

TOP TEN INDUSTRIAL NODES Performance rank

	2015 Score
1 BLACKHEATH	5.0
2 BRACKENFELL IND	3.8
3 AIRPORT IND	3.8
4 MILNERTON	1.9
5 BRACKENFELL	1.7
6 MONTAGUE GARDENS	1.5
7 PAARDEN EILAND	1.4
8 SOMERSET MALL	1.3
9 SACK'S CIRCLE IND	1.3
10 KILLARNEY GARDENS	0.9

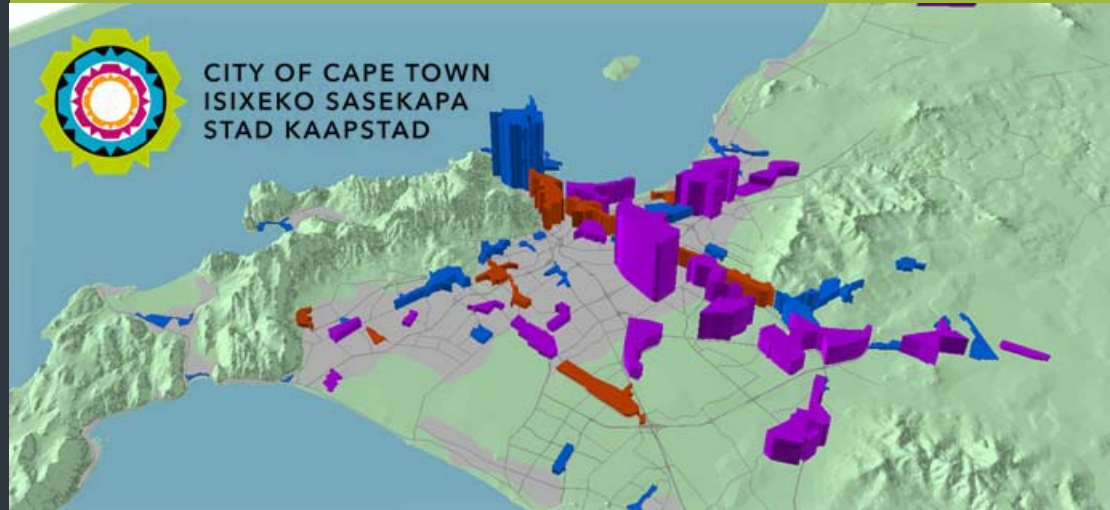
TOP TEN OFFICE NODES Performance rank

	2015 Score
1 CENTURY CITY	5.0
2 CBD	3.9
3 WATERFRONT	3.8
4 TYGER VALLEY	3.7
5 AIRPORT IND	1.7
6 MAITLAND	1.1
7 CLAREMONT	1.0
8 DURBANVILLE	0.6
9 BELLVILLE	0.6
10 SOMERSET MALL	0.4

TOP FIVE IMPROVERS Performance rank vs. 2013

	Improvement since 2013	2015 Rank
EPPING IND	+28	11
NDABENI	+19	16
CLAREMONT	+16	12
SEA POINT	+15	44
GOODWOOD	+14	26

- Claus



It has been a roller coaster ride since the ECAMP Portal was launched by the Mayor six months ago at the SAPOA conference.

The overwhelmingly positive response to this initiative has placed a special onus on the ECAMP team to communicate consistently (but sparingly) with the investors, academics, students, researchers, consultants and policymakers who have joined our community of users.

We have therefore elected to distribute an annual newsletter to registered users of ECAMP Portal, in addition to selected project partners. As we do not intend for this newsletter to be confused with the promotional material inundating our in-boxes, we will strictly limit this document to a once-off annual distribution, always following a major annual update. If we have nothing important to share, we won't waste your time.

So, with these caveats, we'd like to invite you to share some exciting recent developments.

WAIT...ECAMP...REMINDE ME?

The Economic Areas Management Programme is a research and policy support initiative which tracks and routinely assesses the market performance and long-term location potential of over sixty business districts across Cape Town. All our data is made available via an on-line interactive map viewer, called ECAMP Portal.

"At the leading edge...
...without precedent,
globally."

