



Transnet Rail Infrastructure Manager

CESA Indaba

Date: March 2026

TRANSNET



rail infrastructure
manager

TRIM OVERVIEW

Transnet Rail Infrastructure Manager

Transnet SOC Limited

Overview



TRANSNET MANDATE Lower the cost of doing business in South Africa, enable economic growth and ensure security of supply through providing appropriate ports, rail, and pipeline infrastructure as well as operations in a cost effective and efficient manner, within acceptable benchmark standards.

STATEMENT OF STRATEGIC INTENT

- Improve Competitiveness of SA's Freight System
- Collaborate with the Private Sector
- Financial sustainability
- Grow Rail Market Share

Transnet Rail Infrastructure Manager

Rail Reform – Changes in Transnet's Rail Business

PRE-RAIL REFORM

TRANSNET FREIGHT RAIL

- **Rail Operator**
 - Managing Rolling Stock and Rail Movement of Freight
- **Rail Infrastructure**
 - Investing and maintaining rail network

RAIL REFORM POLICY & LEGISLATION

White Paper on the National Rail Policy
Mar 2022

Roadmap for the Freight Logistics System in South Africa
Dec 2023

Draft Rail Private Sector Participation Framework
Dec 2023

Economic Regulation of Transport Act 6 of 2024
June 2024

Draft National Rail Bill

POST-RAIL REFORM

TRANSNET FREIGHT RAIL (TFR)

- **Train Operating Company**
 - Managing Rolling Stock and Rail Movement of Freight

TRANSNET RAIL INFRASTRUCTURE MANAGER (TRIM)

- **Rail Infrastructure Manager**
 - Network Capital Investment, Maintenance & Security
 - Network Safety
 - TOC Open Access
 - Increase Rail Market Share

TRANSNET RAIL INFRASTRUCTURE MANAGER – OVERVIEW

PURPOSE & MANDATE



- ✓ Established on 01 April 2025 under the Economic Regulation of Transport Act (2024) and National Rail Policy (2022).
- ✓ Serves as South Africa's national Rail Infrastructure Manager.
- ✓ Ensures safe, reliable, and non-discriminatory access to the national rail network.



CORE FUNCTIONS

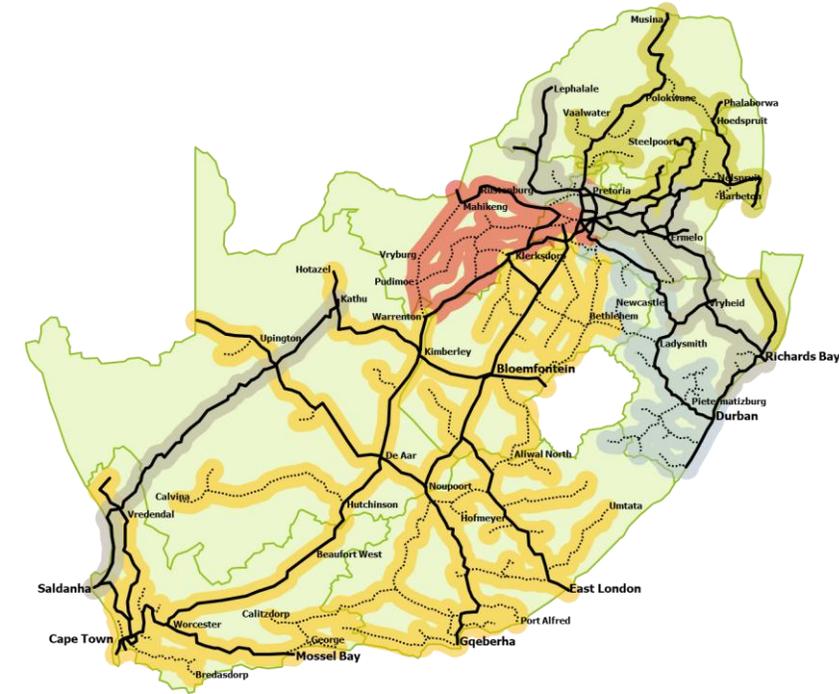


- ✓ Infrastructure Management
- ✓ Network Operations and Train Control
- ✓ Access and Capacity Management
- ✓ Safety, Security and Compliance
- ✓ Performance Oversight
- ✓ Commercial and Investment Enablement

STRATEGIC FOCUS AREAS



- ✓ Network Modernisation and Capital Expansion
- ✓ Network Sustaining Capital and Maintenance Projects
- ✓ Security Stabilisation and Stakeholder Partnerships
- ✓ Open Access Implementation
- ✓ B-Network Revitalisation
- ✓ Funding and Investment Enablement
- ✓ Institutional Development and Regulatory Alignment
- ✓ Oversight and Governance



TRIM Network covers 21 232 km

CORRIDOR	REGION
North (NorthCor)	Eastern
North-East (NorthEastCor)	
Central (CentralCor)	Central
Container (Container Cor)	
Cape (CapeCor)	Western
Ore (OreCore)	

