

ETHEKWINI
Metropolitan Municipality

SITUATIONAL ANALYSIS REPORT



Cities Support Programme

Township Economy Development Project

Situation Analysis Report

Project Site: Pinetown South, eThekweni Metro

Prepared by the Sustainable Livelihoods Foundation TED Project
Team

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I. Executive Summary

The Cities Support Programme (CSP) of National Treasury (NT) has entered into an agreement with eThekweni Metropolitan Municipality (EM) to provide technical support for a township economy development (TED) strategy. This three-year intervention will strengthen the capacity of the EM to strategise, plan, fund, implement and monitor TED projects within the township of Pinetown South.

The CSP appointed the Sustainable Livelihoods Foundation NPC (SLF) with a professional technical assistance team (TAT) comprising a team leader; small-business development, social scientist, spatial planning, public transport, housing, infrastructure development, environmental advisors and community liaison persons. The TAT will collaborate with the Metro to align the strategy to existing and emerging development frameworks, strategies and projects and advance implementation of the strategy through specific projects derived from the unique development challenges and opportunities within the site.

In formulating projects and implementation plans, the TAT will facilitate processes of participatory engagement and transversal planning to advance projects with spatial impact, whilst synergising resources and ensuring alignment with sector plans. These strategies will provide the Metro with a replicable area-based development approach. The project will leverage institutional impacts through knowledge sharing, strengthening Metro strategies and policies, and through facilitating transversal planning processes. It will benefit the Metro through the building of new partnerships and arrangements for the implementation of economic development projects, sourcing of funding, and gaining access to specialist knowledge and expertise. This Situation Analysis identifies aspects and components of the Pinetown South township economy that could benefit from project interventions within an overarching strategic alignment.

Pinetown South is a large, peri-urban cluster of townships (in both spatial and population terms) in the north-western portion of the Metro. The township is approximately 30 kilometres from the Durban Central Business District (CBD). It is bordered by the N3 and the industrial centre of Pinetown on the north-eastern side of the site.

Theory of Change (ToC)

Building on prior CSP work, the ToC recognises townships as requiring a spatially and systems-oriented development approach, influenced by 1) provision (and quality) of public goods and services, 2) the regulatory environment, 3) the organisation of society, and 4) the character and orientation of economic and business activities. Furthermore, there is a requirement for a context specific understanding of the physical, social and psychological needs of township communities; to understand the range of shocks that exacerbate economic vulnerability; and actions to strengthen accountability and governance.

Partners

The CSP has entered partnerships with the European Union supported Ecosystem Development for Small Enterprise (EDSE) programme, the World Bank Group (South Africa) (WBG), and the Aspen Network of Development Entrepreneurs (ANDE) to amplify the TED project. These align the TED project with the Department of Small Business Development (DSBD), Small Enterprise Development Agency (SEDA) and the Small Enterprise Finance Agency (SEFA). In addition, the CSP TED project will work synergistically with the Neighbourhood Development Partnership Programme (NDPP) of National Treasury.

Methods

The TAT undertook a series of seven simultaneous steps in preparing the situation analysis:

1. Establishing a transversal team of sector specialists.
2. Desk-top identification of all relevant municipal planning documents, and feasibility studies for economic projects. In all, 117 official publications, academic publications and unpublished reports were accessed and reviewed.
3. Participatory engagement – because of COVID-19 primarily through on-line engagements in the **Pinetown South Virtual Imbizo** page on Facebook.
4. Spatial information - obtained data from open sources and the Metro including land use (zoning schemes), cadastral boundaries, social and community infrastructure, water and sewerage systems, electricity networks, telecommunications, natural features and roads and transport infrastructure. In addition, the TAT undertook a spatial analysis of identified high streets, business nodes and development precincts.

5. Ecosystem survey – a team of field researchers used a survey instrument to collect data within the field, focussing on economic high streets, business precincts, retail hub and identified nodes / precincts. Field research was undertaken in late 2020. The research examined 429 businesses (micro-enterprises, SMEs and corporates), recorded 27 business hotspots and 34 institutional services.
6. Site field research and engagement to qualitatively understand the socio-economic characteristics of business and urban dynamics.
7. Sector specific investigations into essential aspects of the township economy.

To mitigate the challenge of relative scarcity of area-based data, the TAT accessed unusual data sources, including private sector datasets and qualitative data.

Institutional Ecosystem

The TAT assessed government strategies at national, provincial and metro levels to support businesses within the township economy. The assessment of the institutional ecosystem has identified multiple opportunities through which the township economy in general and micro-enterprises in particular are prioritised for development support.

National government programmes such as those driven by the Department of Small Business Development (DSBD) and its associated agencies of SEDA and SEFA include:

- New incentives (with the Medium-Term Expenditure Framework (MTEF) period),
- The Small Business and Innovation Fund (R3,2b),
- Black Business Supplier Development Programme (R906m),
- National Informal Business Upliftment Scheme (R248m),
- Enterprise Incubation Programme (R186m),
- Craft Sector Programme (R36m),
- SheTrades,
- Township Entrepreneurship Fund,
- Township and Rural Entrepreneurship Fund (TREP)
- The Small Business Economic Development Portal (www.smmesa.gov.za).

KwaZulu Natal Province Programmes

The KwaZulu Natal Provincial Growth and Development Strategy (PGDS) sets the 20-year vision for the Province as well as the Strategic Goals and Objectives that will drive the Strategy. It has five strategic overarching goals for expanding Provincial economic output and employment:

- Unleash agricultural potential,
- Enhance sectoral development through trade and investment,
- Improve the efficiency of government-led job creation programmes,
- Promote SMME and entrepreneurial development,
- Enhance the knowledge economy.

Strategic Goal 1 in the PGDP relates to 'unlocking SMME development, co-operatives, township and rural enterprises' within its "nine-point plan".

Operation Vula, a programme of the Department of Economic Development, Tourism and Environmental Affairs (EDTEA), focuses on 56 economic sectors for accelerating provincial socio-economic transformation. In support of TED it has identified a series of interventions:

- Organising local business through setting up a Provincial traders' association and establishing district warehousing and bulk buying facilities.
- Provision of business management skills.
- Ensuring proper business licenses and permits.
- Interventions to improve the current mall and rural economy shopping centre tenancy.
- Micro-finance support.

A Youth business development fund has been established within Operation Vula for priority sectors and activities. Furthermore, the following programmes and sectors have also been targeted for special attention and strategic investment:

- Township Business Revitalisation Programme
- Township and Rural Automotive Industry
- Informal Economy Development Initiative

eThekwini Metro Programmes

Integrated Development Plan (IDP)

The eThekwini IDP focuses on key areas such as tourism, catalytic projects, urban renewal, investment promotion and facilitation, small business support, city enterprises, economic leadership, industry support, and township revitalization. Enterprise development within the IDP is mainly focused on sectoral strategies and cluster approaches, including integrating SMEs, black industrialists and township enterprises into eThekwini's larger sectors. SMEs are also identified as potentially important suppliers to the port, auto and chemicals industries. The Metro's support to the development of its 'marginalised areas' includes the following:

- Connecting and upgrading townships through public transport roll-out and the Urban Network Strategy (Hubs & Connectors);
- Social facility provision via a hierarchy of social facility nodes;
- Developing large scale and mixed land use housing projects through the Housing Catalytic Projects programme;
- Provision of basic services via the Incremental Services to Informal Settlements programme;
- Provision of serviced sites and top structures via the Housing Upgrading Program; and
- Facilitating the provision of institutional and social housing in transit corridors.

Industrial Development Implementation Programme Action Plan (IDIPAP)

Building on eThekwini's local economic comparative advantages, the IDIPAP identifies specific ways for the Metro to support inclusive economic growth and industrialisation. Whilst much of what is outlined does not directly refer to township microenterprise, the IDIPAP emphasises support for SMEs, and especially black industrialists in value chains with high growth potential.

Business Support Programme

The eThekwini Metro's Business Support Programme specifically offers:

- Access to finance for business support,
- Technical skills for Arts and Craft Development,
- Business Development Strategic Partnerships - aligned with Metro strategic focuses,
- Business Linkage Programme to assist SMMEs to secure mainstream business opportunities,
- Construction Sector Support Programme,

- Cooperative Development Programme to improve and provide capacity of cooperatives,
- Durban Business Fair
- Support to Enterprise aimed at facilitating skills development, mentorship, coaching,
- Tourism Development Programme for Community Tourism Organisations,
- Umkhumbane Entrepreneurial Support Centre to support local manufacturing businesses,
- Women's Empowerment Programme - to raise their profile of women and address their business needs through capacity building.

Informal Sector Policy

The Informal Sector Policy has a primary focus on retail markets, street trading and street vendors within the CBD. This includes declaration of management zones, the demarcation of trading areas, organising traders into area committees and the issuing of permits. The Metro has identified that agreement on trading zones, links between 'first' and 'second' economies, and capacity building for extant traders should be prioritised.

Economic Development Unit (EDU)

The EDU Sector Development Programmes facilitates the stimulation and growth of priority sectors by providing city-wide support to the targeted economic sectors in-line with the National Industrial Development Policy Framework, the IDP, and Economic Development and Job Creation Strategy. A range of initiatives and projects have been conducted, including:

- Promoting private investment in marginalised CBDs.
- Infrastructure upgrades aimed at improving service delivery.
- Specific support to the automotive industry.

Sector Support Programmes

- **Enhancing Sector Competitiveness** – including the development of best practice models and clusters driven by industry to address various challenges affecting the sector – leaner production methods, human and technology skills, value-chain alignment and benchmarking programmes.
- **Sector Skills Alignment** – for alignment of skills, supply and industry demand in the priority sectors, through an integrated approach between tertiary institutions and industry.

- **Enterprise Development Support** – in conjunction with KZN EDTEA to support businesses in the creative sector and targeting emerging and small businesses.
- **Material Recovery Support** - the promotion of materials recovery as a business opportunity.

The Micro-Enterprise Ecosystem in Pinetown South

The TAT investigated the micro-enterprise ecosystem in the project site. Field research was conducted in October 2020. The aim of the ecosystem survey was to record 'snapshot in time' evidence of: i) business activities, ii) institutional facilities and iii) business hotspots and spatial opportunities. The research team surveyed 318, and interviewed 305 businesses (micro-enterprises, SMEs and corporates), recorded 28 business hotspots and 30 institutional services within the research focus areas of Pinetown South.

Pinetown South is a large geographic area with long thoroughfares where businesses would be found on the fringes. The spread-out and peri-rural characteristics of the site meant that there were less localised 'nodes' for enterprise activity, except around mall precincts where some clustering of business activity was evident.

Scale and Categorisation

Of the 318 businesses identified, 2% (5) were corporates, 21% (66) were SMEs, and 78% (247) micro-enterprises. All corporates and 90% (60) of SMEs were formal whilst 94% (250) of micro-enterprises were reported as informal. From 208 open micro-enterprises, 72% (178) businesses were interviewed. The most common categories were micro-enterprises operating hair salons (19%/44), those selling cooked food / takeaways (13%/30), micro-manufacturing (8%/18%/46), grocery retailers (8%/18) and car repair services (7%/17).

Cooked food businesses occur as roadside activities – generally on street intersections, outside taxi ranks and transport nodes and from people's homes. The hair salon businesses commonly fringe the important thoroughfares of Pinetown South and is an important business for both South African and immigrant entrepreneurs.

Demographics

Of the 178 micro-enterprises interviewed in Pinetown South, three-quarters (132) are run by South Africans. With Malawians (9%) and Zimbabweans (7%) also strongly represented. Some 57% of the respondents were business owners (102), 5% were running the business in a partnership (10), and 37% were employees (66). Altogether, 61% (108) of the respondents were males of which most (47 / 43%) were in their 30s. Similarly, more than half of all women (69) were in their 30s (26) and 40s (21).

Business Dynamics

The micro-enterprises operated from a range of structures which, in turn, influenced their position. These included businesses operating from a container (81), from a brick-and-mortar building as a business premises (31), and shacks (23). Several businesses operated out of dedicated business premises – some of which were developed by the municipality, and others that had been privately built or repurposed for business activity. 50% of respondents reported that their businesses paid rent for the premises on / in which they operated. Just over a third (59) were owners and remainder paid nothing at all to occupy the sites on which they worked – this included street traders, street braaiers and mobile traders.

Renting trading spaces and infrastructure to foreign nationals is an important income opportunity with almost three quarters (32) of non-South Africans trading in Pinetown South paying rent – primarily to the South African landowners.

Access to Utilities

The topography of Pinetown South is hilly and steep with those closer to the valleys and roads having disproportionately greater access to utilities, whilst those residing in the hills tend to have less or no services. Whilst most businesses had access to water and electricity (134 / 75% and 153 / 86% respectively), some 58% (103) had informal water connections and 53% (97) had informal electricity connections.

Time in Business

In common with the other research sites, many businesses in Pinetown South have been established in the past few years. Of the 41% (73) who have been operating between one and four years, the spread

of business ages is fairly uniform and in gradual decline: 32% (23) have been operating for one year; 26% (19) for two years; and 22% (16) for four years.

Operating Challenges

Respondents commented on the challenge of crime (95 respondents). According to microenterprise owners, crime has worsened due to land insecurity, created by the lack of permission from the eThekweni metro to occupy sites; businesses being geographically spread out and thus isolated; and organised groups of gangsters robbing customers and businesses. However, the reality of criminality, whilst potentially less of an issue than in larger metros, is a day-to-day challenge for those in Pinetown South.

Respondents in Pinetown South further noted the challenges of inadequate infrastructure (54), competition with other businesses (46) and storage matters (22). Service delivery by local government remains a significant business challenge.

A further challenge highlighted by Pinetown South business owners is that of competition (46) from other businesses. This was commonly reported by grocery retailers (such as house shop operators who are unable to match the terms of their competitors).

Business Support

Upon querying matters of business support, 83% respondents (149) have not received any support to operate but said that if they had a choice in what would benefit them, 52% (94) reported financing and 24% (42) better infrastructure. The desire for appropriate infrastructure appears reasonable, and commonly reflects basic items such as toilets and enhanced trading spaces. Importantly, comparing the microenterprise survey results against a review of the contemporary literature linked to various government programmes to support economic growth reveals common mismatches between business support offerings and township microenterprises with formal business registration, necessary permits and documentation are commonly not in place for informal business yet are required as minimum conditions for support.

SMEs and Corporates

Most of the identified corporates and SMEs operate within retail nodes. Of the five corporate that were recorded, three were service stations (Shell and Engen), one is grocery retailer (Shoprite) and one is a

foodservice outlet (KFC). There are a variety of SMEs in these sites, 15% (10) of them were grocery retailers, followed by 14% (9) liquor sales.

Business Hotspot Surveys

The community of Pinetown South was geographically mapped to understand the collective impact of the kinds of business sites and their responding business activities. There were 28 potential business hotspots identified and surveyed during the fieldwork process in Pinetown South. Of these, only 12% (5) were identified as vacant land not currently used for any regular business activity. The remainder were geographic sites where township businesses had emerged through organic processes of agglomeration and included marketplaces, high streets and open ground.

Available Services

Of the sites with business activity, 78% (22) had access to Wi-Fi, 78% (22) had some access to both water and electricity but 64% (18) had no access to waste disposal. Where Wi-Fi access was present, no one could access it. Yet, despite Metro failings it is clear that Pinetown South business owners have conducted their own assessments of occupying trading sites which appear to take priority over infrastructure needs. Town planners should thus consider the 'organic' emergence of township businesses within a site before investing in creating new, and untested trading areas or infrastructure such as market stalls or communal facilities.

Place Categories

The types of places varied, made up of 39% business hives, 21% high streets and 18% retail nodes. There were 182 businesses operating from business hives, five retail nodes with 90 businesses, and 60 businesses operating on high streets. In a spatially dispersed site such as Pinetown South, it is clear that business hives, high streets and retail nodes have an important role in bringing businesses together into clusters.

Barriers to Operating in Hotspots

Of the 28 active sites, 54% (15) had no site infrastructure and over a third (10) of respondents did not know whether the space had anyone managing the site. Examples of infrastructure issues raised by

respondents pertain to Metro service delivery issues and included no water access (15), lack of sanitation (13), no refuse removal (11), inadequate shelter (5) and lack of electricity supply (5).

Institutional Services

Across the Pinetown South research site there were 30 institutional services sites recorded, 57% (17) of whom were financial services. Those recorded as 'Other' were two police stations, two post offices, a clinic and Metrostorage. Of the available financial services, 88% (15) are ATMS representing all of the major South African banks.

Important Sectors

Whilst the microenterprise form and function in Pinetown South is fairly typical of South African township economies, there are some important local sectors that stand out as having potential for investment. These sectors are highlighted due to particular regional advantages such as the clustering of relevant skills types or markets in the area, being geographically close to important South African business sectors, or due to other socio-economic circumstances that align to create local advantage.

- Recycling - The green economy activity of recycling of plastic and glass has important potential for Pinetown South due to its relatively close proximity to recycling facilities and relevant markets. Links to EDTEA programmes within Operation Vula that promote recycling should be further investigated.
- Creative Economies - Links to EDTEA programmes within Operation Vula that promote creative economies should be further investigated.
- Micro-Manufacturing - The considerable private investments made into local houses presents a valuable opportunity for the micro-manufacturing sector – such as upgrading gates, fences, doors and windows.

Land Use / Development Plans

Land use in Pinetown South is governed by the Municipal Spatial Development Framework (MSDF) which is a long-term spatial planning tool providing metro-wide planning guidance for the spatial growth of EM Metro. This tool is required in terms of the Spatial Planning and Land Use Planning Act, 2013 (SPLUMA) and forms part of the Integrated Development Planning (IDP) process, to the extent that it assists with providing a spatial context for investments. The Spatial Development Plan (SDP)

provides detailed planning directives that align with the MSDF for each region in the metro within more immediate time frames. The Local Area Plan (LAP), Functional Area Plan (FAP) and Scheme Reviews have been utilized to address the piecemeal development trajectory within the Pinetown South area, where in land use falls under different planning schemes (including townships planned under the R293 regulations). With respect to buildings, the Built Environment Performance Plan (BEPP) is intended as mechanism to align the IDP and budget with spatial priorities each year, to promote the effective functioning of the metropolitan built environment, in line with the guidelines set out by National Treasury. Within eThekweni, the Municipal Planning By-Law provides the legal framework that spatial policies such as the MSDF play out in at the metropolitan level. The zoning scheme provides the detailed zoning guidelines and permissions.

Development Plans

Pinetown South is identified as an Urban Investment Node in the EM Metro. The MSDF identifies Pinetown South as a Phase 1 Priority Area in the **Central Spatial Development Plan (CSDP)**. The CSDP is a detailed planning document that carries through the directives of the SDF to each region within the EM metro. Noteworthy outcomes include the objective to foster diversity in the industrial sector and to promote the functionality of CBDs through greater mixed-use development. Other desired outcomes relate to developing appropriate residential environments with greater densities, establishing access hierarchies and linkages, maintaining the integrity of the open space and providing infrastructural support.

Pinetown South has been identified as a well-located area in the eThekweni metro, which has been developed without strategic, integrated planning. The Pinetown South LAP was formulated to provide planning direction and provides a comprehensive overview of the site, identifying some of the major development issues.

From these issues, six goals have been formulated for the Pinetown South area. Since the TED project is focused on stimulating economic development, it is most closely aligned with goal two, which seeks to expand the economy and foster industrial development. However, it also aligns with Goal One, which is enhancing the regional accessibility of this area. As such, this project will focus on interventions in areas that have been identified in strategically important areas.

Pinetown is located in a Prime Investment Corridor, which is made up of Priority Urban Investment Areas identified in the SDF. To this end, the primary services the BEPP highlights in relation to Pinetown are the Integrated Public Transport Network (IPTN), housing and employment. In terms of the IPTN,

Pinetown is on the C3 corridor, which links Pinetown CBD to Bridge City in the North. This is prioritized as a first phase project. Other corridors that will link to the Pinetown area are the C6 corridor, which is intended to link Hammarsdale and Pinetown to Warwick (this is a phase 4 priority) and the C7 corridor (a phase 2 priority), which is intended to link Hillcrest to Chatsworth, which is adjacent to Pinetown South.

Accredited NPOs have undertaken a number of independent social housing projects in the area. Affordable housing developments are planned in the Prime Investment Corridor and in the C3 corridor. It is anticipated that about 12 500 units will be built in the area between Bridge City and Pinetown South.

Pinetown, Westmead and New Germany are classed as a high priority Core Employment Nodes. As these nodes provide employment in the industrial and commercial sectors, the maintenance of infrastructure serving these nodes it to be prioritised.

Land Use Dynamics

The land governance in Pinetown South is complex. Pinetown South is predominantly governed by the Inner West Zoning Scheme. However, part of this area is also classified as a former R293 Area, as indicated by the hatched area. A portion of the area also falls under the Traditional Authority, as indicated by the dotted area, this area has Less Formal Township Establishment Act 113 of 1991 application status. Further consultation with the eThekweni planning team is required to better understand the implications of the current land use administrations.

Most properties that fall under the Inner West Zoning Scheme are zoned for residential purposes, which has limited potential for intensification and densification, although the range of residential land use categories in this area do vary. There are areas of industrial zoning in the site.

Precinct Plans

The **KwaNdengezi Framework** is a regeneration strategy with eight primary objectives. These are: creating a retail node, consolidating the institutional and social facilities in this area, creating a sports hub, improving access and safety for pedestrians, formalizing the taxi rank and meeting informal economy needs, promoting entrepreneurship by facilitating support for small businesses operating in the node, creating quality public space, creating medium density residential opportunities around the node.

The **Nagina Precinct Plan** is a primary service node. The regeneration strategy for this site has the following objectives: improving the aesthetic value of the surrounding area, promoting more activity in this node, stimulating private-sector investment through state-led interventions, increasing job opportunities in the formal and informal sectors, creating better access to this node, improving safety and promoting civic pride.

Priority Nodes

The data indicates that private land ownership appears very low. It is important to leverage investment in land to stimulate economic development. One constraint is that there are significant areas that have not been zoned, whilst the provision of commercial zoning across the study area is inadequate. The nodes that have been identified are located on existing transport corridors. The topography plays a dramatic role in informing infrastructure provision, urban development, and pedestrian walkability, which is an important mode of mobility.

The Situational Analysis provides spatial development suggestions in respect to:

- The KwaNdengezi Node,
- The Nagina Node,
- The Mpola Taxi Rank Node,
- Tshelimnyama Business and Social Node,
- Tshelimnyama Area Micro-Nodes.

The **KwaNdengezi Node** is located at a topographical high point of the township. Its vantage together with the concentration of sports and recreational assets allow the site to be positioned as a major sporting destination within the township context. In addition to the sports precinct, the low-level and ad-hoc economic activity that occurs at the taxi drop off along MR518 (at the intersection of Maviyo Road) and land adjacent requires consolidation and spatial legibility to enable sustainable and coordinate growth.

The **Nagina Node** has extraordinary potential for increased economic development. It is currently a vibrant consolidation of businesses (corporates, SME and micro-enterprises), including the Mamdekazi Shopping Centre, with room for the amplification of economic and social amenities. It is very well connected and accessed via the Old Richmond Road corridor, albeit via vehicular transport (public and private). The emergent nature of the business and uses means that there is a disconnect between the

use of space and the design of the area. While vibrant and busy, there are underperforming land parcels in proximity to the site, thus allowing for increased opportunity to be consolidated and reinforced

The **Mpola Taxi Rank Node** is located along a key arterial (Milky Way) of the township and provides a central point of mobility and connectivity infrastructure. The node comprises a busy taxi rank, related formal and informal businesses, a general dealer, a (under-performing) community hall and functioning library. A spatial development plan is suggested to improve the current use of assets, stimulate investment into the node and configure use to accommodate the diverse requirements of businesses, pedestrians and taxi transport operators.

The **Tshelimnyama Business and Social Node** is well located within the township and a connector to major urban centres, including Pinetown CBD. The node is diverse in offering comprising a library, sports ground and clubhouse, river, green belt / park, taxi rank, and small business premises. The opportunities for spatial development include enhancing the connectivity between various nodal aspects, including the taxi ranks, Metro facilities and recreational facilities. The situation analysis suggests the redevelopment of the taxi rank, the creation of pedestrian lands, and the establishment of a recreational park within the green belt.

The **Tshelimnyama Area Micro-Nodes**. Spatial development of these micro-nodes presents a useful strategy for the transformation of historical dormitory settlements to become more socially and economically diverse. The micro-nodes relate well to walkable pedestrian catchment areas. These micro-nodes function on a small scale mostly $\pm 100\text{m}$ in diameter from an identified epicentre, often an informal taxi rank. There is an opportunity to consolidate and amplify their operation both in terms of the nodal autonomy and its relation to other such micro-nodes.

Housing

Pinetown South was planned as a dormitory suburb peripheral to social and economic opportunities. The settlement is therefore predominantly residential with a mix of formal, informal and traditional housing typologies. The area is characterised by high levels of unemployment, poverty and low household incomes. Approximately 60% of households remain below the poverty line. However, social stratification is evident in higher quality housing owned by middle-income households. The northern and eastern portion of the study area is composed of middle to high income housing, with areas like Queensburgh, Shallcross, Caversham Glen and Savanna Park. The southern and western areas, as well as the north western area comprises of low to middle income housing. Many of the housing upgrades

in the area post 1994, were either in-situ upgrading or RDP type housing. A few hostels, as well as greenfield developments have also been developed. Existing informal settlements within the project area need upgrading.

As of 2019, Pinetown South had a registered housing stock of 19,000, which is only 50% of all the formal houses recorded in the census 2011. The mismatch indicates the challenges with the transfer of formal title deeds to individual homeowners. Between 2015 and 2019, the stock of registered properties grew by 870, which is about 5% of the total registered stock. The Metro has also identified Pinetown South as an area for densification and mixed-use developments, although area has not been included in the national Department of Human Settlement's (DHS) declaration of the priority human settlements and housing development areas. With government housing provision likely to decline in this area, there are opportunities for innovative public-private partnerships in delivering higher-density affordable housing. Through unlocking strategic sites and enabling in-fill developments, the Metro can promote urban consolidation and land use intensification.

Within Pinetown South, the St Wendolins area, Nagina node and KwaNdengezi node have been earmarked for strategic investments into mixed-use, higher density developments. This process could be supported through regulatory reform (including the consolidation of properties), incentivizing vertical expansion, fast-tracking building applications, promoting property market (formal) development. Another opportunity relates to the subdivision of land owned by educational institutions and social organisations where past planning practices have allocated large sites for these institutions where buildings can occupy approximately 50% or less of the land. The formalization of informal settlements is another important strategy for the area. The backyard real estate market could offer some opportunities for the local construction and property industry as well as for businesses in up- and downstream industries.

Home-based enterprises are another important use of the house as an economic asset. Homes are the dominant business location for enterprises operating in residential neighbourhoods in the townships. The recently conducted micro enterprise ecosystem survey recorded the location of entrepreneurs operating in the selected high streets and hotspots, which we grouped into businesses operating from property (private house & business premise) and impermanent location (containers, shed/shack, table). The survey recorded the location for 178 businesses out of 318 surveyed. The survey highlights that three-quarter of all businesses (131) operate from mobile structures (74%) and 25% operate from private property (47).

Transport

Transport in Pinetown South is challenged. The road network attempts to follow the natural contours to reduce the steep gradients that would otherwise result. This creates a disconnect between dwellings and the pickup points as commuters must walk up and down hills to gain access to public transport services. Minibus taxis are the predominant mode of transport with three major taxi/bus ranks in the site. In the peri-rural neighbourhoods, there is inadequate infrastructure which include street and general lighting, engineered roads and access to water. Drainage systems are inadequate. The road shoulders are untarred.

Infrastructure

The Metro commenced a project to connect all Metro properties with fibre. However, this has started within the city core and there are currently insufficient resources to extend the scheme whilst planning blockages have affected rollout. The quality of stormwater pipes around Pinetown South varies from area to area. There are specific areas that show evidence of lower quality infrastructure provision for stormwater runoff. This has led to increased erosion of river/stream banks and pollution of catchments. The Durban Heights Waterworks has reached its capacity and has since been experiencing increased pressure to provide services as human settlements in the area continues to grow. The eThekweni Water Services Development Plan (EWSDP) intends to connect the area to the Western Aqueduct to ensure the constant supply of water to the area, relieve pressure on Durban Heights Waterworks, and lessen operational costs.

Certain areas in the study site make use of 200 litre water tanks to distribute water in the households. The infill and west/south end areas in need improvements in bulk sewers, while rural areas have no sanitation or pit latrines. There are opportunities for water harvesting (rainfall, frequency and distribution) in Pinetown South , but there has been minimal investment in infrastructure to promote this. Bulk sewer service is well provisioned in Ward 16, Ward 63, and the Industrial areas. This is due to these areas being the most urban in the site. The infill areas, as well as the south and west ends of the site require bulk sewer service improvement. The less urban areas have a waterborne sewerage system in place. Plans are in place for a new bulk main to be established from Klaarwater South to Dassenhoek, with a later extension of this main to Kwandengezi Treatment Works.

Most residents have their refuse collected by the Metro service once a week, while a much smaller portion of the community makes use of unauthorised refuse dumps. Although many households have access to electricity, use of candles and paraffin is also common. Solar power is used the least out of all the other forms of energy. The electricity network in this area extends throughout most of the site and most even are connected to the municipal grid. There is also public street lighting throughout the site although it is unclear about the whether there is adequate capacity in this area.

Environment

Pinetown South contains significant natural assets. This includes Marionwood, Roosfontein and North Park Nature Reserves, the Umlaas, Umhlatuzana, and Umbilo Rivers, wetlands, grasslands, and forest / woodland areas. River restoration pilots represent an opportunity to restore ecological infrastructure as well as provide employment and skills development. The Metro has already placed ecological infrastructure at the core of their approach to respond to climate change. The Mlazi River and Cutshwayo Streams and surrounding catchment areas have high potential for undertaking river restoration work with potential to partner with the Shongweni Dam and Nature Reserve upstream.

Food security has also been an issue, exacerbated during the lockdown. There are successful food garden projects running, like the Luganda garden which is supported by Shoprite, as well as the Food and Trees for Africa campaign. The township is close to the newly established Hammarsdale Waste Beneficiation Centre, which aims to facilitate market access for waste sector entrepreneurs in the informal economy.

A key urban ecosystem risk is flooding / rain damage to physical infrastructure and road networks after heavy rain events. A key response measure would be to ensure grey infrastructure is implemented with green infrastructure to ensure mitigation of climate impacts and protection of investments.

Urban Conditions and Management

There is a deficit of public facilities in the site. The EM investments, nonetheless, include sports fields and a Metro service centre at Kwandengezi, a community hall and sports field at Tshelimnyama, a community hall at Nagina, a public library and councillor offices. There are few public parks in the site. The area is also poorly serviced with footpaths, non-motorised-transport (NMT) routes, public Wi-Fi and investments in place-making, such as public art installations.

The TAT identified numerous urban management changes, which have impacted on existing Metro facilities and assets. These include inadequate maintenance of core facilities, vandalism, unauthorised human settlements, the encroachment of businesses on Metro land, and the erosion / decay of road systems and storm water infrastructure.

Project Opportunity Identification

Based on the extensive fieldwork evidence and consultation with Metro specialists, the TAT has identified a range of potential project interventions. These have been considered in view of the socio-economic, institutional and spatial situation. In highlighting the below opportunities, the TAT has been guided by the following variables:

- I. Alignment with City / Metro programmes and development priorities,
- II. The availability of funding within City / Metro budgets,
- III. The identification of project implementing lead departments and units within the City / Metro,
- IV. The potential for accessing external funding and partnerships,
- V. The role of the TAT in providing technical assistance and adding value to project implementation,
- VI. The potential for projects to have strong economic multipliers and result in a catalytic impact on development,
- VII. The potential for projects to leverage productivity enhancement,
- VIII. The potential for projects to strengthen social cohesion and enhance community well-being, including considerations of safety and security,
- IX. The potential of project to contribute towards environmental sustainability and reduce the risks from climate change,
- X. The reach of projects and targeting of specific beneficiaries, including women, youth, informal micro-enterprises and established SMEs,
- XI. The timeframe for project implementation, recognising the need for immediate, short-term and medium-term projects with varying levels of complexity,
- XII. And the potential for projects to be replicable in other township localities.

The scope of potential projects is wide; the proposed opportunities allow for discussion of the merits or otherwise of each intervention before final selection.

The identified opportunities have been categorised within 7 headings: A) Policy and Strategy; B) Enterprise Development; C) Nodal Development; D) Spatial Integration; E) Housing and Property; F) Social and Community Infrastructure and G) Urban Management. The range of identified opportunities within these categories are:

Table 1: Opportunities in Pinetown South

A. Policy and Strategy

| Opportunity | Notes |
|--|--|
| Revenue collection from rates improved. | The Metro to develop and implement a plan to generate rates revenue from commercial businesses, including home-based enterprises and businesses operating in retail nodes. |
| TED evidence utilised in area-base strategic plans. | The Metro to incorporate the evidence from the TED situation analysis into strategic plans, including the IDP, SDF, and BEPP. |
| Informal land use prevented along high-street and floodplains. | Metro acts to stop unauthorised developments along high streets and environmentally sensitive areas. |
| Business in shipping containers are situated in approved sites / configurations. | The Metro to revise the policy on using shipping containers to promote adherence with spatial plans / nodal growth objectives. |

B. Enterprise Development

| Opportunity | Notes |
|--|--|
| Micro-enterprises have improved access to business development support services. | The Metro to integrate the DSBD district ecosystem facilitation approach and district information management system within enterprise development programme, building upon the learning from a pilot initiative. |
| Micro-enterprises have improved access to digital services to participate in the digital economy & 4IR technologies. | The Metro to facilitate partnerships to improve digital access in Pinetown South, through (inter alia) digital hubs and expanded free wi-fi. |
| The income and productivity of township recyclers improved. | The Metro to facilitate partnerships to enable township waste recyclers to more effectively obtain and package material, including glass bottles from taverns, and improve their returns. |

| | |
|--|---|
| Opportunities unlocked in the creative and leisure economies, provide youth a pathway to transition into jobs and livelihoods. | The Metro to support the development of creative sector / hobbies via social enterprise / community- based organisation programmes, use of Metro facilities, the staging of events, and linkages to BDS services. |
| Annual trade marketing events held in Pinetown South to link the community to retail business opportunities. | The Metro to facilitate a trade promotion event to stimulate opportunities for direct marketing, supplier agreements and digital services, connecting home based traders to companies. |
| Regulated business sectors are formalised and able to access state-subsidies / industry programmes. | The Metro to facilitate transversal engagement as well as with national and KZN Prov. Gov to address constraints on ECDC, taverns / restaurants, undertakers and other regulated sectors from attaining compliance with business licencing. |
| Personal service businesses have access to products and business development support services. | The Metro to identify BDS opportunities and facilitate partnerships to support hairdressers and barber shops with skills, supplies and marketing. |
| Infrastructure facilities established and supported to enhance efficiencies for recycling and upcycling programs. | The Metro to develop a strategy for improving infrastructure (including repositories for the collection, sorting and processing of recycled materials and waste) through PPPs and Metro led initiatives. |
| Businesses have greater financial literacy and have access to services and technologies, including digital platforms. | The Metro to facilitate partnerships to extend financial literacy training and improve access to services and technologies. |
| Mechanics / panel beaters and associated businesses in the after-sales automotive sector have access to business development support services to grow and professionalise. | The Metro to facilitate partnerships with private sector companies, BDS stakeholders including DSBD / SEDA, to provide equipment / skills training / supply agreements / finance to automotive sector micro-enterprises. |

C. Nodal Development

| Opportunity | Notes |
|---|---|
| An economic strategy to revitalise the Nagina node developed and implemented. | The Metro to advance the situational analysis for this node, identifying suitable projects, undertaking planning and secure funding for implementation. |
| Micro-nodes developed with supporting land-use and urban management strategies. | The Metro to identify sites and opportunities to develop micro-nodes (including the Tshelimnyama and Mpola) and other transport related nodes, including measures through which economic activities and the use of space can be enhanced in these places. |

| | |
|---|---|
| A business micro-node established within the Kwandegezi node. | The Metro to design, plan, resource and implement a business micro-node at Kwandegezi, enhancing the taxi rank, unlocking vacant land and activating the high street. |
|---|---|

D. Spatial Integration

| Opportunity | Notes |
|--|---|
| Street traders in the Nagina node operate with tenure security and have improved facilities. | The Metro to conceptualise and implement a street trader plan within Nagina node, expanding on the existing plan. The plan may include infrastructure aspects that require additional scoping and technical support. |
| An integrated public transport system achieved. | The Metro to devise strategies for integrating mini-bus taxi, train, BRT and long-distance bus modes and payment systems. |
| Affordable public transport enhanced through expansion of local e-hailing services. | The Metro to develop a strategy to promote the use of e-hailing via information awareness and safety campaigns. Mobility as a service is provided via the use of smart devices, connecting the supply of drivers seeking fares and the demand of commuters seeking lifts. |
| Shopping malls foster and enable opportunities for micro-enterprises. | The Metro to facilitate engagement with shopping mall owners to agree on strategies to integrate micro-enterprises into the shopping mall precinct, through adherence to development planning agreements and proactive measures to support micro-enterprises. |
| NMT and pedestrian lanes established. | The Metro to establish NMT and pedestrian lanes, formalising existing routes and enhancing connections between transport nodes and commercial hubs. |

E. Housing and Property

| Opportunity | Notes |
|--|--|
| Land-use obstacles reduced to enable business formalisation and investment in commercial property. | The Metro to develop a strategy for reducing land-use obstacles via overlay zones or other suitable instruments. |
| Homeowners utilise water harvesting and solar PV technologies. | The Metro to develop a strategy and partnerships (including incentives) to enable homeowners invest in water harvesting and energy generation (solar). |

Encourage housing investments by the public and private sectors in strategic sites to raise population densities, encourage mixed land uses and stimulate additional economic activity.

The Metro will introduce procedures to fast track higher density housing investments, including PPPs, in strategic sites, including Nagina.

F. Social and Community Infrastructure

| Opportunity | Notes |
|---|--|
| Sports facilities within the KwaNdegezi node developed and maintained. | The Metro to revise the situational analysis for Kwandegezi node, identifying suitable recreation projects, secure funding and advise on implementation. |
| Fibre network expanded and wi-fi hotspots established in business / transport hubs. | The Metro to advance the roll-out of the Fibre network and establishing wi-fi hotspots in shopping complexes, high street nodes, local schools and public transport systems, including the train stations and taxi ranks. |
| A public park developed in Tshelimnyama. | The Metro to conceptualise and implement a public park in Tshelimnyama, with pedestrian linkages to the sports facility / public toilets, braai stands, public gym, and a precinct management strategy to safeguard the greenbelt. |

G. Urban Management

| Opportunity | Notes |
|--|---|
| Public Employment Programmes enhance urban management and contribute to infrastructure repair. | The Metro to repurpose PEP to improve urban management and infrastructure maintenance challenges, including waste collection and road repairs, through identifying partnerships and new approaches. |

Next Steps

In the Second Phase of the TED Project, the TAT will support the Metro to conduct an evaluation of the merits of the identified opportunities. This process will require high-level transversal engagement with all affected line departments and units. An evaluation matrix tool will be utilised to record the outcome of this engagement process. The results of the evaluation will guide the project steering team to re-assess the identified opportunities to be incorporated in the TAT supported township economy development strategy for Pinetown South townships.

The selection of the 8 projects will be determined in consideration of the following criteria AND weighting (minimum number of projects) to ensure that the range of project interventions address economic, socio-spatial and institutional change necessary for transformative development. The TAT will provide a high-level indication of the 'value-add' from technical assistance in respect to the selected projects in support of the need for a range of project interventions across the categories indicated above.

| Criteria | Minimum # of Projects |
|---|-----------------------|
| aligns with identified City programme and project priorities. | 4 |
| can be funded by the City. | 4 |
| has an identified lead department / unit for implementation. | 4 |
| can unlock new partnerships via the CSP and non-state actors. | 2 |
| will benefit from CSP technical assistance. | 4 |
| can enhance productivity and stimulate economic multipliers. | 4 |
| will benefit emerging entrepreneurs and marginalised groups. | 4 |
| will enhance social cohesion, improve safety, and contribute to environmental sustainability. | 1 |
| will strengthen spatial integration. | 1 |
| will enhance the availability of decent housing and accommodation. | 2 |
| will enable immediate wins (within a 24-month timeframe). | 4 |
| will improve the township business environment and ecosystem services. | 2 |
| is replicable in other townships. | 4 |

The TAT support may include:

- Partnership facilitation,
- Strategic and policy advice,
- Project conceptualisation and design,
- Business case development,

- Research support and knowledge sharing,
- Project monitoring & evaluation and impact assessment,
- Project submission within City and NT budgeting process,
- Project spatial and architectural design,
- Quick-win implementation,
- Support in the preparation of calls for proposals or tenders.

At the conclusion of the assessment process, and agreement on the ranking and weighting of the identified opportunities, the TAT will then support the eThekweni Municipality to advance 8 projects within the framework of an overarching township development strategy.

II. Abbreviations and Acronyms

| | |
|--------|---|
| ANDE | Aspen Network of Development Entrepreneurs |
| BBBEE | Broad-Based Black Economic Empowerment |
| BBSDP | Black Business Development Programme |
| BDS | Business Development Support |
| BEPP | Built Environment Performance Plan |
| CAHF | Centre for Affordable Housing Finance |
| CEN | Core Employment Node |
| CIS | Co-operatives Incentives Scheme |
| COGTA | Cooperative Governance and Traditional Affairs |
| CSDP | Central Spatial Development Plan |
| CSP | Cities Support Programme |
| CTO | Community Tourism Organisations |
| DSBD | Department of Small Business Development |
| DHS | Department of Human Settlements |
| DIMS | District Information Management System |
| ED | Economic Development |
| EDSE | Ecosystem Development for Small Enterprise programme |
| EDTEA | Department of Economic Development, Tourism and Environmental Affairs (KwaZulu-Natal) |
| EDU | Economic Development Unit |
| EM | eThekweni Municipality |
| GIS | Geographic Information System |
| IDIPAP | Industrial Development Implementation Programme Action Plan |
| IEDI | Informal Economy Development Initiative |
| IMEDP | Informal Micro-Enterprise Development Programme |
| IPTN | Integrated Public Transport Network |
| KZN | KwaZulu-Natal |
| LAP | Local Area Plan |
| LEFTEA | Less Formal Townships Establishment Act 113 of 1991 |
| MSDF | Municipal Spatial Development Framework |

| | |
|---------|---|
| MTEF | Medium-Term Expenditure Framework |
| NT | National Treasury |
| NYDA | National Youth Development Agency |
| PGDS | Provincial Growth and Development Strategy |
| PIC | Prime Investment Corridor |
| PPE | Personal Protection Equipment |
| SEDA | Small Enterprise Development Agency |
| SEFA | Small Enterprise Finance Agency |
| SLF | Sustainable Livelihoods Foundation |
| SME | Small and Medium Enterprises |
| SMME | Small, Medium and Micro-Enterprises |
| SPLUMA | Spatial Development and Land Use Planning Act, 2013 |
| StatsSA | Statistics South Africa |
| TAT | Technical Assistance Team |
| TED | Township Economic Development Project |
| ToC | Theory of Change |
| TREP | Township and Rural Entrepreneurship Programme |
| UESC | Umkhumbane Entrepreneurial Support Centre |
| WGB | World Bank Group (South Africa) |

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1. Situational Analysis Aims

The Cities Support Programme (CSP) of National Treasury (NT) has entered into an agreement with eThekweni Municipality to provide the metro with technical support for formulating and resourcing a township economy development (TED) strategy. The TED project of the CSP is a three-year intervention to strengthen the capacities of the beneficiary metros to strategise, plan, fund, implement and monitor TED projects within specific townships to achieve a meaningful economic development impact. In eThekweni the selected site is the area of Pinetown South.

The Situation Analysis of Pinetown South is an important output towards the process of developing a TED development strategy. The aim of the situation analysis is to identify aspects and components of the township economy that could benefit from project interventions within an overarching strategic alignment. The purpose of the analysis is not to delineate or define projects, but to indicate opportunities where projects could meaningfully contribute towards a TED outcome. The opportunities we have identified in this report will, in subsequent steps in the project process, be further investigated through a series of processes. These will include participatory engagement with members from the community of potential beneficiaries and consultations with metro and other specialists. In addition, the opportunities will be further assessed to understand the project risks and identify measures that could enhance sustainability and align to support structures within the business ecosystem.

The draft Situation Analysis provides a status report on crucial aspects of the township economy. The analysis focuses on: i) the business ecosystem, ii) township micro-enterprises, iii) the land use systems and characteristics, iv) strategic spatial nodes, including precincts, v) housing, vi) public transport, vii) physical infrastructure, and viii) the environment.

The draft report will be circulated to stakeholders in the relevant line departments, as identified in the project transversal planning process. The TED consultant will then engage with representatives from these departments with the purpose to stress test the data contained in the report, obtain additional information and data, and consider alternative perspectives on the findings. These inputs will then be incorporated within a second draft. The revised draft will then provide an evidence platform to inform the identification of projects and development of the TED strategy. We anticipate that the process of finalising the Second Draft Situational Analysis Report will be concluded on or before the end of April 2021.