- World Bank

OUR COMMUNITY IS GROWING

As of 2015, registered users of ECAMP Portal include many universities, government agencies and departments across all spheres, local and regional investment promotion agencies, business chambers, corporates, institutional investors and major planning firms. We view with equal enthusiasm the incorporation of ECAMP into the course material at the University of Cape Town, introducing a whole new generation of property economists, planners and developers to the concept of data-driven planning.

BEST PRACTICE

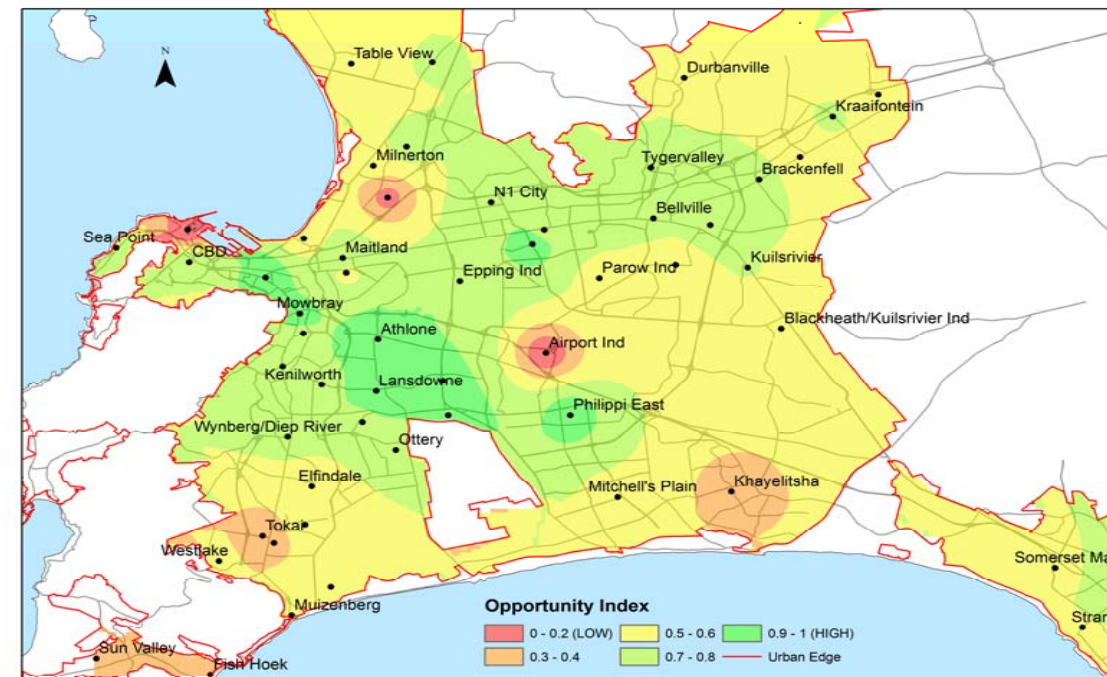
ECAMP is not original. Instead, it humbly carries the torch lit by the NSDP and the Western Cape's Growth Potential of Towns to the metro scale. Our work has been cited as an "isolated example of progress" in *Urban Forum*, extensively profiled in the November issue of *Earthworks* magazine, and will be featured in the February edition of *Contact*. The ECAMP Diagnostic Model has also been introduced as best practice in National Treasury's municipal guide, 'The Art of Precinct Management'. After a visiting World Bank team described the initiative as 'at the leading edge', and 'without precedent', there has been a renewed interest to roll out the ECAMP concept at regional and national level.

WINNER OF THE 2014 SAPI NATIONAL PLANNING AWARD

Our highlight however was receiving the National Planning Award in recognition for ECAMP's "outstanding contribution to planning in South Africa" by the South African Planning Institute at the Planning Africa Conference held in eThekweni in October 2014.

What's new on Cape Town's ECAMP Portal?

Check out our annual circular to find out what we've been up to, and where we're going in 2015



YOU ARE LOOKING AT THE TOPOGRAPHY OF LATENT ECONOMIC OPPORTUNITY
Values represent the degree of short-term market underperformance relative to long-term location potential, quantified.

