	World Bank	Project: Congo Basin Forest Accounts. Position and tasks: Environmental economist, helping to develop Ecosystem Accounts for six countries, including the valuation of selected forest provisioning, regulating and cultural ecosystem services.

Period	Country	Client	Project, Tasks
2023-2024	South Africa	City of Cape Town & GIZ	Project: Green infrastructure options for improved waterway and catchment management for the City of Cape Town. Position and tasks: Environmental economist undertaking the socioeconomic, governance, selection and evaluation of GI interventions and valuation of ecosystem services components.
2022-2025	South Africa	GIZ & DFFE	Project: Biome-level implementation plans for the biodiversity and ecosystems sector climate change adaptation strategy and review of the Ecosystem-Based Adaptation (EbA) Strategy in South Africa. Position and tasks: Natural resource economics expert responsible for data management, analysis, and report writing as well as the identification and costing of adaptation options and activities, and stakeholder engagement.
2022	Ghana	Catholic Relief Services	Project: Business case development for the Tamale Water Fund, Ghana Position and tasks: Project management, undertook the ecosystem services modelling and economic analysis, report writing
2022	Uganda	World Bank	Project: Development of ecosystem services accounts for Uganda Position and tasks: Assisted in preparing a first set of physical and monetary ecosystem accounts at a national scale, following SEEA EEA guidelines. This included mapping and valuation of selected provisioning, regulating and cultural ecosystem services.
2022-23	Mozambique Zimbabwe	IUCN & GWP-SA, through Southern Waters	Project: An integrated Eflows assessment to facilitate the development and agreement of “objective flows” at key sites in the Pungwe River Basin. Position and tasks: Responsible for the socio-economics aspects, including modelling of ecosystem services, and scenario inputs.
2022 - 2025	South Africa	DWS, through Myra Consulting	Project: Classification of the Limpopo River basin. Position and tasks: Responsible for the socio-economics aspects, including modelling of ecosystem services, water trade-offs and scenarios
2022	South Africa	uMzimkhulu Local Municipality	Project: Map out, value and undertake a complete market study on natural resource opportunities in the uMzimkhulu Local Municipality Position and tasks: Project management, ES valuation
2021	Botswana, Angola, Namibia	OKACOM	Project: Design and Roadmap for the establishment of a transboundary Payment for Ecosystem Services scheme for the Cubango-Okavango River Basin Position and tasks: Resource economist, ecosystem services assessment, review of PES.
2021-23	South Africa	Water Research Commission	Project: A framework to guide investments in hydrological services in South Africa. Development of guidelines for financing the restoration and maintenance of hydrological ecosystem services in different socio-ecological contexts, based on analysis of the South African experience & research on the demand side. Position and tasks: Project manager & lead researcher
2021	Lesotho, Botswana, South Africa, Namibia	ORASECOM	Project: Identification of potential PES projects for addressing environmental degradation in the Orange-Senqu River Basin Position and tasks: Review and analysis of environmental and socio-economic data and ecosystem services modelling to identify potential projects, narrowed down using cost-benefit analysis.
2021	South Africa	V&A Waterfront	Project: An economic analysis of the proposed Granger Bay Marina Position and tasks: Economic analysis, questionnaire development
2021	Kenya	AFD, TNC	Project: Design study for the creation of a Water Fund for Mombasa City Position and tasks: Undertook the ecosystem services modelling and socio-economic analysis
2020-21	East Africa	USAID, Economic Incentives	Project: Natural capital assessment for selected transboundary landscapes of conservation importance Position and tasks: Assisted with the valuation of ecosystem services and modelling BAU and alternative scenarios.
2020	Sierra Leone	CRS, TNC	Project: Business case development for the Western Area Peninsula Water Fund, Sierra Leone Position and tasks: Undertook the ecosystem services modelling and economic analysis