Overview Transnet Rail Infrastructure Manager

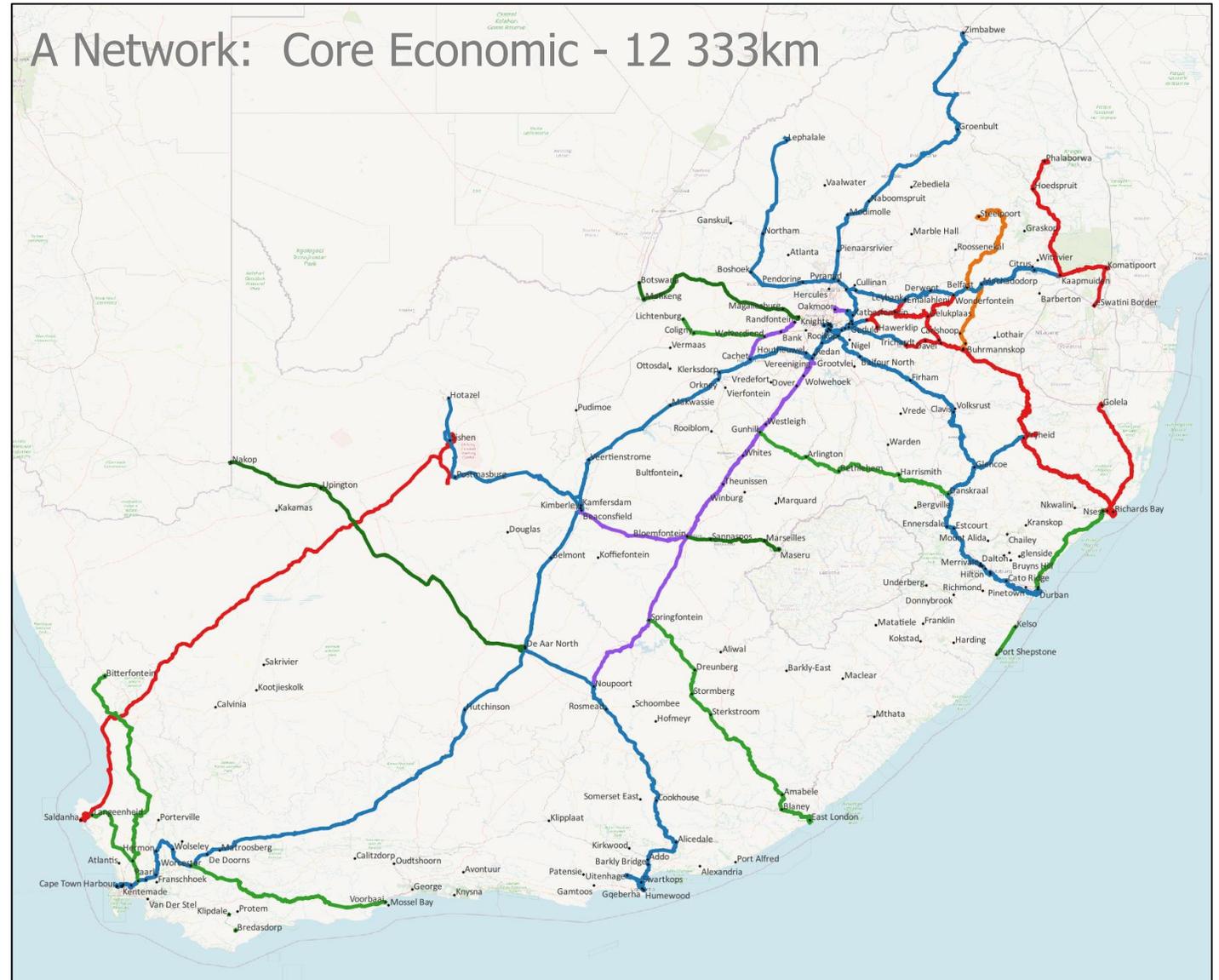
Corridor Footprint – A Network



TRIM Network covers 21 232 kilometres

BACKBONE 9 072	Bulk Minerals Corridors (BMC)	2 405
	*BMC Dependent (some CFN & Feeder)	3 717
	Core Freight Network (CFN) Remaining	1 960
	Key Redundancy	990
FEEDER 3 261	Feeder	2 224
	Feeder Strategic	1 037
LOW DENSITY 8 899	Low / No Freight Potential	5 466
	Some Freight Potential	3 433

A Network: Core Economic - 12 333km



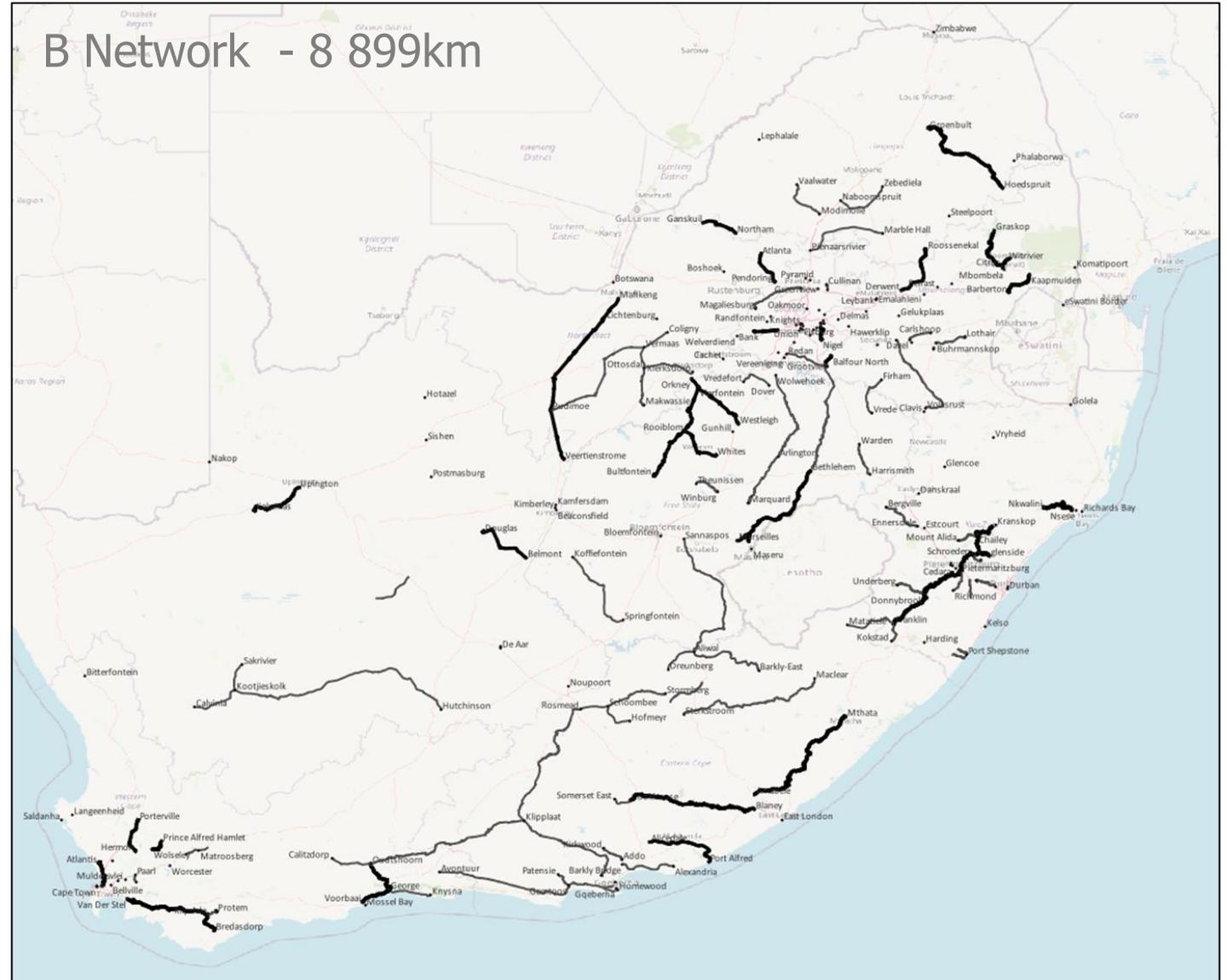
Overview Transnet Rail Infrastructure Manager