2. Cities Support Programme Overview

The Cities Support Programme is a multi-year, demand-driven umbrella programme within the National Treasury that aims to support the development of productive, well-governed, inclusive and sustainable cities (<http://csp.treasury.gov.za>). The CSP operates within South Africa's eight metros focused on the following thematic components: Governance and Fiscal Sustainability, Climate Resilience, Economic Development, Human Settlements and Public Transport. The CSP focuses on strengthening metro capabilities through three core focus areas: one, city leadership and governance, two, integrated planning and delivery within city spaces, and three, building an enabling environment for cities through appropriate financial, fiscal frameworks and instruments and the refinement of sectoral policies, regulations and support capabilities.

The economic development (ED) component of the CSP programme supports projects across all three focus areas. Projects to support city partnerships for inclusive growth and regional economic development collaboration are focused on building city economic development leadership and governance capabilities. The Industrial Park Revitalisation, Sub-National Doing Business (a project that enables cities to become more competitive in business processes related to small firms registering property, receiving construction permits and getting electricity), and Township Economic Development projects aim to strengthen integrated planning and delivery within city spaces. Finally, there are three projects that intend to strengthen the enabling environment for metros, namely: Spatialised City Economic Data; Economic Development Data Strategy; and City Incentives Review and Policy.

3. Township Economic Development Project Overview

3.1. Project Aims

The Township Economic Development Project is a 3- year project with technical support in the form of a multi-disciplinary professional team. The project commenced in February 2020 and will conclude in February 2023. The CSP has entered a memorandum of understanding with eThekweni Municipality (EM) to implement the project in one township community.

The CSP appointed the Sustainable Livelihoods Foundation (SLF) NPC (www.livelihoods.org.za) to implement the project. The professional technical assistance team (TA) of consultants comprises a team leader; a small-business development advisor, a social scientist, a spatial planner, a public transport expert, a housing specialist, an infrastructure development advisor, an environmental expert and community liaison persons.

The SLF TAT partner is mandated to work with EM to conceptualise an overarching TED strategy for the selected township. The strategy will comprise a development vision, the delineation of specific project (up to 8 projects), and a programme for implementation. The TAT will collaborate with the Metro to align the strategy to existing and emerging development frameworks, strategies and projects. The TAT will advance the implementation of the strategy through specific projects. These projects will derive from the unique development challenges and opportunities within each site and hence respond to, inter-alia, metro enterprise policy and strategy requirements; the building of partnerships for project implementation; the need for business infrastructure in high potential precincts or nodes; the improvement in the delivery of enterprise development support services; transversal alignment within the metro and strengthened linkages across government; market development; and investment in infrastructure.

In formulating projects and implementation plans, the TAT will facilitate a process of participatory engagement at the township level to ensure that projects are responsive to the needs, capabilities, and priorities of the beneficiaries. Within the metro, the TAT will facilitate a transversal planning process with the aim to advance projects with spatial impact, whilst synergising resources and ensuring alignment with sector plans. The intention is to support a range of projects that impact directly through business support services and indirect measures that improve the business environment and urban condition.

It is anticipated that the TED strategies will provide the EM with a replicable area-based development approach. As a TED intervention, the project plans to leverage institutional impacts through knowledge sharing, strengthening metro strategies and policies, and through facilitating transversal planning processes. The TED project, furthermore, aims to benefit the metro through the building of new partnerships and arrangements for the implementation of economic development projects, the sourcing of funding, and gaining access to specialist knowledge and expertise.

The TED project will be undertaken in 7 Steps. The first step (step 1) requires a detailed situation analysis of the socio-spatial, infrastructural and economic characteristics of the target township. The current document contributes towards this output.

3.2. CSP TED Theory of Change

The TED project adopts an area-based approach to concentrate development within a specific geographic site to address the pressing needs for local economic development and to reduce the apartheid spatial and social legacies. The CSP has proposed a project Theory of Change (ToC) that situates people and their communities at the heart of the development process. The foundation analysis to this ToC is contained in the ***Township Economies Series #5: A framework for the development of metro-strategies*** produced during the first phase of the CSP. In the ToC, townships are recognised as spatially distinct areas that are structurally disconnected from the wider economy and therefore require a spatially and systems-oriented development approach. The CSP framework identified four central influences on TED development:

- I. the provision (and quality) of public goods and services,
- II. the regulatory environment that enables and constrains opportunities for business development (and social enterprises),
- III. the organisation of society through informal institutions (rules, customs, constraining behaviours etc.) and organizational forms (groups, associations, stokvels, neighbourhood watches etc.),
- IV. and the character and orientation of economic activities in general and businesses in particular.

As a foundational principle, the CSP ToC holds that spatial factors have a strong influence on both social organisation and economic activities within townships. Hence TED must address spatial obstacles and enhance spatial opportunities for inclusion in local economic activities as well as the wider economy. At the project commencement, the TAT have highlighted a further set of components within the development processes. These include:

- The requirement for a context specific understanding of the physical, social and psychological needs of township communities,
- The need to understand the range of shocks that cause of enhance economic vulnerability and, at same time, the human responses, including coping mechanisms, that enhance social resilience.
- The importance of actions to strengthen accountability and governance, within the metro and down to benefiting communities.

In supporting EM to develop TED strategies, the TAT support will clarify the methodological approaches to identifying and prioritizing TED interventions. The strategies will detail the logical relationships between actors, resources, activities and outcomes in the development, specifying indications against which the TED strategies can be evaluated and assessed. Each TED strategy will provide a crucial opportunity for learning and knowledge sharing, as well as reflection on the validity of the CSP's ToC thinking.

3.3. Project Partners

The CSP has entered partnerships to amplify the TED project. These include partnerships with the European Union supported Ecosystem Development for Small Enterprise programme (EDSE), the World Bank Group (South Africa) (WBG), and the Aspen Network of Development Entrepreneurs (ANDE). The EDSE partnership aligns the TED project with the TAT to the Department of Small Business Development. This partnership will enable the TED project to facilitate metro and project access to development support opportunities within a broader ecosystem centred on the DSBD, which includes the Small Enterprise Development Agency (SEDA) and the Small Enterprise Finance Agency (SEFA). The EDSE programme provides linkages to private sector led opportunities and leverage to engage on matters of policy and strategy.

The World Bank Group offers technical and financial leverage to support the TED project development process in accordance with a partnership agreement that is in place with National Treasury. This support includes providing opportunities to metros to utilise the CSP's Economic Strategies Support Facility within the World Bank to access global expertise for advice on complex challenges. Furthermore, through the WBG's support to metros and local organisations focused on strengthening and improving efficiencies within the township housing market, the WBG provides an opportunity for alignment of technical expertise, as well as funding to pilot an intervention to develop the township accommodation

rental market segment. The ANDE partners offers further opportunities for technical co-operation and knowledge sharing.

The CSP TED project will work synergistically with the Neighbourhood Development Partnership Programme (NDPP) of National Treasury. The NDPP provides financial and technical investment towards the development of nodes and precincts that strengthen the township economy. The TED project has drawn on and sought to advance the situational reports and design proposals for identified NDPP sites of strategic importance in the benefiting townships. The TED project will aim to enhance these investments through, inter alia, strategizing an enterprise-led approach to strengthening precinct management and identifying projects to support business opportunities.

4. Approach and Methods

The TAT undertook a series of steps in preparing the situation analysis. The seven steps that we highlight below were undertaken simultaneously.

4.1. Establishment of Transversal Team

The project was institutionally landed in an initial series of high-level engagements, which commenced in 2019. In this project introductory phase, the TAT was introduced to the metro departments of economic development and CSP metro co-ordinator. The metro leadership team appointed a dedicated project lead whose roles included the establishment of a transversal planning team and support to the TAT in accessing data and conducting sector engagements.

4.2. Desk-Top Analysis

The TAT team identified all relevant municipal planning documents. These included the Built Environment Performance Plans (BEPP); spatial development frameworks (SDF); district development plans (DDP), local area plans (LAP) and plans for specific nodes; and integrated public transport network (IPTN) plans. In addition, we accessed feasibility studies for economic projects. Through examining these documents, we were able to comprehend metro spatial and economic development priorities in Pinetown South. The subsequent ecosystem survey and field research investigation focused on the identified nodes, precincts and high streets. The consulted plans and literature are listed in Annexure A. We identified a total of 129 sources, comprising official publications, academic publications and unpublished reports.

To understand the history, structural nature of the benefiting township economies and sociological characteristics of Pinetown South, the TAT undertook a survey of professional (grey) and academic literature on the subjects of economic development, spatial planning and township enterprise. In addition, we investigated the 'urban everyday' through scanning newspaper articles and social media postings. The academic and social media information would shape our approach to participant engagement via the virtual imbizo.

The desk-top analysis enabled the TAT to identify aspects of the township economy in Pinetown South that have undergone transition or recently emerged in response to changing ecosystem opportunities

and market conditions. Finally, the literature review gave the TAT an insight into the social relationships that underpin business practices and shape the environment in which micro-enterprises operate.

4.3. Participatory Engagement

In the context of Covid-19, the TAT instituted on-line engagements. This was achieved through the establishment of a ***Pinetown Virtual Imbizo*** page on Facebook. To initiate support for the page, the TAT ran a series of advertisements and promotional campaigns which offered air-time vouchers as prizes for the 'best' contribution posted on the page via images or text. As a support base was established, the TAT utilised the Virtual Imbizo to investigate socio-economic conditions and business activities in Pinetown South. These interventions included campaigns to understand innovative forms of non-motorised transport; to investigate the scope of activities within the creative sector; and understand peoples' leisure time activities. Through the virtual imbizo page, the TAT was able to recruit local field research to support the TAT undertake the ecosystem surveys.

The Virtual Imbizo has also been used to advertise local businesses identified through field work and action research interventions. This platform has also been used to post relevant business and job opportunities. Engagement has also been fostered by disseminating the ecosystem survey results, through a series of infographics and polls about which interventions people believe are priorities in key locations in the study area.

SLF is involved in a project with the National Lotteries Commission of South Africa to produce a 30-minute visual product on township life in South Africa. The competition's mandate is to find creatives (videographers and musicians) to participate in this project. The competitions have been a good source of content engagement and have been useful in generating traffic to the virtual imbizo pages.

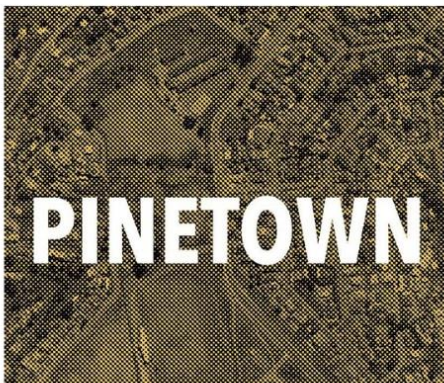
At the time of writing this report, the ***Pinetown Virtual Imbizo*** has achieved the following level of support:

- Likes: 445
- Follows: 448

The Virtual Imbizo pages recognises the multi-stakeholder composition of the TED development process, including the Metro, project partners and the CSP. The TAT will manage the page for the duration of the project. The short-term goal is to increase the level of community participation to a minimum of 1000 unique followers.



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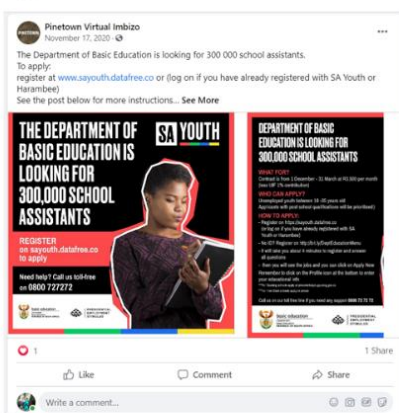
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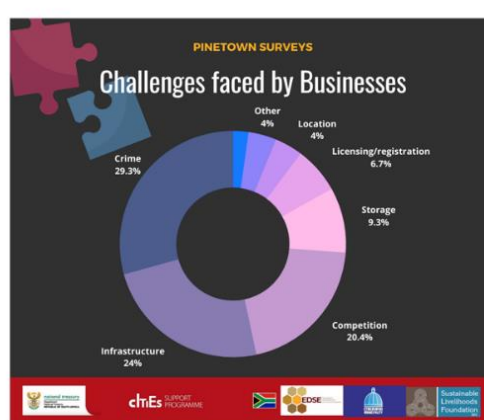
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7.

1. Cover Image
2. Profile Picture
3. Fieldworker Recruitment
4. Participatory Action Engagement for the Non-Motorised Delivery
5. Heritage Day Participatory Action Engagement
6. Opportunity Promotion
7. Survey Infographic

Figure 1: Examples of content published on the Pinetown South Virtual Imbizo

4.4. Spatial Information

To analyse the spatial dynamic of the site, the TAT obtained geospatial data from open sources and the Metro. The goal was to obtain data on land use (zoning schemes), cadastral boundaries, social and community infrastructure, water and sewerage systems, electricity networks, telecommunications, natural features and roads and transport infrastructure. From open sources (including Google Maps), the TAT identified businesses operating within the project site and immediate surrounds.

All geospatial data has been compiled into a data portal. The portal has been utilised to examine the development opportunities / limitations within the project site, from the area-wide perspective to the micro-context of streets, nodes and precincts. Further, the data portal permits an analysis of the relationship between the identified business activities (from open sources and the survey) across the scope of the site and the physical relationship between businesses and the built and natural environments and public infrastructure. The data portal comprises an important output of the situational analysis process. The datasets have been compiled within a single PDF file, within which the document contains a series of spatial layers that include the aerial imagery, site boundaries, land use, public infrastructure and economic data. The PDF tool permits users to enable or disable the GIS layers and hence focus on specific issues and data relationships.

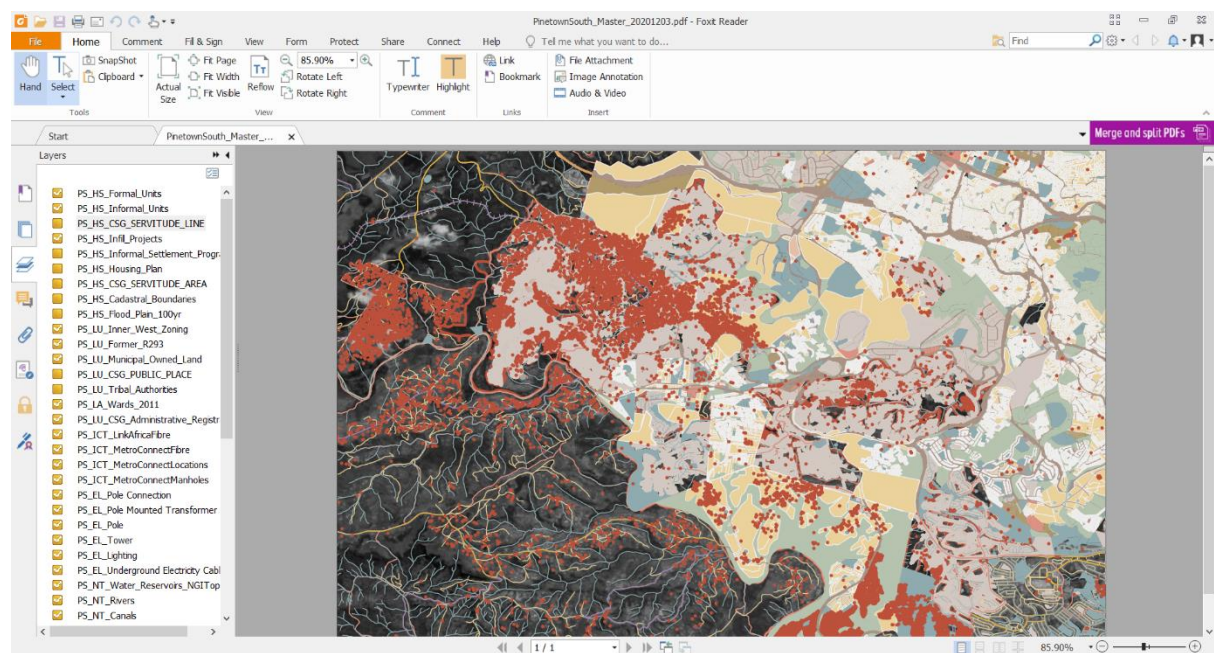


Figure 2: Interactive GIS Tool

Opportunity: TED evidence utilised in area-base strategic plans.

The TAT undertook a spatial analysis of identified high streets, business nodes and development precincts. The precise area of these spaces has been illustrated. The site layout, cadastral units and land-use zones have been extracted from the geospatial portal and represented within these diagrams. Within each of these micro-context analyses, we have sought to indicate the proposed the building footprint of developments as identified in project plans. We have utilised annotated photographs and field research notes / observations to comment on the economic potential of these spaces.

4.5. Ecosystem Survey

The TAT developed an ecosystem survey instrument to collect data within the field. The research approach was to obtain information on the total ecosystem of businesses and institutional services within the site. The research focussed on economic high streets, business precincts, retail hub and identified nodes / precincts. A multi-component questionnaire, the research instrument comprised: i) a business survey; ii) a survey of places at which business is conducted ('hot spot' analysis); iii) a survey of institutions (including financial institutions); and iv) a stakeholder survey.

The data gathering process was undertaken by a team of field researchers. The TAT recruited, via the virtual imbizo platforms, and trained local researchers for this purpose. In the field, information was recorded on hand-held tablets, with the questionnaire built within the CommCare app. The tablets permitted the researchers to capture photographic and geospatial data, whilst the app enabled the data to be safely stored in the cloud.

Field research was undertaken from August to November 2020. The local field researchers were supported by experienced SLF researchers & consultants as well as collaborators from the EDSE project. Measures were instituted to ensure that the field research team adhered to recommended guidelines to minimise exposure to COVID-19.

In Pinetown South the researchers undertook 397 surveys, which included surveys of 247 township micro-enterprise businesses. We recorded 66 small and medium enterprises (SME) (these included all large, non-corporate businesses), 5 corporates, 28 business 'hotspots' and 30 institutional services

(which included financial services). During the field research, the team undertook interviews with 3 local stakeholders. Further interviews will be undertaken in Project Step 2.

Ecosystem survey entry point



Business surveys



Business hotspot

Institutional services

Stakeholder



Figure 3: Ecosystem Survey in the CommCare App



1.



2.



3.



4.

Figure 4: Field Workers in Pinetown South

Description of figures 1 – 4:

1. *Field research training was conducted at Marrianhill Monastery.*
2. *Most of the field researchers had post-tertiary qualifications.*
3. *The field team was made up of residents from the local area.*
4. *The field team provided valuable insights about the socio-economic environment.*

4.6. Site Field Research and Engagement

The TAT undertook an immersed field research process to understand the socio-economic characteristics of business and urban dynamics. The research methods were largely qualitative. These included: ethnographic observations and note taking; capturing photographs of sites and aspects of the township economy including the use of space; conducting interviews with key persons, business operators and representatives of trader / business associations. To obtain data, the TAT walked across transects within the site. We specifically inspected sites that contribute towards 'place making' and social cohesion in the site. These included:

- Old Richmond Road,
- Milky Way road,
- Kwandengezi precinct,
- Nagina precinct,
- Micro-nodes at Tshelimnyama, Mpola, Dassenhoek, Savannah Park and Regency Park.

The enterprises surveys were focused on the identified precincts. The research team also inspected taxi ranks at Nagina, Kwandengezi and Mpola.

4.7. Sector Specific Investigations

In accordance with the CSP theory of change, the TAT undertook a series of sector specific studies into essential aspects of the township economy. This research sought to characterise the state of knowledge and identify both opportunities and constraints for leveraging economic growth and business development. An important component of this research was the engagement with metro specialists. In some instances, the TAT has struggled to obtain internal reports / information and to secure meetings with counterparts. In revising the draft and formulating the second draft, the TAT will endeavour to schedule further meetings to address knowledge gaps and obtain missing data. These gaps have been highlighted within the relevant sector status reports.

A notable challenge in undertaking the sector specific studies was the relative scarcity of area-based data. To mitigate this challenge, the TAT team has sought to access unusual data sources, including private sector datasets and qualitative data. Through the CSP partners and collaborators, the TAT has sought to obtain insights and data on specific aspects of the township economy. In this respect, the CSP's spatialised city economic data project has provided anonymised tax-return information on a limited range of data variables, derived from the tax returns of the businesses operating within the site. The TAT has obtained data on formal market property transactions from the Centre for Affordable Housing Finance Africa (CAHF). Since the TAT has considerable experience in township research, SLF could contribute datasets and qualitative evidence to address knowledge gaps. We report on the analysis of these datasets in the relevant sections.

5. Limitations

The Situation Analysis is a rapid research output, developed through consulting existing reports, utilising available dataset, engaging with stakeholders and brief field research, including primary data collection. The approach does not permit the TAT to undertake extensive surveys and consultation. The area-based focus on a single township is a novel approach to development planning. Yet it should be noted that the project site does not neatly fit into the geographical area / units used in statistical enumeration, in particular the Sub-Place and Main Place boundaries as defined by Statistics South Africa (StatsSA). Nor do the areas align with ward boundaries (which are re-assessed and realigned after local government elections), but instead the project site includes multiple wards. Whilst the site falls within the municipal inner-west zoning scheme, it also includes pockets under traditional authority jurisdiction (the Ingonyama Trust). The complexities in characterising the site are also reflected in the general shortage of site-specific data. Metros do not, as a matter of routine, collect and update geospatial data on township business activities, whilst informal businesses or micro-enterprises operate in spatially fluid patterns and tend to resist statistical enumeration. Open-source data, whilst providing an additional data source, also does not reflect the frequent changes in the micro-enterprise environment. The data we obtained thus includes businesses that are no longer in operation.

Shortly after the commencement of the project, the Covid-19 pandemic necessitated strict control measures (lockdown) which then limited opportunities for in-person engagements and field-based activities. Online engagements were instituted and proved to be a partially effective substitution for in-person meetings and consultations. But whilst these engagements would permit organisational efficiency, they did not enhance the process of building repour with the project steering team and nor were more thorough day-long workshop possible. The TAT was only able to commence field research after the introduction of level 3 restrictions. Despite our efforts to facilitate transversal planning processes, the TAT was not able to consult with all relevant Metro stakeholders. Similarly, the TAT was unable to access all the necessary GIS information and project plans.

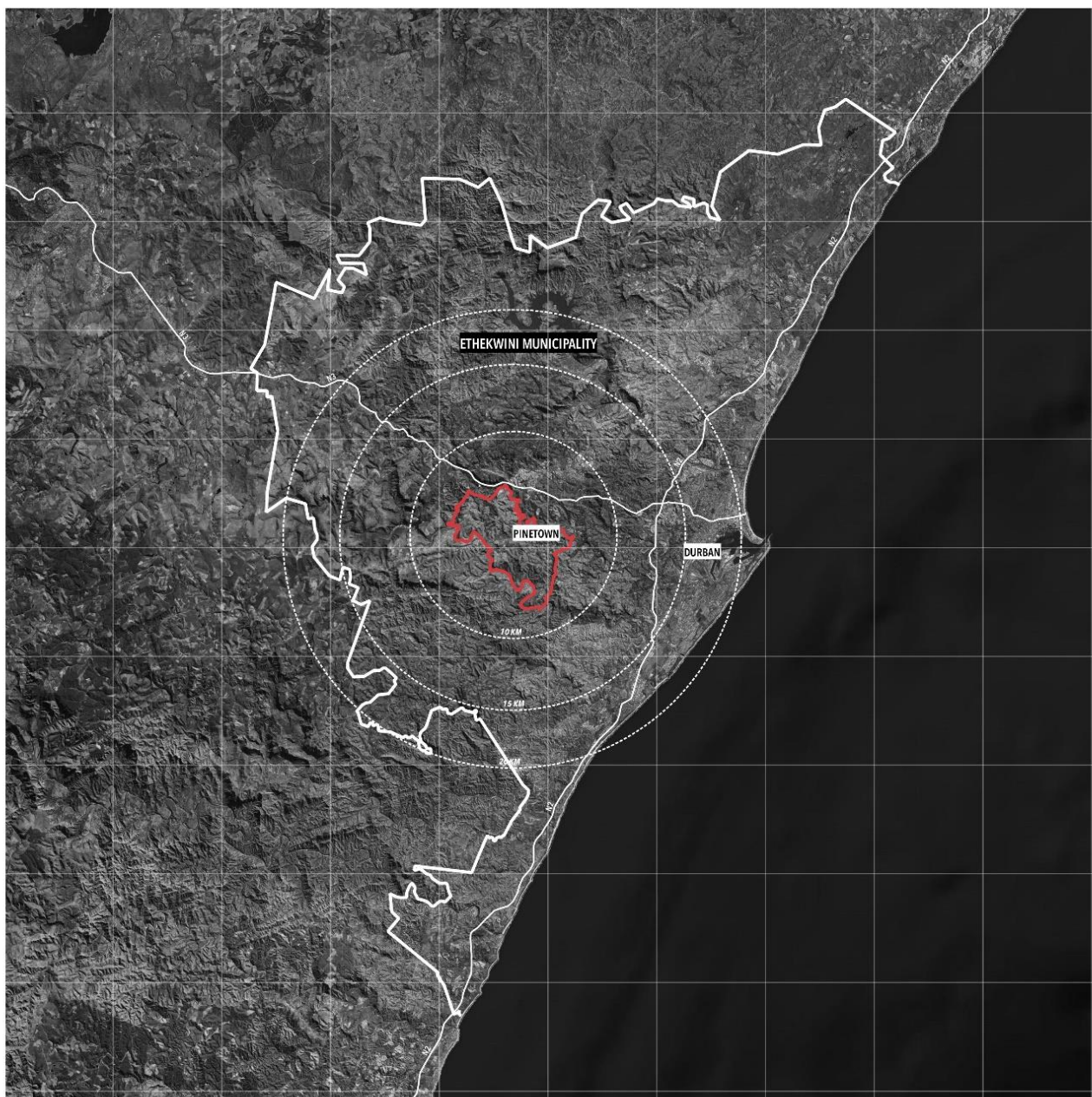
The ecosystem survey method was intended to provide an initial insight of business activities within the township context. The approach was to conduct the survey on the high street and within specific nodes. It was not possible to survey all contexts and situations, and thus we intentionally excluded residential sites and transport operators. Since participation in the survey was voluntary, several business operators did not participate for various reasons including their desire to avoid enumeration and fear of state interference in their business practice (formalisation).

6. Project Site

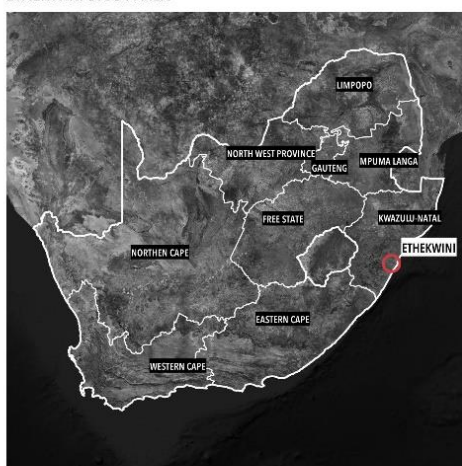
The Pinetown South area is situated approximately 10 kilometres from Pinetown central business district (CBD). Pinetown South is situated in the Inner West Region of EM. The site is situated to the South of the N3. A passenger rail line that connects with the Durban CBD runs through this site and is accessible via a line of stations. It is noteworthy to state that the railway stations are not generators of urban and economic activity as they do not work effectively for commuters. They do however provide a valuable freight and logistics role.

The site includes (partially) wards 12, 13, 14, 15, incorporating the neighbourhoods of Kwandengezi, Tshelimnyama, Thornwood, Mpola, Luganda, Klaarwater, Coffee Farm, Nambia C, Mozambique, Emansenseni, Dassenhoek, Angola, Lusaka, Acorn, Oaklands, Sithundu Hill, and Marianridge. The site includes a core area and secondary area. The core area comprises the following sub-places (StatsSA): Tshelimnyana, Lusaka Block D, Mopola A, Thornwood. The secondary area comprises the sub-places of Mariannridge, Mariannheights and Tollgate. The area is shown in Map 1.

The project site is favourably situated in respect to employment opportunities within the greater Pinetown manufacturing hubs. The site has access to quality educational services at the Mariannhill Mission and within the Pinetown CBD.



ETHEKWINI STUDY AREA



LOCATION KEY

KEY

ETHEKWINI MUNICIPALITY

1. Base Map

1.1 Extents

- ▬ PinetownSouth_Study_Boundary
- ▬ EtheKwini Municipality Extent

1.2 Connectivity

- ▬ Highways

ETHEKWINI MUNICIPALITY | PINETOWN SOUTH

Cities Support Program | Sustainable Livelihoods Foundation | Township Economic Development Project | Situational Analysis Report | 16.02.2021

Map 1: Pinetown South in the Context of the eThekwin Metro

7. Institutional Ecosystem

Townships are spatially distinct areas, structurally disconnected (in large extent) from the wider city economy. The nature of society within these geographically marginalized spaces is in turn, shaped by four framework influences:

- the provision (and quality) of public goods and services,
- the regulatory environment which enables and constrains opportunities for business development (and social enterprises),
- the organisation of society through informal institutions (rules, customs, constraining behaviours etc.) and organizational forms (groups, associations, stokvels, neighbourhood watches etc.) and,
- the character and orientation of economic activities and businesses.

Various government strategies at national, provincial and metro levels have been evolved to support the reshaping of the above influences and enhancement of economic opportunities within township economies.

7.1. National Government Programmes

The Department for Small Business Development (DSBD) is the national government agency responsible, with its associated agencies, for enabling enterprise support. DSBD has mandated to operate the Small Enterprise Development Agency (SEDA) and the Small Enterprise Finance Agency (SEFA). Furthermore, according to DSBD, government programmes at a national level of relevance to township economic development include the following:

- New incentives (with the Medium-Term Expenditure Framework (MTEF) period),
- The Small Business and Innovation Fund (R3,2b),
- Black Business Supplier Development Programme (R906m),
- National Informal Business Upliftment Scheme (R248m),
- Enterprise Incubation Programme (R186m),
- Craft Sector Programme (R36m),
- SheTrades,
- Township Entrepreneurship Fund,
- Township and Rural Entrepreneurship Fund (TREP).

Outside of the DSBD, other national government initiatives include those by Cooperative Governance and Traditional Affairs (COGTA), and the National Youth Development Agency (NYDA), in particular:

- The Integrated Township Economic Development Programme (COGTA)
- The NYDA Grant Programme.

The DSBD also directly manages the Black Business Development Programme (BBSDP), Co-operatives Incentive Scheme (CIS), Shared Economic Infrastructure Facility (SEIF) and the Informal Micro Enterprise Development Programme (IMEDP). Some of the key partners and programmes under the DBSD mandate are discussed below:

7.2. Small Enterprise Development Agency

SEDA is an agency of the DBSA with a mission to develop, support and promote small enterprises throughout the country through non-financial business support. By 2019, Seda had a network of 53 branches, 17 information kiosks, 74 outreach offices where Seda shared with other ecosystem partners and 76 incubation centres. In 2019, Seda reported that 6,957 new jobs were created and 19,064 jobs sustained by supported clients.

An ecosystem appraisal undertaken as part of the inception of the EU Small-Medium and Micro-Enterprise (SMME) Support Programme observed that although Seda was designed to be the premier hub for the delivery of Business Development Services (BDS), it is only a small player among a large number of institutions that fund and support SMMEs, without a key role in coordinating the market for BDS. Though Seda has attempted to act as a coordinator, notably in the incubator space, these efforts have not been reaching SMMEs in large numbers.

The EU Inception Report noted that whilst South Africa has a highly developed BDS market, it is insufficiently accessible for different types of SMMEs and the quality is not always at the level required. SEDA, however, has not been in a position to resolve these issues. SMMEs face challenges in accessing supply chains without the support and would benefit from support through an organisation able to identify opportunities and facilitate programmes (BDS, financial services) that could enable access to these markets.

More recently, SEDA has shifted strategy to focus on becoming an effective facilitator of the BDS market in South Africa rather than a direct provider, focused on strengthening the SMME support eco-system.

As part of this role, it is developing minimum standards and a registration platform for BDS providers, as well as mapping and coordinating public and private incubators. It is also actively transitioning to delivery based on the government's new District Model initiated for development implementation in 2019.

7.2.1. Small Enterprise Finance Agency

Since 2017, SEFA has facilitated funding to 2,946 township-based/owned enterprises amounting to R199 million. The focus on supporting township-based/owned businesses was in line with the call from government to develop rural and township economies into more economically and socially sustainable communities. SEFA's disbursement to township-owned enterprises makes up just 1% of the total SEFA investment into the South African economy of R6.8 billion. This funding was disbursed through SEFA's different loan programmes as follows: Direct Lending (R108 million), Wholesale SMEs (R52 million); Khula Credit Guarantee (R13 million), Microfinance (R22 million) and Co-operatives (R3 million). A Township Entrepreneur Fund has recently been announced.

7.2.2. Black Business Supplier Development Programme

The BBSDP was introduced in 2002 to address the limitations associated with the participation of black owned small enterprises in the mainstream economy. The BBSDP is a cost-sharing grant offered to black-owned small enterprises to assist them to enhance their competitiveness and sustainability to facilitate their integration into the mainstream economy. It provides grants to a maximum of R800 000 for tools, machinery and equipment and R200 000 for business development and training interventions per eligible enterprise to improve corporate governance, management, marketing, productivity and use of modern technology.

The BBSDP provides funds to black owned township enterprises. The support to township enterprises has decreased from 123 (R56.2 million) to 77 (R37.9 million) from 2016-2019. The budget for the current MTEF is R906m.

7.2.3. Co-operative Incentive Scheme

The CIS is a 100% grant for registered primary co-operatives. The objective of the CIS is to improve the viability and competitiveness of co-operative enterprises by lowering their cost of doing business through an incentive that supports Broad-Based Black Economic Empowerment (BBBEE). The table

below indicates that the number of co-operatives supported through CIS has decreased from 58-15 from 2015-2019. The amount disbursed has decreased from R11.6 million to R2.7 million from 2015-2019. Of this, 6.7% was to co-operatives based in townships.

7.2.4. Shared Economic Infrastructure Facility

SEIF intends to leverage public sector investment that would provide necessary shared infrastructure by creating an enabling environment for businesses to crowd in investment, mostly in townships, rural areas and the inner city where there is clear business activity taking place. This instrument is designed to cover the funding of common infrastructure that is either new, upgraded or maintained and is shared by a certain number of informal businesses, SMMEs and co-operatives. It is a 50/50 contribution with the municipality, province and any other partners that seeks to contribute towards this partnership. The DBSA contribution to the facility is up to R5 million per project. R55.4 million has been disbursed from November 2017 up to August 2019 covering 15 shared infrastructure facilities in the Eastern Cape, Limpopo, Western Cape, North West and Kwa-Zulu Natal from which 454 enterprises benefitted. Besides, R12.3 million has been allocated for the support of 4 shared infrastructure facilities from which 425 enterprises will benefit.

7.2.5. Informal and Micro Enterprises Development Programme

IMEDP is a 100% grant offered to informal and micro-enterprises from the minimum grant amount of R500 up to the maximum of R10 000 to assist them in improving their competitiveness and sustainability. IMEDP distributed R 25.5 million to 2007 beneficiaries from November 2018 - March 2019.

The objectives of the IMEDP are:

- To provide developmental support to informal and micro-businesses that are operating in urban centres (preferably townships) and rural areas and owned by historically disadvantaged individuals.
- To strengthen the capacity of credible informal and micro-enterprises to be sustainable through the provision of access to information, business development support services and business infrastructure (machinery, tools, equipment).

7.2.6. The Small Business Innovation Fund

The SBIF was announced in 2019 and provides a mixture of grants and loans through a new blended finance model fund that aims to finance 100 000 young entrepreneurs. The grant portion will be up to a maximum of R2.5-million per enterprise. The fund is run jointly by the DBSA and the Department of Science and Technology; the grant is administered by SEFA. It targets black-owned businesses in townships and rural areas.

According to Minister Ntshavheni (Parliamentary Briefing, 10 July 2019), applicants must have the potential to create at least 10 jobs to be eligible for funding. The National Treasury's 2019 Budget Review notes that R3.2-billion has been set aside over the next three years for the fund, which it will lend to small business intermediaries, including fund managers and incubators. It is these intermediaries will fund and support ideation and start-up companies, and small businesses focusing on innovation. The blended finance model will be tested initially through the fund before consideration is made to extend it to the government's other small business financing agencies. According to the Minister, The Land Bank has already agreed to partner with the DBSA to provide finance for small-scale (emerging) farmers.

7.2.7. Township and Rural Entrepreneurship Programme

The DBSA, as part of its response to COVID19, initiated TREP to channel support to the township and rural enterprises in the listed sectors, with the allocated budget support:

- Auto body repairers & mechanics: R225 million
- Bakeries & confectioneries: R100 million
- Clothing, textile and leather: R105 million
- Tshisanyama (braai restaurants): R 50 million
- Spaza shops support programme: R138.5 million
- Personal care services: R90 million

Current priorities within the programme include:

- **Small-scale Bakeries** – the assistance comes in the form of a financial package, through SEFA, structured to cover the cost for equipment and working capital. It also proposes an off-take agreement with Spaza's for distribution of goods.
- **Informal and small-scale clothing/textile producers** – this support is aimed at the funding of small clothing or textile makers but with a big push on PPE (Personal Protection Equipment) manufacturing. The improvement in quality manufacturing of garments is also taken into consideration that will enhance competitiveness.

- **Automotive Aftermarkets Support** – is aimed at independent automotive aftermarket businesses or enterprises located in townships and villages. This programme also prioritizes informal fitment centres, qualified motor mechanics to operate an authorized repair centres, qualified auto motor body repairers, and distributors of aftermarket auto parts.

7.2.8. SheTrade

The SheTrade digital platform is a programme for female entrepreneurs, jointly supported by DBSA and SEDA. SheTrade aims to enhance support to women by connecting beneficiaries to potential investors, business support organisations, and potential buyers. Through SheTrade platform, female entrepreneurs will be exposed to a global market by connecting nationally, and regionally with other female entrepreneurs and networks. The goal is to have 250 000 women-owned or led businesses connect to markets by 2023.

7.2.9. District Information Management System

An ongoing challenge faced by the different levels of government, department agencies and programmes is in the coordination of BDS services. Due to poor coordination, the SMME development landscape is fragmented. Consequently, consolidated data cannot be produced as data being held across multiple platforms. The newly initiated DIMS will more effectively track BDS interventions and the impact thereof, offer quality assurance and improved enterprise supplier development, and enable shared information in the BDS ecosystem. A key benefit of the DIMS is alignment with the existing datasets of the DBSA and agencies in a “single version of the truth”. The DIMS is to be managed by SEDA but will be access to the BDS ecosystem.

7.2.10. The Integrated Township Economic Development Programme

The Integrated Township Economic Development Programme is designed to respond to the need to position townships as the foremost intervention of government, in developing thriving local economies. Specific programmes will be designed to complement the needs of townships and these packaged interventions. The programme is anchored in the following strategic pillars:

- Mapping and profiling of townships
- Eco-systems for township economies
- Economic Infrastructure and technology development
- Exemption incentives for township economies

- Investment strategies of township economies
- Spatial Transformation of township economies
- Image enhancement of township economies

7.2.11. NYDA – Grant Programme

The NYDA is designed to provide young entrepreneurs with an opportunity to access both financial and non-financial BDS to establish or grow their businesses. The target audience is a range of potential youth beneficiaries. The BDS includes cooperative development programme, business management training, mentorship, and business consultancy services. The programme provides funding for individuals or enterprises, with certain sectors eligible for up to R250 000 in partial, co-funding or towards loan deposits. Young entrepreneurs can access a voucher programme that allows for them to get business support from a NYDA approved BDS service provider. The vouchers range from R6 600 – R19 800.

7.3. KwaZulu-Natal Province Programmes

The KwaZulu Natal Provincial Growth and Development Strategy (PGDS) sets the 20-year vision for the Province as well as the Strategic Goals and Objectives that will drive the Strategy. The KwaZulu-Natal (KZN) PGDP describes the desired outcomes in respect of each Strategic Goal and Strategic Objective through indicators, interventions and targets. To measure progress over 20 years, the PGDP targets are set in 5 yearly intervals, with the 2016 – 2035 PGDS now forms the basis for the revision of the 2016 version of the PGDP. The PGDP (developed in 2012) has five strategic overarching goals for expanding Provincial economic output and employment:

- Unleash agricultural potential so that the KZN agricultural sector grows and generates employment.
- Enhance sectoral development through trade and investment so that trade and investment grows and generates employment.
- Improve the efficiency of government-led job creation programmes so that these programmes yield incomes and prepare participants for entry into the labour market.
- Promote SMME and entrepreneurial development so that their economic participation increases and generates employment.
- Develop the knowledge base to enhance the knowledge economy.

Strategic Goal 1 in the PGDP is Inclusive Economic Development. The focus on townships can be found within this Strategic Goal, in relation to 'unlocking SMME development, co-operatives, township and rural enterprises' within its "nine-point plan" which mainly focuses on large scale constraints that affect growth and investor confidence in the Province. The nine-point plan relies on interventions focused on the following:

- Revitalisation of agriculture and the agro-processing value chain.
- Implementation of a high impact Industrial Policy Action Plan.
- Advancing beneficiation and adding value to mineral wealth.
- Unlocking micro, small and medium enterprises (SMMEs), cooperatives, township and rural enterprises, via:
- A cooperatives programme: to provide food security and to create economic activity at the basic community level – with KZN Development Agency and Ithala Bank providing holistic financial & non-financial support.
- Bulk buying handling and warehousing for cooperatives and SMMEs by the Provincial Association of Traders.
- SMME Academy to provide the very necessary skills for the formal and informal economy.

- Growing the ocean economy.
- Resolving the energy challenge.
- Moderating workplace conflict.
- Scaling up private sector participation and investment.
- Crosscutters with a specific focus on water, ICT, transport infrastructure, science and technology.

The Provincial government has introduced programmes such as Investment Attraction, Enterprise Development, and Operation Vula to advance these objectives. Within this strategic approach, the KZN EDTEA are an important and relevant provincial government authority, whose mandate, among other matters is driving “Operation Vula”.

7.3.1. Operation Vula

EDTEA, with access to the government procurement system has established a practical framework to help co-ordinate the transformation of the KZN economy. Named “Operation Vula”, some 56 sectors of the economy have been identified as potential vehicles to accelerate socio-economic transformation in the province. These sectors include agriculture, fertilisers, bakery, clothing and textiles, and construction. With respect to township economic development Operation Vula has identified a series of interventions:

- Organising local business through setting up a Provincial traders’ association and establishing district warehousing and bulk buying facilities.
- Provision of business management skills.
- Ensuring proper business licenses and permits. This intervention seeks to ensure compliance with existing legislation by all traders.
- Interventions to improve the current mall and rural economy shopping centre tenancy. A new provincial framework for tenancy of 55% national entities and 45% local entities has been developed and been integrated into the Business Bill.
- Micro-finance support.

The KwaZulu-Natal Operation Vula Fund had been conceived to support business operations that promise to survive in the highly competitive business environment. A Youth business development fund is also active within Operation Vula, although applicants for support are required to fulfil the fund priority sectors and activities as determined in the overarching EDTEA strategy.

7.3.2. EDTEA Township Business Revitalisation Programme

EDTEA launched a Business Revitalisation Programme aimed to support local businesspeople, in particular women and youth-owned businesses. The EDTEA has indicated that both it, and its 13 public entities (such as the Ithala Development Bank), will work in KZN townships whose economies have declined in recent years with bespoke revitalisation campaigns. Whilst the programme is extremely new it will include inputs in KwaMashu to reoccupy currently abandoned business spaces, buildings and facilities that could be better used to maximise new businesses to strengthen the local economy. In addition, the programme will showcase available opportunities within the state and demonstrate how businesses from the township can be assisted with skills and financial resources.

An important challenge at this point is that target beneficiaries must have registered their businesses, co-operatives or companies, to be able to liaise with the department for funding and upskilling assistance.

7.3.3. Township and Rural Automotive Industry.

EDTEA has also been driving partnerships to foster specific sector growth. In November 2020 an agreement was struck between EDTEA, the Ithala Development Corporation Limited (IDFC), and the non-profit South African Technicians Association (SATA) to increase the equitable allocation of opportunities to historically disadvantaged service providers in the servicing of the Public Sector vehicle fleet. With support from Ithala IDFC Limited and Ithala SOC Limited, SATA members will gain increased access to asset-based finance, working capital, bridging finance and relevant credit facilities. Further, Ithala provides access to its properties where service providers in the automotive repairs sector could locate their businesses.

7.3.4. Informal Economy Development Initiative (IEDI)

The Informal Economy Development Initiative (IEDI) allows for EDTEA to collaborate with municipalities and or other interested stakeholders (such as NGOs and NPOs) to provide support to local informal businesses within the urban, township and rural areas or designated informal economy area with urban areas of KZN, through the identification and stimulation of relevant economic opportunities. Whilst formal sector partners are intended to be the key applicants, such opportunities are intended to increase productivity and improve livelihoods, the acquisition of equipment and skills to ensure sustainability, and the active participation of informal businesses in the economic growth process. Both shared assets

and infrastructure can be procured or developed with the funds – with amounts between R50,000 and R5,000 000 made available.

7.4. eThekweni Metro Programmes

7.4.1. Integrated Development Plan

eThekweni Metro is the economic hub of KwaZulu-Natal (KZN) with the Port of Durban being the busiest container terminal on the continent and the petrochemical hub. eThekweni is the main port serving Gauteng through rail and road linkages. The local economy is built on three pillars, logistics (including maritime logistics), tourism and manufacturing. Manufacturing has however, been in decline, as has agriculture, with economic growth increasingly driven by the real estate market, and with tourism driven by a growth in incomes in Gauteng. Growth in retail has been in shopping malls, often crowding out smaller businesses.