Period	Country	Client	Project, Tasks
2020	South Africa	ICLEI, CoJ	Project: Economic valuation of ecosystem services for the City of Johannesburg Position and tasks: Assisted with the valuation of ecosystem services and highlighting their importance to the urban environment, enhancing of draft chapters and policy recommendations
2019 - 2020	South Africa	DEA&DP Western Cape Government	Project: Report on the valuation of the estuary in the Berg River catchment Position and tasks: Assisted with the socio-economics component to assess and update the value of Berg estuary and its ecosystem services and how these values change under different yield and ecological reserve scenarios. Analysed Bird data and wrote the bird section for the Biodiversity chapter of the report.
2019-2020	Angola	TNC	Project: Economic analysis of returns to investing in Resilient Development interventions in the Angolan catchment areas of the Okavango Delta Position and tasks: Undertook ecosystem services modelling and economic analysis using scenario-based approach.
2019-2020	South Africa	UN Environment	Project: Support to the South African government for the development of monetary ecosystem accounts: Preliminary monetary ecosystem accounts for KwaZulu-Natal. Position and tasks: Assisted in preparing a first set of monetary ecosystem accounts at a regional scale in South Africa, following SEEA EEA guidelines. This included mapping and valuation of selected provisioning, regulating and cultural ecosystem services, with a view to making methodological input to the SEEA-EEA.
2019	Malawi	UNDP, Lilongwe Wildlife Trust	Project: The Case for Banning Single-use Plastic Products in Malawi Position and tasks: Provided a preliminary assessment of plastic pollution and the ban on thin plastic bags in Malawi and advised on a way forward based on a review of available information and information gathering through semi-structured interviews with government and stakeholders, and local and international experience.
2018	South Africa	UNDP, DEA	Project: Scoping and feasibility assessment for a certification scheme for the SA wildlife industry Position and tasks: Assisted with a review of certification schemes and how a scheme could be implement in SA wildlife industry, carried out a choice experiment study of landowners in the wildlife industry to determine feasibility and buy-in of such a scheme
2018	South Africa	UN Environment	Project: Review of natural capital valuation and accounting in South Africa Position and tasks: Review and design a study to pilot NCA in South Africa
2018	Laos	UN Environment through C4 EcoSolutions	Project: Economic assessment of proposed ecosystem-based adaptation (EbA) strategies for reducing urban flood risk in Lao PDR Position and tasks: Undertook an economic assessment of the proposed set of EbA interventions.
2017	South Africa	TNC & The Cape Town Water Fund	Project: The Cape Town Water Fund: A business case and strategy for clearing of Invasive Alien Plants Position and tasks: Undertook ecosystem services modelling and economic analysis
2017-2018	Namibia	GiZ and Namibia MET	Project: Namibia TEEB Study: The development of strategies to maintain and enhance the protection of ecosystem services in Namibia's state, communal and freehold lands Position and tasks: Evaluated the potential of and developed proposals for the introduction of specific policy measures for each of the following four priority sectors: 1. A national assessment of Namibia's Ecosystem Services. 2. Improving state protected area financing through pricing and institutional changes. 3. Potential for the use of a PES system in communal lands. 4. Incentives for sustainable practices and conservation in freehold rangelands.