Important IT announcements

The Portal's internet address is changing

As part of the City's restructuring of our IT architecture, we will be moving the ECAMP portal to a new server. The unavoidable impact of this measure is that the URL to the portal will change to:

<http://web1.capetown.gov.za/web1/ecamp>

This change – including the deactivation of the existing URL - will come into effect within February 2015. We have been assured that this will not interfere with the site's functionality.

Essential maintenance shut-down

Our IT guys will be performing essential data centre maintenance on our main site. This requires us to move all production applications to another data centre. Accordingly, the ECAMP Portal will be unavailable for the weekend of the 21st and the 22nd of February.

Kind regards

ECAMP Programme Manager
claus.rabe@capetown.gov.za

Winner of the
2014 National
Planning Award



LATEST DATA UPDATES

We are now entering an exciting new space where we can compare ECAMP results over time. Not only does this offer us insight into market trends, but also allows the City to track the effectiveness of our local interventions. Recent updates include:

RENTALS

Rentals for industrial and office space have been updated, and shopping centre rentals have been updated where available.

VACANCIES

Vacancy levels for industrial and office space have been updated, as available.

FLATS COMPLETED

Recognising the power of residential intensification in repositioning our underperforming inner city nodes, the area profile now includes a subindicator of new flats completed since 2005.

BUSINESS SAFETY

Urban management is becoming an increasingly significant driver of business location. We have updated business burglaries and robberies based on the latest SAPS data.

PLAY THE SPACE ECONOMY!

Whether we want to understand the space economy or guide investment, we need to understand how business location decisions are made. However, our analysis of ECAMP data reminds us that business location decisions are only partially cognitive, often idiosyncratic and always strategic.

So we began an experiment, building a game prototype. 'COLLUSION!' puts officials in the shoes of profit-seeking industrialists competing against each other for valuable local, regional and export contracts. To survive, players have to strategise, invest, innovate and collude.

The computer-assisted game tracks the decision of each player as she adapts to ever-changing technological, economic and political conditions from 1970 to 2000. Each player is presented with a dashboard with a live feed of data analytics to allow on-the-spot decision-making.

COLLUSION! not only helps us understand the impact of strategic investment behaviour on shaping economic topographies, but doubles up as a powerful pedagogical tool for students, professionals and policymakers in the built environment.

If you are interested in taking this prototype forward, give us a shout.



PAGING ALL DATA SCIENTISTS

There is mounting pressure on national government agencies, research institutions and even the private sector to liberate their growing pool of raw data being generated as part of the automation and integration of business processes.



It is incumbent upon South Africa's community of data scientists to maintain this momentum by developing the computational and decision-making tools needed to convert data as a by-product into actionable intelligence. ECAMP only scratches the surface of this potential.

We therefore call on data scientists from across the country to join us on an exciting journey into The Unknown. Please share your ideas and expertise on how to explore this data, whether through network analysis, spatial statistics, machine learning, gamification, or better yet something we haven't thought of.

A WORD OF THANKS

Our successes are built on collaborative, win-win partnerships rather than contracts and consultants. ECAMP is only possible because of the enduring energy and imagination of our many partners both within and outside the City, with a special thanks to the following:

Our internal partners

- IS&T Business Applications
- Development Information & GIS
- Economic Development
- Planning and Building Dev. Mgmt.
- Valuations
- Transport for Cape Town

Our network of data practitioners and experts

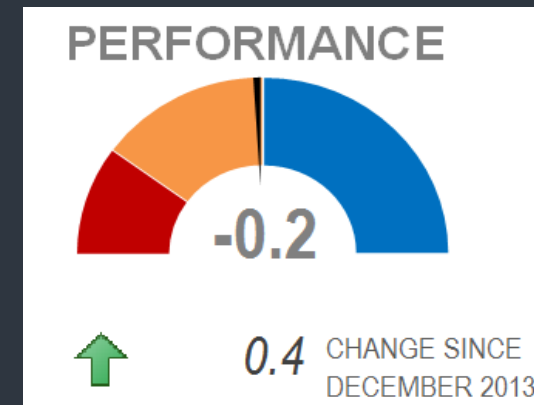
- Western Cape Economic Development Partnership
- Cape Town Partnership
- National Treasury
- SALGA
- UCT School of Property Economics
- MISTRA Urban Futures
- South African Property Owners Ass.
- Rode & Associates
- Baker Street Properties
- Council for Scientific and Industrial Research