Corridor Footprint – B Network



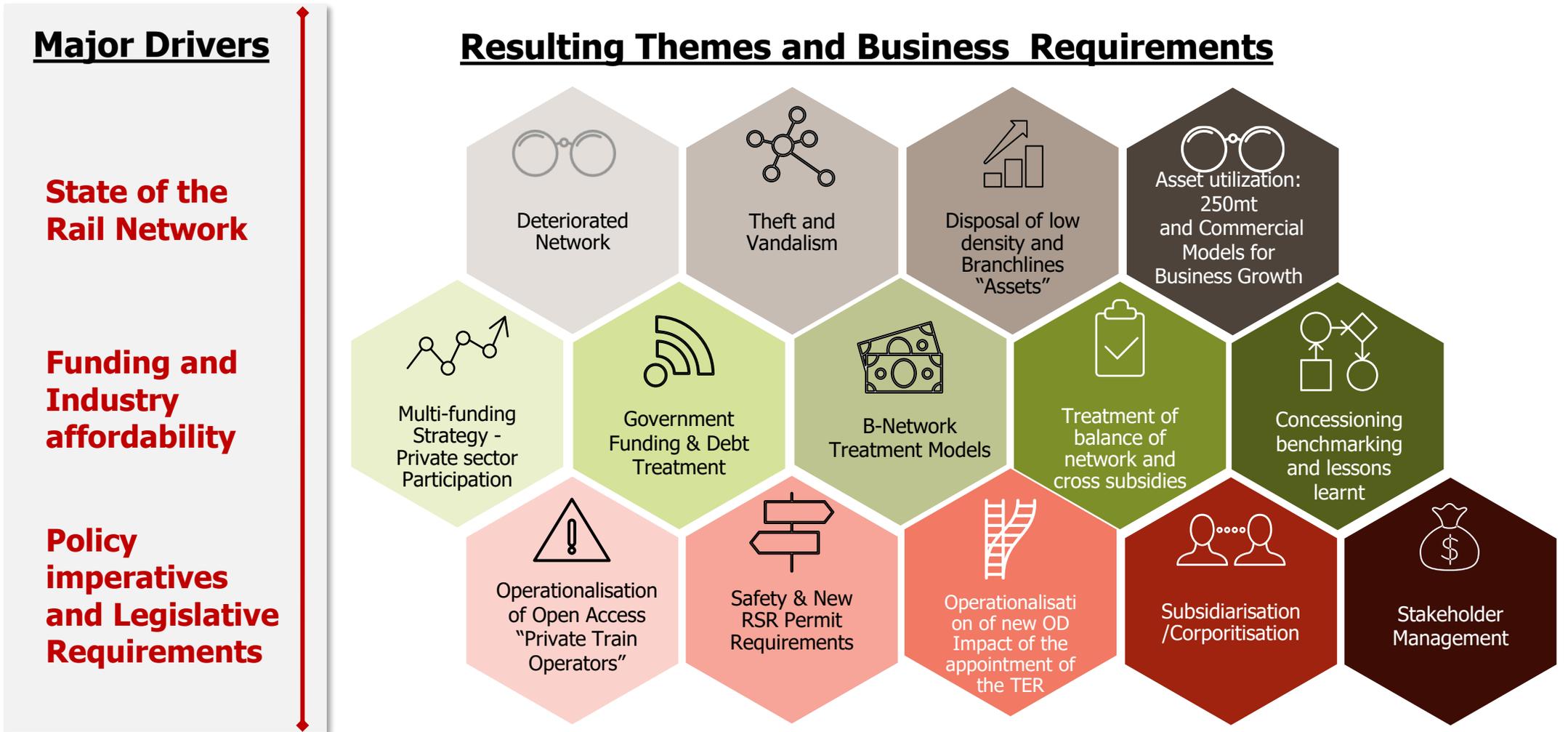
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Key Strategic Areas of Focus

The Changing Business/ Legislation Landscape and the Country's Freight System



The newly established TRIM must implement policy imperatives which entail opening access to multiple operators on its network, however, the network is not in the condition required by Operators, is not in a position to self-fund, and must service current debt. At the same time, there are proposals to ringfence portions of the network to be fully operated by the private sector. Key decisions and initiatives that will have a significant impact on the Transnet rail business portfolio must be implemented



NETWORK STATEMENT & OPEN ACCESS OVERVIEW

Transnet Rail Infrastructure Manager

Network Statement – Version 3

Overview

OBJECTIVE

➤ Enable Open Access:

- Offers Train Operating Companies (TOCs) a clear framework to apply for rail slots, fostering competition and better service, with access starting 2025

➤ Ensure Transparency:

- Provides detailed rules, charges, and processes via annexures (e.g., shutdown plans, specs), with updates posted online for all stakeholders

➤ Promote Efficiency & Safety:

- Sets operational guidelines (scheduling, traffic control, disruption management) to boost network reliability and safety standards

➤ Equitable Network Use:

- Ensures fair capacity allocation based on strategic commodities, contracts, efficiency, & aligns with B-BBEE for emerging operators

➤ Adapt to Regulatory Changes:

- Built for flexibility, allowing revisions for compliance with evolving laws

Key Chapters Overview

1. GENERAL INFORMATION

Introduces the purpose and scope of the Network Statement, including its alignment with regulatory frameworks like the Rail Policy and Freight Logistics Roadmap

2. RAIL INFRASTRUCTURE NETWORK

Details the physical and operational state of the rail network and each corridor.

3. ACCESS REQUIREMENTS

Outlines criteria for Train Operating Companies (TOCs) to access the network.

4. CAPACITY ALLOCATION

Explains principles for rail slot allocation.

5. COMMERCIAL SERVICES AND CHARGES

Defines fee structures and financial obligations for network users.

6. RAIL OPERATIONS

Provides operational guidelines for efficient rail services.

7. ANCILLARY FACILITIES AND SERVICES

Details additional services supporting rail operations.