At the same time, there has been a decline in labour intensive industries, contributing to job-shedding and the closure of businesses in industrial areas. The SDF raises concerns at the 'obsolete and aging' character of much industrial infrastructure and constraints on transport linkages. It notes the growth of economic activity around commuter hubs, public nodes and activity corridors and the growth of street-trading.

Economic development in the Metro is guided by an Integrated Development Plan (IDP). The IDP focuses on key areas such as tourism, catalytic projects, urban renewal, investment promotion and facilitation, small business support, city enterprises, economic leadership, industry support, and township revitalization. Enterprise development within the IDP is mainly focused on sectoral strategies and cluster approaches, largely focused on integrating SMEs, black industrialists and township enterprises into eThekweni's larger sectors including 'clothing and textiles, leather and footwear, furniture, food services and processing, cultural activities, tourism, ICT, electronics and BPS, as well as downstream chemicals such as cosmetics and plastics. SMEs are also identified as potentially important suppliers to the port, auto and chemicals industries.

The Metro's approach to the development of its 'marginalised areas' includes the following:

- Connecting and upgrading townships through the public transport roll-out and the Urban Network Strategy (Hubs & Connectors);

- Social Facility provision via a hierarchy of social facility nodes;
- Developing large scale and mixed land use housing projects through the Housing Catalytic Projects programme;
- Provision of a suite of basic services via the Incremental Services to Informal Settlements programme;
- Provision of serviced sites and top structures via the Housing Upgrading Program; and
- Facilitating the provision of institutional and social housing in transit corridors.

The Metro's current Economic Growth and Job-Creation Strategy involved renewing and updating the IDP for the period 2019-25, through an interactive partnership approach called 'Shape Durban'.

7.4.2. Industrial Development Implementation Programme Action Plan

The Metro's Industrial Development Implementation Programme Action Plan (IDIPAP) aims to identify specific ways in which the metro can support inclusive economic growth and industrialisation in the municipality. This IDIPAP builds on eThekweni's comparative advantages in logistics and advanced manufacturing. It promotes light industry and value-adding services to attract new investment, innovation, and job creation and retention. Whilst much of what is outlined in this programme does not directly refer to township microenterprise, the IDIPAP emphasises support for SMEs, and especially black industrialists, in value chains with high growth potential.

7.4.3. Business Support Programme

The following activities are specifically included within the additional Metro's Business Support Programmes:

- Access to finance for business support.
- Arts and Craft Development Programme - providing individuals with technical skills which they will use to generate income.
- Business Development Programme Strategic Partnerships - aligned with the strategic focus of the department economic development.
- Business Linkage Programme to assist SMMEs to secure mainstream opportunities in the public and private sectors.
- Construction Sector Support Programme.
- Cooperative Development Programme to improve and provide capacity of cooperatives.

- Durban Business Fair.
- Support to Enterprise aimed at facilitating skills development, mentorship, coaching and support to enterprises.
- Tourism Development Programme Community Tourism Organisations (CTOS) - the City has identified CTOS as one of the important instruments for promoting tourism development in local communities.
- Umkhumbane Entrepreneurial Support Centre (UESC) - established to support manufacturing businesses in the City
- Women's Empowerment Programme - to raise the profile of women in business, try and address their business needs through Productive Capacity Building Programme

7.4.4. Informal Sector Policy

The Informal Sector Policy focus is on retail markets, street trading and street vendors within the CBD. This includes declaration of management zones, the demarcation of trading areas, organising traders into area committees and the issuing of permits. In certain cases, retail spaces and flea markets have been set-up in such a way as to facilitate easier entry into markets for emerging entrepreneurs. According to the Metro, the key functional areas it aims to address in relation to informal trading are as follows:

- To provide a management service in accordance with Council policy and within National, Provincial and other legislation to trading in public spaces.
- Identify new and existing areas for management, upgrading and development for recommendation to Council and their funding sources.
- Provide community consultation service with relevant stakeholders on behalf of Council.
- Provide a related public enquiries service.
- Identify, implement and monitor support programmes and opportunities.
- Initiate and provide policy documents related to all street trading issues in council.
- The Metro has identified the following development priorities as fundamental to the supporting businesses within the informal economy: To identify and agree on specific trading zones in order to ensure effective enforcement and regulation with reasonable trading opportunities.
- To develop linkages between the first and second economies, supporting the "graduation" of street traders from the second to the first economy.

- To make business development support and capacity building services available to traders in the informal economy.
- To find synergies between street traders and formal businesses through specific programmes, such as cleaning and greening and formal businesses "adopting" traders.

The Metro has formulated policies in respect of: Retail Markets; Itinerant Traders, eThekweni Rentals,

7.4.5. Economic Development Unit

The Economic Development Unit (EDU) is mandated to promote economic development, job creation, economic transformation and economic intelligence. The EDU Sector Development Programmes Department facilitates the stimulation and growth of priority sectors by providing city-wide support to the targeted economic sectors in-line with the National Industrial Development Policy Framework, the IDP, and Economic Development and Job Creation Strategy.

The EDU implements a range of sector development programmes through special purpose vehicles such as creating business clustering within specific localities. A range of initiatives and projects have been conducted to support economic development, including:

- Promoting private investment in the area as part of its regeneration programmes in former black CBDs in KwaMashu, eThekweni, including Verulam, Tongaat, Umlazi, Isipingo, Pinetown and Amanzimtoti.
- Infrastructure upgrades aimed at improving service delivery.
- The development of the Umlazi MegaCity represents the first phase of a process of transforming both the physical appearance and social dynamics of the township communities in Umlazi.
- Specific support to the automotive industry
- A Public Private Partnership of commercial and residential property in Bridge City as a catalyst for economic growth in Inanda, Ntuzuma, KwaMashu and Phoenix.

7.4.6. Sector Support Programmes

- **Enhancing Sector Competitiveness** – including the development of clusters driven by industry to address various challenges affecting the sector – leaner production methods, human and technology skills, value-chain alignment and benchmarking programmes. These challenges assist in devising best-practice models for enhancing global competitiveness. Various public-private partnerships with the automotive, chemicals, clothing & textiles and furniture sectors are in place.

- **Sector Skills Alignment** – this facilitates the alignment between skills supply and industry demand in the priority sectors, through an integrated approach between tertiary institutions and industry.
- **Enterprise Development Support** – to support businesses in the creative sector and targeting emerging and small businesses with a pro-poor focus. These initiatives are funded in conjunction with KZN EDTEA and include the development of an Arts & Craft Hub.
- **Material Recovery Support** - the promotion of materials recovery as a business opportunity.

8. Enterprise Activity

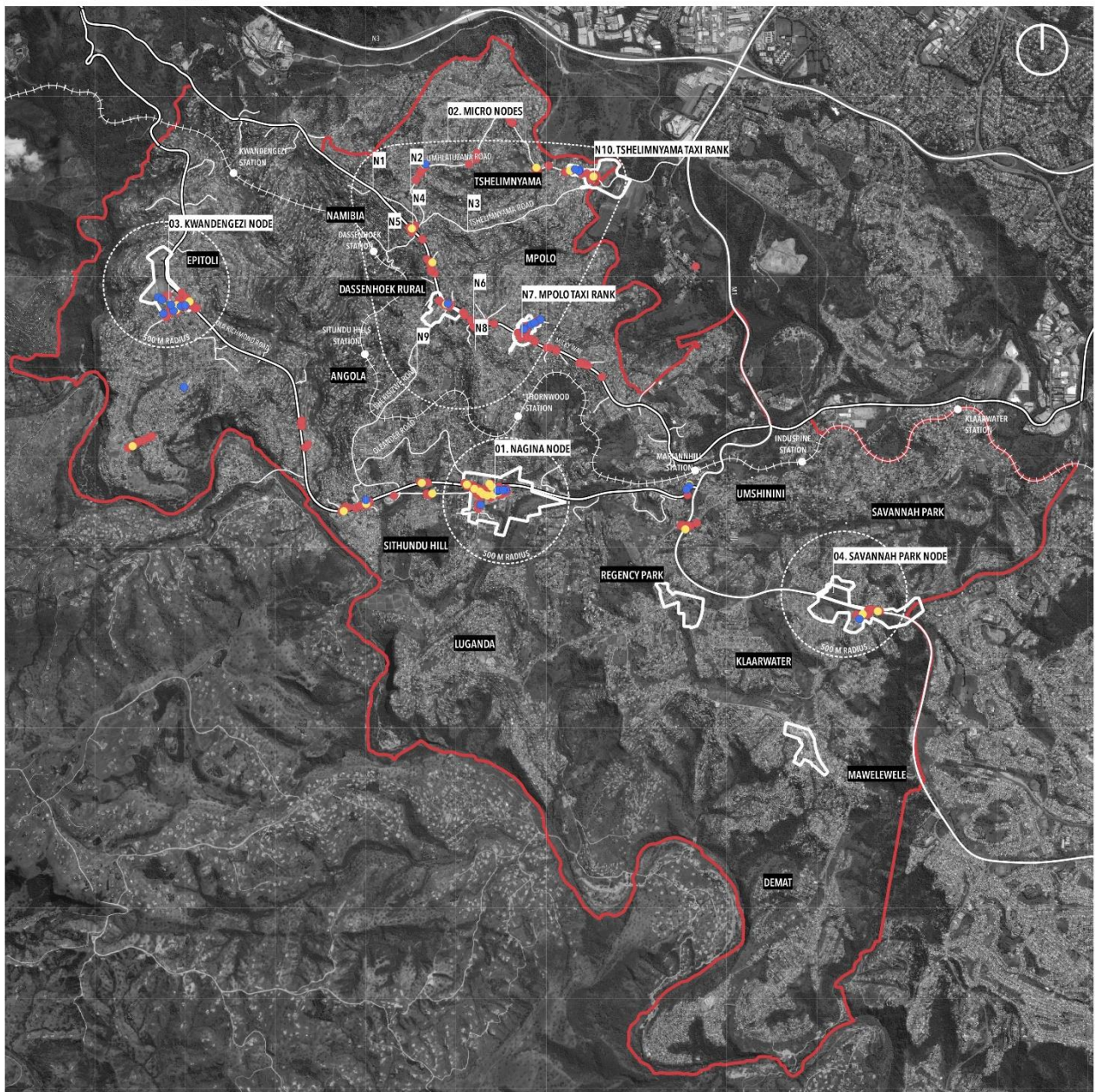
8.1. The Micro-Enterprise Ecosystem

8.1.1. Approach

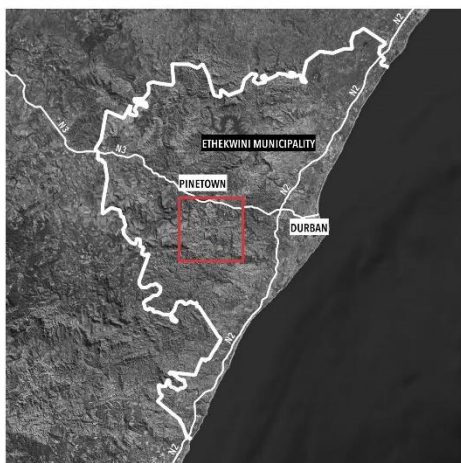
The first phase of the surveys for the TED Ecosystem project was conducted in Pinetown South and completed in October 2020. The aim of the ecosystem survey was to record evidence of: i) business activities, ii) institutional facilities and iii) business hotspots and spatial opportunities. The investigation comprised of researchers from SLF and Pinetown South, who were recruited through social media and local business forums. The team used GPS and cloud-connected electronic tablets to record spatial, photographic and qualitative data (through interviews) on each of the recorded businesses within the selected research sites. This ecosystem survey (the methodology of which is fully described in the project proposal and inception report) is designed to provide a snapshot of the business activities. A full census would require extensive field research, the scope of which is outside the ToRs of the service provider.

The research team surveyed 318, and interviewed 305 businesses (micro-enterprises, SMEs and corporates), recorded 28 business hotspots and 30 institutional services within the research focus areas of Pinetown South.

The aerial image below provides an overview of the spatial locations of economic activity, as documented by the field researchers within investigated business and residential portions of Pinetown South. The points in white represent “hotspots” where clusters of business activities were located (such as intersections or shopping malls). Points in yellow represent institutional services such as schools, municipal halls, libraries and other community facilities. Green points are representative of interviewed SMMEs.



PINETOWN SOUTH FOCUS AREA BASE MAP



LOCATION KEY

KEY

Pinetown South Map

1. Base Map

1.1 Study Area

PinetownSouth_Study_Boundary

1.2 Nodes

Municipality Identified Nodes
Opportunity Nodes
TED Focus Area

1.3 Connectivity

Development Corridor
Main Routes
Railway Stations
Railway Lines
Arterial Road

Ecosystem Survey [376]

- Institutional service [30]
- Business hotspot [28]
- Enterprise [318]

ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | BASE MAP

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Map 2: Businesses, Business Hotspots and Institutions in Pinetown South

Unlike other townships in the study such as New Brighton, Thembisa or Delft, Pinetown South is a large geographic area with long thoroughfares where businesses would be found on the fringes. The spread-out nature of the site meant that there were less localised 'nodes' for enterprise activity, except in places outside of large corporate businesses such as supermarkets, where some clustering of business activity was evident. The site has a rural ambience which does not reflect a high concentration of economic activity.

8.1.2. Scale and Categorisation

Of the 318 businesses identified, 2% (5) were Corporates, 21% (66) were SMEs, and 78% (247) micro-enterprises. All corporates and 90% (60) of SMEs were formal whilst 94% (250) of micro-enterprises were reported as informal.

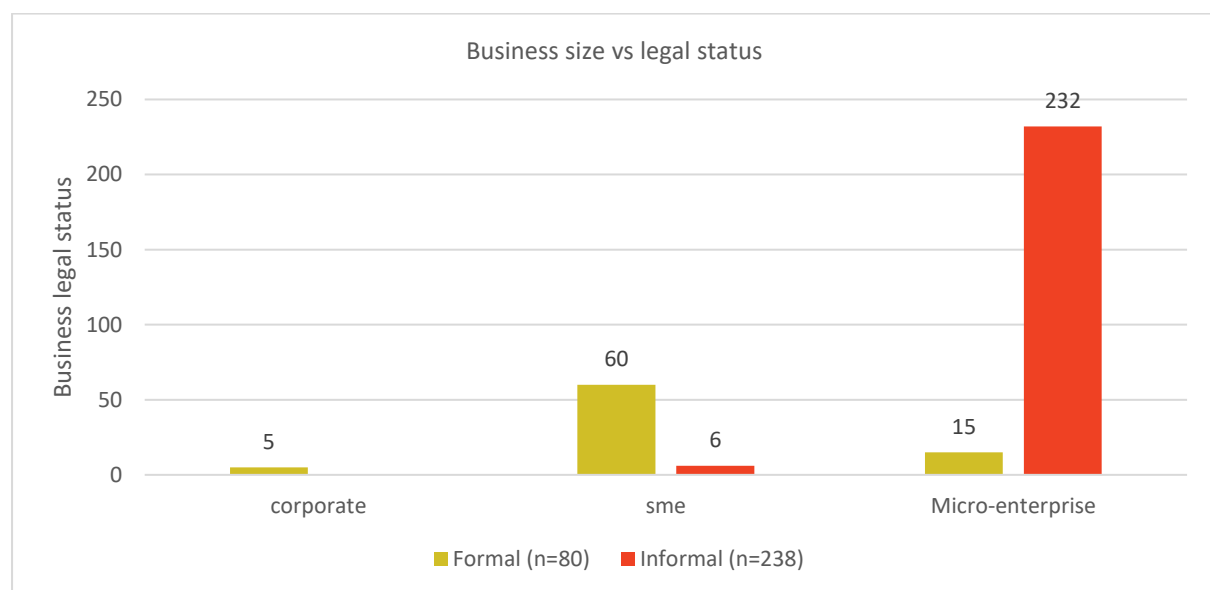


Figure 5: Overview of business size and legal status

Micro-enterprises make up 78% of businesses identified in Pinetown South. Of the 247 micro-enterprises, 72% (178) of 208 businesses were open and full interviews were recorded. The range of categories is shown in **Error! Reference source not found.** below. The most common categories were micro-enterprises operating hair salons (19%/44), those selling cooked food / takeaways (13%/30), micro-manufacturing (8%/18/46), grocery retailers (8%/18) and car repair services (7%/17).

Cooked food businesses occur as roadside activities – generally on street intersections, outside taxi ranks and transport nodes and from people's homes. The hair salon businesses commonly fringe the important thoroughfares of Pinetown South and is an important business for both South African and immigrant entrepreneurs. The local food economy is also important and includes a wide range of enterprises from preparing and trading cooked food / braaied meat (60 / 24%), spaza shops (38 / 15%) and hair salons (31 / 13%), to car repairs (15 / 6% of enterprises).



Figure 6: Street Trading in general is commonplace. This activity is often found in nodal areas.

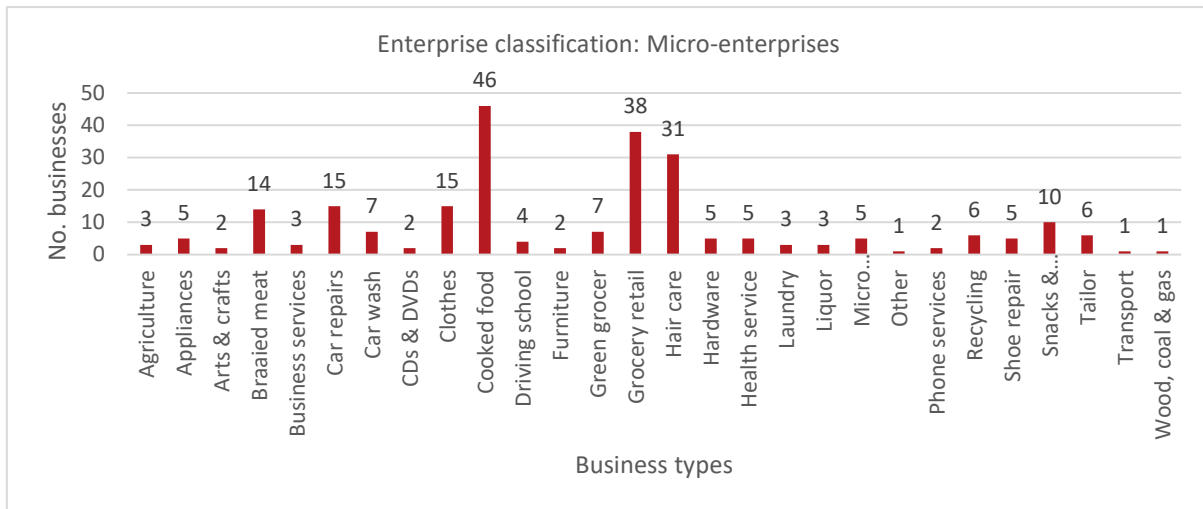
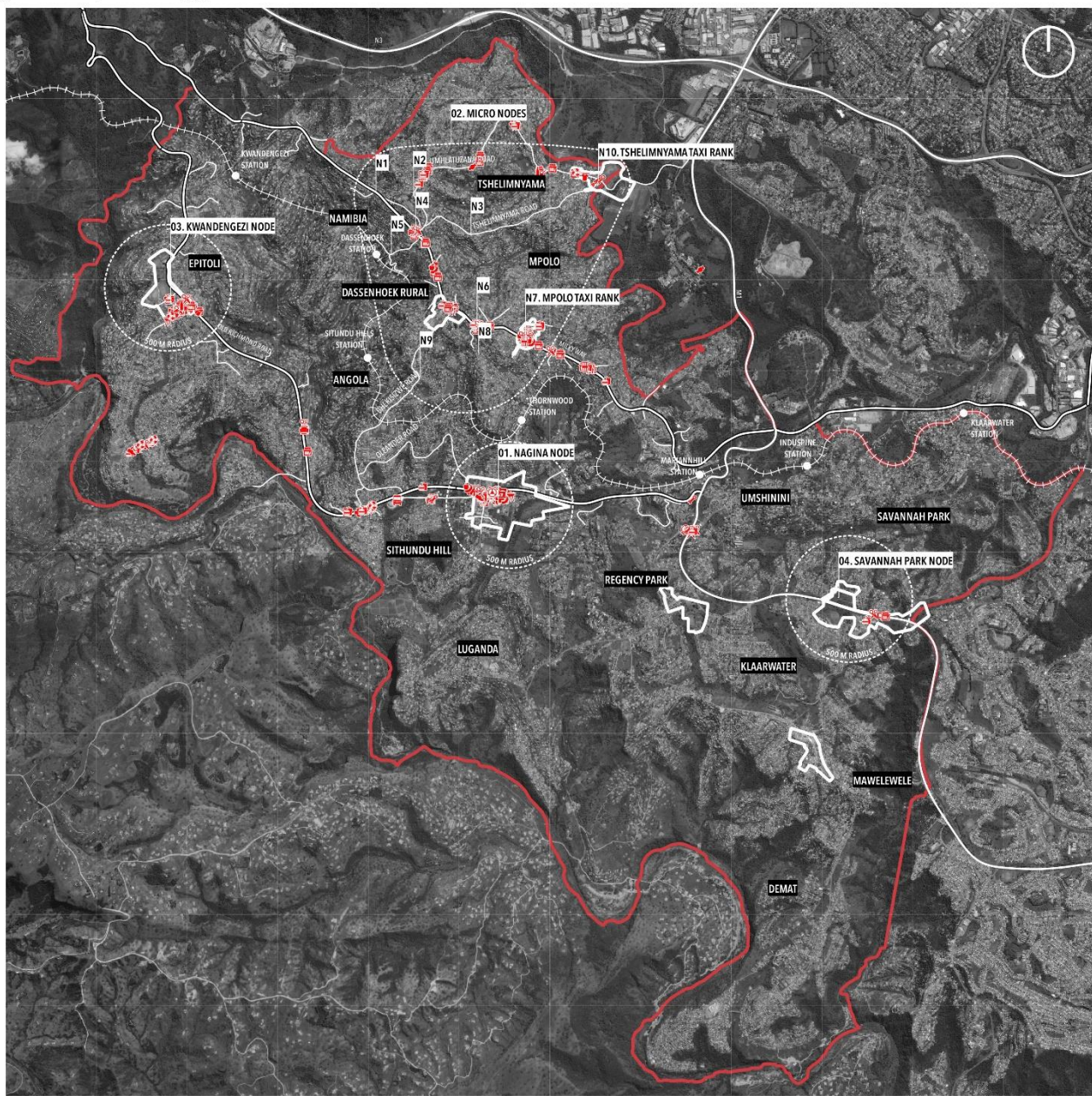


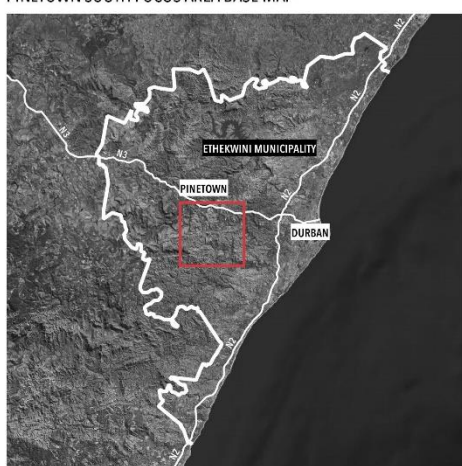
Figure 7: Enterprise Classification, Micro-Enterprises



Figure 8: Retailing of fruit and vegetables is commonplace. Much of this activity is found in nodal areas.



PINETOWN SOUTH FOCUS AREA BASE MAP



LOCATION KEY

KEY**Pinetown South Map****1. Base Map****1.1 Study Area**

PinetownSouth_Study_Boundary

1.2 Nodes

Municipality Identified Nodes

Opportunity Nodes

TED Focus Area

1.3 Connectivity

Development Corridor

Main Routes

Railway Stations

Railway Lines

Arterial Road

Micro-enterprise [249]

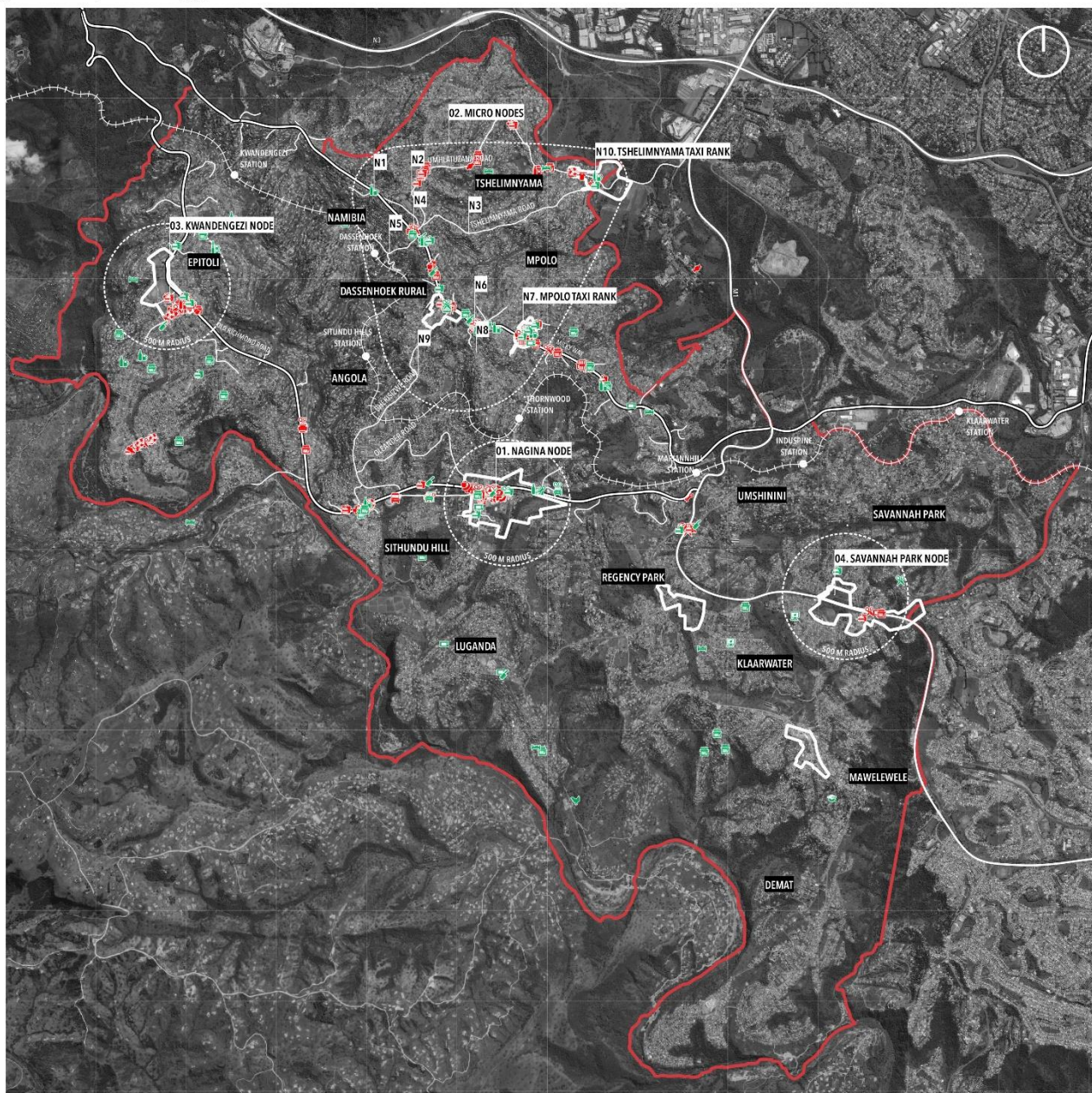
- ➡ Cooked food [46]
- 🛒 Grocery retail [37]
- ✂ Hair care [31]
- 🔧 Car repairs [15]
- 👕 Clothes [15]
- 🥩 Brailed meat [14]
- 🍷 Snacks & cigarettes [10]
- 🚗 Car wash [7]
- 🌿 Green grocer [7]
- ♻ Recycling [6]
- 🧵 Tailor [6]
- 🔧 Appliances [5]
- 🔧 Hardware [5]

- 🏥 Health services [5]
- 🏭 Micro manufacturing [5]
- 👞 Shoe repair [5]
- 🚗 Driving school [4]
- 🌾 Agriculture [3]
- 🏢 Business services [3]
- 🧺 Laundry [3]
- 🍷 Liquor [3]
- 🎨 Arts & crafts [2]
- 💿 CDs & DVDs [2]
- 🪑 Furniture [2]
- 📞 Phone services [2]
- 🚗 Transport [1]
- 🔥 Wood, coal and gas [1]
- Other [1]

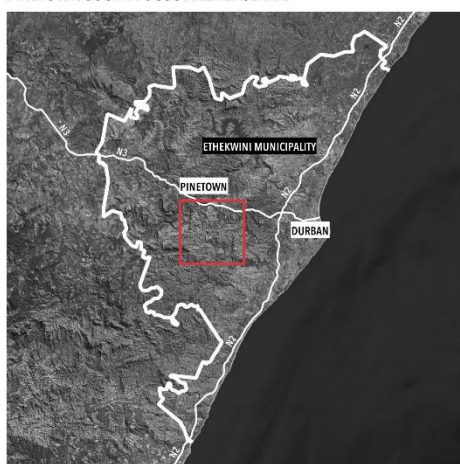
ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | BASE MAP

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Map 3: Micro-enterprise Businesses by classification



PINETOWN SOUTH FOCUS AREA BASE MAP



LOCATION KEY

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PinetownSouth_Study_Boundary

1.2 Nodes

Municipality Identified Nodes
Opportunity Nodes
TED Focus Area

1.3 Connectivity

Development Corridor
Main Routes
Railway Stations
Railway Lines
Arterial Road

Micro-enterprise: Open source [93]

Grocery retailer [28]
Take-aways [17]
Tavern [13]
Accommodation [8]
Meat & poultry [8]
Appliances [6]
Hair salon [5]
Business services [2]
Car wash [2]
Car repairs [1]
Clothing [1]
Educare [1]
Livestock [1]

Micro-enterprise: Survey [249]

Cooked food [46]
Grocery retail [37]
Hair care [31]
Car repairs [15]
Clothes [15]
Braai meat [14]

Snacks & cigarettes [10]
Car wash [7]
Green grocer [7]
Recycling [6]
Tailor [6]
Appliances [5]
Hardware [5]
Health services [5]
Micro manufacturing [5]
Shoe repair [5]
Driving school [4]
Agriculture [3]
Business services [3]
Laundry [3]
Liquor [3]
Arts & crafts [2]
CDs & DVDs [2]
Furniture [2]
Phone services [2]
Transport [1]
Wood, coal and gas [1]
Other [1]

ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | BASE MAP

Cities Support Program | Sustainable Livelihoods Foundation | Township Economic Development Project | Situational Analysis Report | 29.03.2021

Map 4: Survey and Open-Source Data Micro-Enterprises by Classification



1.



2.



3.



4.



5.



6.

Figure 9: Examples of Micro-Enterprises in Pinetown South

Description of figures 1 – 6:

1. Tuck shops selling fruit and vegetables.
2. Street traders selling snacks, fruit and vegetables and homeware.
3. Glass recycling.
4. Food service: Shawarma outlet.
Shisa nyama food truck.

Opportunity: As can be seen in the above images, **shipping containers** represent important business premises for microenterprises. Whilst their utility is clear, they can **represent challenges for urban planners** and neighbourhood function. The Metro should consider **revising its policy** on the use and placement of these items to promote adherence with spatial plans and nodal growth objectives.

Demographics

Of the 178 micro-enterprises interviewed in Pinetown South, three-quarters (132) are run by South Africans. The majority of non-South Africans operating in the local township economy are originally from Malawi (9%) and Zimbabwe (7%).

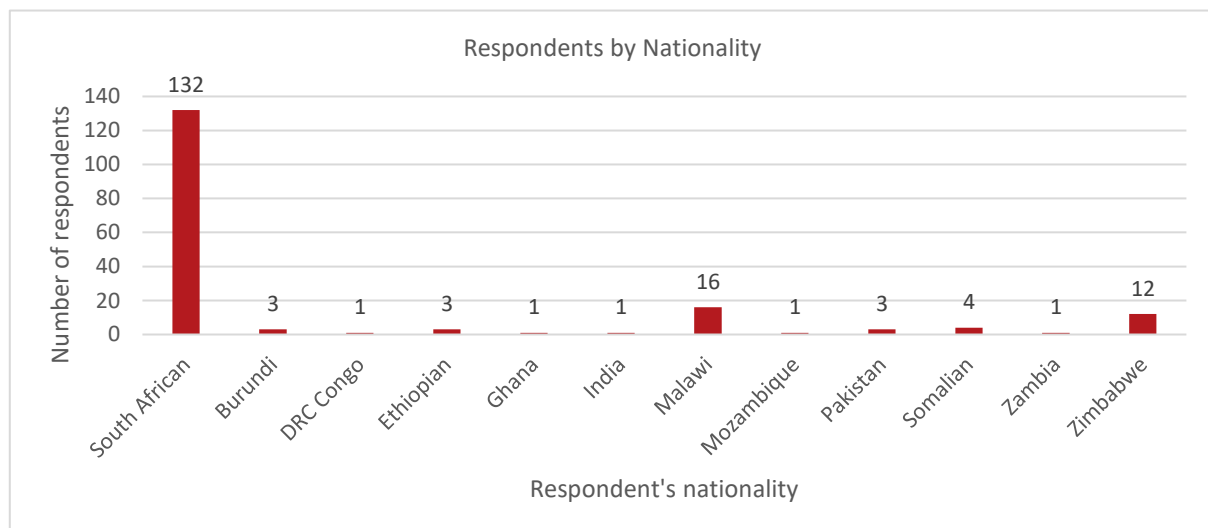


Figure 10: Nationality of respondents

57% of the respondents are business owners (102), 5% were running the business in a partnership (10), and 37% were employees (66).

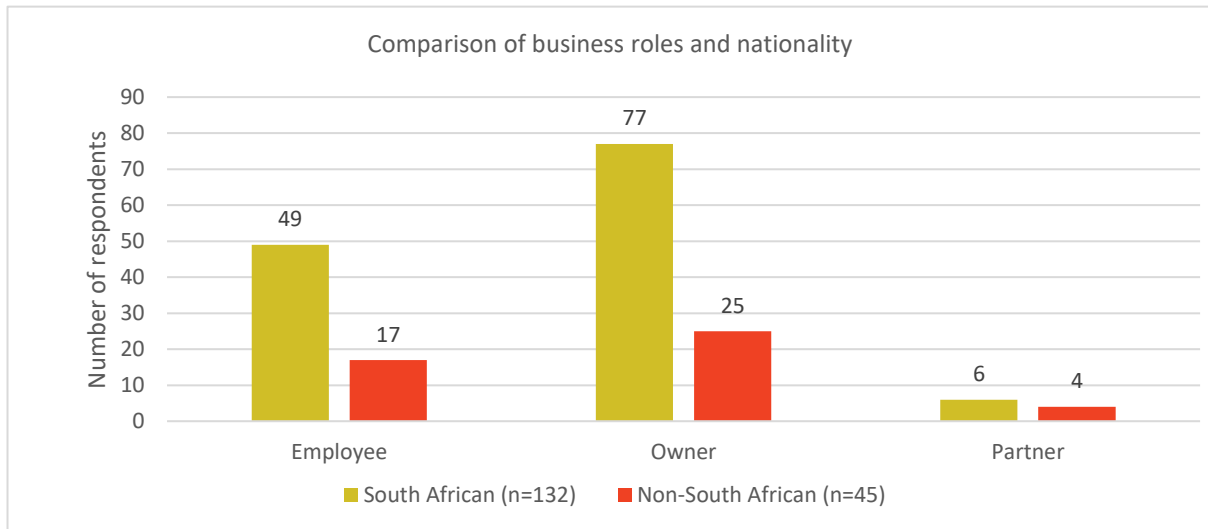


Figure 11: Respondent business roles and nationality

Altogether, 61% (108) of the respondents were males. Interestingly, almost half of the men (47 / 43%) operating businesses in the Pinetown South informal economy were in their 30s. Similarly, more than half of all women (69) were in their 30s (26) and 40s (21). In line with other research sites there is a steep decline in the age of business operators with few people over the age of 50 years conducting local businesses.

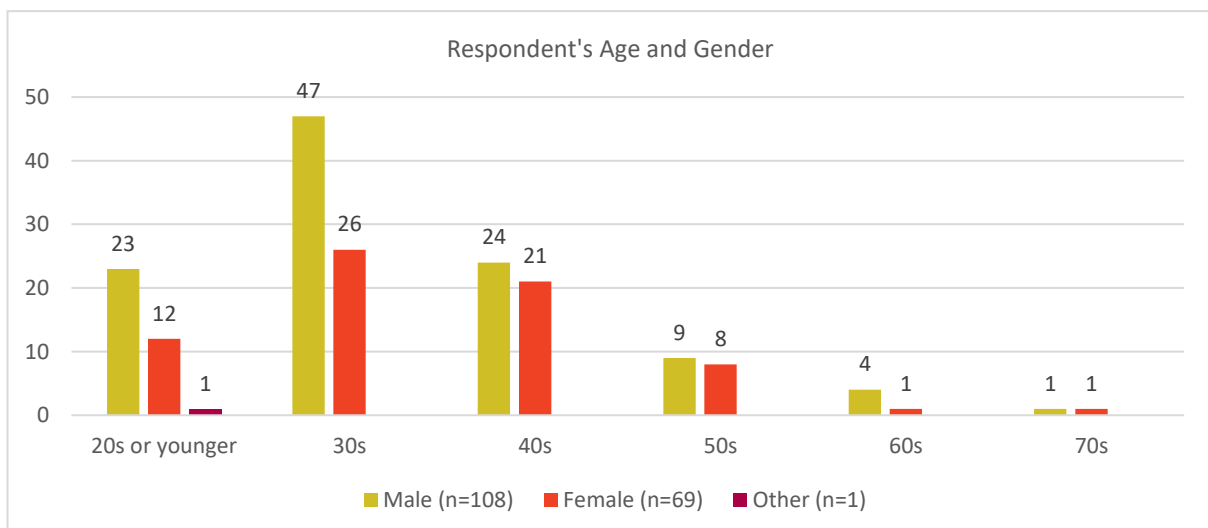
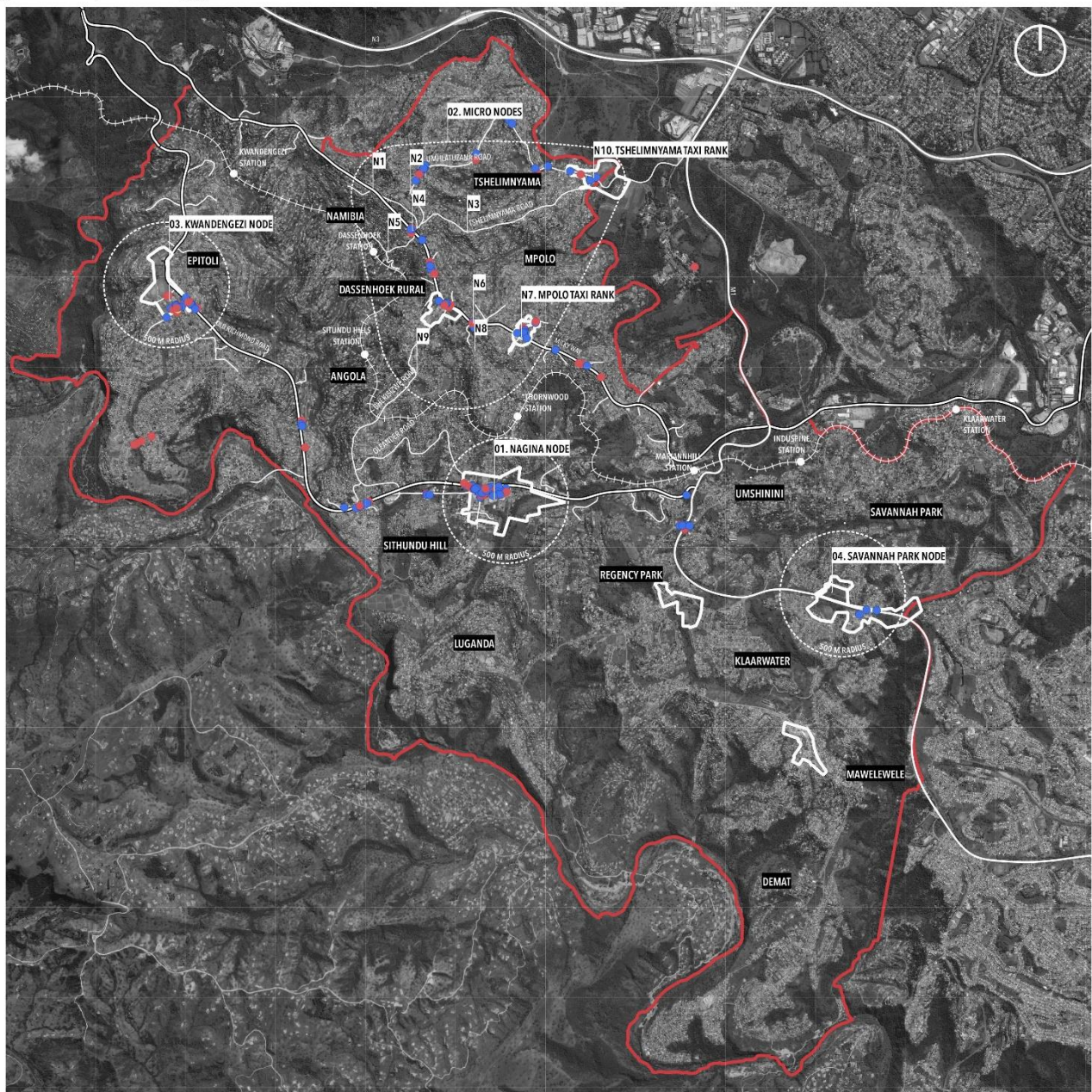
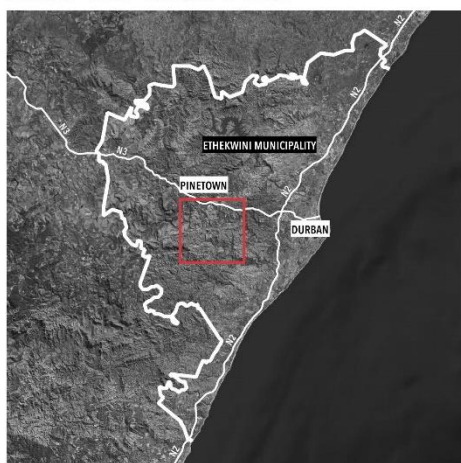


Figure 12: Respondent age and gender



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LOCATION KEY

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Municipality Identified Nodes
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1.3 Connectivity

Development Corridor
Main Routes
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Railway Lines
Arterial Road

Gender [178]

Male [108]
Female [69]
Other [1]

ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | BASE MAP

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Map 5: Micro-Enterprise Respondent Gender

8.1.3. Business Dynamics

The micro-enterprises operated from a range of structures which, in turn, influenced their position. These included businesses operating from a container (81), from a brick-and-mortar building as a business premises (31), and from a shack (23). Like other coastal sites, the use of repurposed shipping containers as business structures is a common activity. Several businesses operated out of dedicated business premises – some of which were developed by the municipality, and others that had been privately built or repurposed for business activity.