Period	Country	Client	Project, Tasks
2017	Zambia	ERM	Project: Tourism Assessment for the Kalungwishi River Hydroelectric Power Project. As part of the Environmental and Social Impact Assessment Position and tasks: Conducted a tourism assessment in Northern Zambia to determine the value of tourism in the study area. Estimated the magnitude of socio-economic impacts of the proposed hydroelectric power project. Involved field work and surveys.
2017	South Africa, Tanzania, Uganda	World Bank	Project: Greening Africa's Cities: Enhancing the relationship between urbanization, environmental assets and ecosystem services Position and tasks: Co-author of a policy document with World Bank on the above topic.
2016-2017	South Africa	DWS through Aurecon	Project: Classification of and resource quality objectives for the water resources of the Breede-Gouritz Water Management Area: Economics sub-component Position and tasks: Assisted with the socio-economics component to assess value of ecosystem services and model impacts of different yield and ecological reserve scenarios.
2016-2017	South Africa	DWS through Aurecon	Project: Classification of and resource quality objectives for the water resources of the Berg Water Management Area: Economics sub-component Position and tasks: Assisted with the socio-economics component to assess value of ecosystem services and model impacts of different yield and ecological reserve scenarios.
2016	Mozambique	ERM	Project: Socio-Economic Impact Assessment for the proposed Sasol Offshore Pipeline and FSO, Inhambane Province, Mozambique Position and tasks: Conducted tourism business interviews and surveys in Inhassoro to determine the value of tourism in the study area. Estimated the magnitude of socio-economic impacts of the proposed offshore pipeline and FSO.
2015	Zambia Zimbabwe	ERM	Project: Socio-Economic Impact Assessment for the proposed Batoka Gorge Hydropower Facility – Zimbabwe/Zambia Position and tasks: Conducted tourism business interviews and surveys in Livingstone and Victoria Falls to determine the value of tourism in the study area and the contribution of the Batoka Gorge to this value. Estimated the magnitude of socio-economic impacts of the proposed dam.
2014-2016	South Africa	World Bank through AECOM Washington	Project: Promoting Green Urban Development in Africa: The value of Durban's natural capital and its role in Green Urban Development. Part 2: Evaluating the potential returns to investing in Green Urban Development Position and tasks: Economic analysis – assessing relative costs and benefits of different scenarios using a cost benefit approach.
2014-2016	South Africa	World Bank through AECOM Washington	Project: Promoting Green Urban Development in Africa: The value of Durban's natural capital and its role in Green Urban Development. Part 1: A spatial valuation of the natural and semi-natural open space areas in eThekweni Municipality Position and tasks: Ecosystem services assessment, including the development of water treatment cost models and hedonic analysis of property value.
2014-2016	Tanzania	World Bank through AECOM Washington	Project: Promoting Green Urban Development in Africa: Return on investment in Green Urban Development: amelioration of flood risk in the Msimbazi River catchment, Dar es Salaam, Tanzania Position and tasks: Economic analysis – scenarios were assessed in terms of their return on investment and a life-cycle cost (LCC) to estimate the costs of the flood mitigation measures, and analyse them in relation to the reductions in expected annual losses under each scenario.
2014-2016	Uganda	World Bank through AECOM Washington	Project: Promoting Green Urban Development in Africa: A preliminary investigation of the potential costs and benefits of rehabilitation of the Nakivubo wetland, Kampala Position and tasks: Economic analysis using CBA to evaluate the viability of restoration interventions

Period	Country	Client	Project, Tasks
2011	South Africa	G7 Renewable Energies	Project: Preconstruction monitoring of avifauna at two proposed wind energy sites in the Karoo, South Africa Position and tasks: Assisted with ecological surveys conducted on proposed wind farm sites.
2011	Numerous	UNOPS	Project: Agulhas Somali Current Large Marine Ecosystem Valuation of Marine and Coastal Resources Position and tasks: A desktop study which involved valuing the coastlines of eastern South Africa and Mozambique (within the ASCLME) using available data
2011	South Africa	DAFF	Project: Sector Plan for the Department of Agriculture, Forestry and Fisheries Position and tasks: Assisted with the editing of reports and with stakeholder consultation.
2010-2011	South Africa	SANBI	Project: National Biodiversity Assessment: South African National Estuary Conservation Plan Position and tasks: Co-author on a project aimed at developing a conservation plan for the estuaries of South Africa. The study concentrated on the development of an overarching conservation plan that involved using conservation planning techniques (MARXAN and CLUZ) and ArcView GIS
2010-2011	South Africa	CapeNature	Project: Uilkraals Estuary Situation Assessment and Estuary Management Plan Position and tasks: Assisted with writing the situation assessment and development of the EMP. The document formed the basis of the development of a vision and strategy for the management of the estuary in a participatory process involving stakeholders.
2010	Botswana	BirdLife Bots, GEF, DWA	Project: Makgadigadi Protected Areas Project Position and tasks: Assisted with the desktop valuation of protected areas of the Makgadikgadi Pans, financial/economic models of conservation models involving co-management, and the development of a financing strategy