Feedback on the Open Access Process

- The application process for slots (end-to-end routes) commenced promptly after the Network Statement and the Draft Access Agreement were gazetted in December 2024. Applications opened on 20 December 2024 and closed on 27 February 2025.
- The market response was extremely positive, with **twenty-five (25) new TOCs applying** for freight and passenger access to **ninety-eight (98)** main line routes across **six (6) corridors** and the SADC region to transport several commodities.
- An **initial 11 new TOCs** and a total of **41 routes** across **6 corridors** have been selected to proceed to the next stage of negotiations and contracting, marking the end of the initial round of applications.
- The initial allocations per corridor before the contract negotiation stage are as follows:
 - **North Corridor:** 6 new entrants, 15 routes, for transportation of coal and chrome;
 - **Iron Ore Corridor:** 1 new entrant, 1 route, for transportation of iron ore;
 - **Cape Corridor:** 2 new entrants, 2 routes, for transportation of manganese;
 - **North-East Corridor:** 6 new entrants, 16 routes, for transportation of coal, chrome, magnetite, fuel, containers;
 - **Central Corridor:** 1 new entrant, 2 routes, for transportation of coal, containers (manganese); and
 - **Container Corridor:** 4 new entrants, 5 routes, for transportation of containers, coal, sugar.

Summary Of New Entrants by Commodity and Corridor

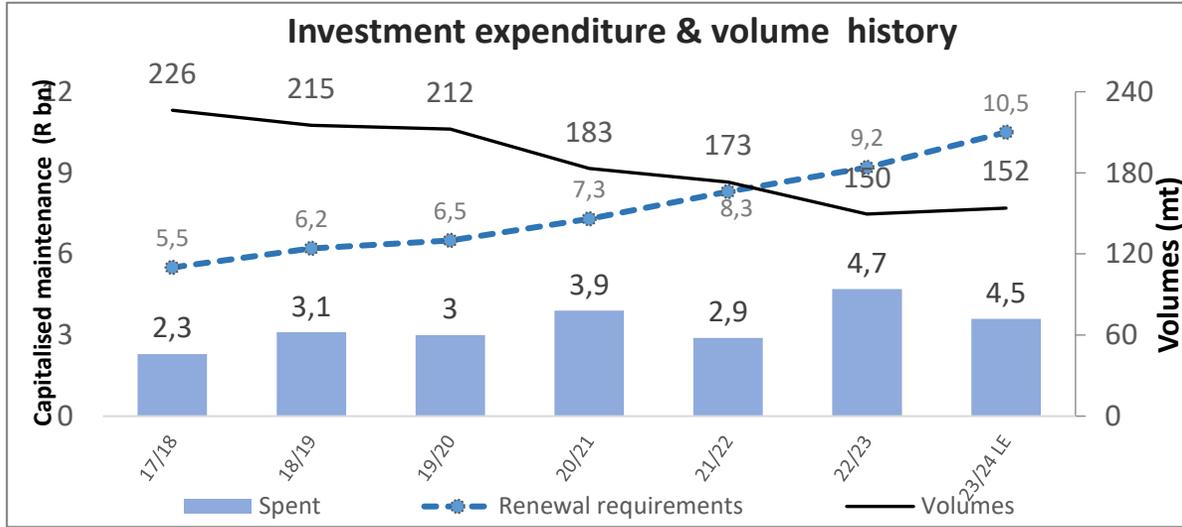
Commodity	# of Route Applications	Estimated Practical Annual Volume
Cape Corridor	2	616 400
Manganese	1	314 000
Manganese	1	302 400
Central	2	2 609 280
Coal	1	2 505 600
Containerised Manganese	1	103 680
Container Corridor	5	1 756 640
Containers	1	361 200
Coal	1	167 040
Sugar	1	98 000
Containers	1	722 400
Containers	1	408 000
Iron Ore Corridor	1	3 300 000
Iron Ore	1	3 300 000
North Corridor	15	12 562 872
Chrome	2	267 264
Coal	7	4 716 288
Coal	1	139 200
Chrome	1	139 000
Coal	2	5 222 720
Coal	1	278 400
Coal	1	1 800 000
North East Corridor	16	3 494 728
Fuel	1	86 400
Chrome	1	167 040
Coal	1	127 200
Coal, chrome	1	139 200
Coal, chrome, containers	1	127 200
Containers	3	576 000
Fuel	1	105 600
Magnetite	2	725 760
Magnetite	2	127 400
Coal	1	556 800
Magnetite	1	500 000
Containerised chrome	1	256 128
Total	41	24 339 920