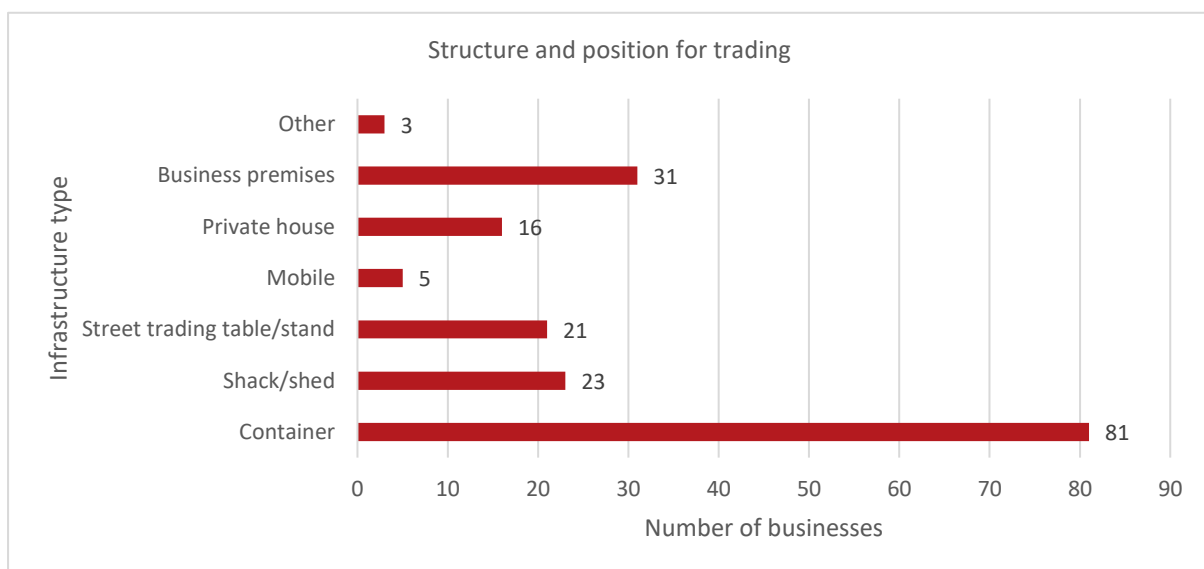
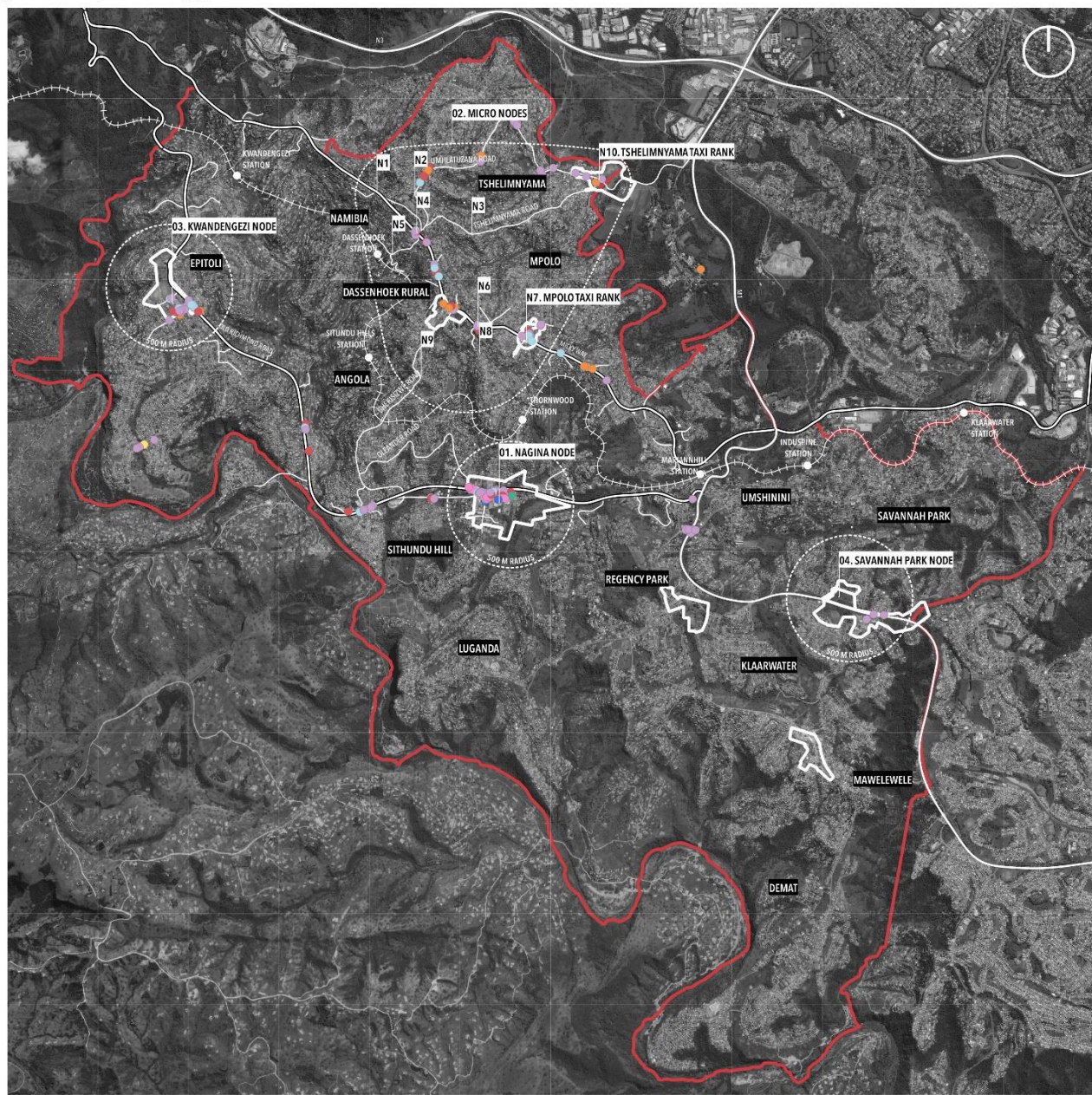
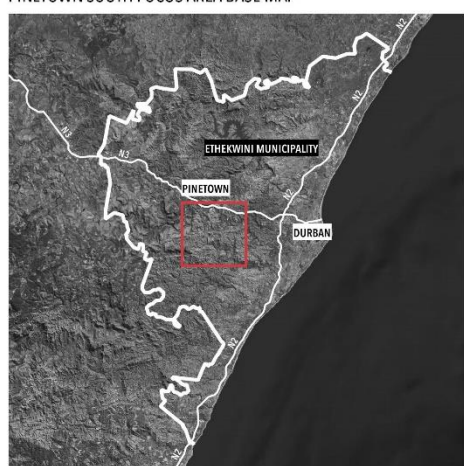


Figure 13: Business infrastructure



PINETOWN SOUTH FOCUS AREA BASE MAP



LOCATION KEY

KEY**Pinetown South Map****1. Base Map****1.1 Study Area**

PinetownSouth_Study_Boundary

1.2 Nodes

Municipality Identified Nodes

Opportunity Nodes

TED Focus Area

Development Corridor

Main Routes

Railway Stations

Railway Lines

Arterial Road

Structure [178]

Container [79]

Business premises [31]

Shackshed [22]

Street trading tablestand [21]

Private house [16]

Mobile [4]

Other [3]

Container mobile [1]

Container shackshed [1]

ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | BASE MAP

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Map 6: Micro-Enterprise Structure Classification



Figure 14: Shipping containers represent important business venues in Pinetown South

Rent

50% of respondents reported that their businesses paid rent for the premises on / in which they operated. Just over a third (59) were owners, whilst just under half (58) of South Africans paid rent. The remainder paid nothing at all to occupy the sites on which they worked – this included street traders, street braaiers and mobile traders.

Renting trading spaces and infrastructure to foreign nationals is an important income opportunity with almost three quarters (32) of non-South Africans trading in Pinetown South paying rent – primarily to the South African landowners. The monthly rental amounts varied greatly, ranging from R100 to R30,000.00. Most common monthly rental amounts were between R250 and R10,000 with the median falling between R1,000 and R1,500. Twelve respondents paid R500 per month, 11 paid R1,000, and ten paid R1500 per month.

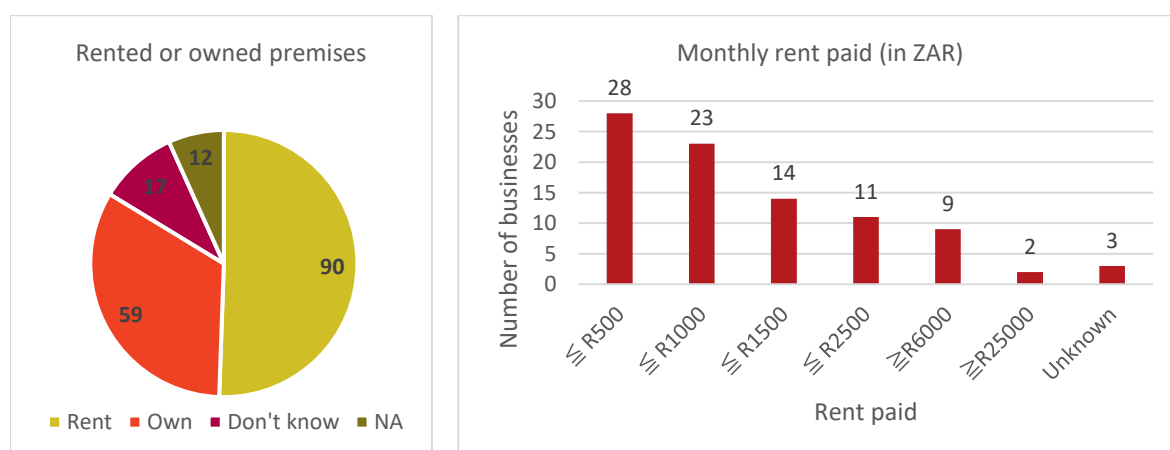
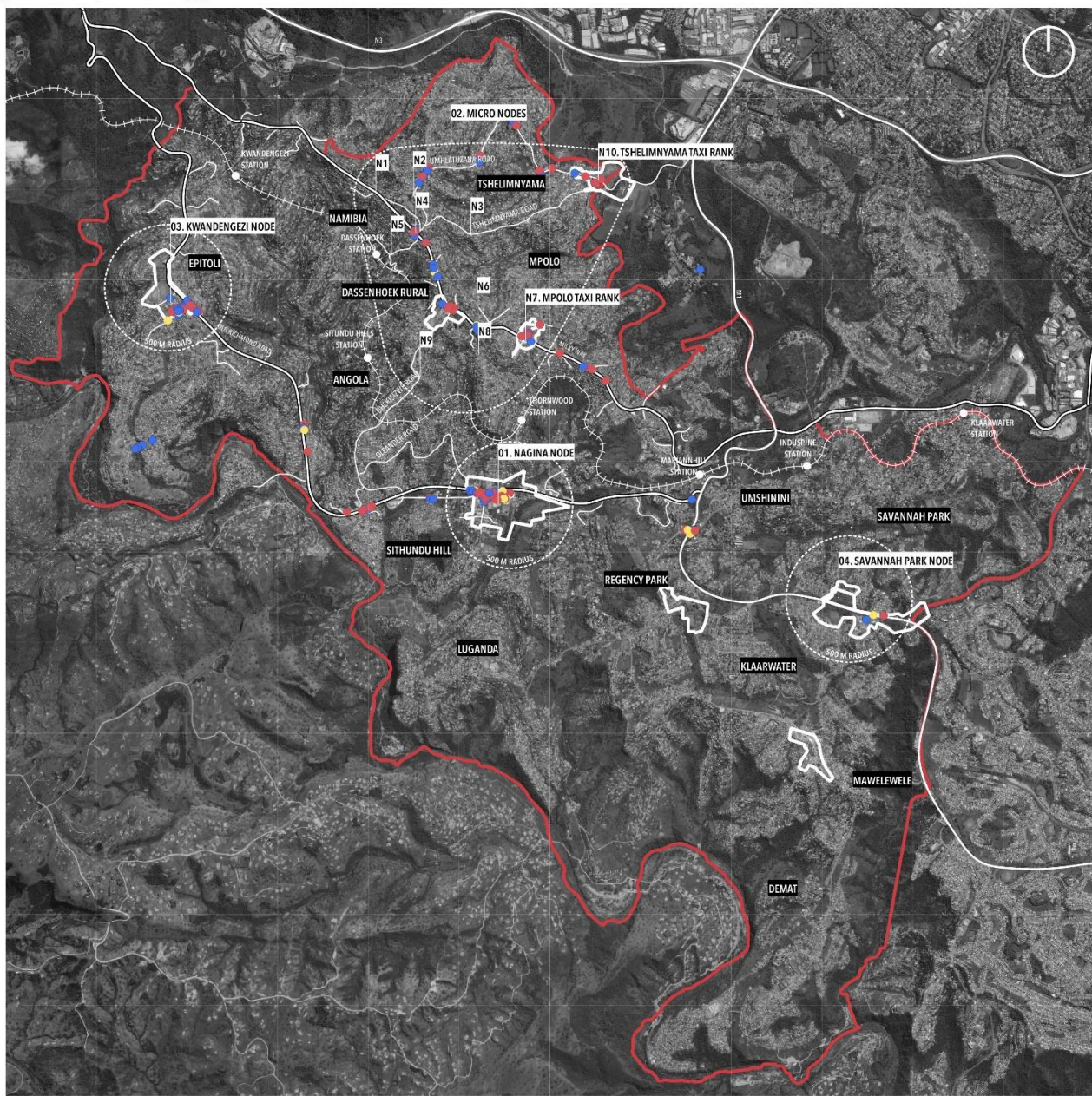
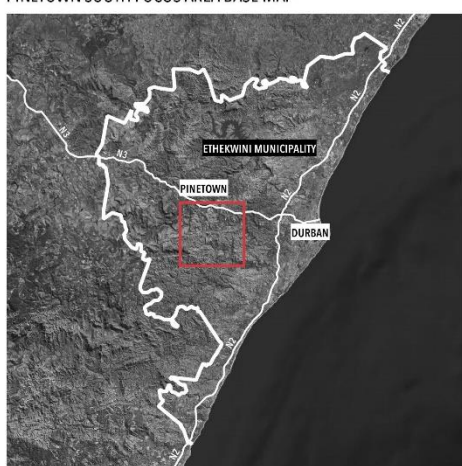


Figure 15: Occupation model and rent paid in ZAR



PINETOWN SOUTH FOCUS AREA BASE MAP



LOCATION KEY

KEY**Pinetown South Map****1. Base Map****1.1 Study Area**

PinetownSouth_Study_Boundary

1.2 Nodes

Municipality Identified Nodes

Opportunity Nodes

TED Focus Area

1.3 Connectivity

Development Corridor

Main Routes

Railway Stations

Railway Lines

Arterial Road

Site rental [166]

Own [59]

Rent [90]

Unknown [17]

ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | BASE MAP

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Map 7: Micro-Enterprise Site Rental

Access to utilities

Pinetown South has a variety of developed and un-serviced areas. The topography of the site is hilly and steep with those closer to the valleys and roads tending to have disproportionately greater access to utilities, whilst those residing in the hills tend to have less or no services. As the roads represent the key nodes of pedestrian and transport activity, much business takes place there. Whilst most businesses had access to water and electricity (134 / 75% and 153 / 86% respectively), some 58% (103) had informal water connections and 53% (97) had informal electricity connections. Those with no water (24% of total sample) or electricity (14% of total sample) access were predominantly operating their business from a container (16 and 4, respectively), shack (3) or a table on the street (11).

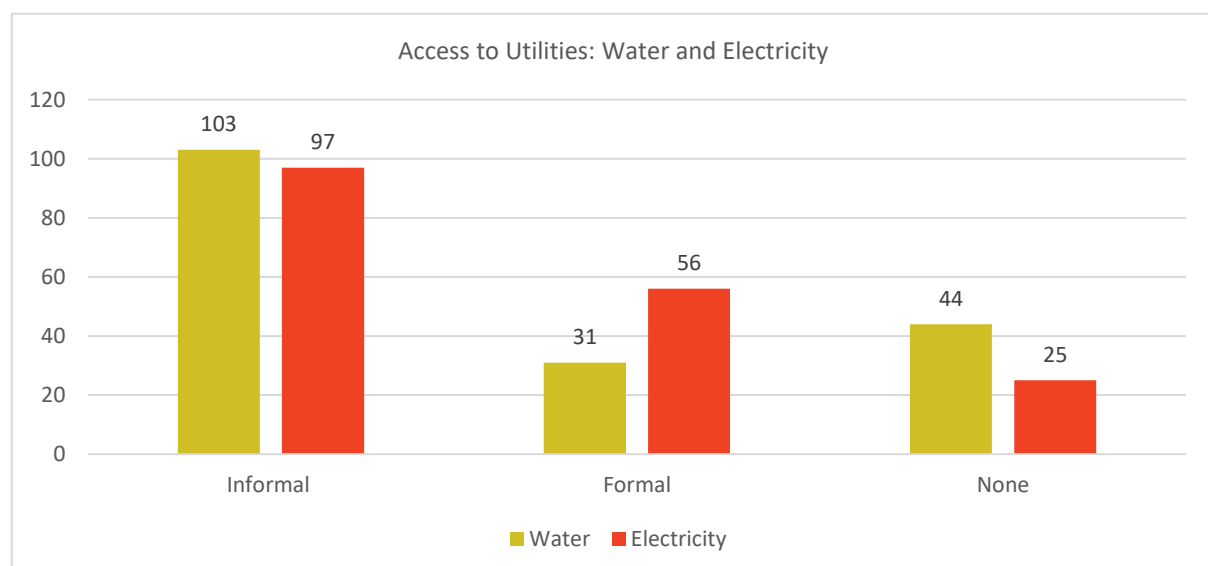


Figure 16: Available utilities

Opportunity: There is a need for basic services and utilities to service businesses in Pinetown South. Service delivery for utilities should include consideration of strategies to gain **important revenues from beneficiaries of Metro services.**

Time in business

In common with the other research sites, many businesses in Pinetown South have been established in the past few years. Of the 41% (73) who have been operating between one and four years, the spread of business ages is fairly uniform and in gradual decline: 32% (23) have been operating for one year;

26% (19) for two years; and 22% (16) for four years. Business sustainability for enterprises after the first five years of operation is reasonable, for the 66 operating for five years or more, overall, 27% (18) have been operating for five years and 20% (13) for ten years.

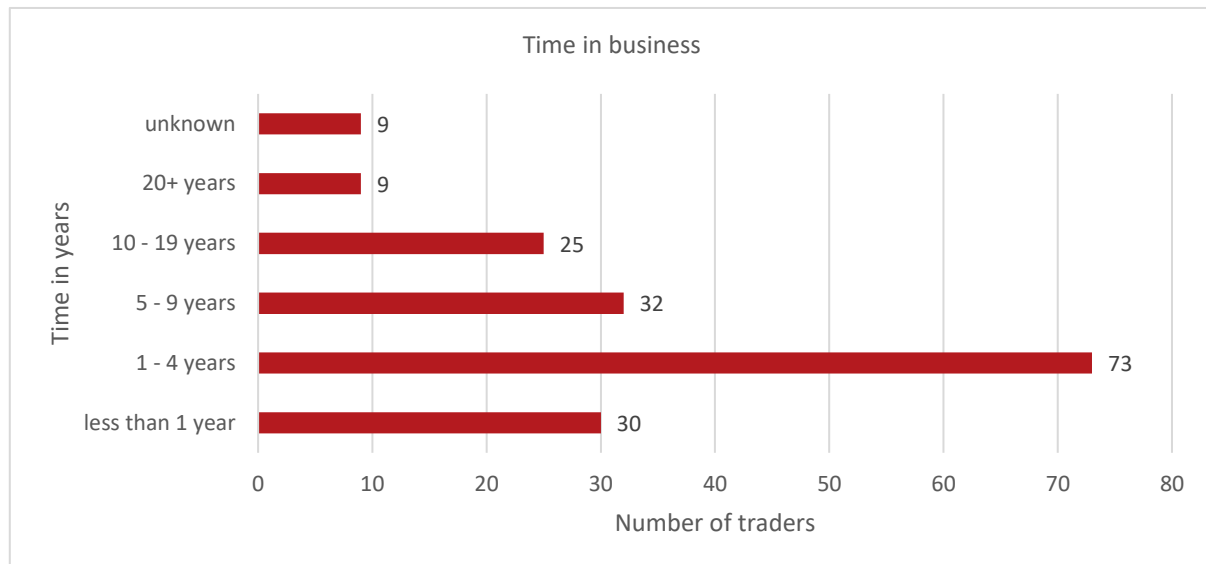


Figure 17: Time in business

Overall, 75% (135) of businesses have been operating for less than ten years which correlates with the general age of the business owners, who are predominately in their 30s.

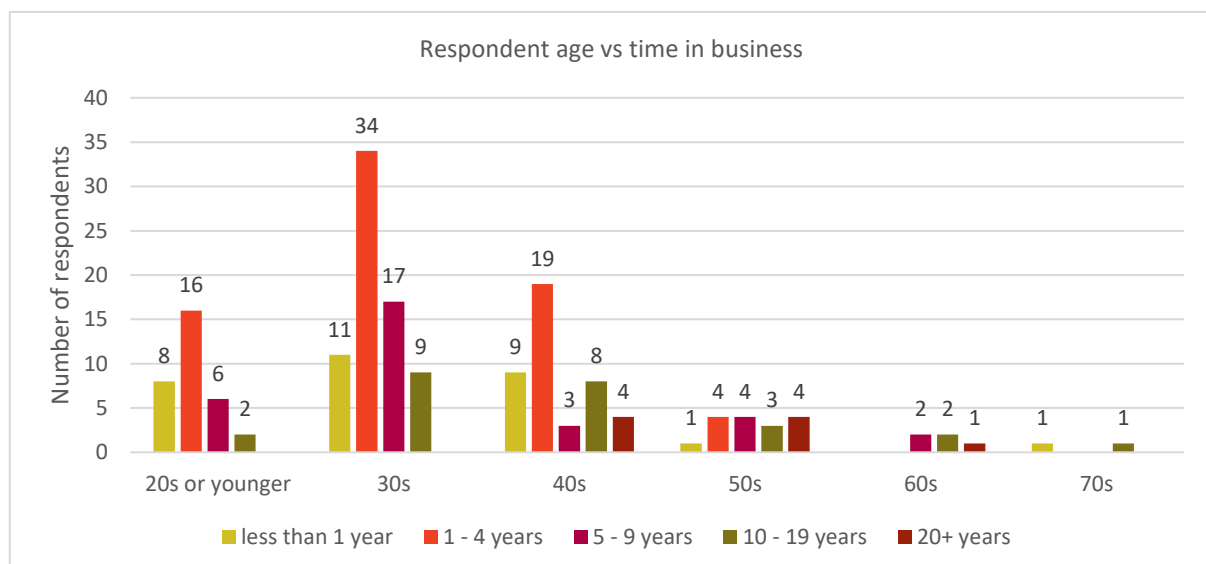


Figure 18: Comparison of respondent age and time in business

8.1.4. Operating Challenges

As is commonplace elsewhere, respondents commented on the challenge of crime (95 respondents). According to microenterprise owners, crime has worsened due to land insecurity, created by the lack of permission from the eThekweni metro to occupy sites; businesses being geographically spread out and thus isolated; and organised groups of gangsters robbing customers and businesses. The challenge of crime is multifaceted and affects different people in different ways. However, the reality of criminality, whilst potentially less of an issue than in larger metros, is a day-to-day challenge for those in Pinetown South. The following respondent quotes support the finding:

- *"This is a shopping centre built in a very old-style way. Shops are clustered together giving no proper space for development. This business node straddles a wide space down to the taxi rank and the businesses are all haphazardly. Crime is also a challenge especially at night."*
- *"We need more security in this area, because we find that during the night people come and vandalise our containers."*
- *"It's not safe especially in the evenings, we are forced to close early than usual."*
- *"Crime has increased if we could have more police visibility it would be good."*
- *"With a high rate of crime in this area it's very hard to sell as you are robbed in daylight. And there are no police visibility."*
- *"It's at the corner so there is an advantage for thieves."*

Respondents in Pinetown South further noted the challenges of inadequate infrastructure (54), competition with other businesses (46) and storage matters (22). Service delivery by local government remains a significant business challenge. Similarly, despite being a well-established site Pinetown South was built primarily as a residential settlement and has little provision for businesses. Practically this means that infrastructure has not been sufficiently developed for commercial uses such as the provision of storage, nor is there common access to three phase electricity or land legitimately available for activities such as micro-manufacturing. Combined with substandard service delivery (rubbish removal, municipal asset maintenance) the local township economy is under considerable strain:

- *"The business has been operating for quite a long time, but there are some challenges in terms of registering the business and getting support to grow the business."*
- *"The place they are working from has no running water, so they have to bring their own in order to wash the clothes."*
- *"The interviewee mentions that the Municipality refuses to help South African people from around the township, but they do provide foreigners with workspace containers."*

A further challenge highlighted by Pinetown South business owners is that of competition (46) from other businesses. This was commonly reported by grocery retailers (such as house shop operators who are unable to match the terms of their competitors). The nature of township business competition has reportedly emerged from the relatively recent arrival of a new class of business owner commonly in the form of foreign nationals. Many of these business owners have established themselves in grocery retailing (spaza) shops and in informal street trade sectors.

Pinetown South microenterprise owners further highlighted a wide range of business challenges including competition, the economic impacts of the COVID-19 pandemic, access to utilities and sanitation, the lack of business registration, financial stress, and empty promises from government officials as a concern. The impacts of COVID-19 have brought about long term, systemic challenges for local business:

- *"Although business was brisk before lockdown, things have changed and everyone is selling stuff so competition is high now. The other challenge is that criminals target the shop at night but during the day it is safe."*
- *"At the time of the interview the business was very quiet, there were no people around. the owner mentioned that the lockdown has caused a lot of problems for the operation of the business. the registration offices have been delaying to provide liquor licences."*
- *"Crime has increased especially after the lock down. We have started to close early than usual."*
- *"As small business operating in this area, we are struggling in terms of making a profit, reason being that we are competing with shop owners from other countries who are selling things at a cheaper price than we do."*
- *"It is located in a busy area, they are still struggling to attract more customers."*
- *"The business is located next to a shopping centre so it's not always busy. Most people buy from the shopping."*

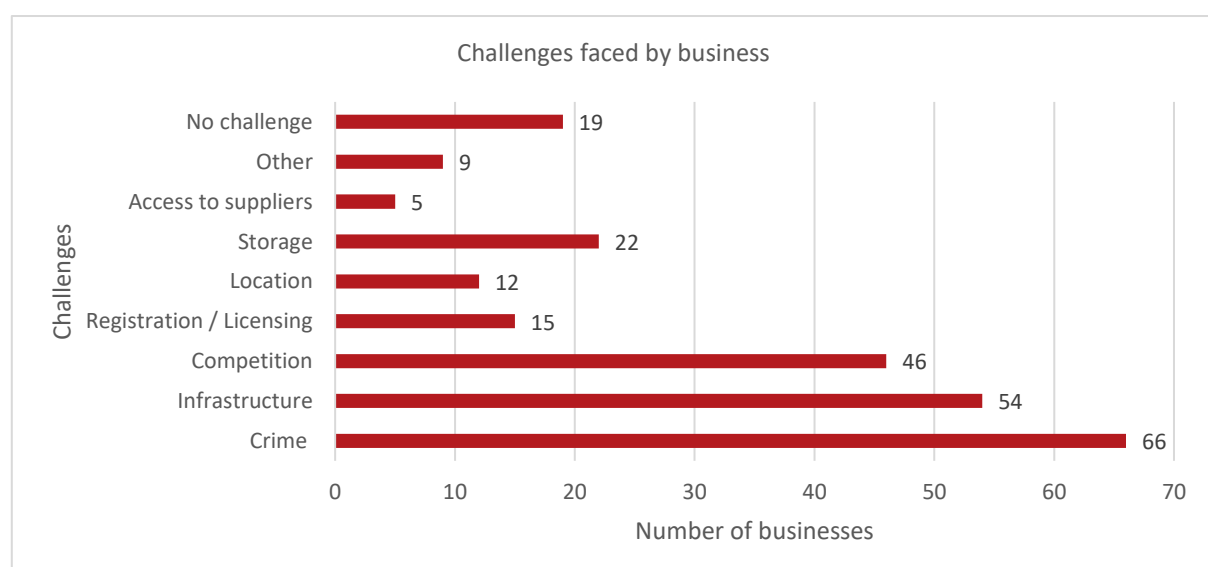


Figure 19: Main operating challenges

Opportunity: There are many regulated business sectors in the Pinetown South township economy such as liquor retailing and ECD enterprises. **Bringing these businesses into the formalisation framework** in partnerships between the Metro and Provincial Government agencies would both create enterprise legitimisation but also give these enterprises greater access to business support services currently on offer.

8.1.5. Business Support

Upon querying matters of business support, 83% respondents (149) have not received any support to operate but said that if they had a choice in what would benefit them, 52% (94) reported financing and 24% (42) better infrastructure. Many respondents said that a municipal focus on enhancing the state of infrastructure and financial support would help them to:

- grow the business;
- employ more people;
- operate from a better location and bigger space.

The desire for appropriate infrastructure appears reasonable, and commonly reflects basic items such as toilets and enhanced trading spaces:

- *"The municipality has provided trading open stalls for which traders pay R300 after every 3 months. it's a good start but attention should be given to sanitation. Fruit and vegetables traders need water which is not available. the traders use the mall for toilets."*
- *"This section hosts traders operating in an open space with marked squares but no tents and they are paying R180 per month. The interesting part about this section is that other traders want this section to be used for building toilets for the traders."*

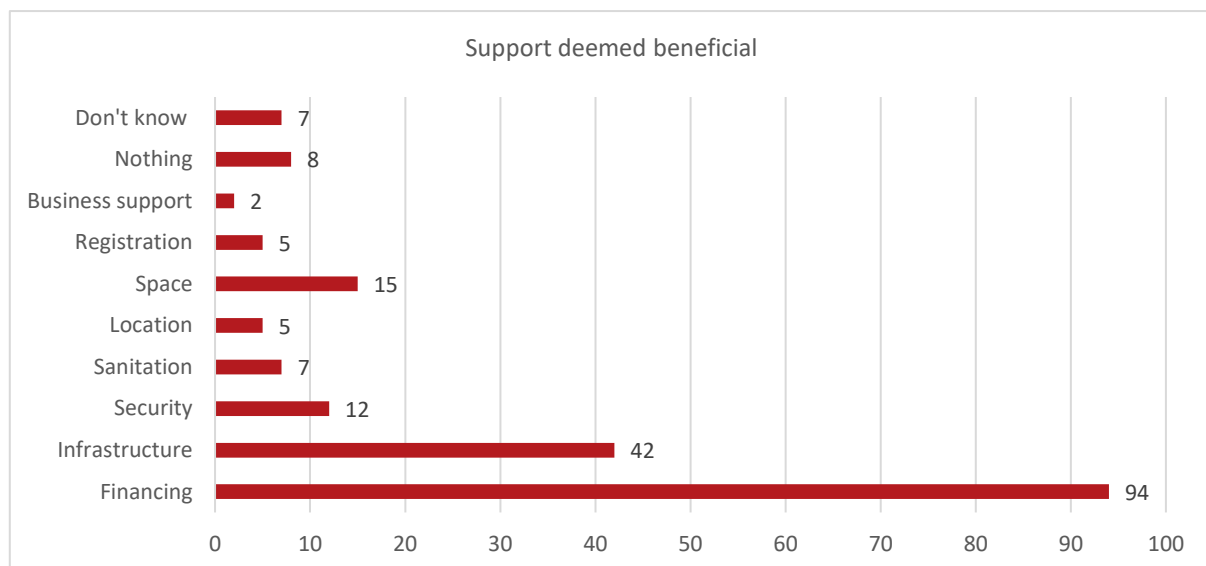


Figure 20: Support deemed beneficial by respondents

Importantly, comparing the microenterprise survey results against a review of the contemporary literature linked to various government programmes to support economic growth reveals common mismatches between business support offerings and township microenterprises. Important misalignments are largely reflective of the conditions of deep informality that preclude many microenterprises from eligibility for support. Characteristics such as formal business registration, necessary permits and documentation are commonly not in place for informal business yet are required as minimum conditions for support.

The strong interest in financing reflects both the desire for operational capital and also the need for enhancing financial inclusion for microenterprise. The lack of operational capital experienced by many businesses can commonly reflect their lack of access into formal financial sector systems, meaning that any processes that may be able increase their access could represent an important economic development intervention.

Opportunity: Linking Pinetown South microenterprises incubators / hubs to business development support services – DBSD, SEDA and SEFA and KZN Provincial Government would bolster sustainability and further support these businesses. Furthermore, there is scope to link these incubators to markets through an **annual trade and marketing event** that would link these local businesses to economic opportunities.

8.2. SMEs and Corporates

8.2.1. Corporates

Very few corporates were identified in Pinetown South. Of the five that were located, three were service stations (Shell and Engen), one grocery retailer (Shoprite) and one foodservice outlet (KFC). These businesses were geographically spread out throughout the site.



Figure 21: Corporate businesses by enterprise classification

8.2.2. SMEs

Although there were a variety of SMEs operating in Pinetown South, 15% (10) of them were grocery retailers, followed by 14% (9) liquor sales.

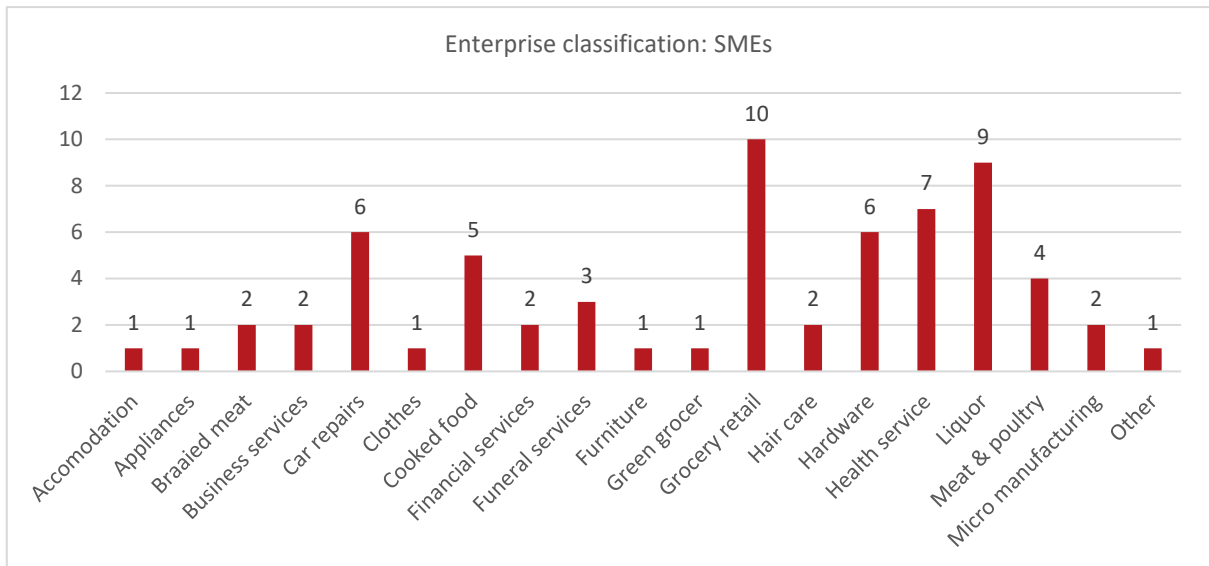
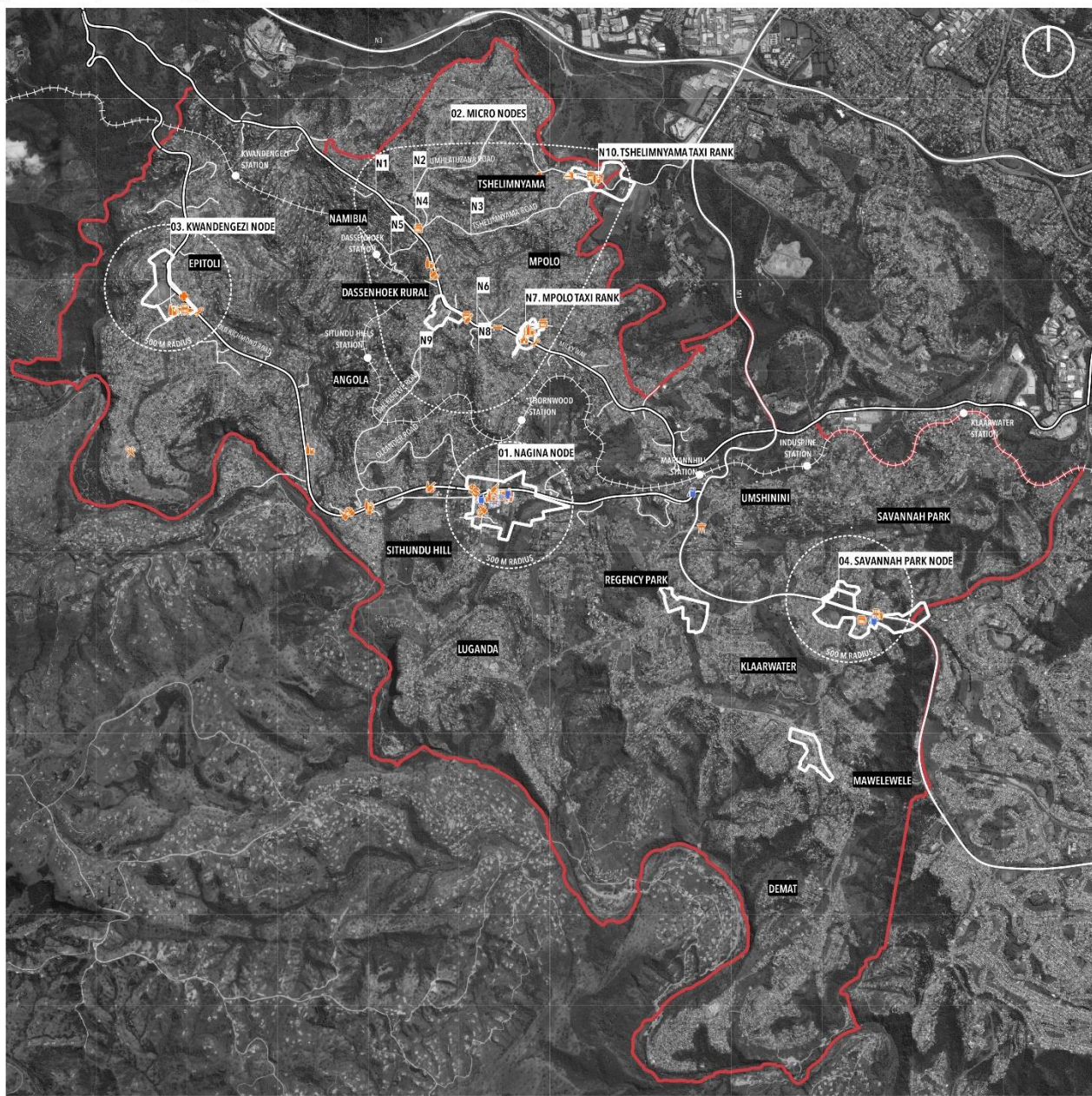


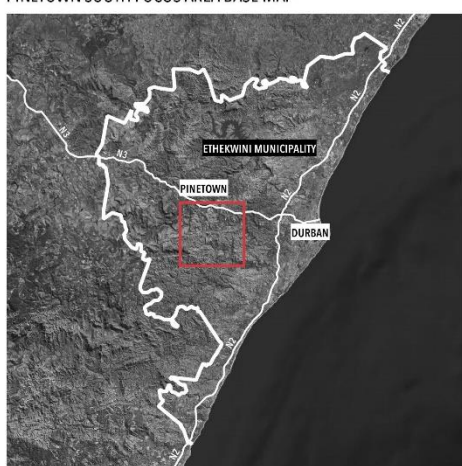
Figure 22: SME businesses by enterprise classification



Figure 23: Hardware Stores are an important SME in Pinetown South



PINETOWN SOUTH FOCUS AREA BASE MAP



LOCATION KEY

KEY**Pinetown South Map****1. Base Map****1.1 Study Area**

PinetownSouth_Study_Boundary

1.2 Nodes

Municipality Identified Nodes

Opportunity Nodes

TED Focus Area

1.3 Connectivity

Development Corridor

Main Routes

Railway Stations

Railway Lines

Arterial Road

Corporate enterprise [5]

Service station [3]

Cooked food [1]

Grocery retail [1]

SME enterprise [64]

Liquor [9]

Grocery retail [8]

Health services [7]

Car repairs [6]

Hardware [6]

Cooked food [5]

Meat & poultry [4]

Funeral services [3]

Braai meat [2]

Business services [2]

Financial services [2]

Hair care [2]

Micro manufacturing [2]

Accommodation [1]

Appliances [1]

Clothes [1]

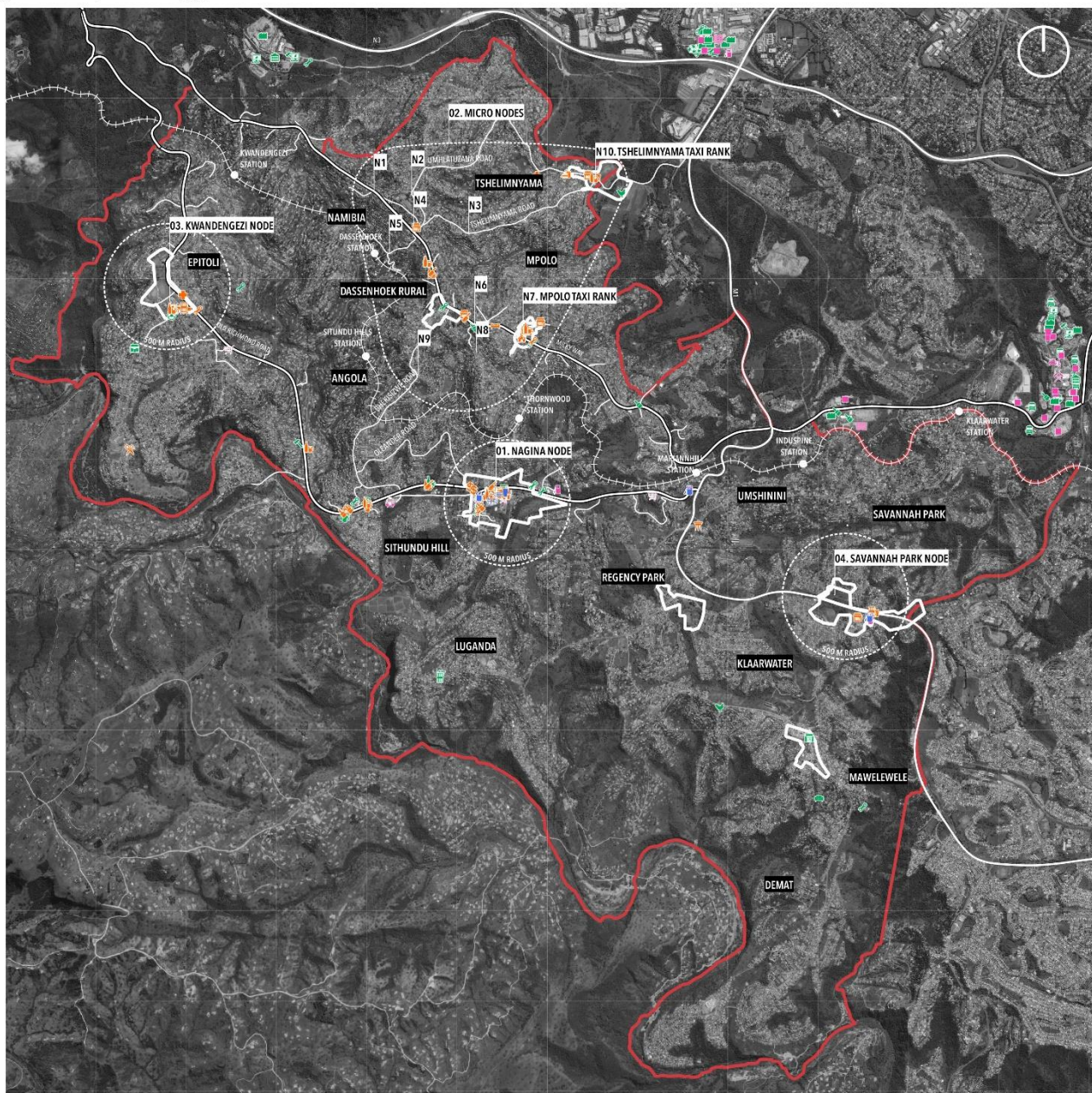
Furniture [1]

Green grocer [1]

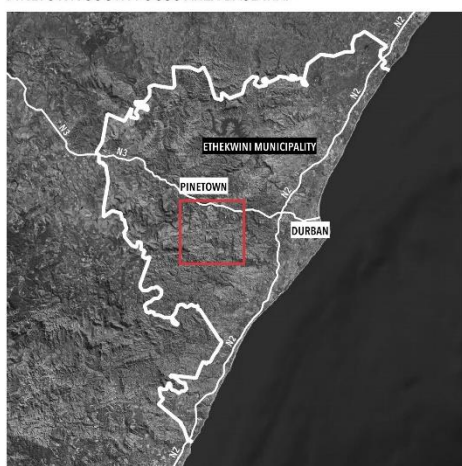
Other [1]

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PINETOWN SOUTH FOCUS AREA BASE MAP



LOCATION KEY

KEY**Corporate enterprise [5]**

- Service station [3]
- Cooked food [1]
- Grocery retail [1]

SME enterprise [64]

- Liquor [9]
- Grocery retail [8]
- Health services [7]
- Car repairs [6]
- Hardware [6]
- Cooked food [5]
- Meat & poultry [4]
- Funeral services [3]
- Braided meat [2]
- Business services [2]
- Financial services [2]
- Hair care [2]

- Micro manufacturing [2]
- Accommodation [1]
- Appliances [1]
- Clothes [1]
- Furniture [1]
- Green grocer [1]
- Other [1]

Corporate enterprise: Open source [33]

- Manufacturing [17]
- Service station [5]
- Supermarket [4]
- Warehouse [2]
- Building services [1]
- Car repairs [1]
- Grocery retailer [1]
- Hardware [1]
- Transport services [1]

SME enterprise: Open source [78]

- Car repairs [16]
- Manufacturing [16]
- Hardware [10]
- Transport services [8]
- Business services [4]
- Building services [3]
- Recycling [3]
- Supermarket [3]
- Clothing [2]
- Grocery retailer [2]
- Liquor retail [2]
- Livestock [2]
- Micro-manufacturing [2]
- Warehouse [2]
- Driving school [1]
- Furniture [1]
- Wholesaler [1]

ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | BASE MAP

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Map 9: Survey and Open-Source Data Corporates and SMEs

8.3. Business Hotspot Surveys

The community of Pinetown South was geographically mapped to understand the collective impact of the kinds of business sites and their responding business activities. Understanding the link between the types of sites and their potential attractiveness for local business activity has potential to inform future spatial development decision making and infrastructure projects.

8.3.1. Hotspot Types

There were 28 potential business hotspots identified and surveyed during the fieldwork process in Pinetown South. Of these, only 12% (5) were identified as vacant land not currently used for any regular business activity. The remainder were geographic sites where township businesses had emerged through organic processes of agglomeration and included marketplaces, high streets and open ground. Similar to other research locations, such local sites are worthy of further investigation for promoting local business activity. It is apparent that Pinetown South businesses have arranged themselves around the most practical and viable operational sites where this has been possible.

Opportunity: The high concentration of businesses within marketplaces and retail nodes presents an important opportunity for revitalising areas such as **Nagina, Tshelimnyama, Mpola** and **Kwandegezi** as nodes and micro-nodes for businesses within them. Furthermore, these localities are all **important areas** of pedestrian and potential customer footfall – which tend to attract retail businesses but also important services such as hairdressers and barber shops.