YEAR-ON-YEAR RESULTS

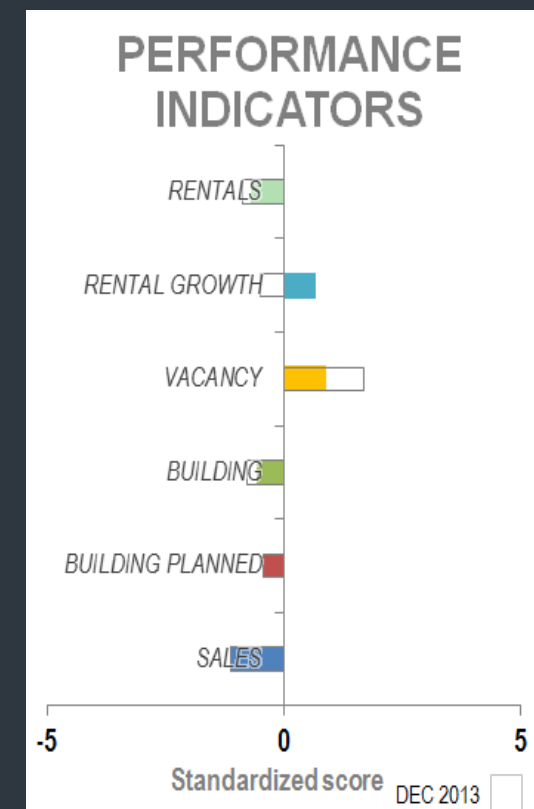
We have entered an exciting new space where we can compare year-on-year results. You will find the following analytics in our new area profiles:

1 WHICH INDICATORS ARE DRIVING YEAR-ON-YEAR CHANGE?

Let's look at the profile for Bellville CBD. Its overall market performance has increased by 0.4 points to -0.2 since 2013. Which performance indicators drove this improvement?

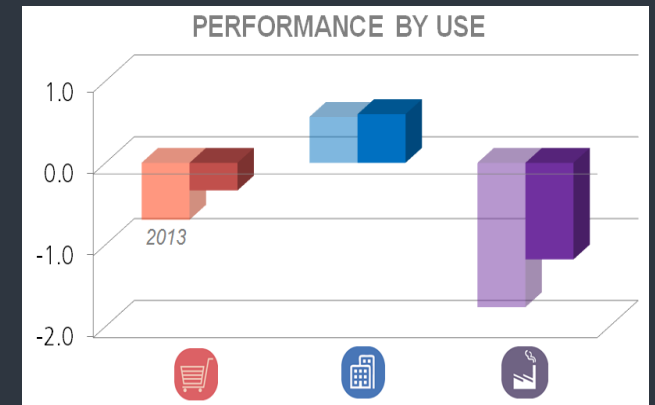


With our new and improved Indicator Bar Chart, we can immediately compare current indicator scores with previous results. Looking below, we can see that rising rental growth and reduced vacancies drove change.



2 WHICH BUSINESS USES ARE DRIVING YEAR-ON-YEAR CHANGE?

Many of our business districts perform more than one role, and we need to evaluate these districts both in aggregate and according to their respective roles.



The column chart evaluates the market performance for the three major business use categories, retail, office and industrial.

COMING UP IN 2015

Here are some of the enhancements that are in the planning phases:

NEIGHBOURING MUNICIPALITIES

Recognising that the Cape Town functional region extends beyond the City's boundaries, talks are underway to include Stellenbosch and Paarl as ECAMP nodes.

INDUSTRIAL CLUSTER DATA

We have geo-coded over 5,000 businesses in twenty industrial districts across the city, attributing each entry with a 5-digit Standard Industrial Classification code. We are exploring ways of incorporating this data into our ECAMP Portal.

TRANSPORT NETWORKS

We will be drawing travel-time and congestion data directly from the City's transport model.

No consultants were harmed during the making of this initiative.