**NETWORK CONDITION, FINANCIAL REQUIREMENTS &
TRIM INTERVENTIONS**

Case for change : State of the Network

The impact of inadequate network maintenance funding on rail volumes

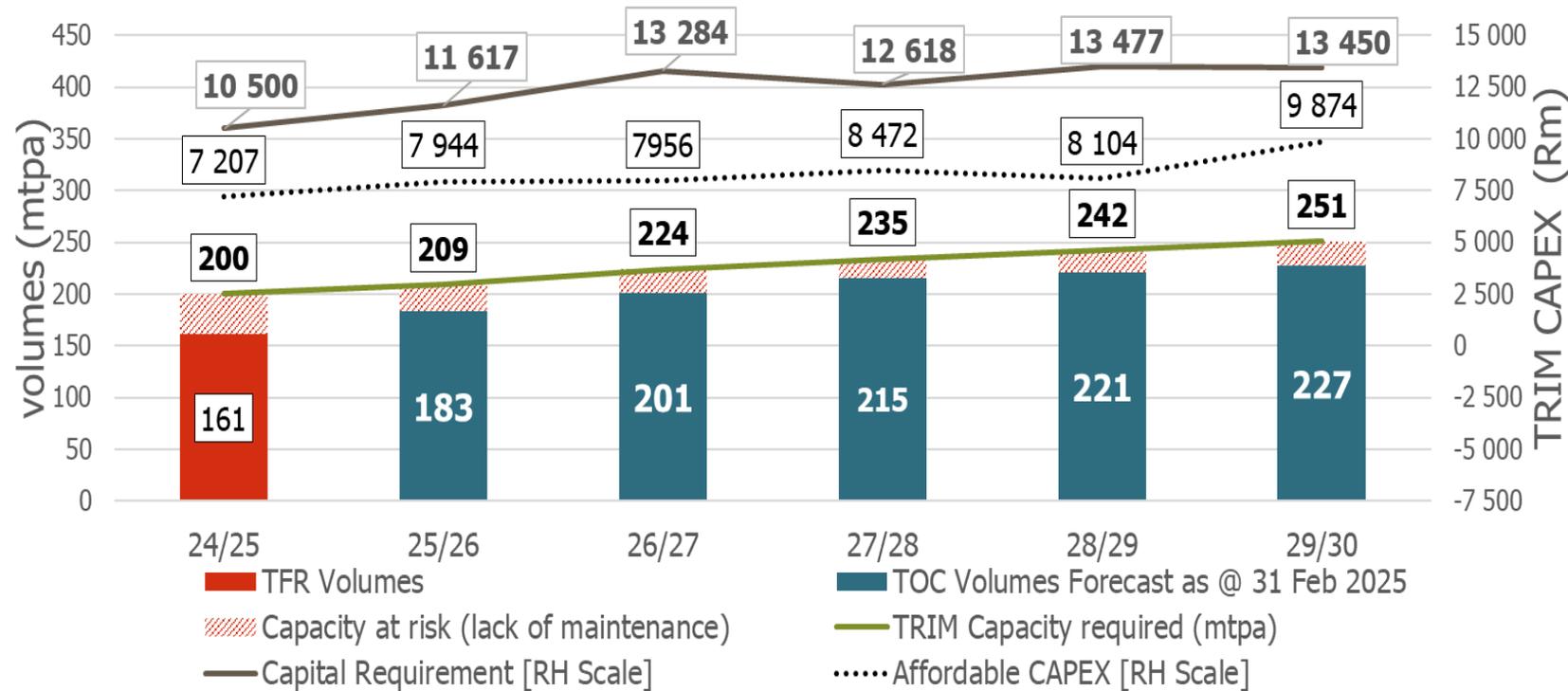


Corridor view: Status per Engineering Discipline									
Acceptable condition Condition impaired Degraded state									
CORRIDOR	NORTH CORRIDOR		CONTAINER CORRIDOR	CAPE CORRIDOR		CENTRAL	NORTH-EAST CORRIDOR		
Category	ORE CORRIDOR	Coal Line	Lephalale – Ogies	Hotazel – PE	De Aar – CPT	Pyramid - Beitbridge	PHAL A to RCB	Greenview - Kaapmuiden	
Perway	Red	Yellow	Yellow	Red	Red	Green	Yellow	Yellow	Red
Structures (Bridges)	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow
Electrical	Yellow	Yellow	Yellow	Red	Red	Red	De-Electrified (Theft)	De-Electrified	Yellow
Train Authorisation	Yellow	Red	Red	Red	Red	Red	Red	Yellow	Red
Condition Assessment & Protection Systems	Red	Red	Red	Red	Red	Red	Red	Red	Red
Radio networks	Red	Red	Red	Red	Red	Red	Red	Red	Red
Transmission networks	Yellow	Yellow	Yellow	Green	Green	Yellow	Red	Red	Yellow
Offtrack (Service roads, etc.)	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow	Red	Yellow	Yellow

NOTE: Condition categorisation based on the latest Rail Network Condition Reports

- Deteriorating levels of asset reliability & availability result in **safety risks, train delays, cancelled train slots, volume loss and eventual permanent capacity loss;**
- Derailments result in **loss of assets and redirection of maintenance budgets** which in this case may be newly acquired locomotives, wagons and customer product;
- Failure rates of the asset base is increasing. Failure rates increase exponentially at the **end of life of the asset**, or poorly maintained asset' causing a greater safety risk
- Majority of **Train Authorisation Systems are obsolete** (some are >60 years old). Train authorisation systems are central to the Train Control interface between the Infrastructure Manager (IM) and Train Operating Companies (TOCs)

TRIM 5 Year Maintenance Investment Plan Required to reach 250MT



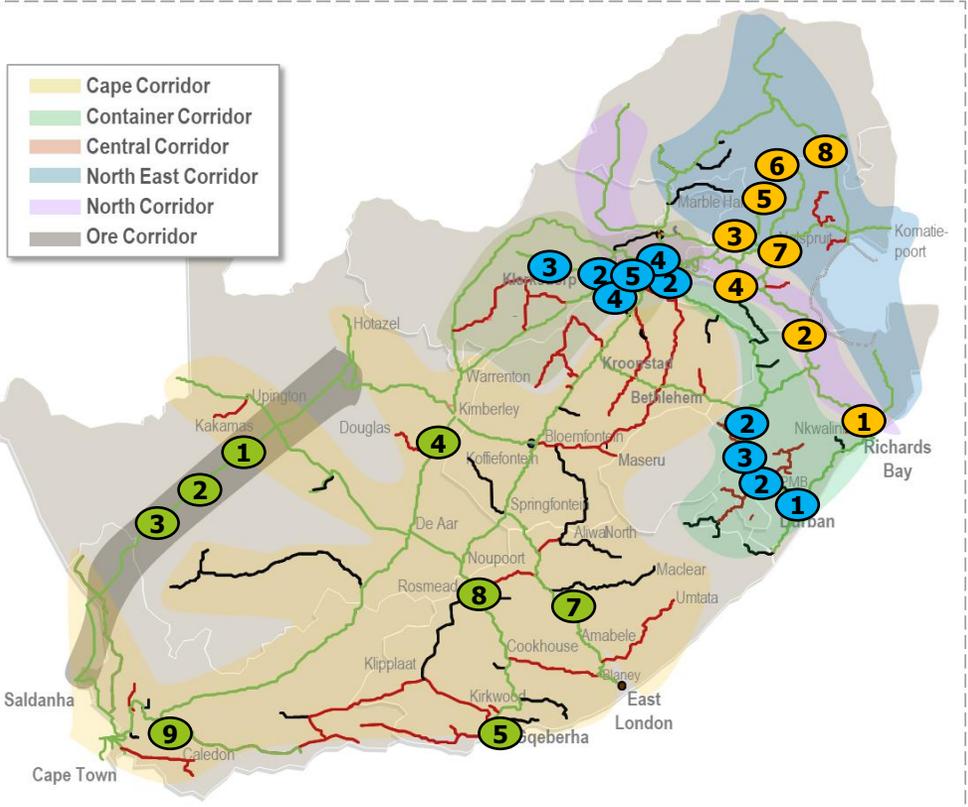
Assumptions: Required maintenance and renewal funding must be secured ahead of demand growth to ensure infrastructure capacity is available when freight volumes materialise. Without timely investment, deferred maintenance will constrain network capacity and limit achievable rail volumes.