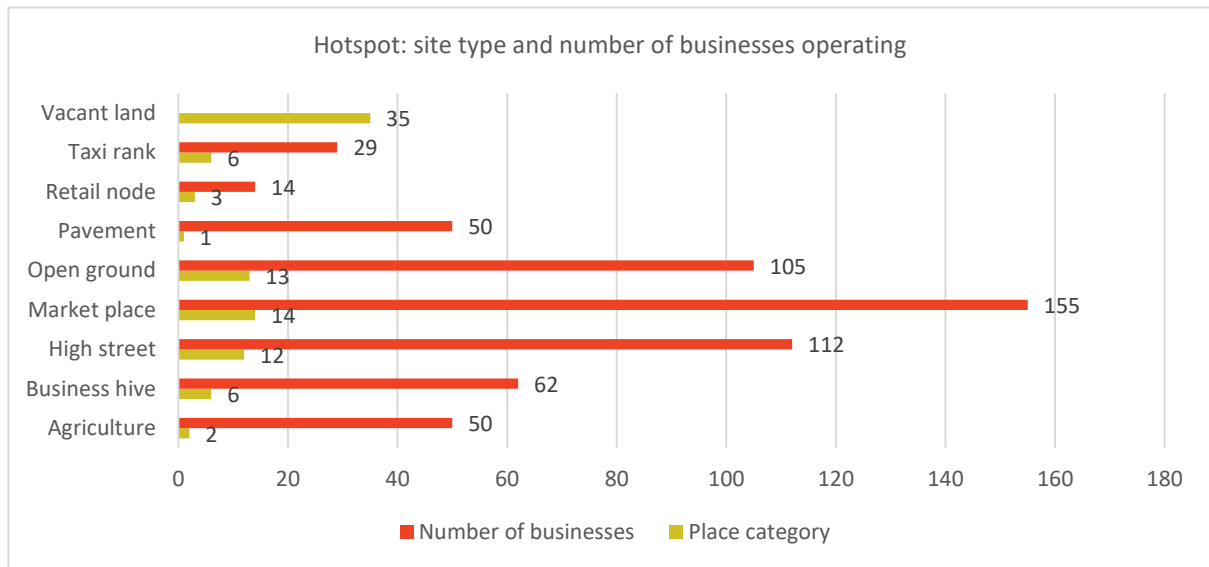
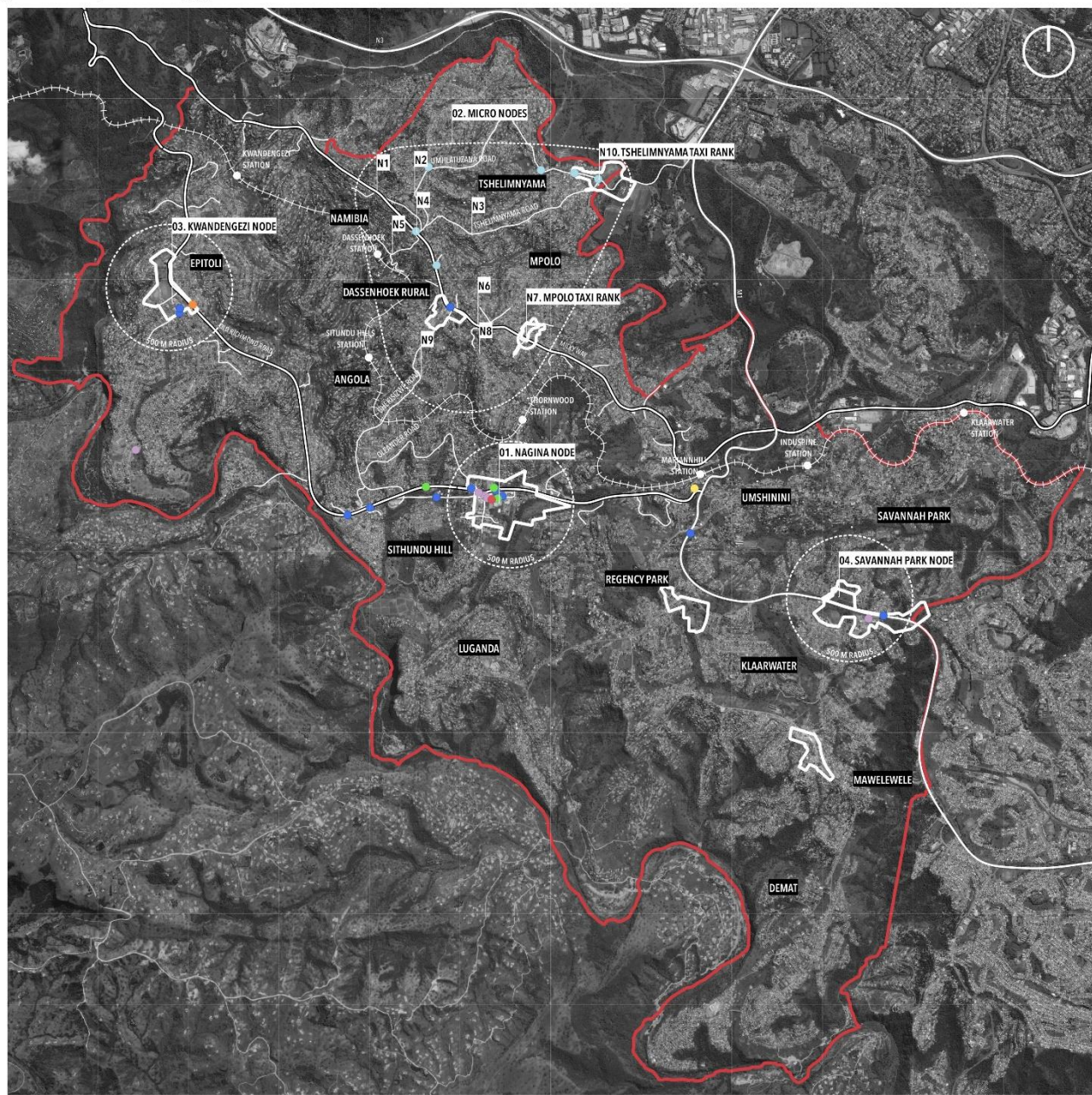
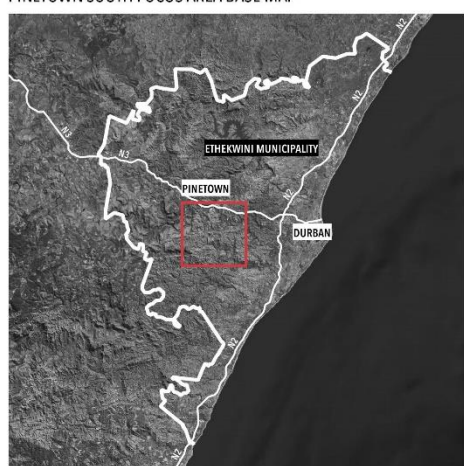


Figure 24: Number of Businesses per Site Type



PINETOWN SOUTH FOCUS AREA BASE MAP



LOCATION KEY

KEY**Pinetown South Map****1. Base Map****1.1 Study Area**

PinetownSouth_Study_Boundary

1.2 Nodes

Municipality Identified Nodes

Opportunity Nodes

TED Focus Area

1.3 Connectivity

Development Corridor

Main Routes

Railway Stations

Railway Lines

Arterial Road

Business Hotspot [28]

Business hive [11]

High street [6]

Retail node [5]

Market place [3]

Shopping mall [1]

Taxi rank [1]

Other [1]

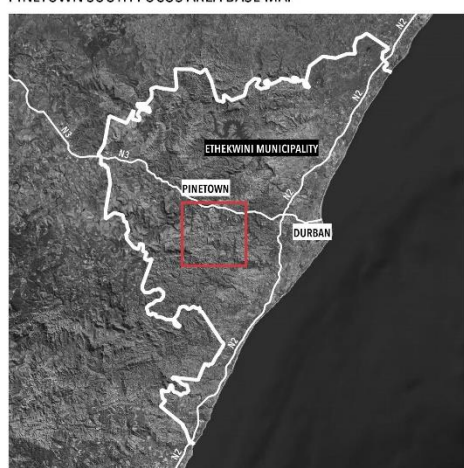
ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | BASE MAP

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Map 10: Business Hotspots



PINETOWN SOUTH FOCUS AREA BASE MAP



LOCATION KEY

KEY**Pinetown South Map****1. Base Map****1.1 Study Area**

PinetownSouth_Study_Boundary

1.2 Nodes

Municipality Identified Nodes
Opportunity Nodes

TED Focus Area

1.3 Connectivity

Development Corridor

Main Routes

Railway Stations

Railway Lines

Arterial Road

2. Land Administration**2.2 Land Ownership**

PS_LU_Municipal_Owned_Land

Municipal owned land

Vacant land

ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | BASE MAP

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Map 11: Vacant Land

8.3.2. Available Services

Overall, access to utilities and services found in business hotspots was unequally shared. Of the sites with business activity, 78% (22) had access to Wi-Fi, 78% (22) had some access to both water and electricity but 64% (18) had no access to waste disposal. Interestingly, where Wi-Fi access was present, no one could access it. Yet, despite municipal failings it is clear that Pinetown South business owners have conducted their own assessments of the costs and benefits of selecting and occupying a trading site and sites considered optimal for trading thus appear to take priority over infrastructure needs. Town planners should thus consider the 'organic' emergence of township businesses within a site before investing in creating new, and untested trading areas or infrastructure such as market stalls or communal facilities.

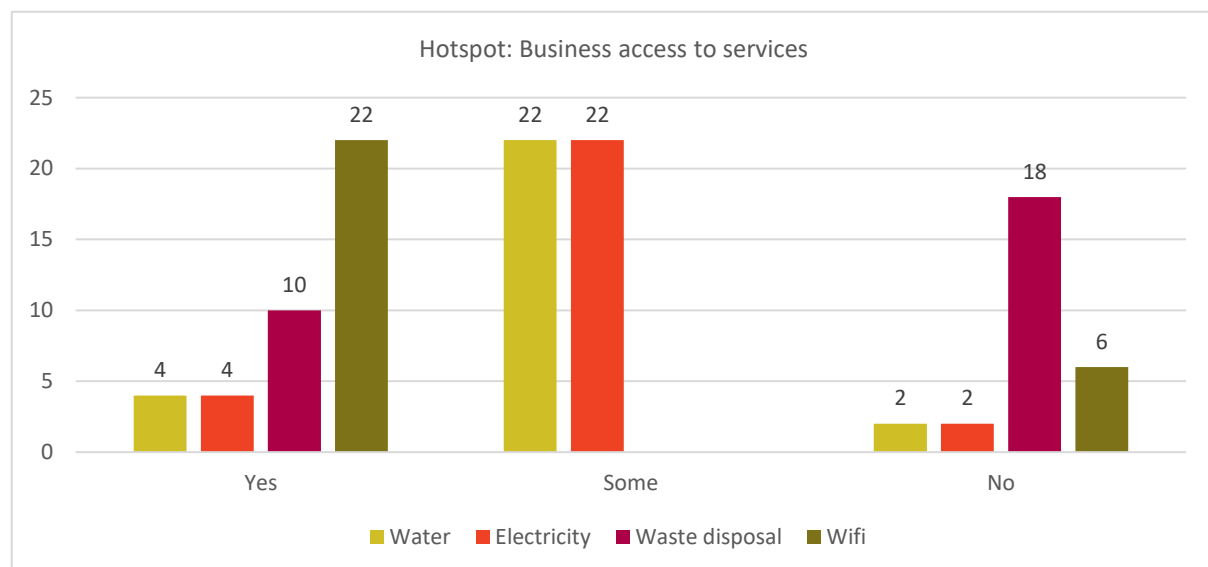


Figure 25: Access to services

8.3.3. Place Categories

The types of places varied, made up of 39% business hives, 21% high streets and 18% retail nodes.



Figure 26: Hotspot place categories

There were 182 businesses operating from business hives, five retail nodes with 90 businesses, and 60 businesses operating on high streets. In a spatially dispersed site such as Pinetown South, it is clear that business hives, high streets and retail nodes have an important role in bringing businesses together into clusters. Well placed clusters can, in turn create their own demand through being convenient for consumers – many of whom would be on foot in Pinetown South.

8.3.4. Barriers to Operating in Hotspots

Of the 28 active sites, 54% (15) had no site infrastructure and over a third (10) of respondents did not know whether the space had anyone managing the site. Some 57% (16) of respondents reported that they were aware of office space available to rent and 93% (26) of fieldworkers observed that there was space for other micro-enterprises to operate. Examples of infrastructure issues raised by respondents pertain to municipal service delivery issues and included no water access (15), lack of sanitation (13), no refuse removal (11), inadequate shelter (5) and lack of electricity supply (5). Although crime was identified as a challenge, it was not commonly identified as a barrier to undertaking business in these settings.

8.4. Institutional Services

Across the Pinetown South research site there were 30 institutional services sites recorded, 57% (17) of whom were financial services. Those recorded as 'Other' were two police stations, two post offices, a

clinic and municipal storage. Apart from financial services, most of the institutional services were open during the fieldwork process. Services such as libraries, community halls and “service centres” were predominantly operated by the Metro (8).

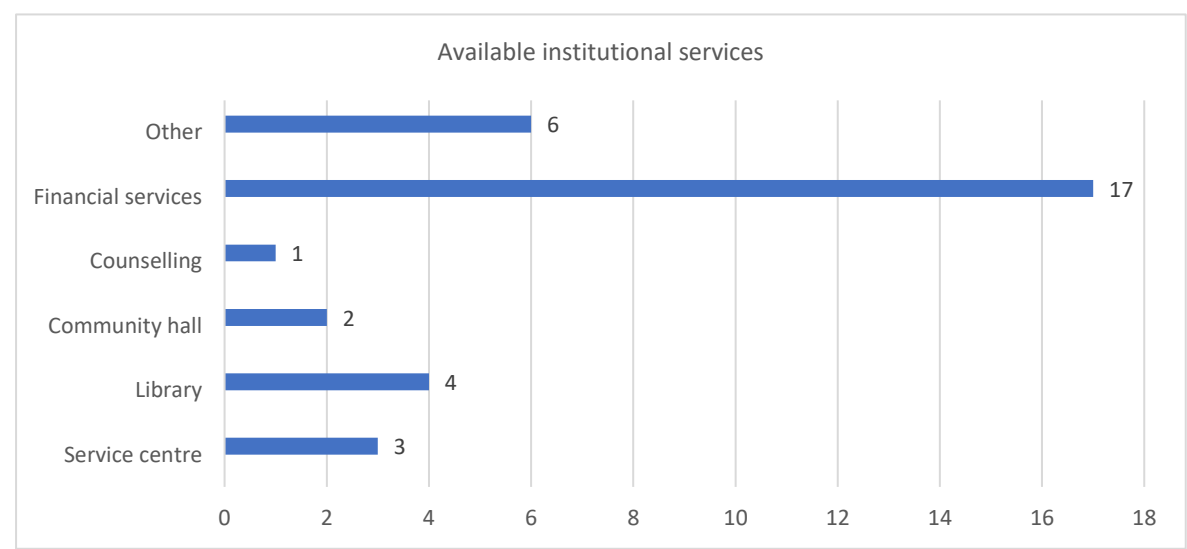


Figure 27: Institutional Services

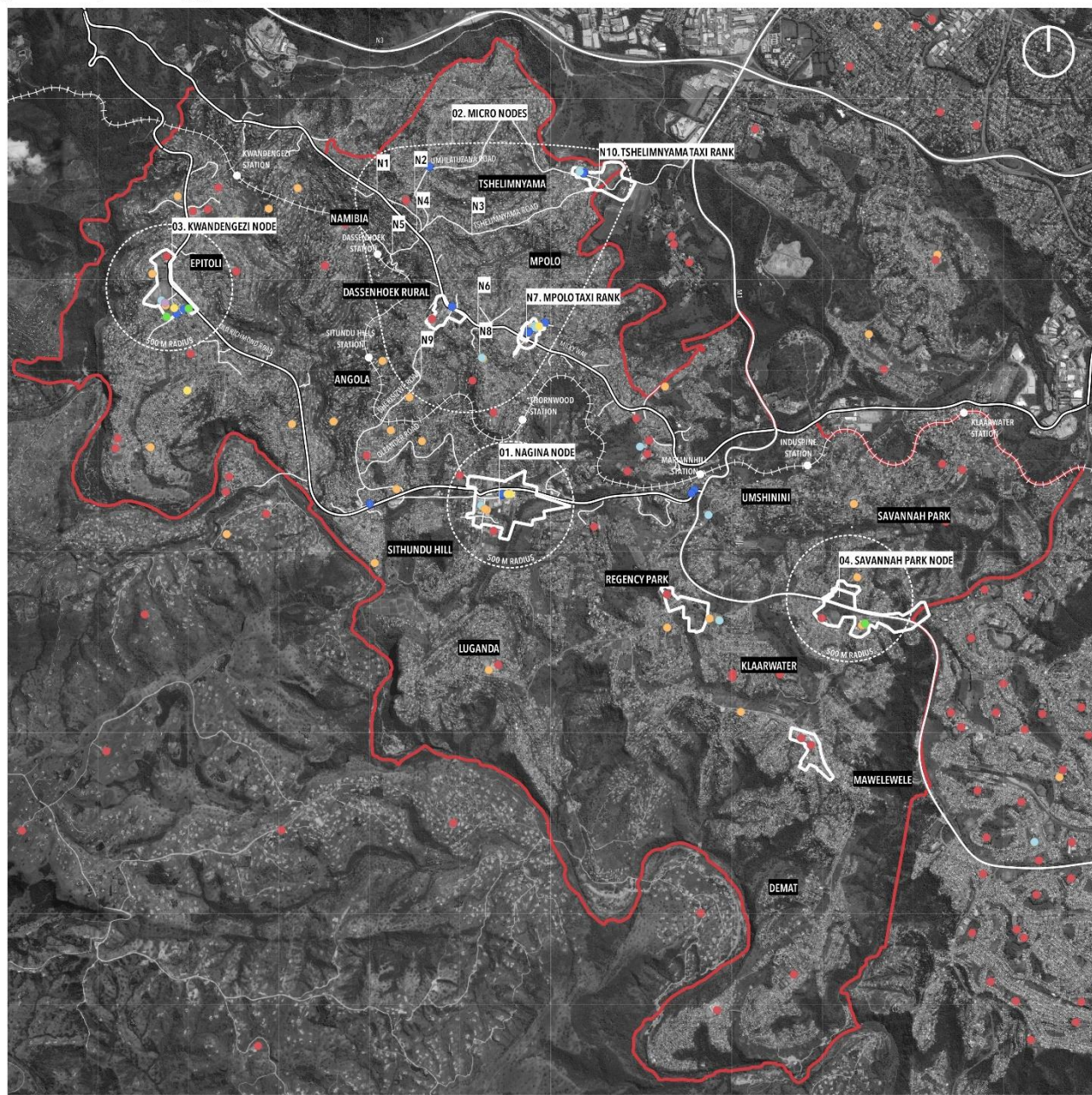
Of the available financial services, 88% (15) are ATMS representing all of the major South African banks. The remaining two are micro-finance organisations that were providing cash loans.

Table 2 ATMs in Pinetown South

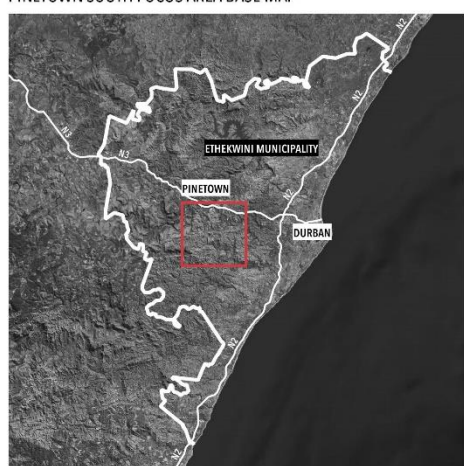
| ATMs | |
|---------------------|---|
| Absa | 3 |
| Capitec | 3 |
| First National Bank | 1 |
| Nedbank | 2 |
| Standard Bank | 3 |
| Cash express | 4 |

Researchers observed and noted comments by respondents, predominantly around the functional access to financial services:

- *"The ATM is perfectly located where there are a lot of residents. This is helpful for the community because they can easily withdraw money given that busy centres with ATMs are very far away."*
- *"This ATM works is also due grants since its month end."*
- *"The ATM is located next to a petrol station, it is easy for customers to withdraw money."*



PINETOWN SOUTH FOCUS AREA BASE MAP



LOCATION KEY

KEY**Pinetown South Map****1. Base Map****1.1 Study Area**

PinetownSouth_Study_Boundary

1.2 Nodes

Municipality Identified Nodes

Opportunity Nodes

TED Focus Area

1.3 Connectivity

Development Corridor

Main Routes

Railway Stations

Railway Lines

Arterial Road

3. Infrastructure**3.4 Public & Social Infrastructure**

Libraries

Community_Halls

Institutional environment

- Community hall
- Financial services
- Library
- Library, community hall, counselling
- Service centre
- Other
- Education

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Map 12: Institutional Environment

8.5. Township Wide Ecosystem

Pinetown South is close to the Pinetown CBD (which is part of the larger Pinetown, New Germany and Westmead Industrial Node) which has emerged as the second most important commercial, industrial and civic urban centre within the eThekweni Municipality. The area supports and in turn is supported by increasing medium to high-income populations living in mixed density residential settlements. Pinetown is also a major transport hub.

Opportunity: Various localities within Pinetown South (such as the **Nagina, Tshelimnyama, Mpola and Kwandegezi**) could be **further activated** for business activities through **local strategic area and management plans** and investment in revitalisation of the local environment in ways suited to an enhanced business environment.

9. Important Sectors

Whilst the microenterprise form and function in Pinetown South is fairly typical of South African township economies, there are some important local sectors that stand out as having potential for investment. These sectors are highlighted due to particular regional advantages such as the clustering of relevant skills types or markets in the area, being geographically close to important South African business sectors, or due to other socio-economic circumstances that align to create local advantage.

9.1. Recycling

There is an important opportunity through a potential green economy initiative to link together large industrial recycling operations with township community members who require access to such markets. Local intra-township transport is an important feature of the township economy. Due to the proximity of the industrial area and recycling services there may be an opportunity to find a working model to link these services and informal recyclers together to increase efficiencies and margins in the value chain. Links to EDTEA programmes within Operation Vula that promote recycling should be further investigated. The green economy activity of recycling of plastic and glass has important potential for Pinetown South due to its relatively close proximity to recycling facilities and relevant markets.

Opportunity: Building on prior and ongoing efforts, the Metro should **facilitate partnerships and market linkages** to enable township recyclers to more effectively **obtain and package waste materials**, and to enhance their **access to markets**. Furthermore, through **PPPs and Metro investments**, there is an important opportunity to develop infrastructure as recycling repositories, sorting and processing of recyclables.



Figure 28: Accumulated glass awaiting collection for recycling

9.2. Creative Economies

The Pinetown South creative economy has potential to be more effectively linked to both government-initiated arts and creatives funding, but also the tourism sector. Links to EDTEA programmes within Operation Vula that promote creative economies should be further investigated. Such programmes can support SMMEs and microenterprises through workshops, networking, registration and directing them to financing. Fostering these links would be an effective tool for supporting local SMMEs. The DSBD TREP programme specifically supports clothing, textile and leather enterprises that are located in townships and villages in terms of business support as well as access to funding, whilst SEDA focuses on skills development in the jewellery sector.

Opportunity: The Metro to devise a strategy, with appropriate partnerships to reposition arts and crafts to directly support township creatives – facilities, training and market development. The Metro to support the development of a creative sector through existing **BDS services** and mechanisms of

enterprise formalisation in order for creatives of various sectors to **gain enhanced access to formal sector funding opportunities**, such as that from the National Arts Council or the National Lottery Commission Trust.

9.3. Micro-Manufacturing

The considerable private investments made into local houses presents a valuable opportunity for the micro-manufacturing sector – such as upgrading gates, fences, doors and windows. These activities could bolster demands for a local micro-manufacturing and home renovation economy.

9.4. 4IR

4IR projects such as Kandua which links technical specialists with customers, and digital platforms such as Khula which market produce grown in an urban agriculture context have important potential for application in Pinetown South and should be further explored and encouraged. An important initiative that could be driven by the Metro is enhancing access to digital services in general, and links to 4IR driven businesses / platforms in particular.

Opportunity: Improving enterprise access to digital economy. This should include links to SEDA who actively promote digital hubs and KZN Provincial Government. Enhanced Wi-Fi access for **increasing 4IR access for SMMEs** in the township economy is also required. Such a programme could also support enhanced participation in the **digital formal financial sector**.

9.5. Financial Inclusion

SMMEs in Pinetown South revealed challenges of being unable to access formal sector financial services products such as business capital and insurance. Most businesses are entirely reliant on cash transactions which brings about added security and operational risks. Enhancing access to formal sector services can bolster business stability and insulate them from economic shocks. Any programme that can enhance access to these products will be of benefit for the local township economy.

Opportunity: There is important scope for the Metro to use existing **BDS services** to extend **financial literacy training** to township microentrepreneurs and improve access to services and technologies

9.6. Automotive Sector

The township automotive sector – especially subsectors of mechanics, tyre fitment and car detailing / washing are important contributors to economic opportunities and job creation. It is therefore important to promote investment activities and private sector BDS to support these SMME opportunities. In Pinetown South the opportunities that are currently accessible in the aftermarket include post-sales maintenance, repairs, refitment, spares, disposal of vehicles and recycling.

9.6.1. Stakeholders within the Township Automotive Industry

The main stakeholders within the township automotive industry can be categorised into four main areas:

i) micro-enterprises and the associations that represent them; government and SOE; private sector Original Equipment Manufacturers (OEMs) with B-BBEE targets; and customers (motorists including those who own taxis and buses).

Micro-enterprises and the Associations

The micro-enterprise surveys revealed that the majority of automotive entrepreneurs operate in the 'aftermarket' offering repairs for vehicles that are out of warranty. These commonly include mechanics, panel beaters, spray painters, tyre fitters / wheel specialists, welders and upholsterers. The business activity is relatively commonplace and has, in some cases attracted important external investment. For example, within the study sites some tyre fitting micro-enterprises have created links to tyre manufacturers such as Dunlop and Tiger Wheel and Tyre and have secured professional and branded premises. The majority however are unlinked to formal sector business and work from home or premises along prominent township roads or near taxi ranks.

With respect to land use, most of these micro-enterprises (particularly home-based, and street-based entities) operate in areas either outside of the regulatory frameworks, or illegally. Most work with basic equipment and poor infrastructure, limited waste disposal, no access to ablution facilities, and poor, if any shelter (which brings about susceptibility to changing weather). There is also a lack of storage and the general hazard posed by them working without the necessary accreditations. Often businesses are positioned close to their customers (near taxi ranks and busy areas where they are visible and accessible). It is to be noted that city and state land that is available for developing hubs and providing the much-needed infrastructure is not necessarily close to where the greatest business opportunities lie.

A persistent challenge for township automotive micro-enterprises is access to markets. Financial and non-financial support is important in ensuring that the enterprises are well operated and governed but, without access to markets the enterprise have little chance of success. Market access in the township economy is hindered through the geographic and economic isolation of the township economy away from mainstream sectors, and also the limited market within the township economy for cars. Furthermore, it is uncommon for reasons such as crime and logistics for vehicle owners residing outside of the township to bring their vehicles into these locations. Finally, there are customer perception on the quality of the service (See opportunity listed below).

Several associations represent the entrepreneurs and their needs. The Retail Motor Industry (RMI) represents retail and associated motor industry within South Africa's automotive aftermarket. There are eight associations represented by RMI with over 8,000 members. The RMI is the major employer representative of the Motor Industry Bargaining Council. It is not clear at this stage how many township entrepreneurs are represented by RMI. An important sectoral newcomer is the African Panelbeaters and Motor Mechanics Association (APMMA), through its chairperson Sisa Mbangxa, has been heavily involved and instrumental in the shaping of the Draft Guidelines for Competition in the Automotive Aftermarket Industry (by the Competition Commission). APMMA's members are largely within the township.

Opportunity: There is scope for the **after-market automotive sector** in Pinetown South to benefit from **Metro-facilitated partnerships** with various stakeholders such as private sector companies, BDS stakeholders such as DSBD / SEDA and Provincial Government to provide equipment / skills training / supply agreements / finance.

10. Land use

10.1. Land Administrative Policies

The TAT reviewed the following planning documents to gain an understanding of the statutory and policy environment for Pinetown South:

- **Municipal Spatial Development Framework**

The Municipal Spatial Development Framework (MSDF) is a long-term spatial planning tool, which provides metro-wide planning guidance for the spatial growth of EM. This tool is required in terms of the Spatial Planning and Land Use Planning Act, 2013 (SPLUMA) and forms part of the Integrated Development Planning (IDP) process, to the extent that it assists with providing a spatial context for investments. In terms of the legal requirements, it is subject to review every five years.

- **Central Spatial Development Plan**

The Spatial Development Plan (SDP) provides detailed planning directives that align with the MSDF for each region in the metro. This planning tool identifies issues and directives for specific areas within each district and provides a shorter-term directive than the MSDF.

- **Local Area Plan, Functional Area Plan, Scheme Review**

The Local Area Plan (LAP), Functional Area Plan (FAP) and Scheme Reviews has been utilized to address the piecemeal development trajectory within the Pinetown South area, where in land use falls under different planning schemes (including townships planned under the R293 regulations). The LAP, FAP and Scheme Review were undertaken as part of the Integrated City Development Grant, in order to set out development objectives and strategies to ensure a more coherent use of space, achieve better land value and more integrated settlement patterns.

- **Built Environment Performance Plan**

The Built Environment Performance Plan (BEPP) is intended as mechanism to align the IDP and budget with spatial priorities each year, to promote the effective functioning of the metropolitan built environment, in line with the guidelines set out by National Treasury.

- **Municipal Planning By-Law and Inner West Zoning Scheme**

The Municipal Planning By-Law provides the legal framework that spatial policies such as the MSDF play out in at the metropolitan level. The zoning scheme provides the detailed zoning guidelines and permissions. A wall-to-wall zoning scheme for each municipality is required in terms of the SPLUMA, 2013.

10.2. Development Plans

10.2.1. eThekweni Municipal Spatial Development Framework, 2020

Pinetown South is identified as an Urban Investment Node in the eThekweni Metro. The MSDF indicates that it is in a Prime Integration Zone. The MSDF defines an integration zone as a sub-metropolitan node that is well-placed for public investment that promotes more unified development. These areas are identified as part of National Treasury's spatial targeting strategy.

10.2.2. Central Spatial Development Plan, 2013/14

The MSDF (2019: 586) identifies Pinetown South as a Phase 1 Priority Area in the Central Spatial Development Plan (CSDP). The CSDP is a detailed planning document that carries through the directives of the SDF to each region within the EM.

The CSPD provides a broad set of desired outcomes. Noteworthy outcomes include the objective to foster diversity in the industrial sector and to promote the functionality of CBDs through greater mixed-use development. Other desired outcomes relate to developing appropriate residential environments with greater densities, establishing access hierarchies and linkages, maintaining the integrity of the open space and providing infrastructural support.

10.2.3. Pinetown South Local Area Plan, Functional Area Plan and Scheme Review, 2015

Pinetown South has been identified as a well-located area in the Metro, which has been developed without strategic, integrated planning. The Pinetown South LAP was formulated to provide planning direction and provides a comprehensive overview of the site, identifying some of the major development issues.

Six development goals have been formulated for the Pinetown South area. Since the TED project is focused on stimulating economic development, it is most closely aligned with goal two, which seeks to expand the economy and foster industrial development. However the TED project also aligns with Goal One, which is enhancing the regional accessibility of this area. As such, the situation analysis will focus on interventions in areas that have been identified in strategically important areas.

10.2.4. Draft eThekweni Built Environment Performance Plan, 2019 - 2020

Pinetown is located in a Prime Investment Corridor, which is made up of Priority Urban Investment Areas identified in the SDF. To this end, the primary services the BEPP highlights in relation to Pinetown are the Integrated Public Transport Network (IPTN), housing and employment. The BEPP refers to Pinetown and the Pinetown CBD more generally, with a major emphasis on the strengthening spatial relationships.

In terms of the IPTN, Pinetown is on the C3 corridor, which links Pinetown CBD to Bridge City in the North. This is prioritized as a first phase project. Other corridors that will link to the Pinetown area are the C6 corridor, which is intended to link Hammarsdale and Pinetown to Warwick (this is a phase 4 priority) and the C7 corridor (a phase 2 priority), which is intended to link Hillcrest to Chatsworth, which is adjacent to Pinetown South.

Accredited NPOs have undertaken independent social housing projects. Noteworthy projects that have been done in Bellair and Pinetown include a 425 unit development called the Hamptons, a 540 unit development called Hilltop and a 180 unit development called Hampshire. (P.18). Affordable housing developments are planned in the Prime Investment Corridor and in the C3 corridor. It is anticipated that about 12 500 units will be built in the area between Bridge City and Pinetown South.

Pinetown, Westmead and New Germany are classed as a high priority Core Employment Nodes. As these nodes provide employment in the industrial and commercial sectors, the maintenance of infrastructure serving these nodes it to be prioritised.

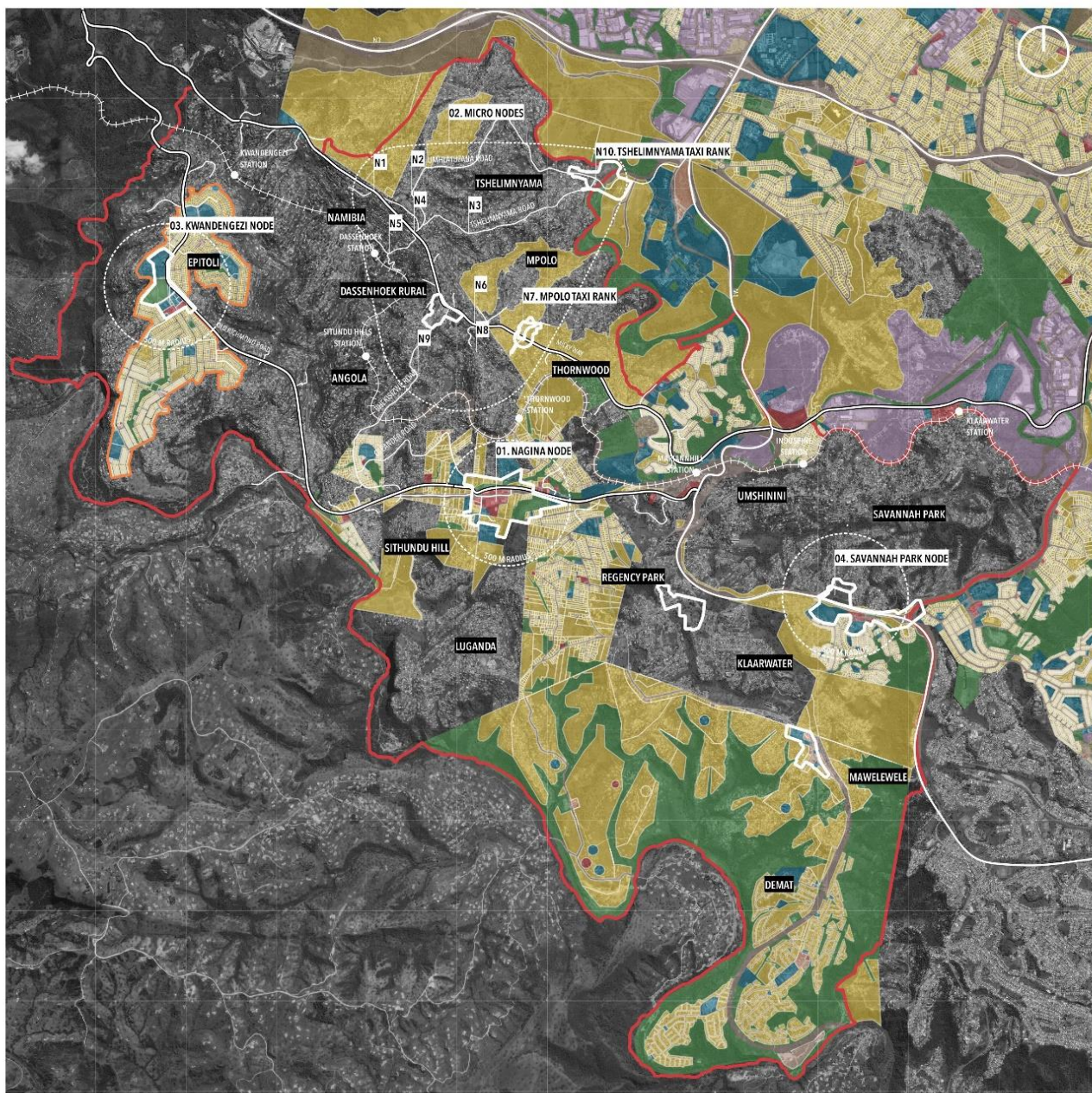
10.3. Land Use Dynamics

The eThekweni Municipality Planning and Land Use Management By-Law was promulgated in 2016. The Metro has not yet established a wall-to-wall zoning scheme, as required by SPLUMA. There are five

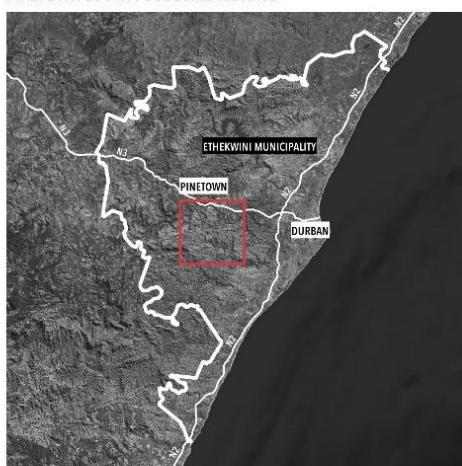
different zoning schemes in place for the entire metro. Pinetown South is governed by the Inner West Zoning Scheme, v 1.4.

The land governance in Pinetown South is complex. Pinetown South is predominantly governed by the Inner West Zoning Scheme. However, part of this area is also classified as a former R293 Area, as indicated by the hatched area. A portion of the area also falls under the Traditional Authority, as indicated by the dotted area, this area has Less Formal Township Establishment Act 113 of 1991 application status. Further consultation with the eThekweni planning team is required to better understand the implications of the current land use administrations.

Most properties that fall under the Inner West Zoning Scheme are zoned for residential purposes, which has limited potential for mixed-use intensification and densification, although the range of residential land use categories in this area do vary. There are areas of industrial zoning in the site.



PINETOWN SOUTH FOCUS AREA ZONING



LOCATION KEY

KEY**Pinetown South Map****1. Base Map****1.1 Study Area**

- Study Boundary
- Former R293 Extent

1.2 Nodes

- Extent
- TED Focus Area

1.3 Connectivity

- Development Corridor
- Main Routes
- Railway Stops
- Railway Lines
- Arterial Road

2. Land Administration**2.3 Zoning****PS_LU_Former_R293**

- COMMERCIAL
- COMMUNITY FACILITY
- EDUCATION
- PUBLIC OPEN SPACE
- RESIDENTIAL
- WORSHIP

PS_LU_Inner_West_Zoning

- Future Commercial Node
- Bus and Taxi
- Fuelling and Service Station
- General Commercial
- Limited Commercial
- Offices 1
- Active Open Space
- Passive Open Space
- Public Open Space
- Cemetery

Conservation Reserve

- General Industry
- Light Industry
- General Mixed Use1
- General Residential
- Intermediate Residential 1
- Intermediate Residential 3
- Medium Impact Residential
- Opportunity Space
- Residential 200m
- Residential 300m
- Residential 400m
- Residential Small Holding
- Special Residential 1
- Worship
- Administration
- Institution
- Education
- Civic and Social
- Public Services
- Refuse Landfill
- Service Industry
- Future Education

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Map 13: Zoning, Pinetown South

10.4. Noteworthy Land Use Applications

10.4.1. Erf 395, Savanna Park

Erf 395, Savanna Park has been identified as a security risk and property that is vulnerable to informal settlement occupation, in an area that would benefit from economic development. It is proposed that a portion of this property be subdivided and opened for development, with an agreement with the developer to develop and maintain the remainder of the site as a park or conservation space for a minimum of 45 years. Maintaining open space in the Metro area is vital. As such, since part of this large open space will be developed, an offset will be purchased and consolidated into Marian Wood Nature Reserve.

10.4.2. Additional Sites

The TAT notes that two additional erven in the Pinetown South Study Area have been prioritized for development, with interest from the private sector, this section will be complete when the information about these properties is provided to the TAT.

10.5. Precinct Plans

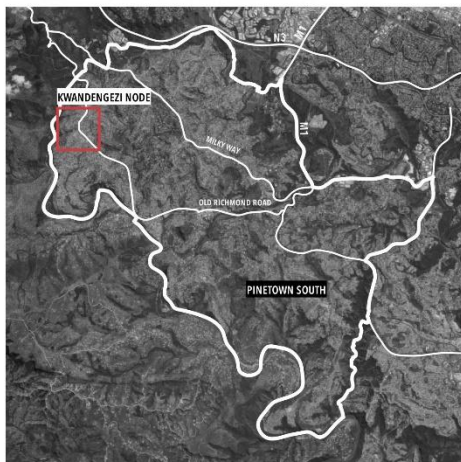
10.5.1. KwaNdengezi Node Framework

The KwaNdengezi Node Framework was finalised in 2013 and seeks to regenerate the area indicated in the below illustrations. The KwaNdengezi Framework is a regeneration strategy with eight primary objectives. These are: creating a retail node, consolidating the institutional and social facilities in this area, creating a sports hub, improving access and safety for pedestrians, formalizing the taxi rank and meeting informal economy needs, promoting entrepreneurship by facilitating support for small businesses operating in the node, creating quality public space, creating medium density residential opportunities around the node (2013: 13 – 14).

0 100 200 m



KWANDENGEZI FOCUS AREA DEVELOPMENT PROPOSALS



LOCATION KEY

KEY

KwaNdengezi Node

1. Extends Node

5. Development Proposals

- 5.1 Existing Proposals
- Proposed interventions
- Proposed Bus Stop
- Proposed BRT

8. Connectivity

- Development Corridors
- Arterial Roads

ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | KWANDENGEZI NODE | DEVELOPMENT PROPOSALS

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10.5.2. Nagina Precinct Plan

The Nagina Precinct Plan was completed in 2019 and aims to enhance the Nagina area indicated in the below illustration. The LAP identifies this node as a primary service node. The regeneration strategy for this site has the following objectives: improving the aesthetic value of the surrounding area, promoting more activity in this node, stimulating private-sector investment through state-led interventions, increasing job opportunities in the formal and informal sectors, creating better access to this node, improving safety and promoting civic pride (2019: 1).

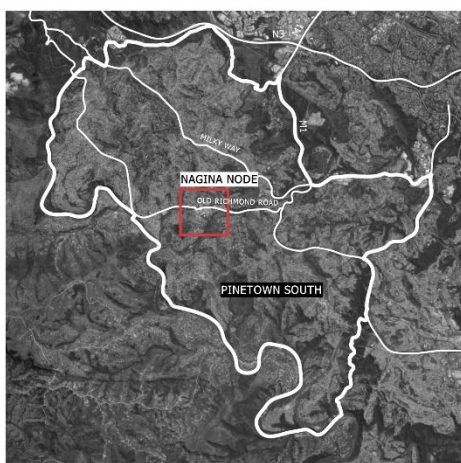
The TED Situational Analysis incorporates Metro land use development plans as well as new sources of information / data, including the micro-enterprises surveys. This information can enhance future development planning process.

Opportunity: TED evidence utilised in area-base strategic plans.

0 100 200 m



NAGINA NODE FOCUS AREA DEVELOPMENT PROPOSALS



LOCATION KEY

KEY

Nagina Node

1. Extents

— Node

5. Development Proposals

5.1 Existing Proposals

— Tshelimnyama Pedestrian Bridge

— PNT_NAG_BRT

— Road Infrastructure upgrade

— Proposed Rezoning

7. Key Interventions

lines

polylines

texts

— Intervention Area

11. Prioritised and High Potential Nodes

11.1. Overview

To inform any TED opportunities, the TAT has produced a series of spatial maps upon which an analysis could be undertaken. The maps are produced at two distinct scales (i) that of the study area – showing the larger context of the township and the respective nodes under investigation and (ii) the nodal or precinct area – showing a more detailed analysis of the land and infrastructure dynamics at a smaller scale.