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- DU PLESSIS, N.S., TURPIE, J.K. & LETLEY, G.K. 2023. Feasibility of financing nature-based solutions for water security through water tariffs: Evidence from South Africa. *AQUA — Water Infrastructure, Ecosystems and Society*. <https://doi.org/10.2166/aqua.2024.221>
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- TURPIE, J.K. & LETLEY, G.K. 2021. Would areas under community-based natural resource management benefit from external oversight? *World Development* **142**: 105442.
- WHITE, R., TURPIE, J. & LETLEY, G. 2017. Greening Africa's Cities: Enhancing the Relationship between Urbanization, Environmental Assets and Ecosystem Services. The World Bank, Washington D.C.
- TURPIE, J.K., FORSYTHE, K.J., LETLEY, G., KNOWLES, A. & BLIGNAUT, J. 2017. Mapping and valuation of South Africa's ecosystem services at a national scale using locally-relevant data: a matter of perspective. *Ecosystem Services*.
- LETLEY, G. & TURPIE, J.K. 2016. The contributions of natural and man-made green open space to property value in Durban, South Africa: a hedonic pricing study. *Environment for Development Discussion Paper Series EfD DP forthcoming*.

- WILSON, G.** & HOCKEY, P. A. R. 2013. Causes of variable reproductive performance by Southern Ground-hornbill *Bucorvus leadbeateri* and implications for management. *IBIS* 155: 476 - 484.
- HELM, C., **WILSON, G.**, MIDGLEY, J., KRUGER, L. & WITKOWSKI, E. T. F. 2011. Investigating the vulnerability of an African savanna tree (*Sclerocarya birrea ssp. caffra*) to fire and herbivory. *Austral Ecology* 36: 964-973.
- WILSON, G.**, BRANCH, G. M. & DE COITO, P. 2009. Comparative salinity tolerances of four siphonariid limpets in relation to habitat restriction of the rare and endangered *Siphonaria compressa*. *AFRICAN JOURNAL OF MARINE SCIENCE* 31 (3): 311-318.

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- LETLEY, G.**, TURPIE, K., BRÜHL, J. 2026. ECONOMIC VALUATION OF THE ECOSYSTEM GOODS AND SERVICES PROVIDED BY THE ANGOLAN HIGHLANDS WITHIN THE CUVELAI AND KUNENE RIVER BASINS: BASELINE ASSESSMENT. PREPARED BY ANCHOR ENVIRONMENTAL CONSULTANTS FOR GWPSA.
- TURPIE, J.K., WILSON, L., BRÜHL, J., SENTERRE, B., **LETLEY G.**, HICKINBOTHAM, B., GARDNER, K. & PHILIPPART, J. 2025. FOREST ECOSYSTEM ACCOUNTS 2000-2020 FOR SIX CONGO BASIN FOREST COUNTRIES: SYNTHESIS REPORT. PREPARED BY ANCHOR ENVIRONMENTAL CONSULTANTS FOR THE WORLD BANK.
- TURPIE, J.K., WILSON, L., BRÜHL, J., SENTERRE, B., **LETLEY G.**, HICKINBOTHAM, B., GARDNER, K. & PHILIPPART, J. 2025. FOREST ECOSYSTEM ACCOUNTS FOR EQUATORIAL GUINEA: ECOSYSTEM EXTENT, FOREST ECOSYSTEM CONDITION, ECOSYSTEM SERVICES AND ASSET ACCOUNTS. REPORT PREPARED BY ANCHOR ENVIRONMENTAL CONSULTANTS FOR THE WORLD BANK.
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