- To enable the rail network to sustainably support 250 Mt of freight demand, significant investment in network maintenance and renewal is required over the next five years.
- Current affordable funding levels fall materially below the capital required to maintain infrastructure condition and deliver the capacity required by forecast Train Operating Company volumes.
- If this funding gap is not addressed, infrastructure condition will deteriorate, capacity will remain constrained, and national rail volumes will fall below potential demand.
- Addressing the CAPEX and COPEX funding shortfall is therefore critical to restoring network performance and enabling freight growth.
- TRIM is therefore pursuing a combination of funding solutions, including development finance, Budget Facility for Infrastructure (BFI) support, private sector partnerships, and corridor-based investment mechanisms.

TRIM Critical Sustaining Projects in Execution 2025/26 FY

Regional Projects

- TRIM is implementing targeted sustaining infrastructure projects across the Western, Central & Eastern Regions to stabilise and restore core rail network performance.
- These interventions include rail replacement, removal of Temporary Speed Restrictions (TSRs), signalling & traction substation reinstatement, & stabilisation of overhead traction equipment.
- The programme is progressively removing operational constraints such as manual train authorisations & degraded infrastructure conditions.
- Collectively, these projects are restoring train slots, improving reliability for Train Operating Companies, & rebuilding freight capacity across key corridors.

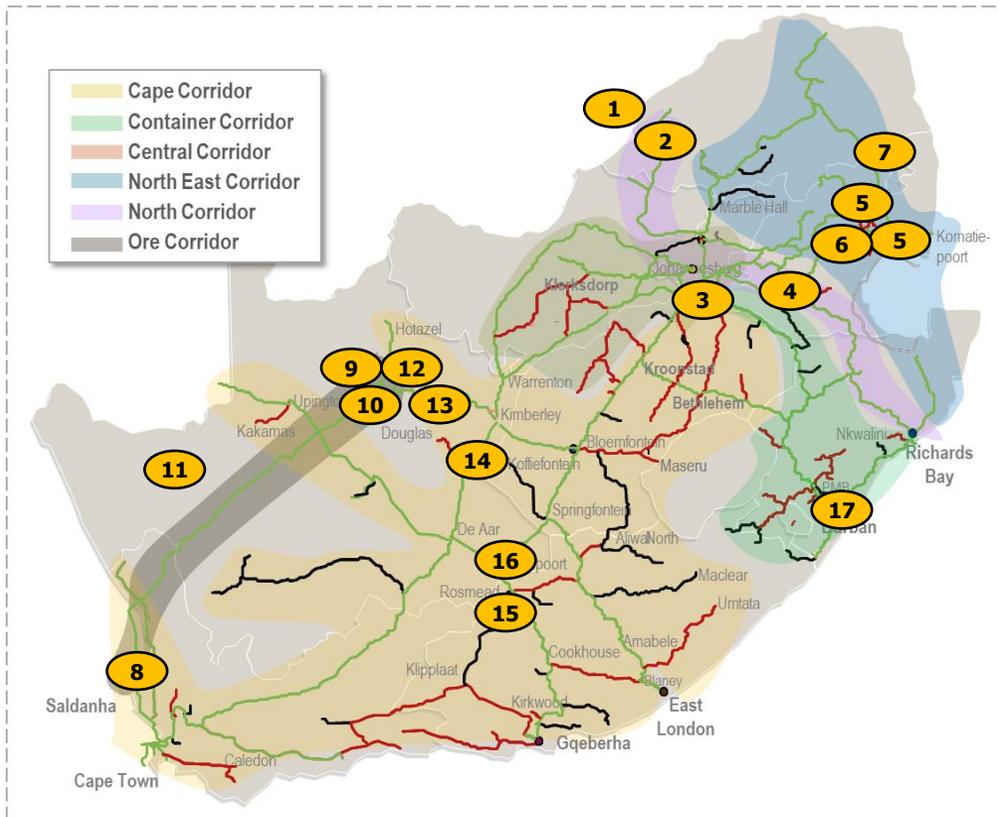


WESTERN REGION	CENTRAL REGION	EASTERN REGION
1) Rail replacement of 155kms (FY 2024/25)	1) Bomvas Embankment Slip	1) Slots Restoration due to Manual Authorisation between Umunywana – Elubana
2) Rail replacement of 218kms (FY 2025/26)	2) Reinstatement and Repair of 14 Signalling Stations in the Container Corridor and 2 in the Central Corridor	2) Slots Restoration Slots Restoration due to Manual Authorisation - between Maviristaad - Sheepmoor
3) Ohte Stabilisation Ore	3) Reinstatement and Repair of 15 traction Substations in Container Corridor and 9 in the Central Corridor	3) Re-instating Kromklip relay room
4) Klofontein Substation (KBS)	4) Reinstatement of 134 km Ohte in the Central Corridor	4) Restore substations off-load/out of service (Boschmanskop)
5) Obsolete Axle Counter Replacement (PE)	5) Decoppering approximately 111 km of Ohte in the Central Corridor	5) Upgrading radio network systems between Belfast & Steelpoort
6) Five Station of Cable reinstatement & CS90 and FSDT Project (BLE)		6) Reinstatement of Steelpoort track condition
7) Waqu river bridge transition (EL)		7) Procurement of check rail
8) Removal of TSR DE Aar – PE Mainline (PE) – Rail, sleepers, tamping		8) Reinstatement of Schanelskop highsite
9) Installation of Transformer at Brakrivier		

TRIM Targeted Expansion Initiatives

Asset Creation Projects (Coal Corridor)

- TRIM is progressing targeted asset creation and expansion projects to increase capacity across the national rail network.
- The portfolio includes new links, yard upgrades, loop extensions, power and signalling improvements, and other interventions to unlock additional train capacity and improve network efficiency.
- Together, these projects support future freight growth, strengthen connectivity to key economic nodes, and position the network for higher throughput over the medium to long term.