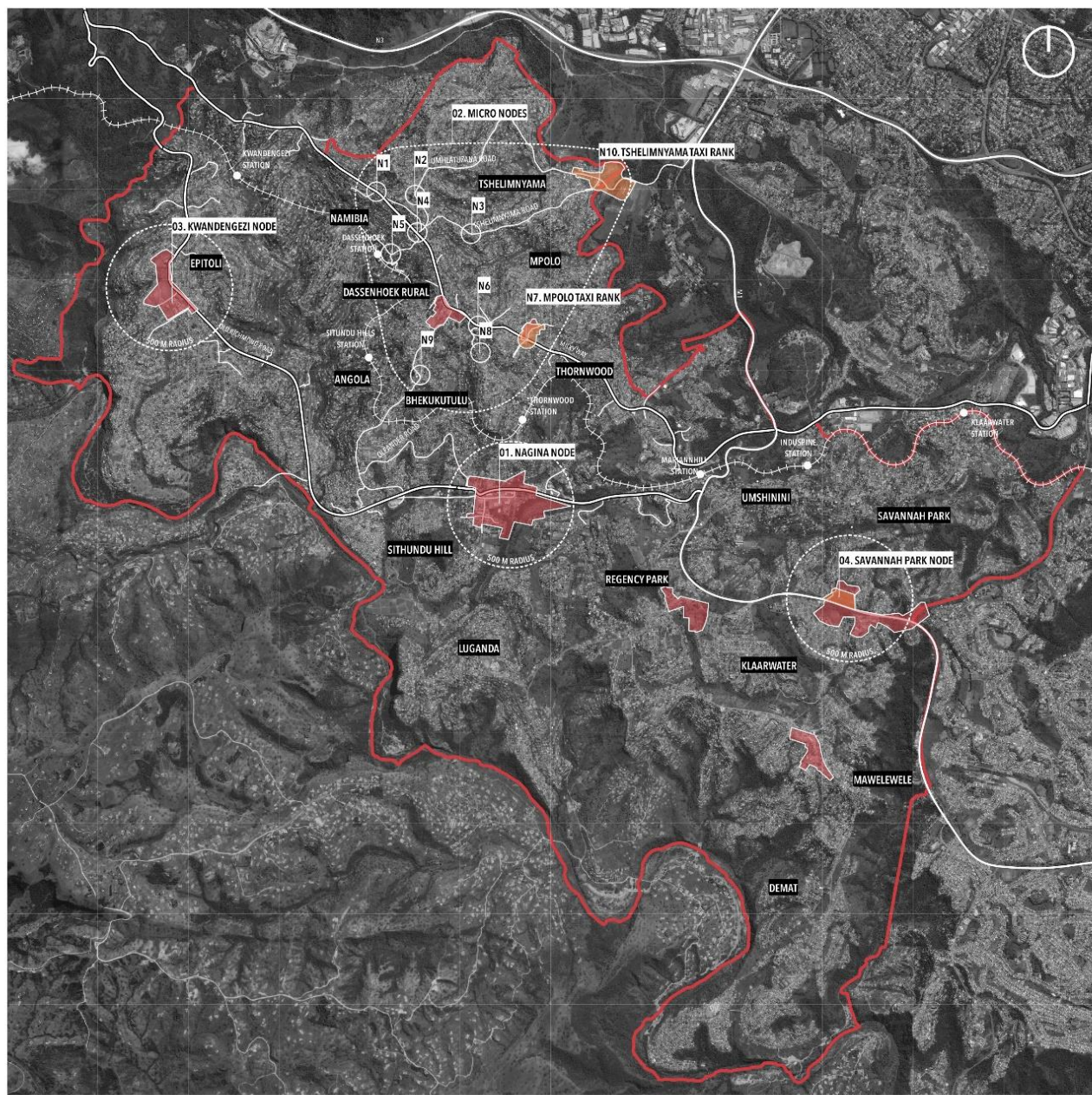
The maps intent to build a cohesive spatial overview. The data was largely obtained from the Metro, including reports and plans. There is still data that is missing or pending. As a result, some maps have been produced by manually through allocating data (such as land use or zoning) to the drawings from relevant planning documents. In priority nodes, the TAT have commenced producing a 3D digital model of selected nodes. This forms the base model through which proposal can be communicated and explored in a 3D dimensional perspective.

In order to effectively bring about impact within the township, it is critical that the geographic extents be appropriately identified. These are often described in spatial terms as nodes – a concentration, consolidation of a variety or similarity of activity. Typically, these would exist along a route or at the confluence of two or more such routes. In defining a node, the TAT have sought to show the relative size, distribution and relationship of focus areas with the larger study area. In conjunction with the identification of geographic extents, the urban typologies are simultaneously identified in relation to these extents. They may include streets, private land parcels, industry, natural features, informal settlements that make up the physical elements of the node. Each urban typology warrants a unique understanding and corresponding developmental response. The size and proximity of these nodes assist in developing a strategy of how to optimize the developmental impact through seeing these nodes as operating in isolation or relative to each other.

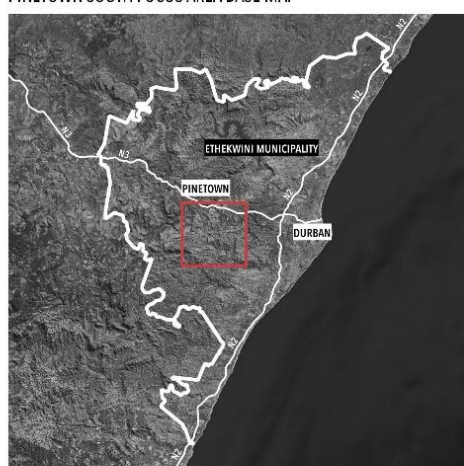
The identification of nodes has been based upon the institutional knowledge and reference to existing Metro plans. In addition to the identified nodes, the TAT proposed additional nodes where the data and technical evidence suggested strong opportunities for local economic development. A basis for the identification of new nodes included,

- (i) the capacity to bring catalytic spatial and economic transformation.

- (ii) ability for opportunities to be realized within the time, budgetary and technical constraints of the project.
- (iii) A response to emergent social and economic activity.
- (iv) The capacity to integrate stubborn and difficult development challenges.



PINETOWN SOUTH FOCUS AREA BASE MAP



LOCATION KEY

KEY**Pinetown South Map****1. Base Map****1.1 Study Area**

PinetownSouth_Study_Boundary

1.2 Nodes

Municipality Identified Nodes

Opportunity Nodes

TED Focus Area

1.3 Connectivity

Development Corridor

Main Routes

Railway Stations

Railway Lines

Arterial Road

ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | BASE MAP

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Map 14: Nodes in Pinetown South

The recommended prioritised TED nodes for Pinetown South include:

- (i) KwaNdengezi Node
- (ii) Nagina Node
- (iii) Mpola Taxi Rank Node
- (iv) Tshelimnayama Business and Social Node
- (v) Tshelimnayama Micro Nodes

11.1.1. Infrastructure and Natural Systems

These nodes are located on existing transport corridors. The topography plays a dramatic role in informing the nature of infrastructure provision, urban development, and pedestrian walkability. The arrangement of infrastructure relates strongly to the natural systems of the site, taking into consideration storm water run-offs, streams and flood plains.

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11.1.2. Land Administration

Private land ownership appears very low according to the data and needs further investigated to understand how private land could be further leveraged for economic development. In addition, there are significant areas that have not been zoned, these can be seen on the maps provided (subject to updated municipal zoning data). The zoning also reveals the significant under provision of commercial zoning across the study area.

11.2. KwaNdengezi Node

KwaNdengezi Node: Development Opportunities.

Conceptually the development opportunities within the KwaNdengezi Nodes are:

- (i) Consolidate and amplify the use-function of the Sports and Recreational infrastructure.
- (ii) Consolidate and amplify the commercial street edge and taxi stop.
- (iii) Create linkages between core functions of the node.

Township Sports and Recreation Precinct

The area has been identified by the municipality as a priority area. The KwaNdengezi Node is located at a topographical high point of the township. Its vantage together with the concentration of sports and recreational assets allow the site to be positioned as a major sporting destination within the township context – and possibly function at a regional scale. Examples of this exist in Wanderers (Johannesburg), Green Point (Cape Town). The adjacent land uses of middle income residential and civic uses contribute towards the secure and predictable characteristics of the node. The consolidated sports functions are in close relationship to the road artery MR518. This connection, however, is suboptimal due to the poor level interface between the main road and entrances to the sports precinct – which are significantly higher than the street.

The sports facilities have potential for consolidation, rehabilitation and augmentation to amplify their functions and synergies. The aim would be to diversify and increase the sports codes. This might include the addition of adventure sports, running trails, a series of 5-a-side and full-size artificial soccer turfs, basketball courts, netball courts, a golf driving range, MTB trail, and supporting amenities such as a clubhouse, spectator support facilities, lighting, landscaping, signage, administrative facilities.

The consolidating of the sports precinct would need to be coupled with a strong and clear urban management plan. It would be critical to have a clear management plan for the area to coordinate various stakeholders, calendars, resources and offerings of the precinct. Investment in hard and soft infrastructure would allow for support leisure, entertainment and food business to associate with the precinct.

Opportunity: Sports facilities within the KwaNdegezi node developed and maintained.



Figure 29: The sports precinct comprises a concentration of sports grounds. The use of space can be optimised to intensify and diversify the sport facilities and codes.

High Street Platform

In addition to the Sports precinct, the low-level and ad-hoc economic activity that occurs at the taxi drop off along MR518 (at the intersection of Maviyo Road) and land adjacent requires consolidation and spatial legibility to enable sustainable and coordinate growth. The space currently comprises a dedicated lane for taxi drop off/collection and informal business with accompanying infrastructure

along the road reserve. Properties behind these businesses have responded to this activity by developing business units along these edges.

A high street platform is proposed – whereby a designed infrastructure allows for the transport system to collect and drop off of commuters, cars to be washed, food prepared and served, spaces to wait and socialize, parking for businesses, micro-convenience businesses, and gateways to larger businesses at the rear properties and within the adjacent Metro-owned site. The intention would be to consolidate the emergent business and transport synergies into a designed infrastructure that is legible and enables economic growth and service offering to the township community. This would include signage, landscaping, lighting, lane-management, shelters, shops.

Opportunity: A business micro-node established within the Kwandengezi node.

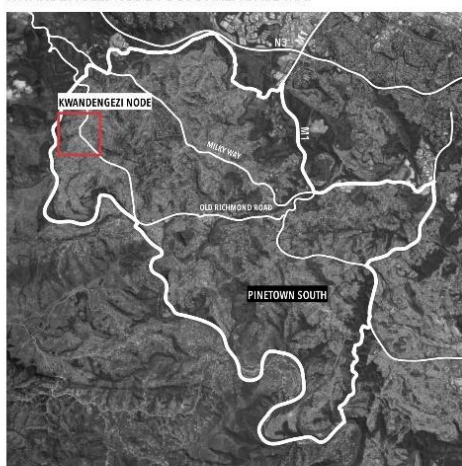
The following section includes a series of maps relating to this node. The table below provides a summary of the status quo for the KwaNdengezi Node, as indicated in the maps.

Table 3: Status Quo of the KwaNdengezi Node

| Connectivity/Transport | Socio-economic Function | Current Zoning | Digital | Stormwater, Water and Sanitation | Energy | Int Human Settlements | Trader Access to Infrastructure |
|---|--|--|--|--|--|---|--|
| Situated along the Old Richmond Road. Informal pedestrian routes to the node (along streets). Two taxi ranks within the node: one rank serves Durban CBD and Pinetown; one serves Chatsworth. | An important service node, which includes a police station, municipal office, and sporting facilities. The node includes a shopping mall, taxi rank, and informal businesses operating on municipal land and along the adjoining streets. Much informal land use along the Richmond Road corridor. | Predominantly community facilities with a large erf zoned for public open space. The southern erven in this node are zoned for commercial purposes. The surrounding properties are zoned residential. Four erven in this node - including the property zoned open space -are owned by the Metro. | There are no ADSL or Fibre internet lines or connections in this site. | The bulk water and sewer systems in and around this node appear well connected. There are some stormwater pipes in the site, but the stormwater system around the node appears uneven. | The electricity network extends into this site and the properties in the node are connected to the grid. There is public street lighting on all the streets in and around this node. | See Housing as Social Asset in the housing section below. | Predominantly informal or no water access. Some formal electricity access, but predominantly informal or no access. Businesses on municipal land have no direct road access. |



KWANDENGEZI NODE FOCUS AREA BASE MAP



LOCATION KEY

KEY

KwaNdengezi Node

1. Extents

- Node
- High Street
- High Street Extension
- Commercial Activity

8. Connectivity

- Development Corridors
- Arterial Roads

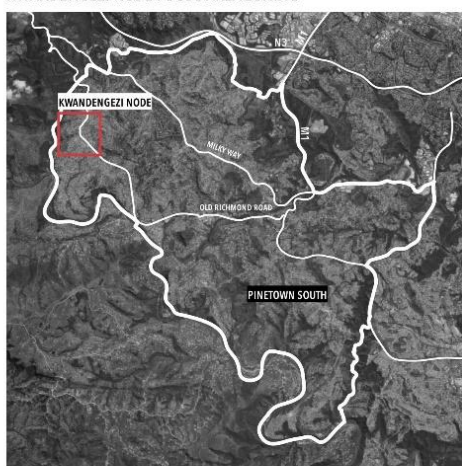
ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | KWANDENGEZI NODE | BASE MAP

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Map 16: KwaNdengezi Node



KWANDENGEZI NODE FOCUS AREA ZONING



LOCATION KEY

KEY

KwaNdengezi Node

1. Extents

Node

8. Connectivity

Development Corridors
Arterial Roads

2. Land Administration

2.3 Zoning

PS_LU_Former_R293

COMMERCIAL
COMMUNITY FACILITY
EDUCATION
PUBLIC OPEN SPACE
RESIDENTIAL
WORSHIP

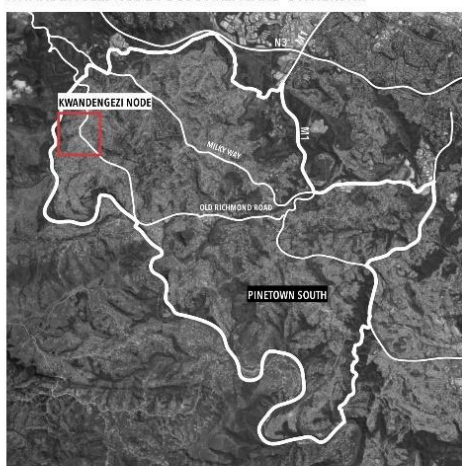
ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | KWANDENGEZI NODE | ZONING

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Map 17: Zoning, KwaNdengezi



KWANDENGEZI NODE FOCUS AREA LAND OWNERSHIP



LOCATION KEY

KEY

KwaNdengezi Node

1. Extents

— Node

2. Land Administration

2.2 Land Ownership

PS_LU_Municipal_Owned_Land

PS_LU_Traditional_Authorities

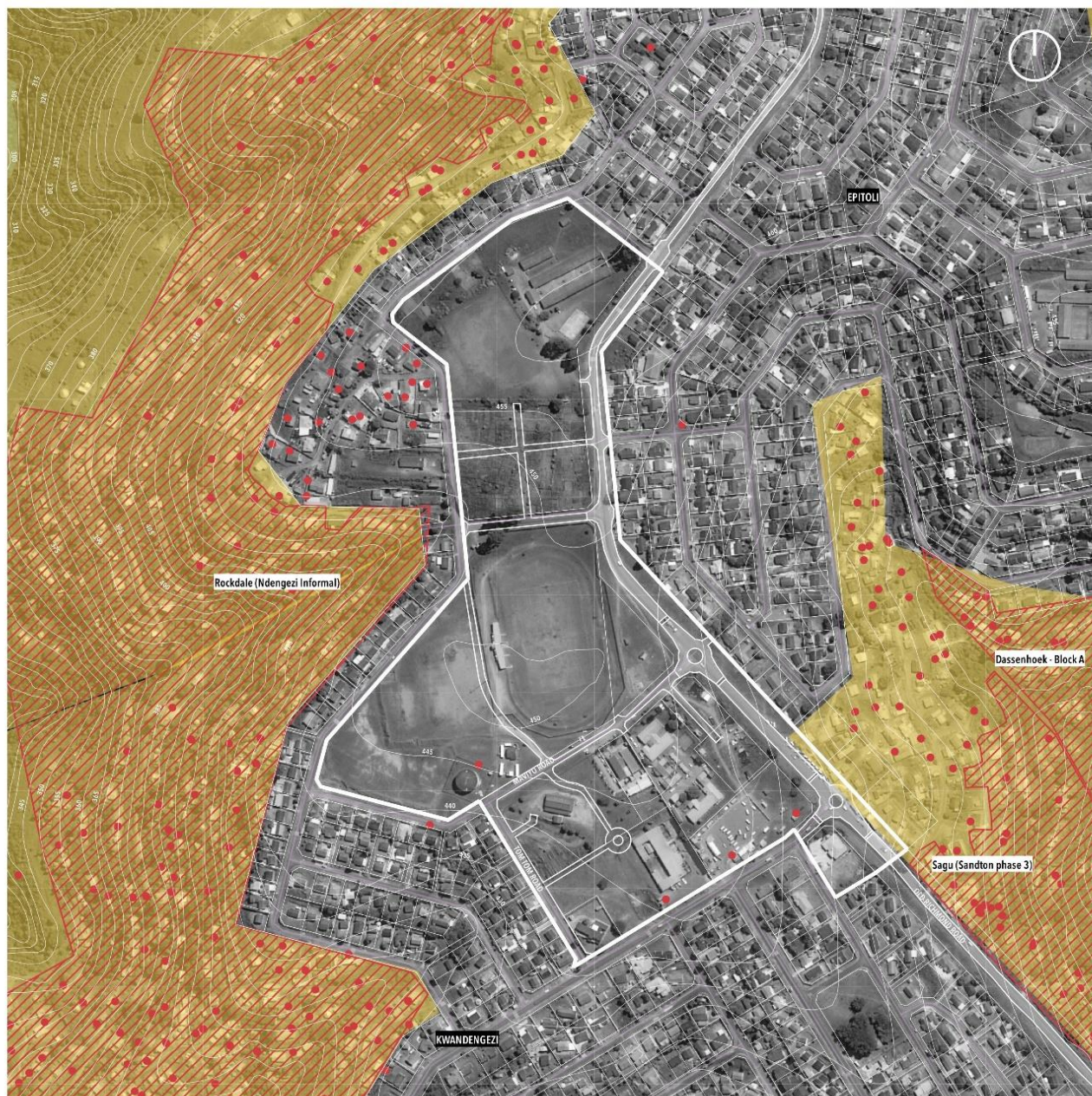
8. Connectivity

— Development Corridors

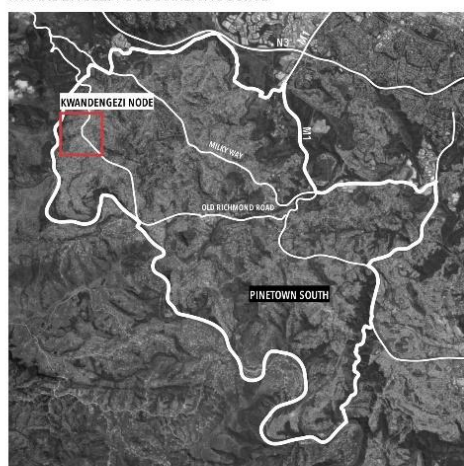
— Arterial Roads

ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | KWANDENGEZI NODE | LAND OWNERSHIP

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KWANDENGEZI FOCUS AREA HOUSING



LOCATION KEY

KEY

KwaNdengezi Node

1. Extents

— Node

3. Infrastructure

3.6 Housing

- PS_HS_Informal_Units
- ▨ PS_HS_Informal_Settlement_Programme
- PS_HS_Housing_Plan
- PS_HS_CSG_SERVITUDE_LINE
- PS_HS_Flood_Plain_100yr

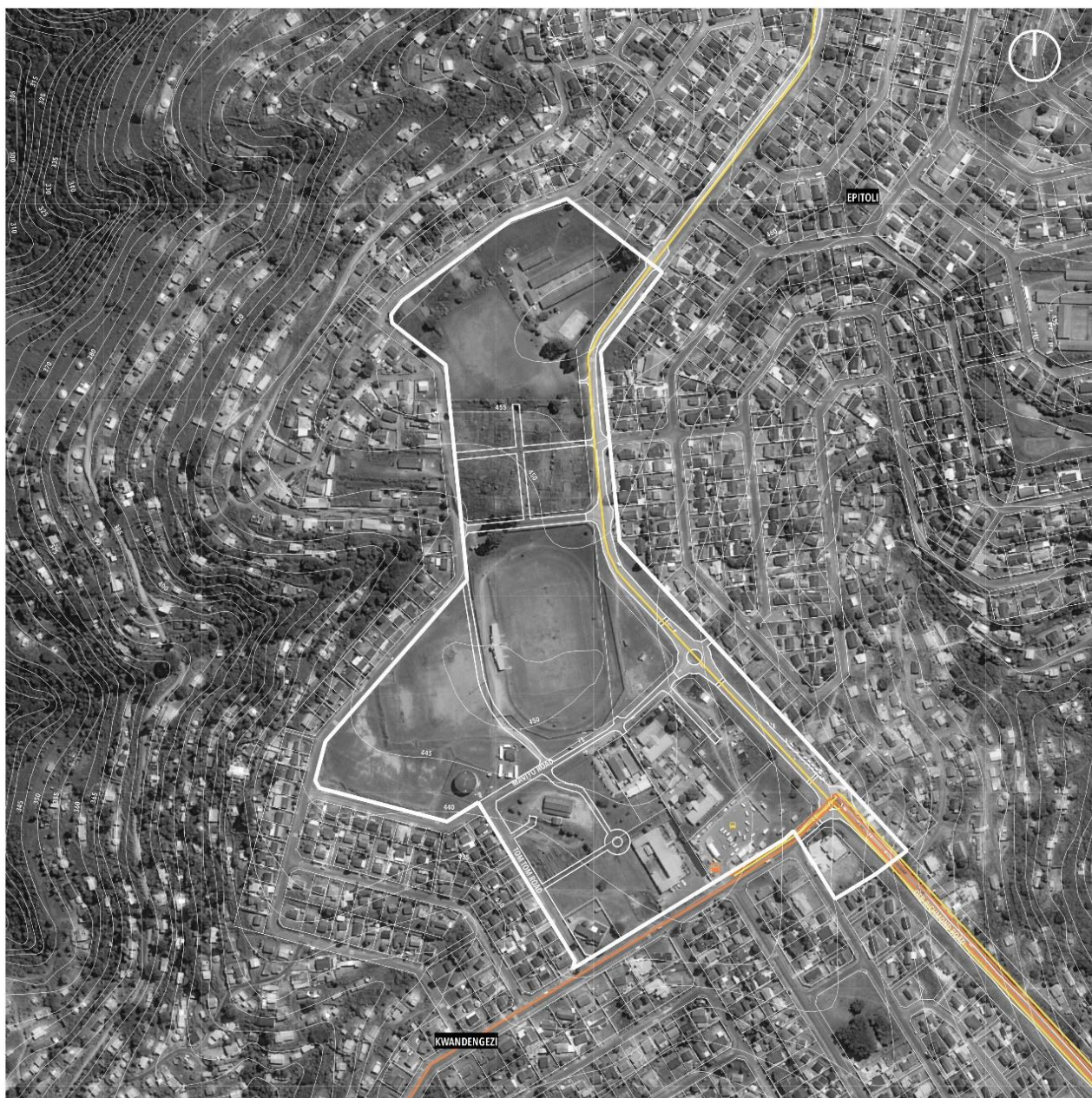
8. Connectivity

- Development Corridors
- Arterial Roads

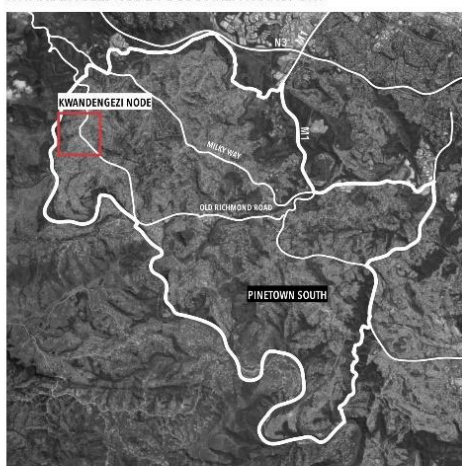
ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | KWANDENGEZI NODE | HOUSING

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Map 19: Housing, KwaNdengezi



KWANDEGEZI NODE FOCUS AREA TRANSPORT



LOCATION KEY

KEY

KwaNdengezi Node

1. Extents

Node

8. Connectivity

Development Corridors
Arterial Roads

3. Infrastructure

3.1 Transport

PS_TPT_Public_Transport_Facilities_2012

Bus Terminal

Taxi Rank

PS_TPT_Bus_Taxi_Ranks

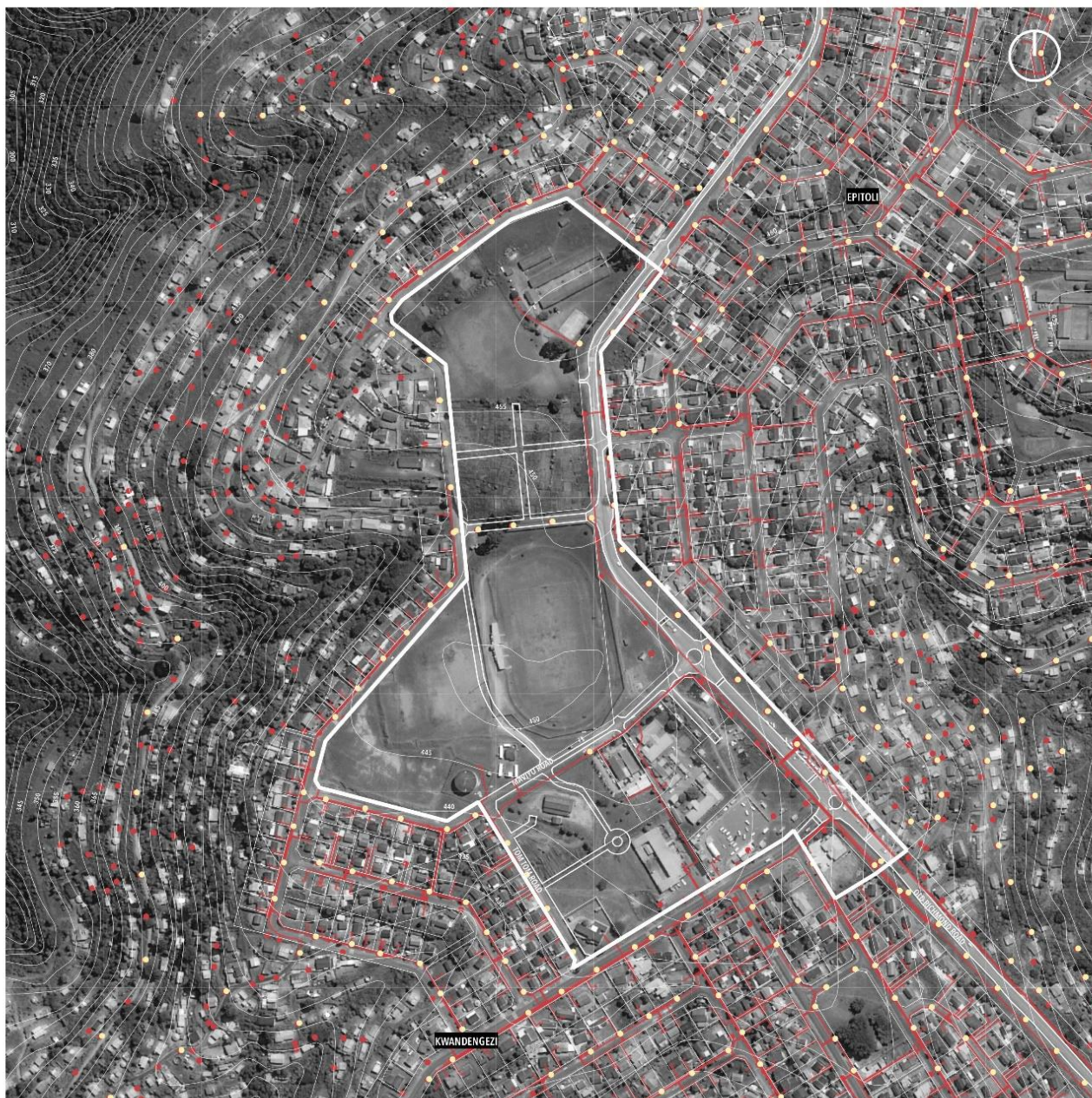
PS_TPT_CPTR2012_82_Routes_Final

PS_TPT_Public_Transport_Routes_2012

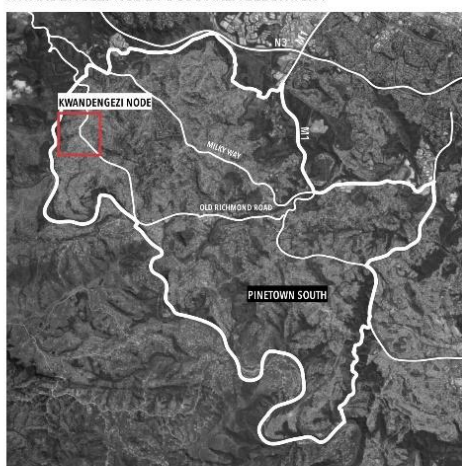
ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | KWANDEGEZI NODE | TRANSPORT

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Map 20: Transport, KwaNdengezi



KWANDENGEZI NODE FOCUS AREA ELECTRICITY



LOCATION KEY

KEY

KwaNdengezi Node

1. Extents

Node

8. Connectivity

Development Corridors
Arterial Roads

3. Infrastructure

3.3 Electricity

PS_EL_Lighting

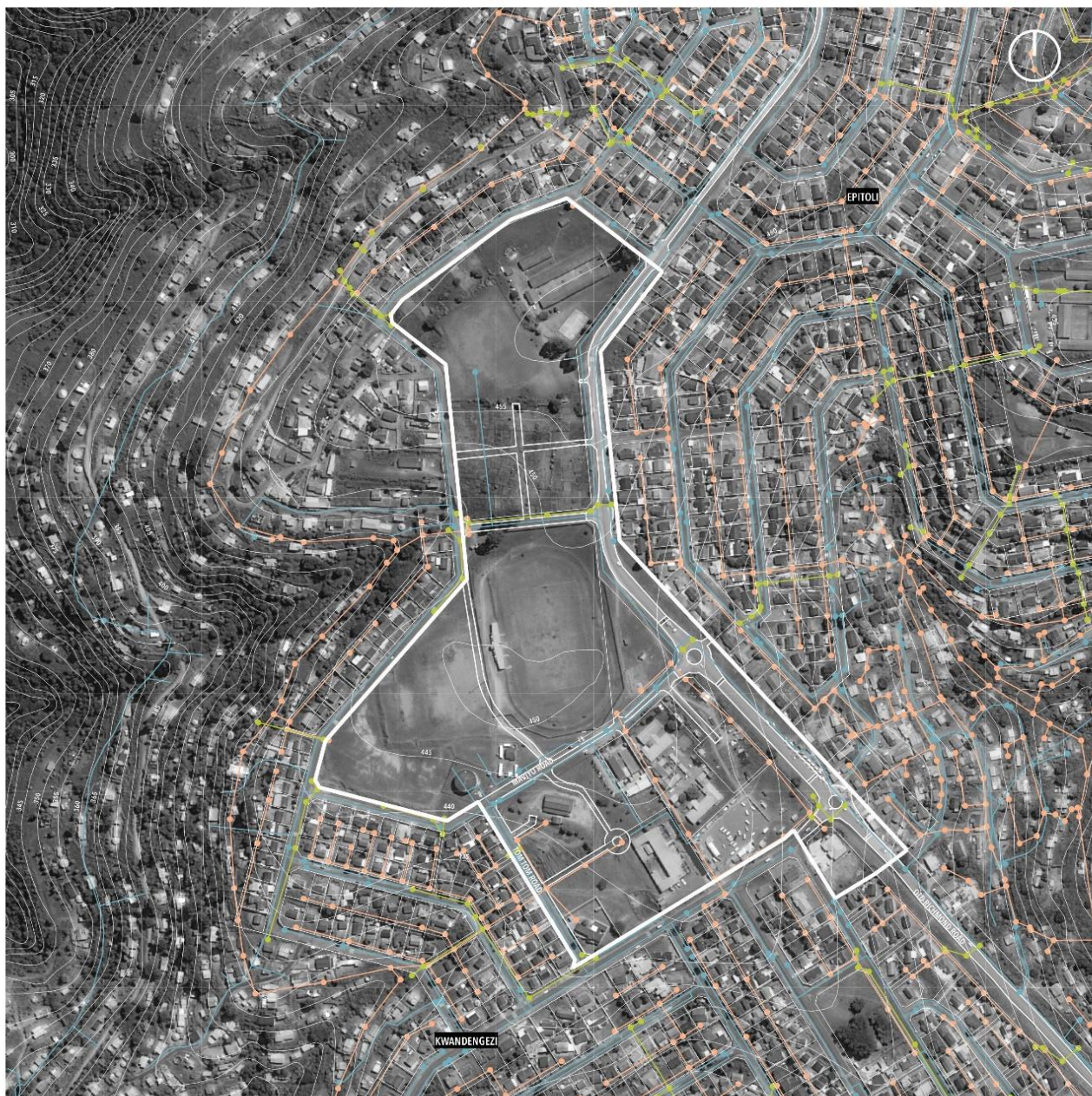
PS_EL_Pole

PS_EL_Underground Electricity Cable

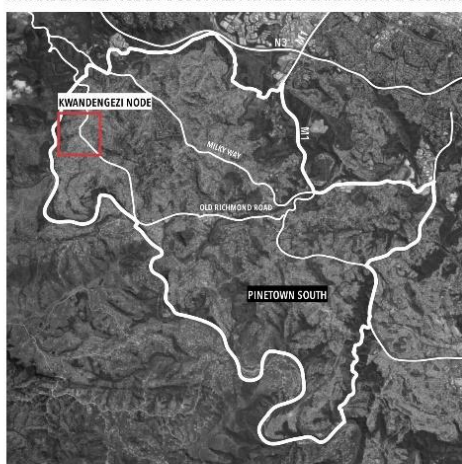
ETHEKEWINI MUNICIPALITY | PINETOWN SOUTH | KWANDENGEZI NODE | ELECTRICITY

Cities Support Program | Sustainable Livelihoods Foundation | Township Economic Development Project | Situational Analysis Report | 16.02.2021

Map 21: Electricity, KwaNdengezi



KWA NDENGEZI NODE FOCUS AREA WATER & SANITATION & STORMWATER



LOCATION KEY

KEY

KwaNdengezi Node

1. Extents

Node

8. Connectivity

Development Corridors
Arterial Roads

3. Infrastructure

3.4 Water & Sanitation & Stormwater

PS_WS_StormwaterManholes
PS_WS_StormwaterPipes
PS_WS_Sewer_Manholes
PS_WS_Sewer_Pipes
PS_WS_WaterFittings
PS_WS_Watermains

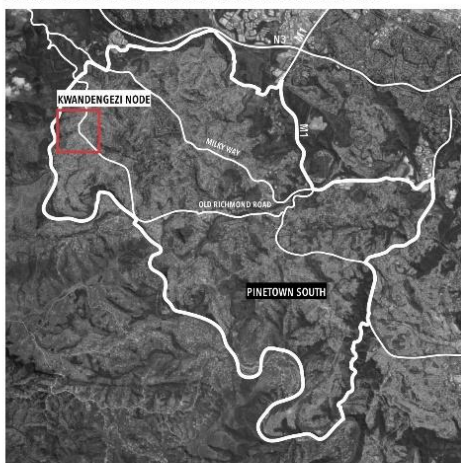
EtheKwini Municipality | Pinetown South | KwaNdengezi Node | Water & Sanitation & Stormwater

Cities Support Program | Sustainable Livelihoods Foundation | Township Economic Development Project | Situational Analysis Report | 16.02.2021

Map 22: Water, Sanitation and Stormwater, KwaNdengezi



KWANDENGEZI FOCUS AREA DEVELOPMENT PROPOSALS



LOCATION KEY

KEY

KwaNdengezi Node

1. Extents

Node

5. Development Proposals

5.1 Existing Proposals

- Proposed interventions
- Proposed Bus Stop
- Proposed BRT

8. Connectivity

- Development Corridors
- Arterial Roads

EtheKwini Municipality | Pinetown South | KwaNdengezi Node | Development Proposals

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Map 23: Development Proposals, KwaNdengezi

11.3. Nagina Node

The Nagina Node has extraordinary potential for increased economic development. It is currently a vibrant consolation of businesses (corporates, SMEs and micro-enterprises), including the Mamdekazi Shopping Centre, with room for the amplification of economic and social amenities. It is very well connected and accessed via the Old Richmond Road corridor, albeit via vehicular transport (public and private). The emergent nature of the business and uses means that there is a disconnect between the use of space and the design of the area. While vibrant and busy, there are underperforming land parcels in proximity to the site, thus allowing for increased opportunity to be consolidated and reinforced. The economic activity is concentrated on a Chestnut Crescent, which is parallel to the mobility corridor, the built infrastructure is also oriented towards this street.

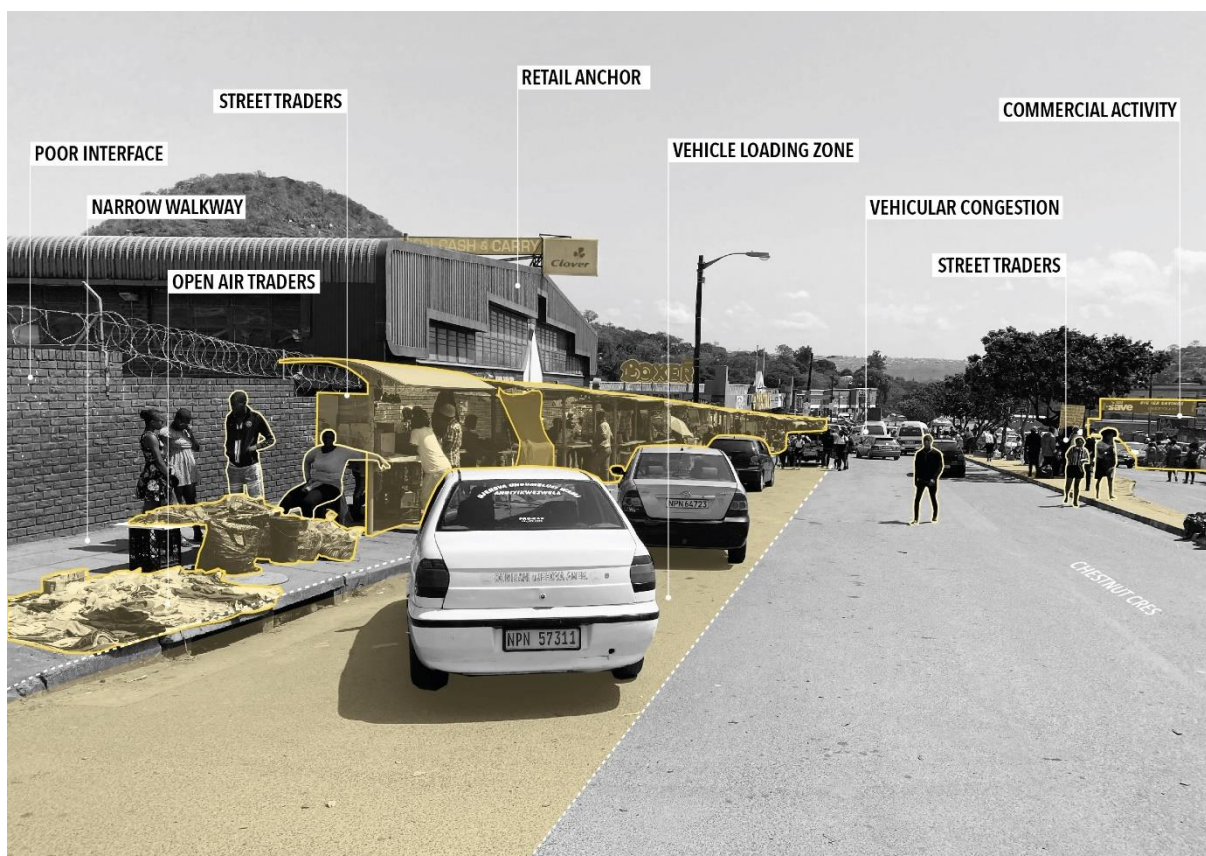


Figure 30: Nagina node is a busy commercial precinct with intense pressure on limited infrastructure provisions - such as streets, trading spaces, parking and sidewalks. The economic opportunity is compromised and limited due to poor infrastructure design around the public environment.

The central street (Chestnut Crescent) at Nagina Node plays a critical role in enabling the performance / enterprise use of this space. It is a wide road with centre island and sufficient layby to allow for traffic and parking/loading on the street. The sidewalks, while congested, accommodate smaller trading

outlets. The node does not have an active relationship to properties and spaces beyond the central street. There are opportunities to re-image and re-design the precinct, responding to current patterns as well as the desired vision for more inclusive economic development.

Chestnut Crescent is central to the restructuring and functioning of the area. The properties to the south are large wholesale retail outlets attracting a concentration of consumer and related logistics services. It is recommended that this street be restructured to allow for:

1. One-way traffic flow from east – to west (entering from 217716 Street).
2. Widening the pedestrian walkway to the south and introducing a large covered street market with lighting, signage and landscaping. This would create a safe pedestrian space for trading, walking, waiting, socialising. This diversity of fixed and mobile vendors will allow for greater economic inclusion.
3. Managed lanes to allow for logistics transport services and taxis that do not conflict with pedestrian movement.
4. This area along Chestnut Crescent requires a strong and clear urban management. It has a clear and defined set of stakeholders that would enable the rapid realisation of an urban management plan.

In addition to Chestnut Crescent rehabilitation the following interventions are suggested:

1. Old Richmond Road – Chestnut Crescent Link. This is a pedestrian link via the existing Shell service station. It is an important north-south connector and can bring increased economic activity to the precinct. It channels pedestrian and public transport commuters from Old Richmond Road into the precinct. Private property owners would be encouraged to leverage off this link through the activation of business infrastructure along this edge. A rehabilitation and design of the linkages along Old Richmond Road would allow for a clear 'port' to the node and connect amenities.
2. Municipal meat market. The existing chicken market (built, though not operational at time of writing) is to be amplified to use all of the municipal land, allowing for space and facilities for meat preparation and consumption of food. A meat market could become a place to purchase and consume food in a hygienic and vibrant space.
3. Municipal market hub (bee-hive) upgrade. A small but dense retail facility is proposed at the existing container yard (bee-hive) to the west of the precinct. This facility and its program will allow for the migration of business from survivalist to thriving entrepreneurs.

- Public Art. It is also recommended that a public art and creative output program is coupled with the nodal development. This would engage local creative practitioners to enhance the precinct and lend a particular creative and brand identity. Outputs could include sculpture, installations, mosaic, murals as well as ephemeral or soft programs like performance.



Figure 31: The intensity of street trading is both a indicator of trading density as well as poor resource allocation and provision. the sidewalks and trading spaces require better design to allow for a more effective means to walk, trade and consume.

The TAT set up a poll on the Pinetown South Virtual Imbizo, to gauge residents' development priorities for this node. The response to this Facebook post was noteworthy. The post received 66 likes, 50 comments and 7 shares (see figure 2a). This is the most engagement the page has received to date. People expressed that more shops were needed in the area. The comments on the need for more shops was perhaps to highlight the need for greater diversity in the types of retail shops that exist in the area. Other comments were on the need for waste management, infrastructure upgrading and the need for sanitation services. One suggestion related to the need for a welcome sign that symbolises the history of the place. Seventeen responses were recorded in the poll. The most voted suggestion for making Nagina Shopping Area better was having a *one-way road through the area with better pavements, stands and services for traders*, followed by *better space for taxis*. Eleven people provided additional suggestions

such as public toilets for vendors including the general public, fixing of roads and cleaning up the area (waste management).

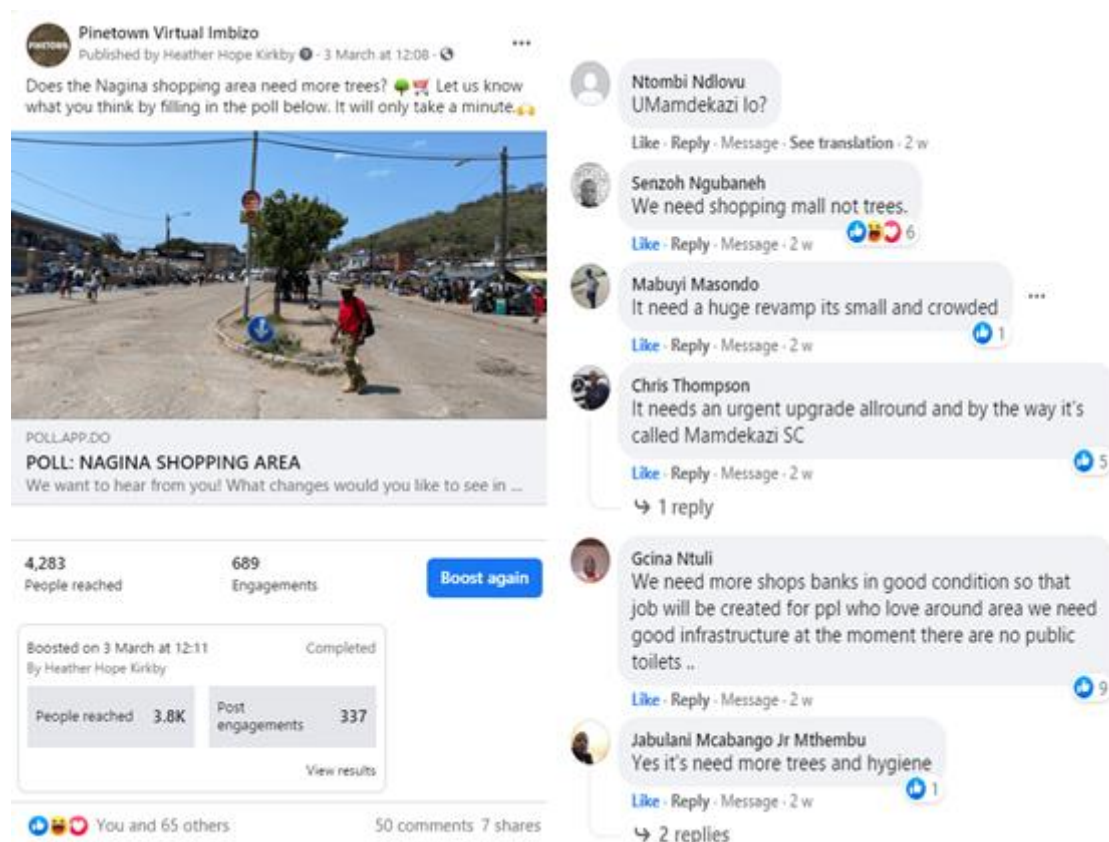


Figure 32: Extracts from the Mamdekazi Shopping Centre Poll on the Pinetown Virtual Imbizo

Opportunity: Street traders in the Nagina node operate with tenure security and have improved facilities.