#	Project	Project Phase
1	Mmamabula - Lephalale rail link line (Botswana link)	Feasibility
2	Waterberg Revised Stage 2 – 3	Execution
3	Coal 81mtpa power upgrades AC, yard and line	Execution
4	Eswatini Rail Link Program	Feasibility
5	Re-signaling and Reconfiguration of the Magnetite line	Complete
5	Running 160 wagon train from Phalaborwa to Komatipoort	Complete
6	Steelpoort Multi-User Facility	Execution
6	Weigh-In-Motion System (WIMS)	Planning
7	Phalaborwa Shunting Neck	Execution
8	Salkor B yard upgrade	Execution
9	Sishen Link line	Design
10	Sishen Yard	Design
11	Boegoebaai Rail-Port Programme	Concept
12	Mamathwane Loop Extension	Complete
13	12Mtpa program - Substations at Witloop and Vlermuislaagte	Complete
14	12Mtpa program - Burgervilleweg loop extension	Execution
15	24Mtpa programme	Prefeasibility
16	Ukuvuselela Project	Execution
17	Bayhead Terminal and yard upgrade	Prefeasibility

TRIM 5 Year Plans to Eradicate Backlog: BFI Applications

- To accelerate the recovery and modernisation of the rail network, TRIM and Transnet are actively pursuing financing and development funding to support critical infrastructure programmes.
- These funding applications focus on backlog eradication, corridor stabilisation, and targeted capacity improvements across key freight corridors.
- The programme combines grant funding, concessional loans, and development finance partnerships to unlock large scale infrastructure investment while reducing pressure on Transnet's balance sheet.
- Collectively, these initiatives form part of a broader 5-year programme to restore network performance, improve reliability, & position the rail system to support South Africa's long term economic growth.

Submission date: July 2025

- North & Ore Corridor – R 8,3billion
Awarded

Submission date: 2026/27 FY

- Container (Re-worked) & Grant Application – R5,3 billion

Submission Date: 2026/27

- Northeast Corridor Discrete Project – R2,9 billion
Concessional Loan
- Cape Corridor Discrete Project – R4,7 billion
- Central Corridor *Grant Application* – R4,7 billion

In addition, application to AFD EU Global Gateway Project – R600m package for Container corridor and Security-related technology on the corridor

TRIM B-Network (Branch Lines)

RFI/RFP Process

STRATEGIC CONTEXT

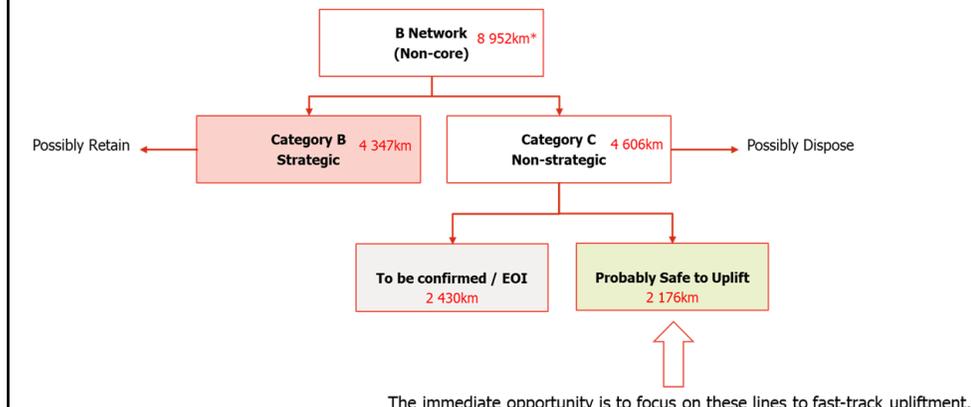
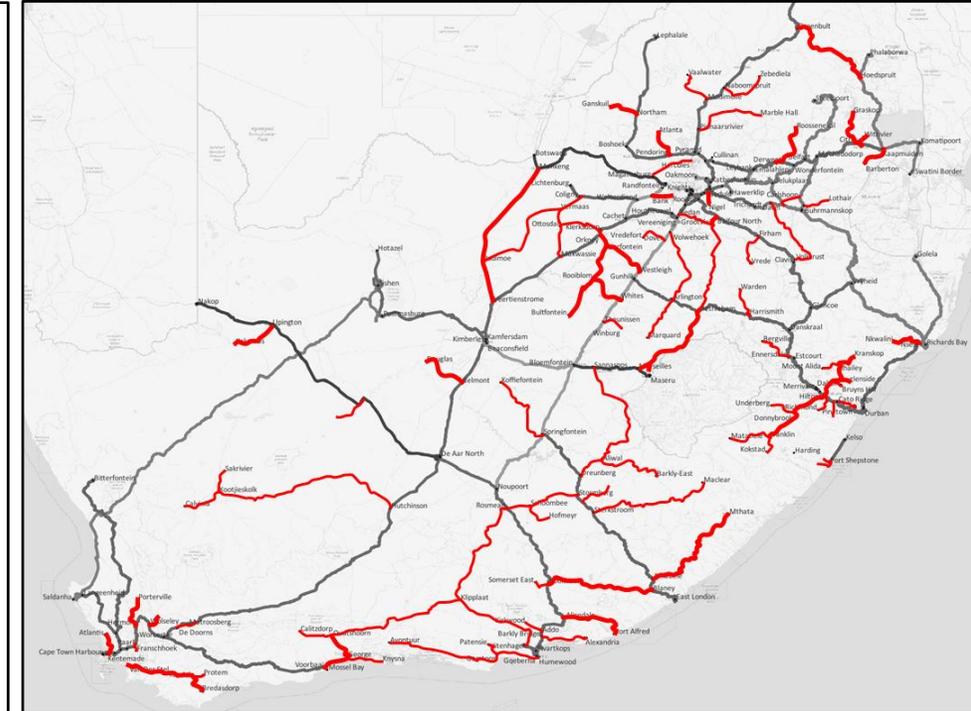
- TRIM manages South Africa's B-Network, comprising approximately 92 branch and feeder rail lines, many of which connect key agricultural production regions to main corridors, inland terminals & ports. This network is central to:
 - Improving rural market access
 - Reducing agricultural logistics costs
 - Supporting export competitiveness
 - Enabling modal shift from road to rail
 - Revitalising underutilised rural and regional infrastructure
 - Addressing legacy infrastructure backlogs, variable asset condition and security-related disruptions that have constrained utilisation across parts of the B-Network

STRUCTURED MARKET APPROACH TO REVITALISE THE B-NETWORK

- TRIM is implementing a structured market approach aligned to national rail reform, incorporating an RFI process for 81 lines and a targeted RFP process for 11 strategic lines where strong private sector interest has already been demonstrated.
 - Request for Information (81 Lines) will:
 - Test private sector appetite across most branch lines
 - Identify viable operating, investment and rehabilitation models
 - Understand commodity flows (grain, sugar, timber, fruit, fertiliser inputs, agri-processing)
 - Inform commercial structuring and corridor clustering
 - Shape the long-term revitalisation of rural rail services
 - Request for Proposal (11 Lines) will:
 - Invite binding proposals for operations, maintenance and capital upgrades
 - Establish clear service standards for freight users
 - Mobilise private sector investment into rural rail infrastructure
 - Restore reliability on priority agricultural corridors

CURRENT STATUS

- TRIM has formally engaged the Department of Transport South Africa to seek approval to proceed with the RFI & RFP market processes, aligned to national PSP frameworks and rail reform objectives.



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RAIL SECURITY INTERVENTIONS

Transnet Rail Infrastructure Manager

Leeuhof Incident 24/07/2025



Incident Report

Depot : Leeuhof

Date : 24/07/2025

Time reported : 21:18

Location : VJ-SBG KM/P 12/12

Incident Description : Driver Puane on Light locos (2446) from SBG reported overhead wires cut and tied from Mastpole to Mastpole, from line no 1 to line no closing both mainlines

Root Cause : Theft

Impact : Traffic to & from Kroonstad, LHF/SBG

RAIL SECURITY INTERVENTIONS

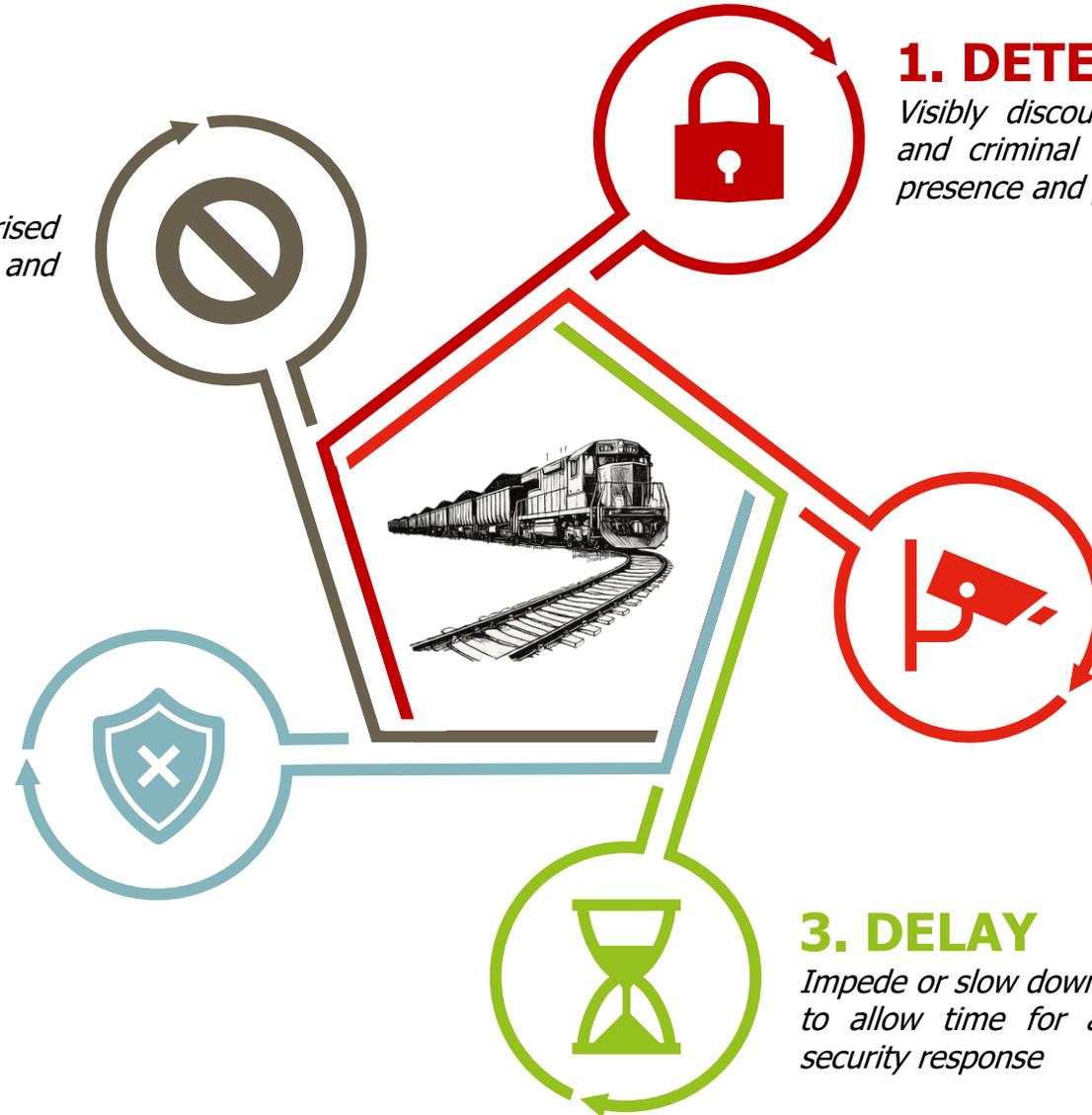
Key Features

5. DENY

Restrict and block unauthorised access to rail network assets and sensitive operational areas

4. DEFEND

Actively protect critical rail infrastructure, assets, and personnel from harm or disruption



1. DETER

Visibly discourage unauthorised access and criminal activity through proactive presence and protective measures

2. DETECT

Identify potential threats or breaches early through surveillance, monitoring, and reporting systems

3. DELAY

Impede or slow down intrusions to allow time for appropriate security response

RAIL SECURITY INTERVENTIONS

Key Features

PURPOSE

Protection of infrastructure and assets to enable service delivery and restore customer, market, and Community confidence

Current National Interventions



Outcome-Based Security



Technology & Modernisation



Enhancing Investigation Capacity



Enhancing Data Analytics & Reporting



Business Intelligence Coordination

Planned Interventions (06 – 12 Months)



Establishment of Analytical Centre



Establish a Security Risk Management



Stabilisation Investigation Capability



Strengthen Stakeholder Engagement



Decoppering



Target Hardening



Coordinated Engagements: Law Enforcement Agencies, Communities & NLCC



Customer Funded Initiatives



Analytical Support at Corridor level



Joint disruptive operations with LEAs

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THANK YOU