Opportunity: Shopping malls foster and enable opportunities for micro-enterprises.

Opportunity: Revenue collection from rates improved.

Opportunity: Informal land use prevented along high-street and floodplains.

Opportunity: An economic strategy to revitalise the Nagina node developed and implemented.

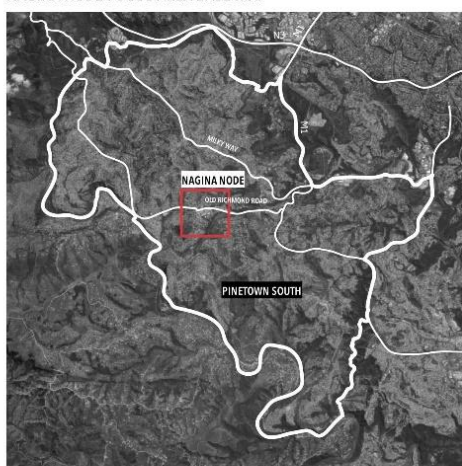
The following section includes a series of maps relating to this node. The table below provides a summary of the status quo for the Nagina Node, as indicated in the maps and development planning reports. In instances where the GIS data is not available or has not been provided, the table specifies the gaps.

Table 4: Status Quo of the Nagina Node

| Connectivity/Transport | Socio-economic Function | Current Zoning | Digital | Stormwater, Water and Sanitation | Energy | Int Human Settlements | Trader Access to Infrastructure |
|---|---|---|--|---|--|------------------------------------|---|
| Situated along the Old Richmond Road. Informal pedestrian routes to the node, including a route across the Situndu stream. Informal sedan taxi rank and services. Formal taxi rank and services. Bakkies for hires operate from the node. | An emerging township CBD, dominated by SME retail and corporate retail on either side of the service lane. Metro has established street trader bays. In a sub-precinct, a trader bee-hive of shipping containers has been established. The Metro has recently established a facility for street traders to store and trade live poultry. Much informal land use along the Richmond Road corridor. | The Properties in the Nagina/Mamdekazi shopping centre are zoned for commercial purposes. There are some properties around the commercial hub that are zoned for administration/education/worship. The Situndu stream runs adjacent to the site through land that is zoned for public open space. | There are no ADSL or Fibre internet lines or connections in this site. | The bulk water and sewer systems in and around this node appear well connected. Stormwater pipes are available in this node, although the stormwater system around the node does not appear to be well-connected. | The electricity network extends into this site and the properties in the node are connected to the grid. There is public street lighting on all the streets in and around this node. | See Housing as Social Asset below. | Apart from the bee-hive, most traders have no access to water. Some formal electricity access, but predominantly informal or no access. |



NAGINA NODE FOCUS AREA BASE MAP



LOCATION KEY

KEY

Nagina Node

1. Extents

- Node
- Commercial Activity
- Street Commercial Activity
- High Street
- High Street Extension

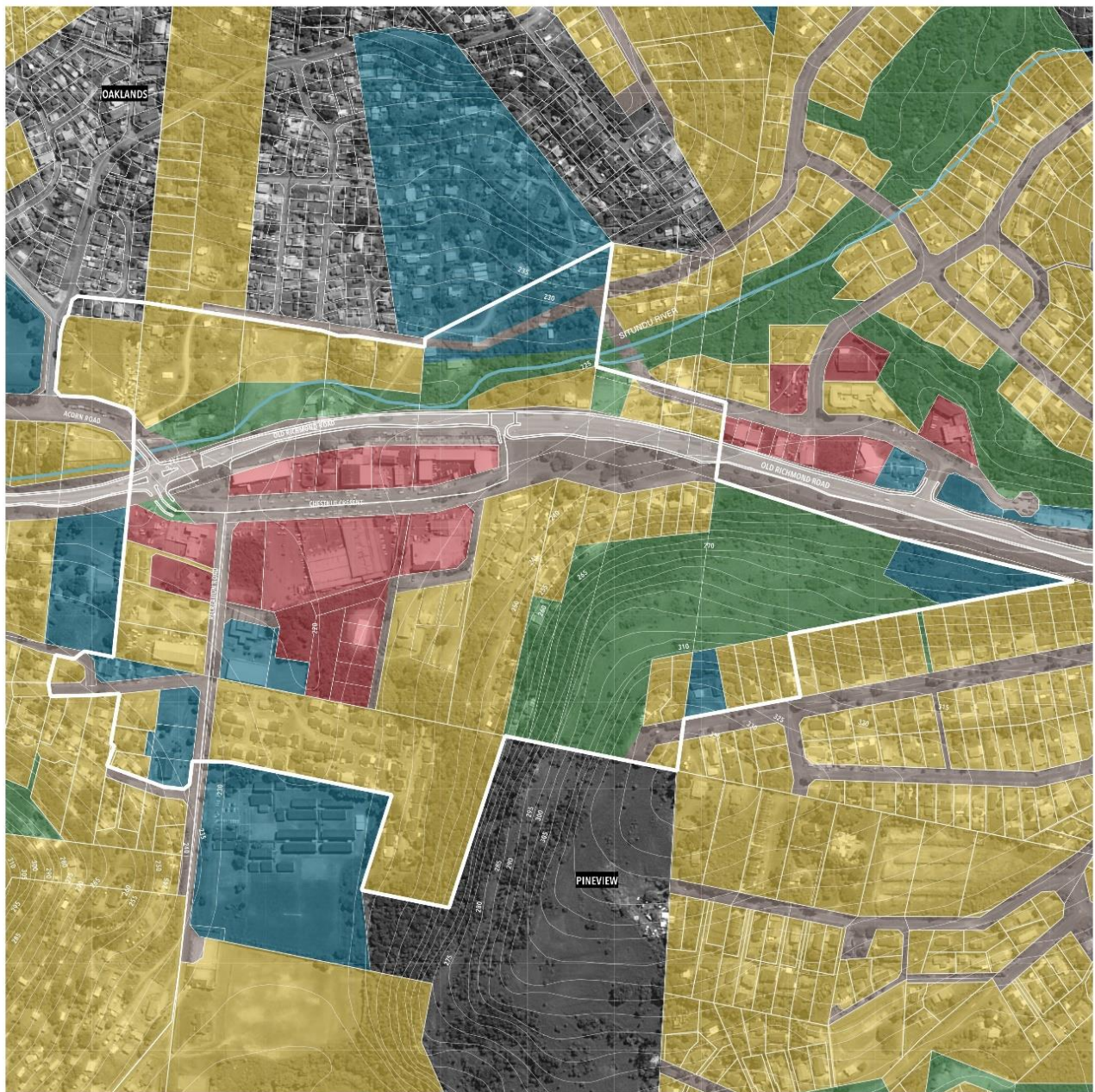
8. Connectivity

- Development Corridor
- Arterial Road

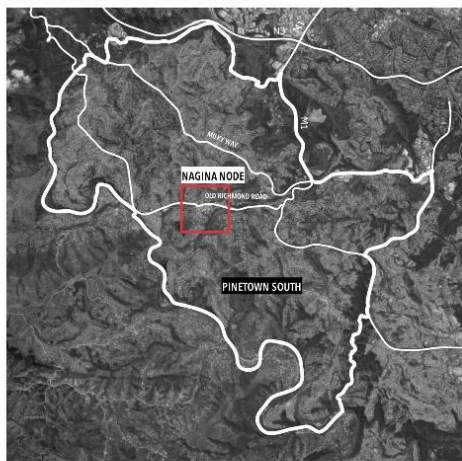
ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | NAGINA NODE | BASE MAP

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Map 24: Nagina Node



NAGINA NODE FOCUS AREA ZONING



LOCATION KEY

KEY

Nagina Node

1. Extents

— Node

8. Connectivity

— Development Corridor
— PNT_NAG_Arterial Road

2. Land Administration

2.3 Zoning

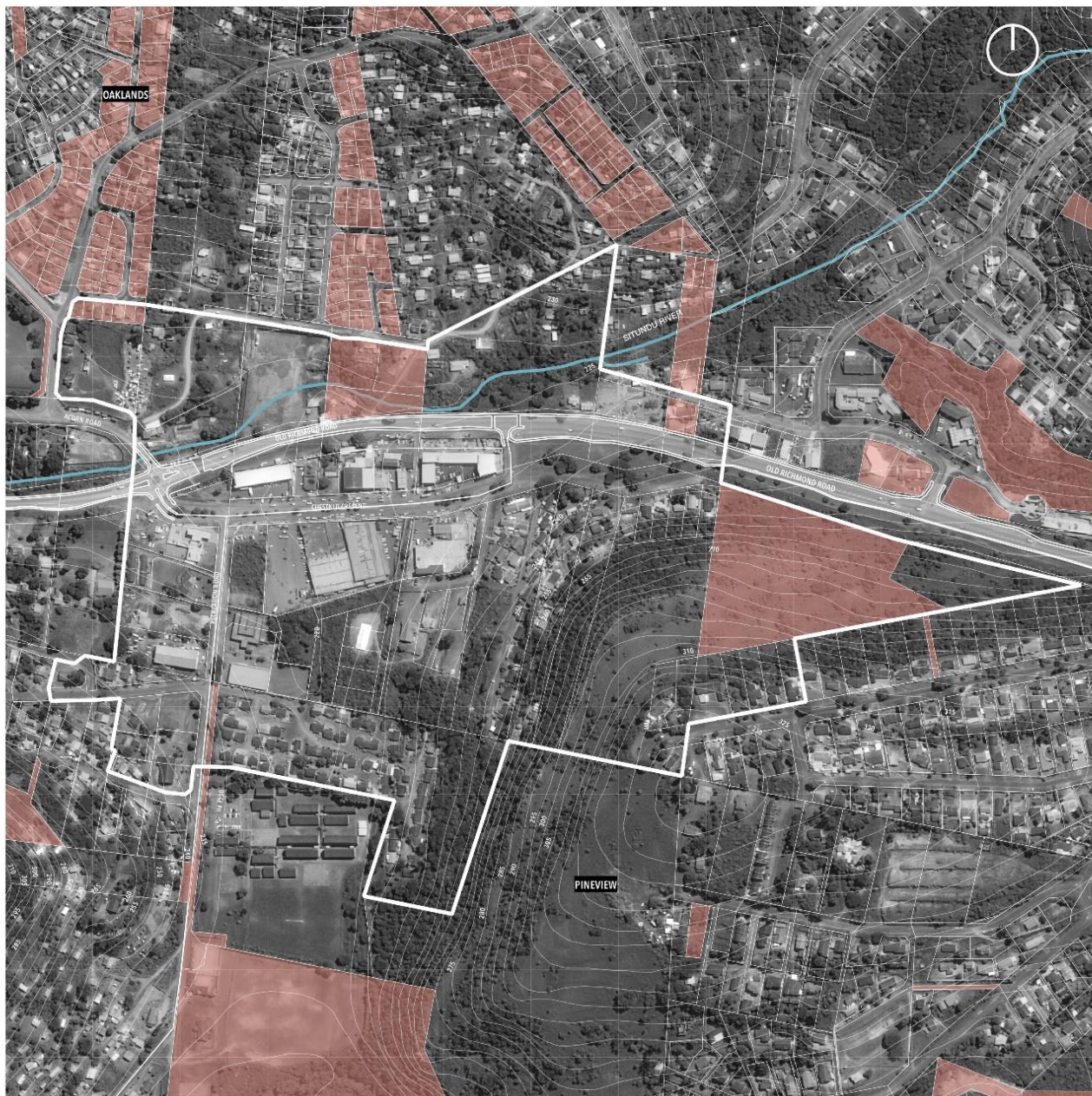
PS_LU_Inner_West_Zoning

- Fuelling and Service Station
- General Commercial
- Limited Commercial
- Public Open Space
- General Residential 1
- General Residential 2
- General Residential 3
- General Residential 4
- Special Residential 1
- Worship
- Administration
- Education
- Service Industry
- Road Reserve

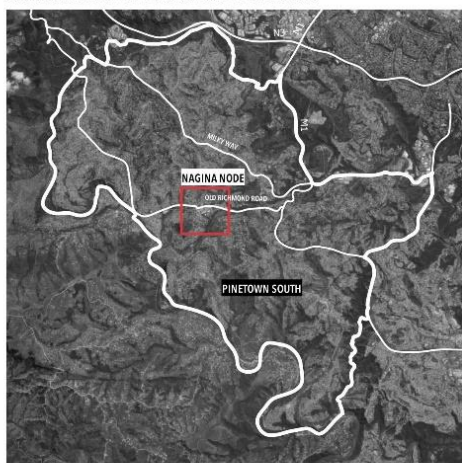
ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | NAGINA NODE | ZONING

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Map 26: Zoning, Nagina Node



NAGINA NODE FOCUS AREA LAND OWNERSHIP



LOCATION KEY

KEY

Nagina Node

1. Extents

— Node

2. Land Administration

2.2 Land Ownership

■ Municipal_Owned_Land

8. Connectivity

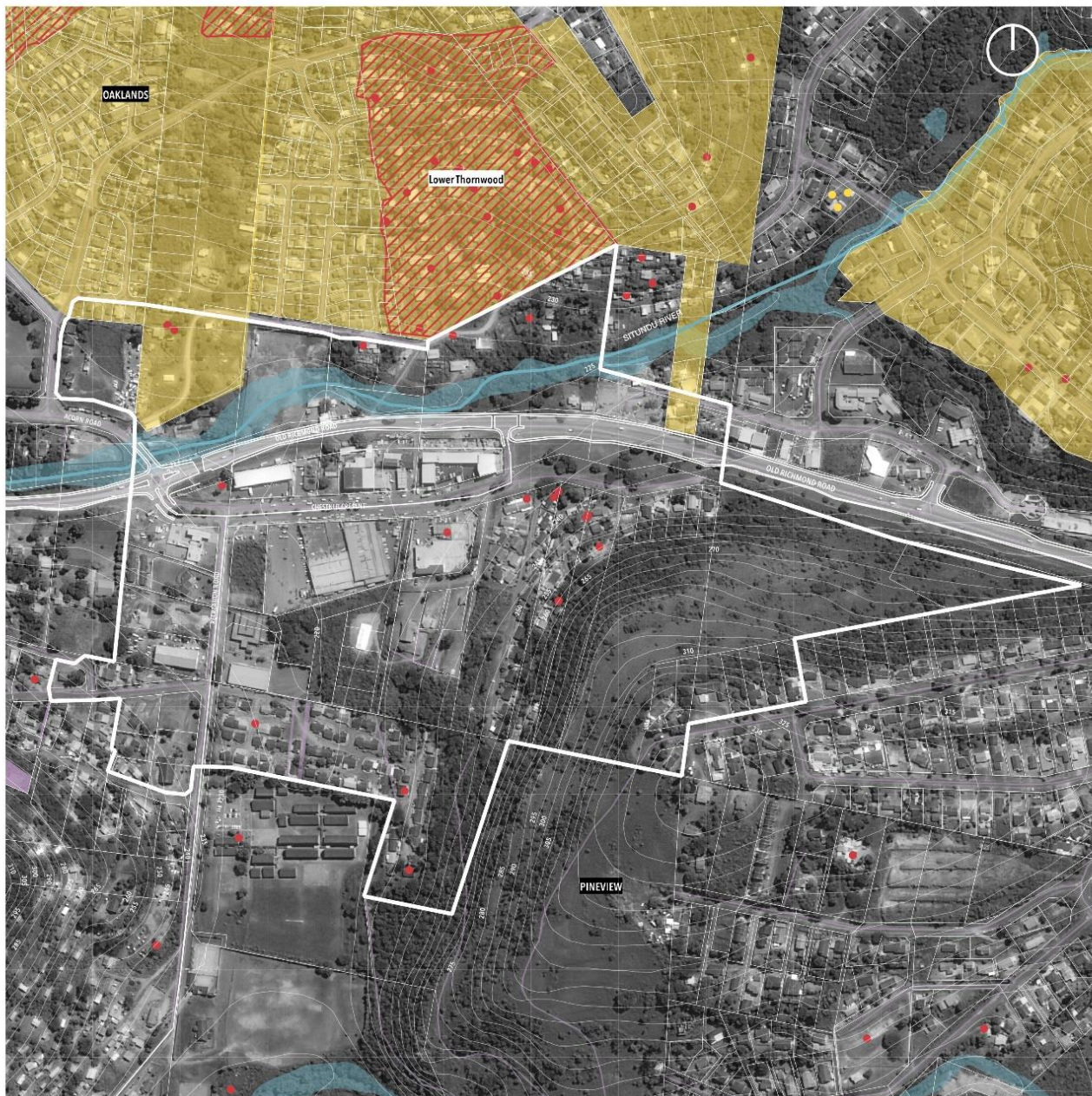
■ Development Corridor

— Arterial Road

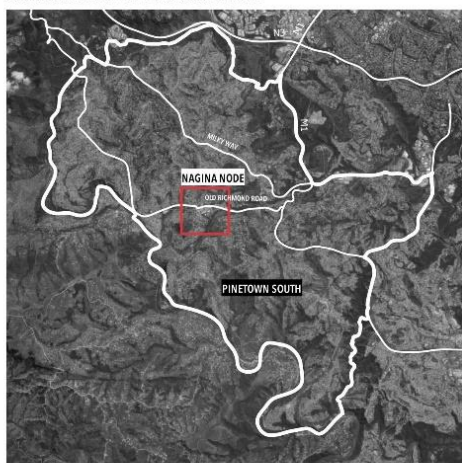
ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | NAGINA NODE | LAND OWNERSHIP

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Map 27: Land Ownership, Nagina Node



NAGINA NODE FOCUS AREA HOUSING



LOCATION KEY

KEY

Nagina Node

1. Extents

— Node

3. Infrastructure

3.6 Housing

● PS_HS_Formal_Units

● PS_HS_Informal_Units

▨ PS_HS_Informal_Settlement_Programme

▨ PS_HS_Housing_Plan

— PS_HS_CSG_SERVITUDE_LINE

▨ PS_HS_CSG_SERVITUDE_AREA

▨ PS_HS_Flood_Plain_100yr

8. Connectivity

▨ Development Corridor

— PNT_NAG_Arterial Road

▨ River

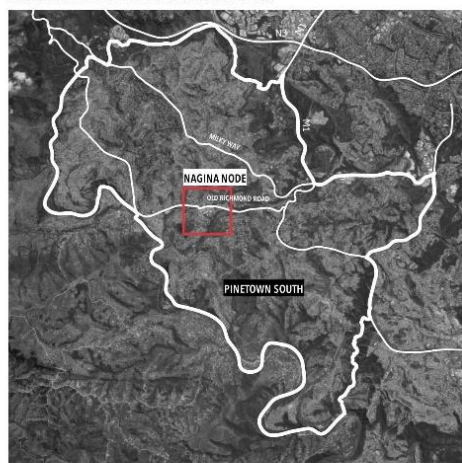
ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | NAGINA NODE | HOUSING

Cities Support Program | Sustainable Livelihoods Foundation | Township Economic Development Project | Situational Analysis Report | 16.02.2021

Map 28: Housing, Nagina Node



NAGINA NODE FOCUS AREA TRANSPORT



LOCATION KEY

KEY

Nagina Node

1. Extents

Node

3. Infrastructure

3.1 Transport

PS_TPT_CPTR2012_82_Routes_Final

PS_TPT_Public_Transport_Routes_2012

8. Connectivity

Development Corridor

Arterial Road

Bus/Taxi Lay Bye

Informal Taxi Holding Area

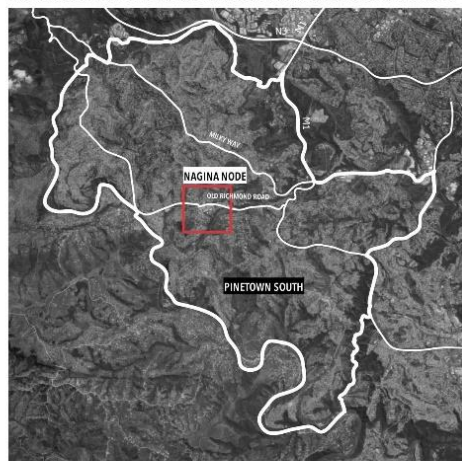
ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | NAGINA NODE | TRANSPORT

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Map 29: Transport Facilities and Routes, Nagina Node



NAGINA NODE FOCUS AREA WATER & SANITATION & STORMWATER



LOCATION KEY

KEY

Nagina Node

1. Extents

— Node

3. Infrastructure

3.4 Water & Sanitation

● PS_WS_StormwaterManholes

— PS_WS_StormwaterPipes

— PS_WS_Culverts

● PS_WS_Sewer_Manholes

— PS_WS_Sewer_Pipes

● PS_WS_WaterFittings

— PS_WS_Watermains

8. Connectivity

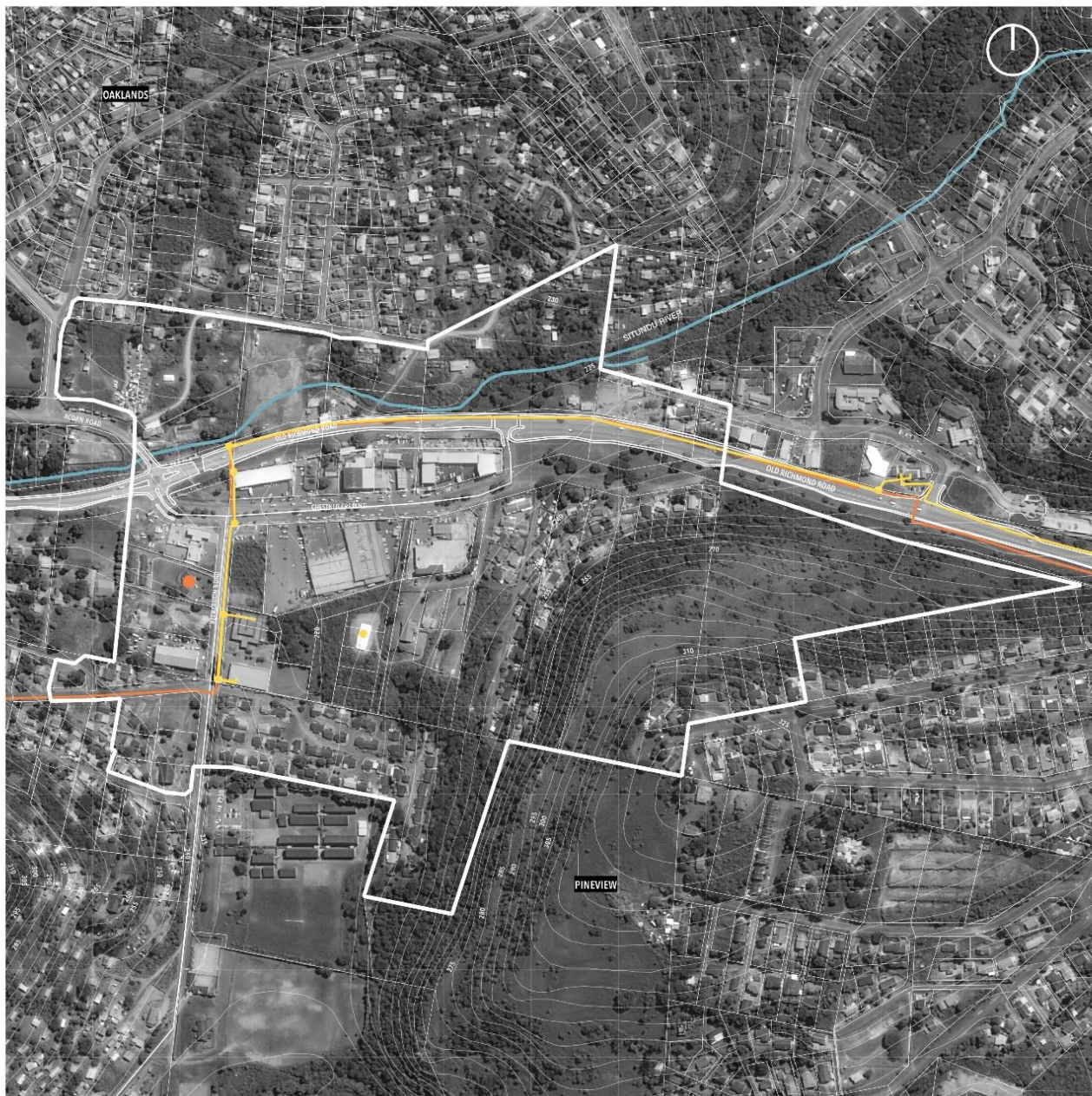
— Development Corridor

— PNT_NAG_Arterial Road

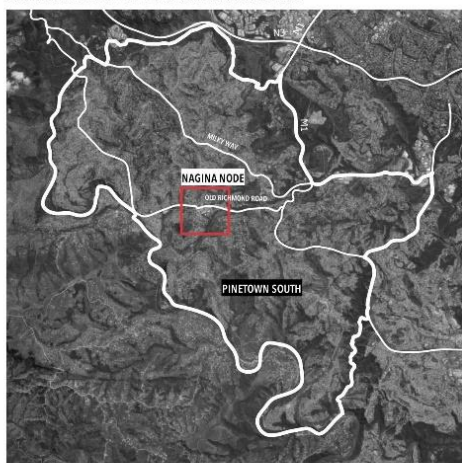
ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | NAGINA NODE | WATER & SANITATION & STORMWATER

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Map 30: Water, Sanitation and Stormwater Infrastructure, Nagina Node



NAGINA NODE FOCUS AREA TECH NETWORK



LOCATION KEY

KEY

Nagina Node

1. Extents

— Node

3. Infrastructure

3.5 Public & Social Infrastructure

● Libraries

3.7 Tech Network

● PS_ICT_MetroConnectManholes

— PS_ICT_MetroConnectFibre

— PS_ICT_LinkAfricaFibre

8. Connectivity

— Development Corridor

— PNT_NAG_Arterial Road

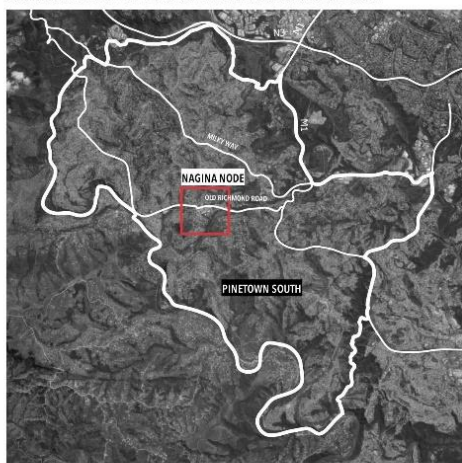
ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | NAGINA NODE | TECH NETWORK

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Map 31: ICT Network, Pinetown South



NAGINA NODE FOCUS AREA DEVELOPMENT PROPOSALS



LOCATION KEY

KEY

Nagina Node

1. Extents

Node

5. Development Proposals

5.1 Existing Proposals

Tshelimnyama Pedestrian Bridge

PNT_NAG_BRT

Road Infrastructure upgrade

Proposed Rezoning

8. Connectivity

Development Corridor

polylines

PNT_NAG_Arterial Road

River

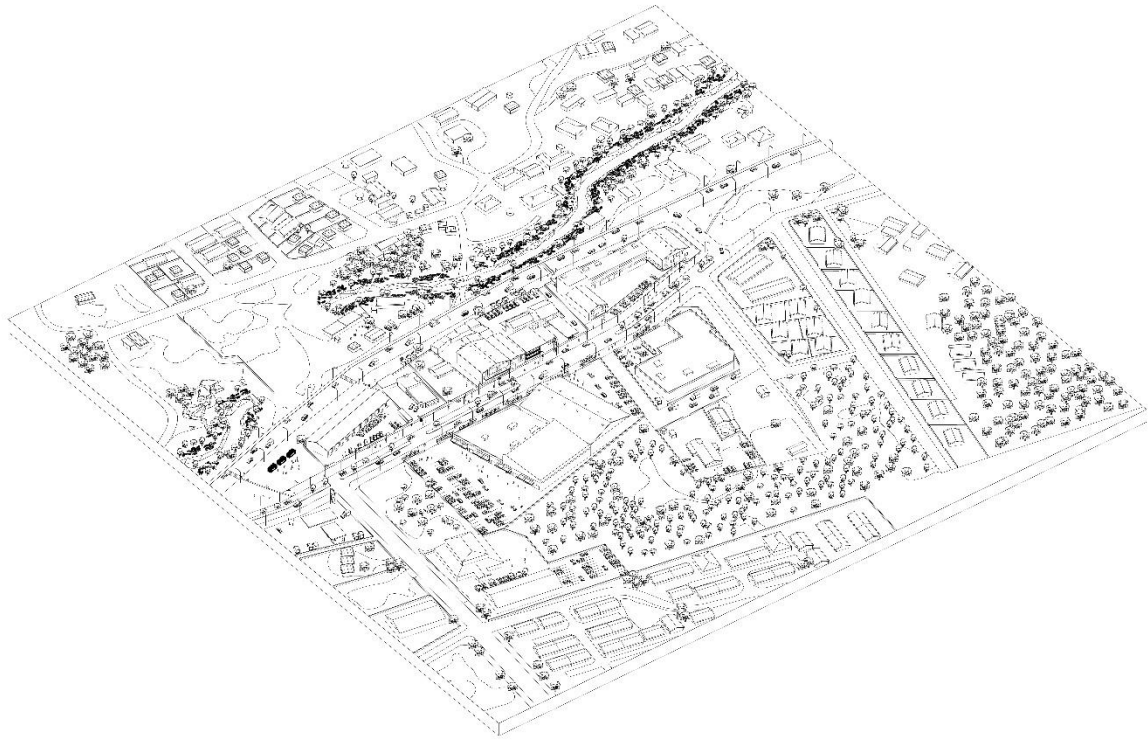
ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | NAGINA NODE | DEVELOPMENT PROPOSALS

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Map 32: Development Proposals, Nagina Node



Map 33: Nagina Precinct Concept



Map 34: 3D Model of the Nagina Precinct

11.4. Mpola Taxi Rank Node

The Mpola Taxi Rank is located along a key arterial (Milky Way) of the township and provides a central point of mobility and connectivity infrastructure. The Node comprises a busy taxi rank, related formal and informal businesses, a general dealer, a (under-performing) community hall and functioning library. The assets are poorly connected to the node. Furthermore, the current spatial configuration does not allow for coordinated growth or easy management in the node.

The following suggestions are contemplated for the node:

1. Urban management plan and the clear demarcation of a precinct. The stakeholders would need to be clearly defined and engaged in the process of the transformation of the node. A stakeholder and management plan will create a secure institutional space for increased private investment – especially through the adjacent underperforming land parcels.
2. Improved taxi terminus. Design of a taxi terminus that includes clear traffic management, signage, shelter, offices, trading spaces, ablutions, waiting areas, WiFi, lighting and landscaping. A redeveloped facility should aim for better operation and consolidation of economic investment within the rank.
3. Crime Prevention through Environmental Design. The poor design and lack of management creates vague territories for appropriation and power dynamics to establish themselves. This enhances the propensity for power struggles and violence.. Designs needs to consider the necessity to create a safe space for commuters. This can be achieved through clear demarcation of territory, a management plan, sight lines, business interdependencies. Through a safe and well-managed space, more established and secure business can develop and bring increased investment to the node.
4. Public environment upgrade. The sidewalks and connections across streets at the node need to be designed to allow for better connectivity and safe walking for commuters/pedestrians and economic opportunity for micro-enterprises. This would involve a general public environment upgrade that would include the design and implementation of sidewalk, lighting, signage (directional and advertising) and landscaping (hard and soft).
5. Public Art. It is also recommended that a public art and creative output program is coupled with the node development. This would engage local creative practitioners to enhance the precinct and lend a particular creative and brand identity. Outputs could include sculpture, installations, mosaic, murals as well as ephemeral or soft programs like performance.
6. NMT and road linkage/by-pass. Linkages east-west along Milky Way and southwards towards Thornwood and Nagina are to be emphasised. The link to Thornwood and eventually to Nagina

is significant to connect two economic and mobility nodes. A link via pedestrian short-cuts, on secure NMT routes, scooters and a dedicated shuttle would dramatically reinforce the Mpola Node as part of a larger system of nodes.

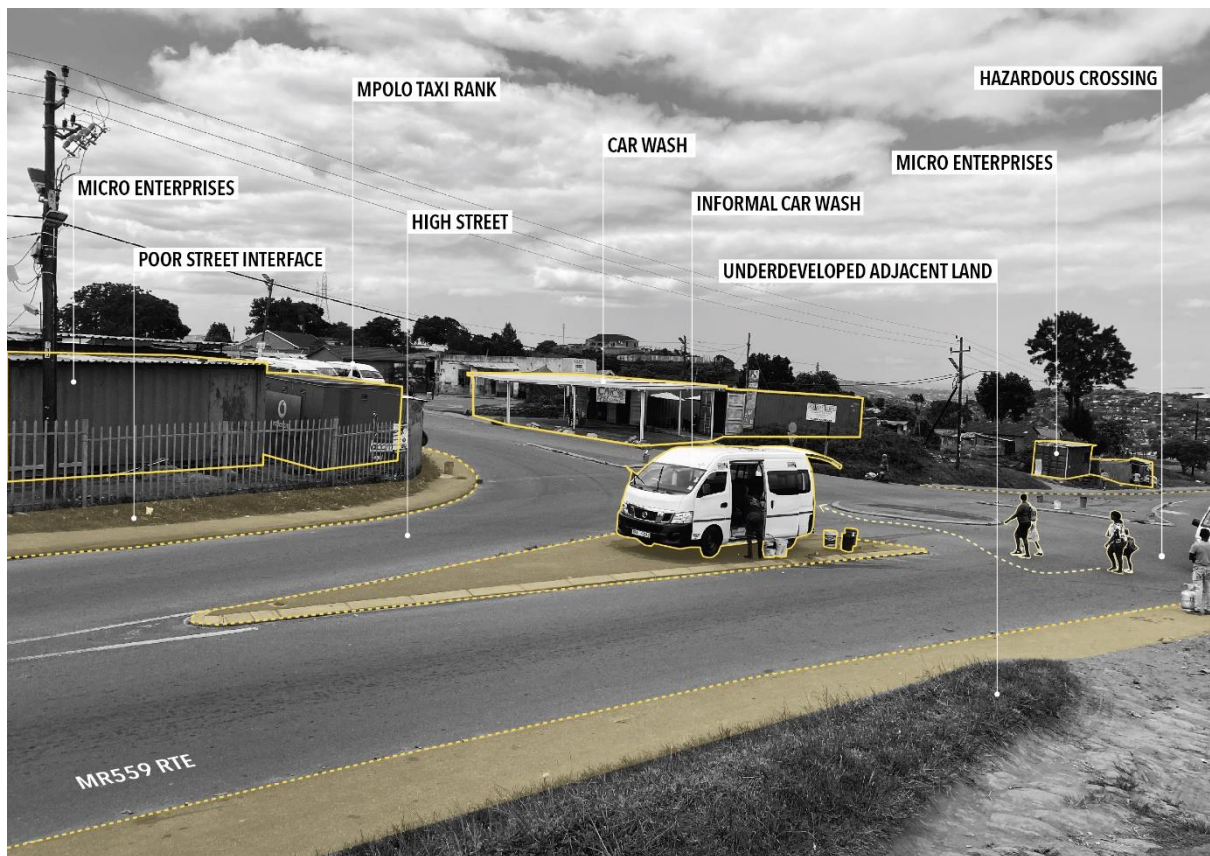


Figure 33: Mpola Taxi Rank is located along the high street and comprises a good concentration of business. The poor spatial definitional, connections and infrastructure provision limits functionality and catalytic growth for this site.

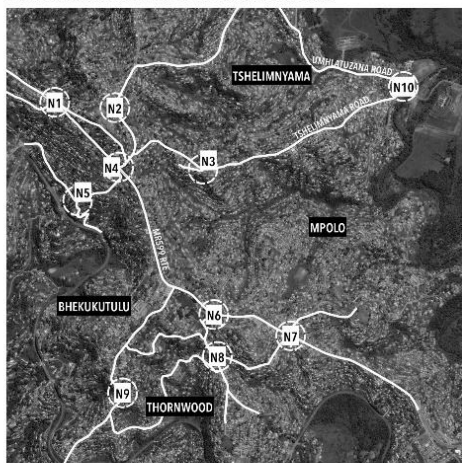
Opportunity: Land-use obstacles reduced to enable business formalisation and investment in commercial property.

Opportunity: Micro-nodes developed with supporting land-use and urban management strategies.

Opportunity: Fibre network expanded and wi-fi hotspots established in business / transport hubs.



TSHELIMNYAMA NODE 7 FOCUS AREA BASE MAP



LOCATION KEY

KEY

Tshelimnyama Node 7

1.1 Extents

- Extent
- High Street
- Commercial Activity

1.2 Connectivity

- Arterial Road
- Development Corridor

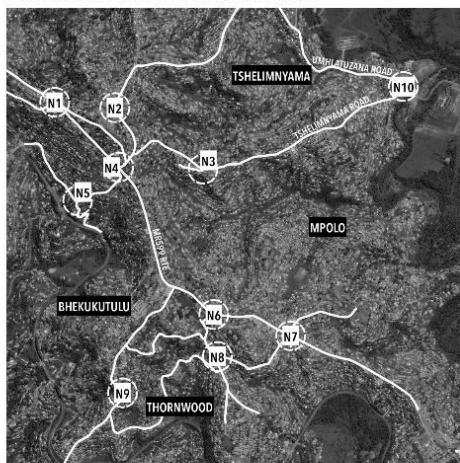
ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | MPOLO TAXI RANK | BASE MAP

Cities Support Program | Sustainable Livelihoods Foundation | Township Economic Development Project | Situational Analysis Report | 10.03.2021

Map 35: Mpolo Taxi Rank



TSHELIMNYAMA NODE 7 FOCUS AREA ZONING



LOCATION KEY

KEY

Tshelimnyama Node 7

1.1 Extents

Extent

1.2 Connectivity

Arterial Road

Development Corridor

2. Land Administration

2.3 Zoning

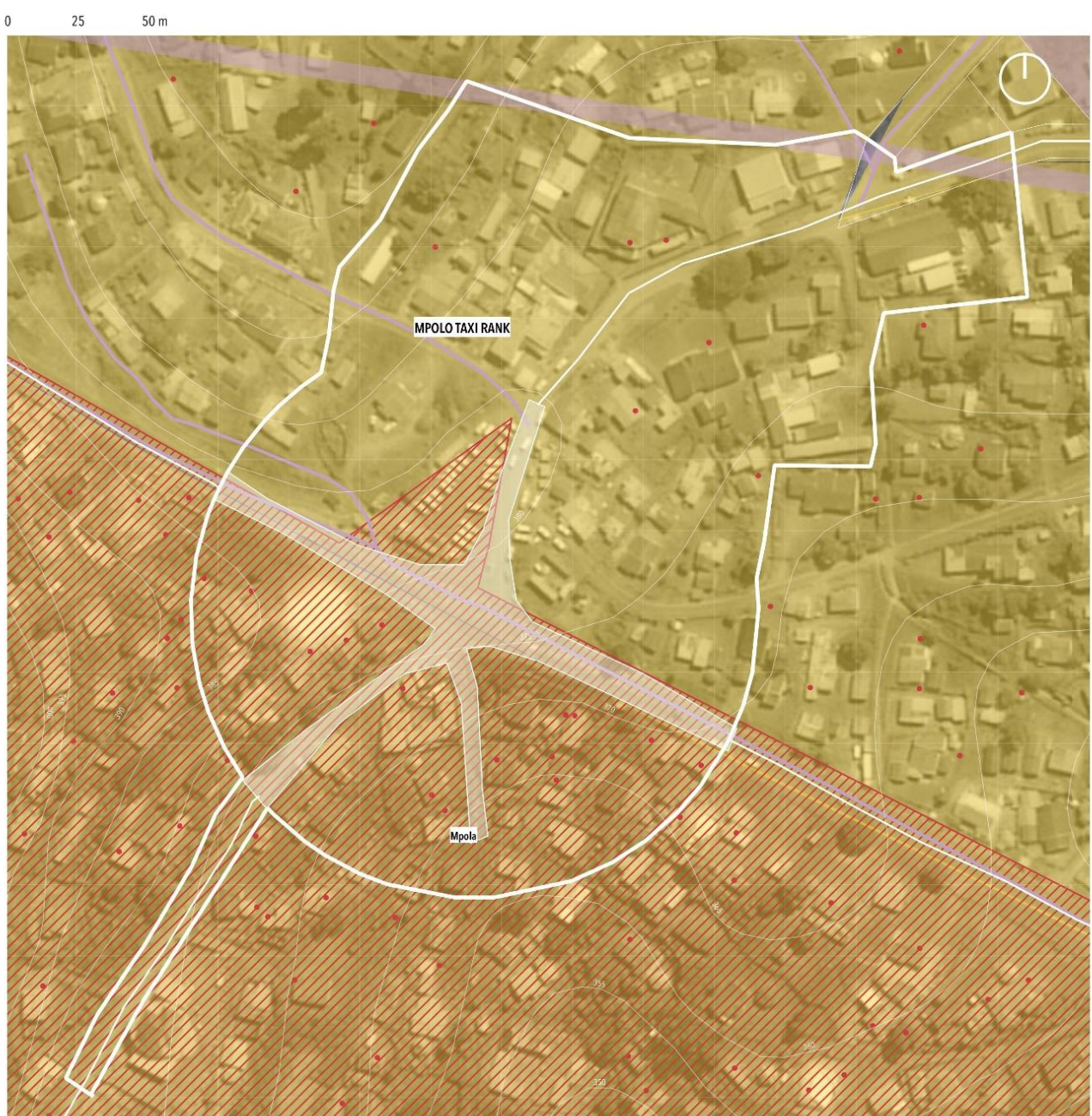
PS_LU_Inner_West_Zoning

Special Residential 1

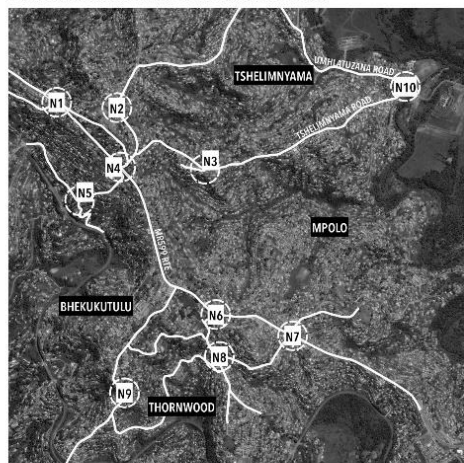
ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | MPOLO TAXI RANK | ZONING

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Map 36: Zoning, Mpolo Taxi Rank



TSHELIMNYAMA NODE 7 FOCUS AREA HOUSING



LOCATION KEY

KEY

Tshelimnyama Node 7

1.1 Extents

Extent

1.2 Connectivity

Arterial Road

Development Corridor

3. Infrastructure

3.6 Housing

PS_HS_CSG_SERVITUDE_LINE

PS_HS_CSG_SERVITUDE_AREA

PS_HS_Informal_Units

PS_HS_Informal_Settlement_Programme

PS_HS_Housing_Plan

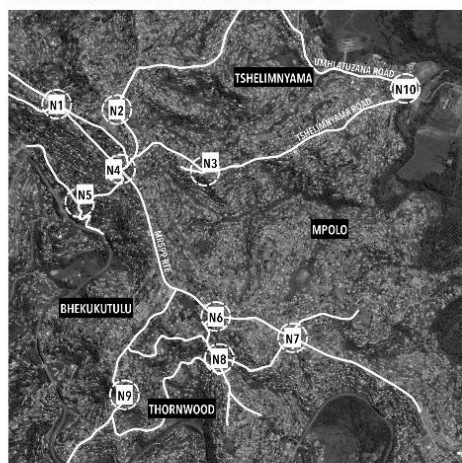
ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | MPOLO TAXI RANK | HOUSING

Cities Support Program | Sustainable Livelihoods Foundation | Township Economic Development Project | Situational Analysis Report | 16.02.2021

Map 37: Housing, Mpola Taxi Rank



TSHELIMNYAMA NODE 7 FOCUS AREA TRANSPORT



LOCATION KEY

KEY

Tshelimnyama Node 7

1.1 Extents

Extent

1.2 Connectivity

Arterial Road

Development Corridor

3. Infrastructure

3.1 Transport

PS_TPT_Public_Transport_Facilities_2012

Taxi Rank

PS_TPT_Bus_Taxi_Ranks

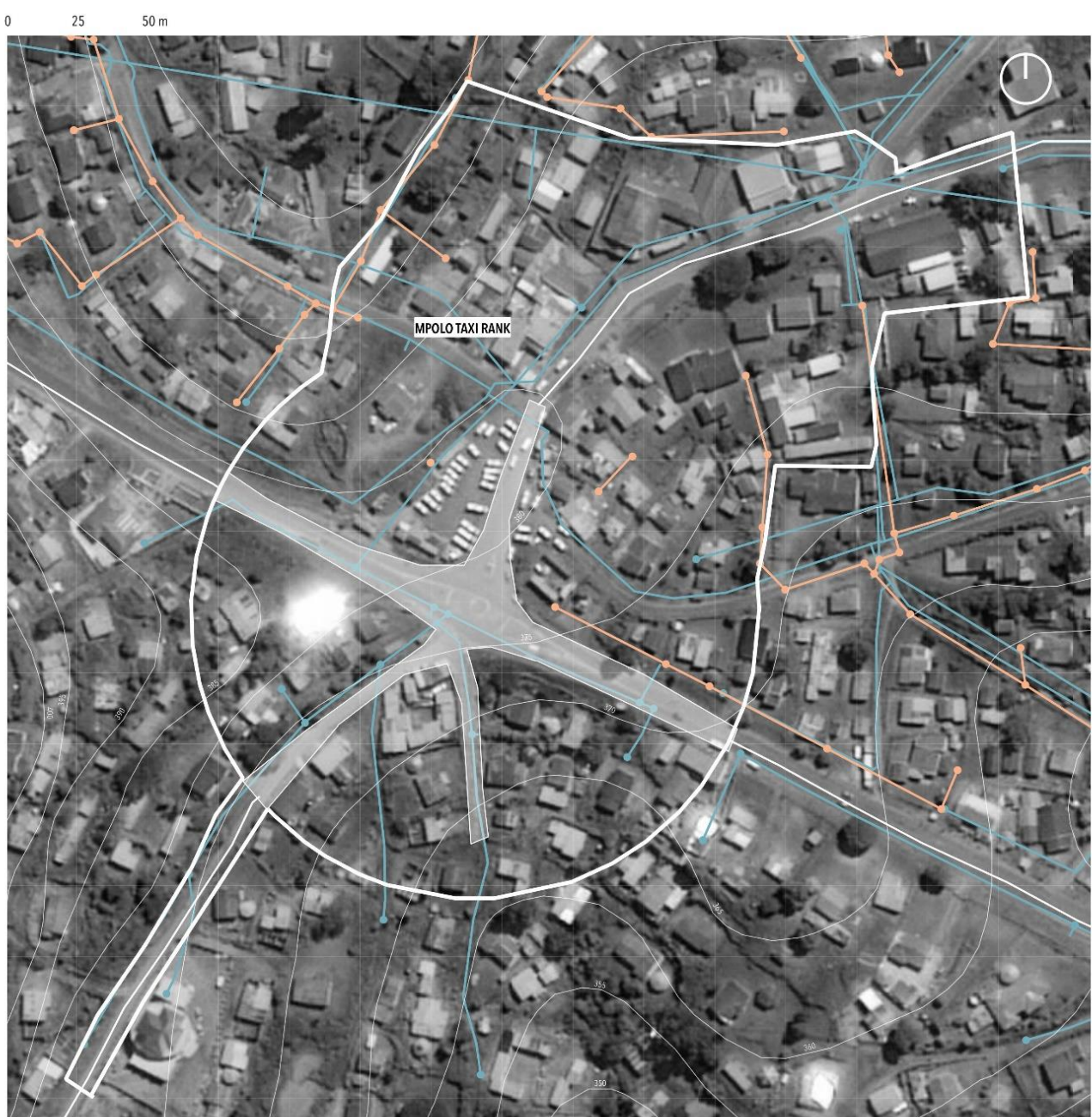
PS_TPT_CPTR2012_82_Routes_Final

PS_TPT_Public_Transport_Routes_2012

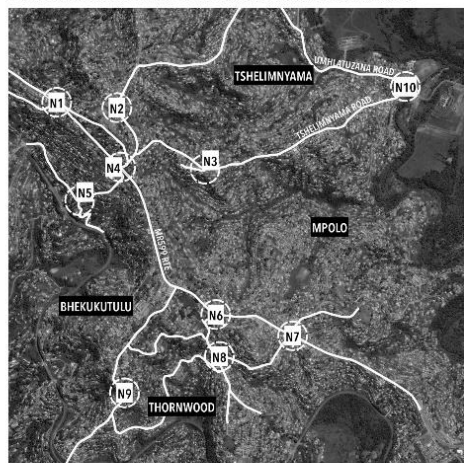
ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | MPOLO TAXI RANK | TRANSPORT

Cities Support Program | Sustainable Livelihoods Foundation | Township Economic Development Project | Situational Analysis Report | 16.02.2021

Map 38: Transport, Mpolo Taxi Rank



TSHELIMNYAMA NODE 7 FOCUS AREA WATER & SANITATION



LOCATION KEY

KEY

Tshelimnyama Node 7

1.1 Extents

Extent

1.2 Connectivity

Arterial Road

Development Corridor

3. Infrastructure

3.4 Water & Sanitation & Stormwater

PS_WS_Sewer_Manholes

PS_WS_Sewer_Pipes

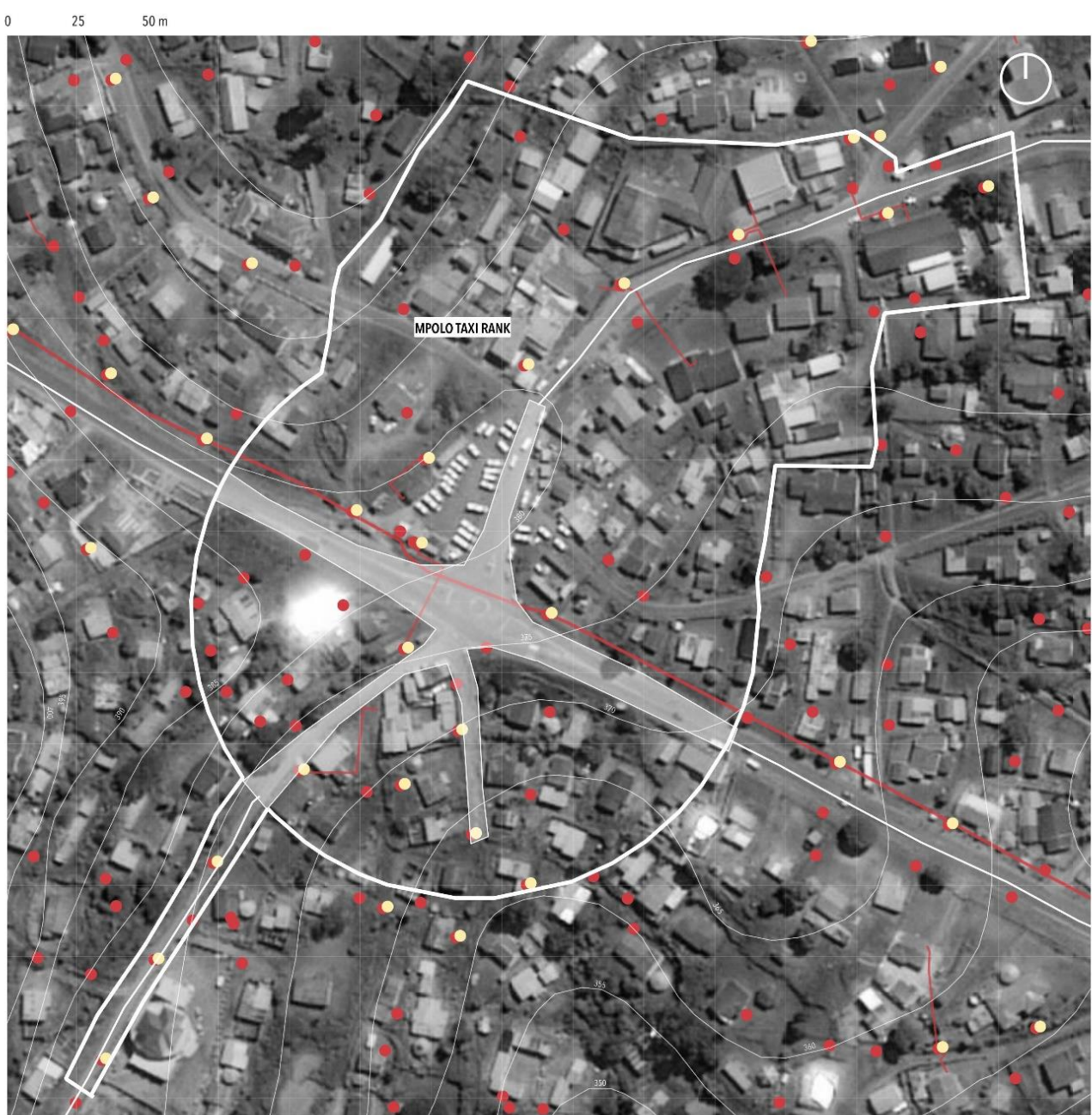
PS_WS_WaterFittings

PS_WS_WaterMains

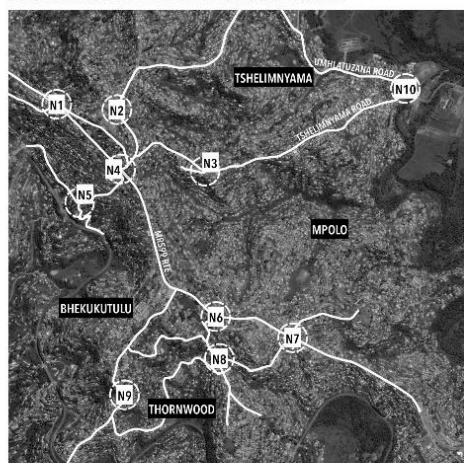
ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | MPOLo TAXI RANK | WATER & SANITATION

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Map 39: Water and Sanitation, Mpola Taxi Rank



TSHELIMNYAMA NODE 7 FOCUS AREA ELECTRICITY



LOCATION KEY

KEY

Tshelimnyama Node 7

1.1 Extents

Extent

1.2 Connectivity

Arterial Road

Development Corridor

3. Infrastructure

3.3 Electricity

PS_EL_Lighting

PS_EL_Pole

PS_EL_Underground Electricity Cable

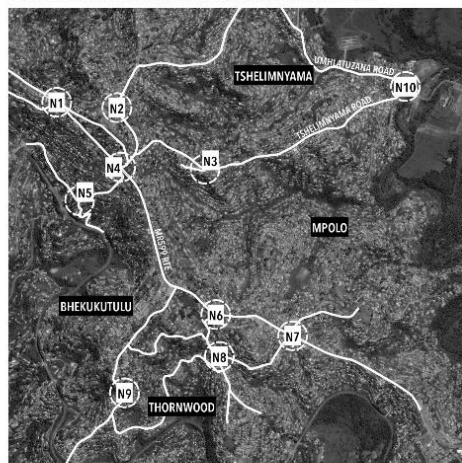
ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | MPOLO TAXI RANK | ELECTRICITY

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Map 40: Electricity Infrastructure, Mpola Taxi Rank



TSHELMINYAMA NODE 7 FOCUS AREA TECH NETWORK



LOCATION KEY

KEY

Tshelimnyama Node 7

1.1 Extents

Extent

1.2 Connectivity

Arterial Road

Development Corridor

3. Infrastructure

3.5 Public & Social Infrastructure

Libraries

3.7 Tech Network

PS ICT MetroConnect Manholes

PS ICT MetroConnect Fibre

ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | MPOLO TAXI RANK | TECH NETWORK

Cities Support Program | Sustainable Livelihoods Foundation | Township Economic Development Project | Situational Analysis Report | 16.02.2021

Map 41: ICT Network, Mpola Taxi Rank

11.5. Tshelimnyama Business and Social Node

The Tshelimnyama Business and Social Node is well located within the township and a connector to major urban centres outside the township. The node is diverse in offering comprising a library, sports ground and clubhouse, river, green belt / park, taxi rank, small business premises and a general dealer. The development of the node has not been leveraged to arrange these functions in an optimal manner. Stormwater management is a major threat to the physical functioning of the node.

The following suggestions are contemplated for the node:

- 1) Urban management plan and the clear demarcation of a precinct. The stakeholders would need to be clearly defined and engaged in the process of the transformation of the node. A stakeholder and management plan will create a secure institutional space for increased private investment and more effective management of business externalities.
- 2) Improved taxi terminus. Design of a taxi terminus that includes clear traffic management, signage, shelter, offices, trading spaces, ablutions, waiting areas, WiFi, lighting and landscaping. The aim should be for better operation and consolidation of economic investment at the rank. Special attention needs to be given to the expansion of the taxi holding area to the vacant land to the east - which is about 3m lower than the existing taxi rank.
- 3) Crime Prevention through Environmental Design. The design of the rank (and broader node) needs to consider the necessity to create a safe space for commuters. This can be achieved through clear demarcation of territory, a management plan, sight lines, business interdependencies.
- 4) Public environment upgrade. The sidewalks and connections across streets at the node need to be designed to allow for better connectivity and safe walking for commuters/pedestrians and economic opportunity for micro-enterprises. This would involve a general public environment upgrade that would include the design and implementation of sidewalk, lighting, signage (directional and advertising) and landscaping (hard and soft). The topography provides both a challenge, but also a useful opportunity to create valuable place-making opportunities, through for example seating and pathways. There is a need for secure pathways extended towards the existing library.
- 5) Public Art. It is also recommended that a public art and creative output program coupled with this development. This would engage local creative practitioners to enhance the precinct and lend a particular creative and brand identity. Outputs could include sculpture, installations, mosaic, murals as well as ephemeral or soft programs like performance.

- 6) Development of recreational park and secure greenbelt. As indicated in the figure below, the open park alongside the river is underutilised, yet has high potential for engendering social cohesion. It is important to introduce a leisure and recreational role on this site, including connections to existing infrastructure. The suggestion is to reinforce the park through a rehabilitation and investment to accommodate a parking space, braai facilities, outdoor gym, social spaces comprising shaded areas for eating and seating. This area is in direction relation to the adjacent soccer fields which is separated by an embankment and river. A bridge would be introduced to connect the two spaces.

Opportunity: Land-use obstacles reduced to enable business formalisation and investment in commercial property.

Opportunity: Micro-nodes developed with supporting land-use and urban management strategies.

Opportunity: Fibre network expanded and wi-fi hotspots established in business / transport hubs.

Opportunity: A public park developed in Tshelimnyama.

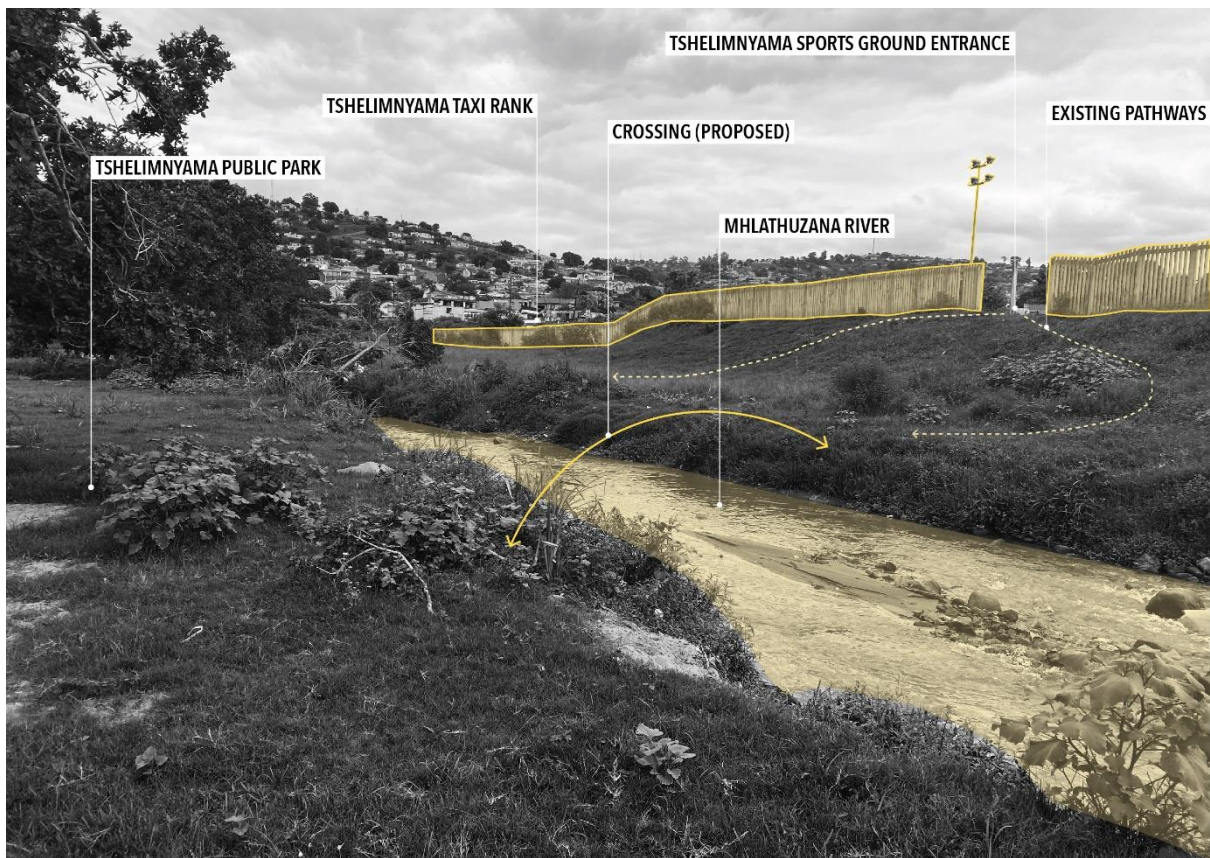


Figure 34: Tshelimnyama Public Park is well-located in relation to a natural river and sports facility. A linkage to the sports facility via a bridge and the consolidation of the park as a leisure and recreation space will reinforce the park as a destination.

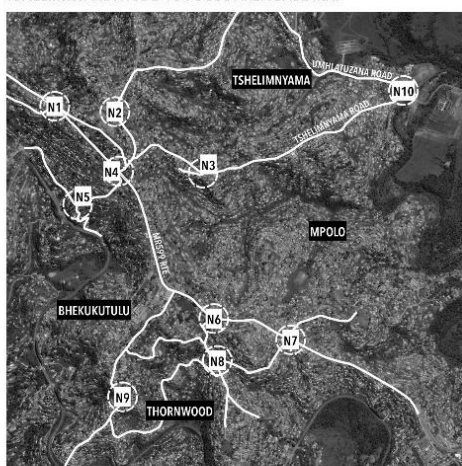
The following section includes a series of maps relating to this node. The table below provides a summary of the status quo for the Tshelimnyama Business and Social Node, as indicated in the maps.

Table 5: Status Quo of the Tshelimnyama Business and Social Node

| Connectivity/Transport | Socio-economic Function | Current Zoning | Digital | Stormwater, Water and Sanitation | Energy | Trader Access to Infrastructure |
|---|--|---|---|---|--|---|
| Situated on Umhlathuzana Road. Node includes a formal taxi rank. Informal pedestrian routes. The causeway on the Mhlathuzana river is subject to seasonal flooding. | A mixed-use node, including transport, sports facilities, street traders, and home-based micro-enterprises. The extended economic influence of the node includes a Metro library and councillors office. | The western portion of the site is zoned in accordance with the Inner West Zoning Scheme. The zonings that are found in this part of the site are environmental conservation and river reserve, residential, including smallholder residential and a portion of the site is zoned for road reserves and widening. | There is internet connectivity in this area, the lines run along Umhlathuzana Road, where they connect to the library. The internet cables also run down Tshelimnyama Road. | The area is well-supplied with water and sewerage pipes and connections. Some stormwater infrastructure is present on Tshelimnyama road, but not along Umhlathuzana Road. | This area is supplied with power via poles, with some underground power lines. Umhlathuzana Road and Tshelimnyama Road are supplied with public street lighting. | Formal taxi rank with access to toilets. But the rank is over-crowded, resulting in spill-over parking on surrounding streets, which impacts on pedestrian use and opportunities for traders. |



TSHELIMNYAMA NODE 10 FOCUS AREA BASE MAP



LOCATION KEY

KEY

Tshelimnyama Node 10

1.1 Extents

- Extent
- High Street
- Commercial Activity

1.2 Connectivity

- Arterial Road
- Development Corridor

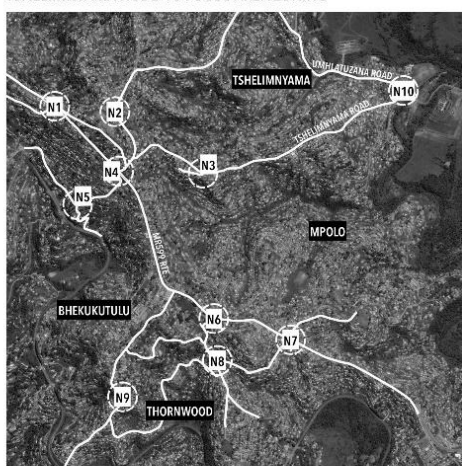
ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | TSHELIMNYAMA TAXI RANK | BASE MAP

Cities Support Program | Sustainable Livelihoods Foundation | Township Economic Development Project | Situational Analysis Report | 10.03.2021

Map 42: Tshelimnyama Business and Social Node



TSEHEIMNYAMA NODE 10 FOCUS AREA ZONING



LOCATION KEY

KEY**Tshelimnyama Node 10****1.1 Extents**

Extent

1.2 Connectivity

Arterial Road

Development Corridor

2. Land Administration**2.3 Zoning**

PS_LU_Inner_West_Zoning

Environmental Conservation Reserve

River Reserve

Intermediate Residential 3

Residential Small Holding

Special Residential 1

New Roads and Widening

Road Reserve

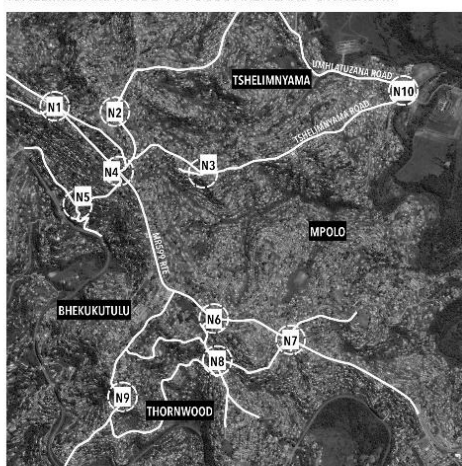
ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | TSEHEIMNYAMA TAXI RANK | ZONING

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Map 43: Zoning, Tshelimnyama Business and Social Node



TSHELIMNYAMA NODE 10 FOCUS AREA LAND OWNERSHIP



LOCATION KEY

KEY

Tshelimnyama Node 10

1.1 Extents

Extent

1.2 Connectivity

Arterial Road

Development Corridor

2. Land Administration

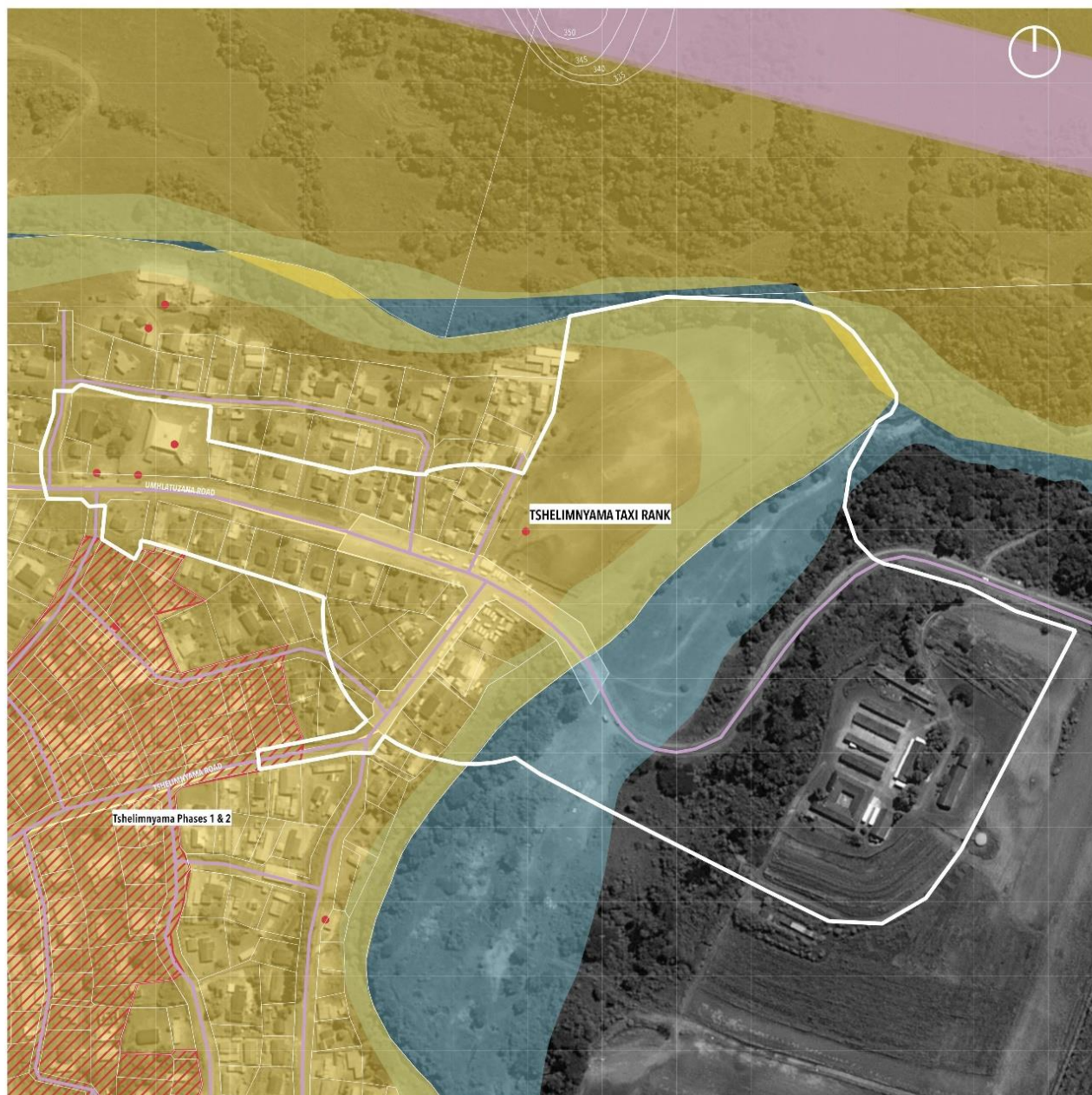
2.2 Land Ownership

PS_LU_Municipal_Owned_Land

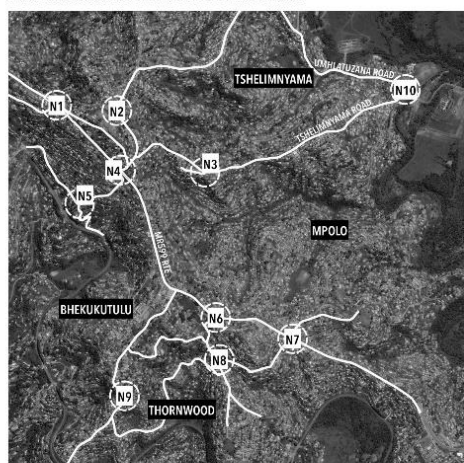
ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | TSHELIMNYAMA TAXI RANK | LAND OWNERSHIP

Cities Support Program | Sustainable Livelihoods Foundation | Township Economic Development Project | Situational Analysis Report | 16.02.2021

Map 44: Land Ownership, Tshelimnyama Business and Social Node



Tshelimnyama Node 10 Focus Housing



LOCATION KEY

KEY**Tshelimnyama Node10****1.1 Extents**

Extent

1.2 Connectivity

Arterial Road

Development Corridor

3. Infrastructure**3.6 Housing**

PS_HS_CSG_SERVITUDE_LINE

PS_HS_CSG_SERVITUDE_AREA

PS_HS_Informal_Units

PS_HS_Informal_Settlement_Programme

PS_HS_Housing_Plan

PS_HS_Flood_Plain_100yr

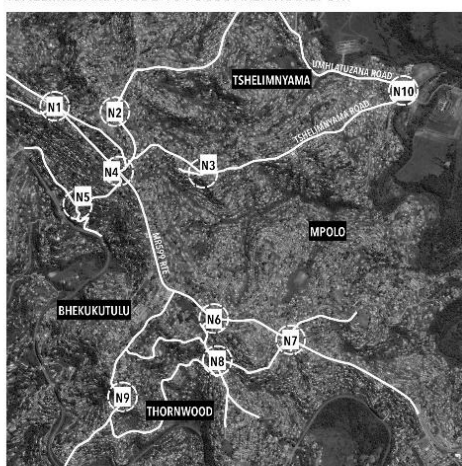
ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | Tshelimnyama Taxi Rank | HOUSING

Cities Support Program | Sustainable Livelihoods Foundation | Township Economic Development Project | Situational Analysis Report | 16.02.2021

Map 45: Housing, Tshelimnyama Business and Social Node



TSELIMNYAMA NODE 10 FOCUS AREA TRANSPORT



LOCATION KEY

KEY**Tselimnyama Node 10****1.1 Extents**

Extent

1.2 Connectivity

Arterial Road

Development Corridor

3. Infrastructure**3.1 Transport**

PS_TPT_Public_Transport_Facilities_2012

Taxi Rank

PS_TPT_CPTR2012_82_Routes_Final

PS_TPT_Public_Transport_Routes_2012

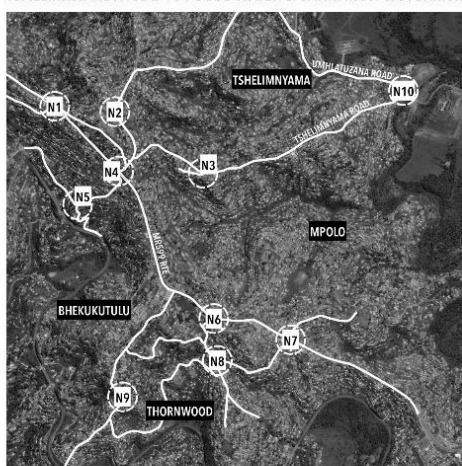
ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | TSELIMNYAMA TAXI RANK | TRANSPORT

Cities Support Program | Sustainable Livelihoods Foundation | Township Economic Development Project | Situational Analysis Report | 16.02.2021

Map 46: Transport, Tselimnyama Business and Social Node



TSHELIMNYAMA NODE 10 FOCUS WATER & SANITATION & STORMWATER



LOCATION KEY

KEY**Tshelimnyama Node10****1.1 Extents**

Extent

1.2 Connectivity

Arterial Road

Development Corridor

3. Infrastructure**3.4 Water & Sanitation & Stormwater**

PS_WS_StormwaterManholes

PS_WS_StormwaterPipes

PS_WS_Sewer_Manholes

PS_WS_Sewer_Pipes

PS_WS_WaterFittings

PS_WS_Watermains

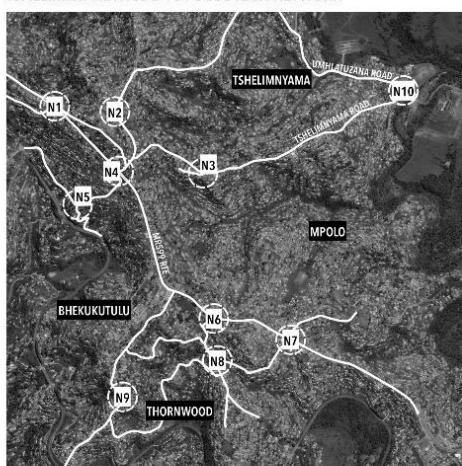
ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | TSHELIMNYAMA TAXI RANK | WATER & SANITATION & STORMWATER

Cities Support Program | Sustainable Livelihoods Foundation | Township Economic Development Project | Situational Analysis Report | 16.02.2021

Map 47: Water, Sanitation and Stormwater, Tshelimnyama Business and Social Node



TSHELIMNYAMA NODE 10 FOCUS TECH NETWORK



LOCATION KEY

KEY**Tshelimnyama Node10****1.1 Extents**

Extent

1.2 Connectivity

Arterial Road

Development Corridor

3. Infrastructure**3.5 Public & Social Infrastructure**

Libraries

3.7 Tech Network

PS_ICT_MetroConnectManholes

PS_ICT_MetroConnectFibre

ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | TSHELIMNYAMA TAXI RANK | TECH NETWORK

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Map 48: ICT Network, Tshelimnyama Business and Social Node

11.6. Tshelimnyama Micro-Nodes

The Tshelimnyama area supports a number of micro-nodes. There is potential to foster greater connectivity between these nodes. The TAT identified two micro-nodes that are already part of a secondary nodal system along the Milky Way mobility corridor. The idea of the micro-nodes would be specific to the density and topographical circumstances of the area. This system of integrated micro-nodes presents a useful strategy for spatial transformation of historical dormitory settlements to become more socially and economically diverse. The micro-nodes relate well to walkable pedestrian catchment areas. These micro-nodes function on a small scale mostly $\pm 100\text{m}$ in diameter from an identified epicentre. There is an opportunity to consolidate and amplify their operation both in terms of the nodal autonomy and its relation to other micro-nodes.

These nodes at present are characterised by the following:

1. Being located along a street network that connects to other nodes.
2. Located along a transport route (private cars, taxis, busses).
3. Waiting areas for transport services.
4. Formal and informal retail.
5. Food vendors.
6. Outdoor signage.
7. Private investment in buildings.

The following suggestions are contemplated for the micro-node system:

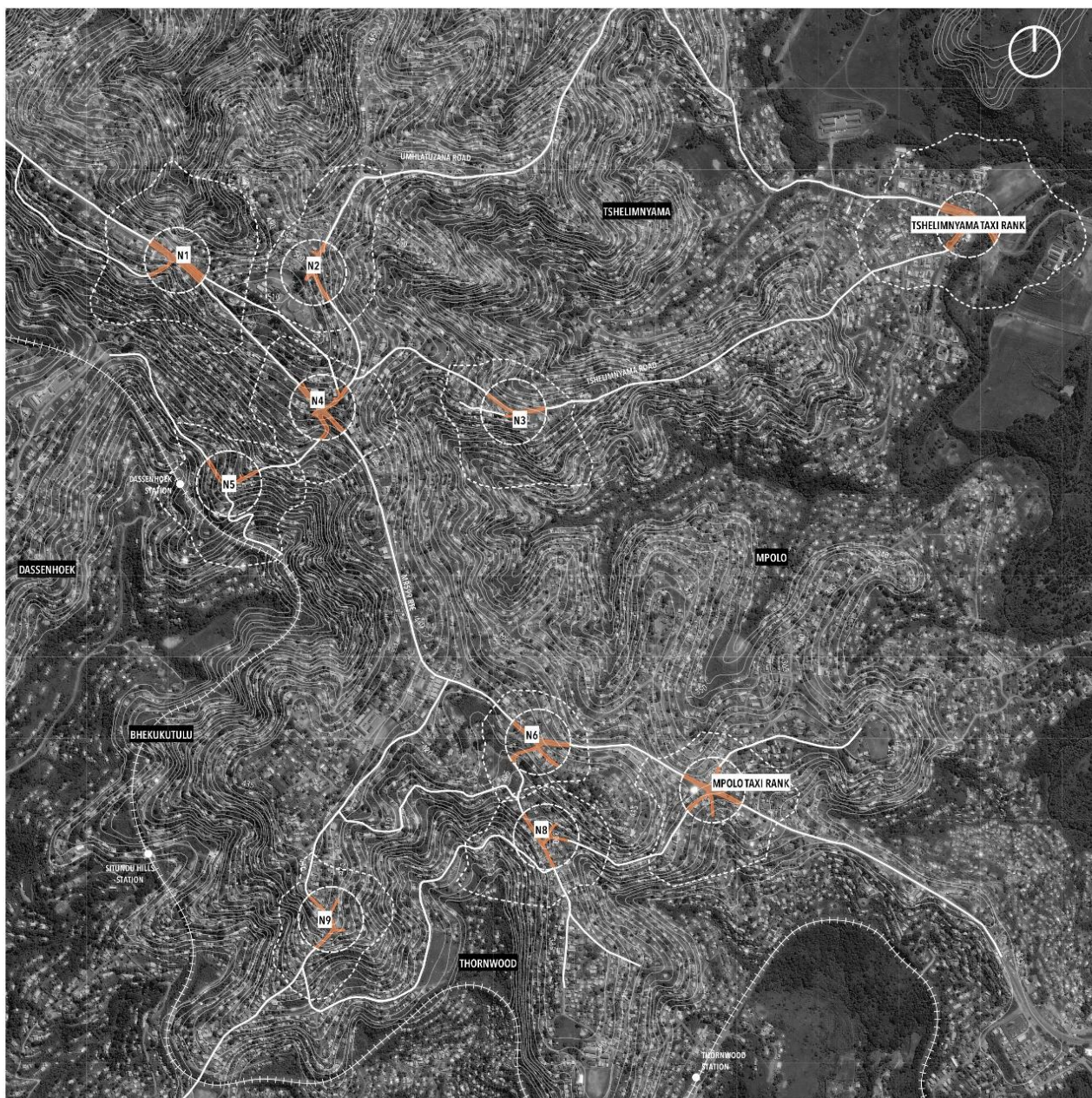
1. Urban management plan and the clear demarcation of a micro-node. The stakeholders would need to be clearly defined and engaged in the process of the transformation of the micro-node. The micro-node needs a clear demarcation and identification of stakeholders.
2. Spatial planning. The Micro-nodes need to work in relation to each other in terms of role, performance and offerings. Strong brandings and urban legibility is needed through visual, spatial and functional design. The service offerings that are being envisioned for the micro-node include a water points, waiting areas, seating, lighting, signage, branding, a market to sell produces, a meeting place, WiFi, social spaces.
3. Private property stimulus. The Metro should investigate ways to stimulate property development, using levers including by-laws, zoning and transferring ownership. We note that several of these nodes are situated on land under traditional authorities and hence have not benefited from systematic land-use improvement programmes and interventions.

4. Public environment upgrade. The sidewalks and connections across streets at the micro-node need to be designed to allow for better connectivity and safe walking for commuters/pedestrians and economic opportunity for micro-enterprises. This would involve a general public environment upgrade that would include the design and implementation of sidewalk, lighting, signage (directional and advertising) and landscaping (hard and soft).
5. Public Art. It is also recommended that a public art and creative output program is included within the development of these nodes. This would engage local creative practitioners to enhance the nodal precinct and lend a particular creative and brand identity. Outputs could include sculpture, installations, mosaic, murals as well as ephemeral or soft programs like performance.

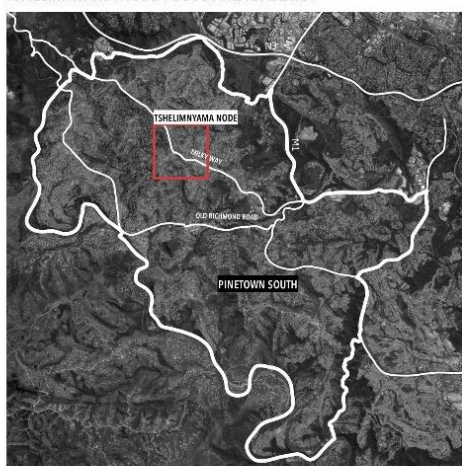
Opportunity: Business in shipping containers situated in approved sites / configurations.

Opportunity: Land-use obstacles reduced to enable business formalisation and investment in commercial property.

Opportunity: Micro-nodes developed with supporting land-use and urban management strategies.



TSELMINYAMA NODE FOCUS AREA BASE MAP



LOCATION KEY

KEY

Tselimnyama Node

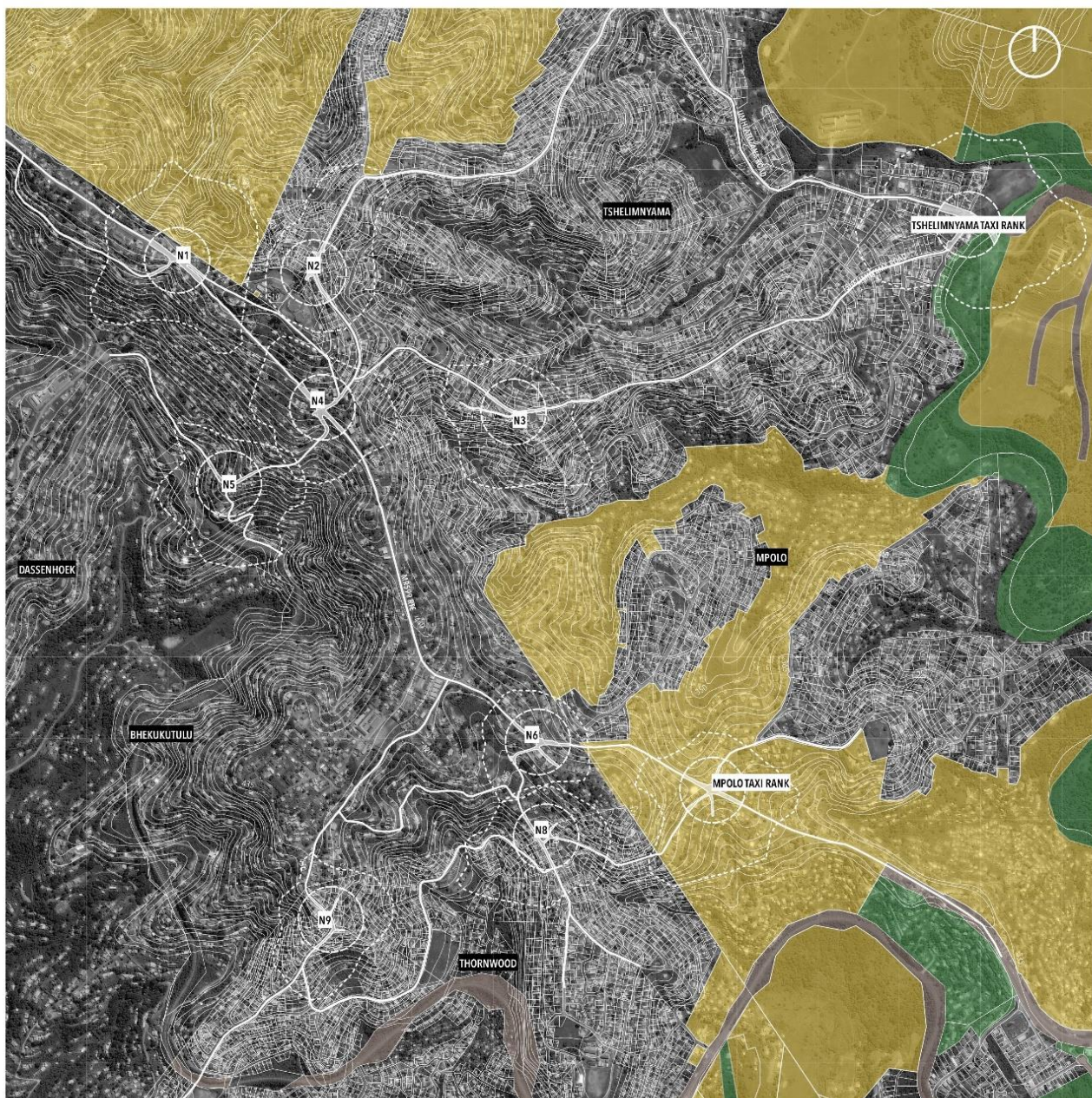
1. Extents

- PNT_TSHL_Compact Growth zones
- PNT_TSHL_Connectivity
- PNT_TSHL_Micro Node
- PNT_TSHL_Nodes

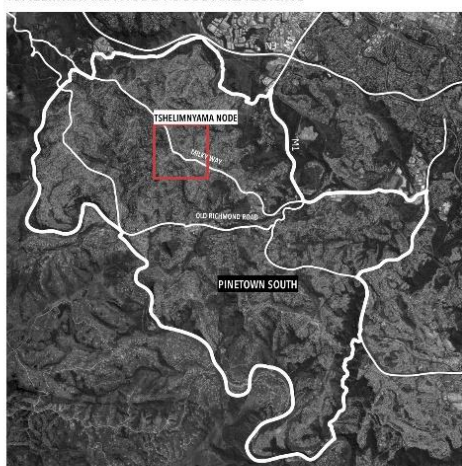
ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | TSELMINYAMA NODE | BASE MAP

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Map 50: Tselimnyama Micro-Nodes



Tshelimnyama Node Focus Area Zoning



LOCATION KEY

KEY

Tshelimnyama Node

1. Extents

- PNT_TSHL_Compact Growth zones
- PNT_TSHL_Connectivity
- PNT_TSHL_Micro Node
- PNT_TSHL_Nodes

2. Land Administration

2.3 Zoning

PS_LU_Inner_West_Zoning

- Public Open Space
- Environmental Conservation Reserve
- River Reserve
- General Residential 4
- Intermediate Residential 3
- Residential Small Holding
- Special Residential 1
- Railway Reserve/Transport Use
- New Roads and Widening
- Road Reserve

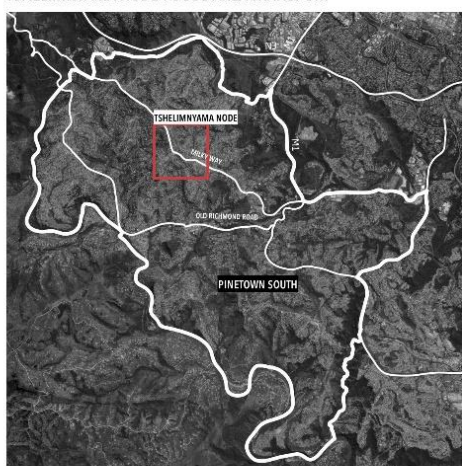
ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | Tshelimnyama Node | ZONING

Cities Support Program | Sustainable Livelihoods Foundation | Township Economic Development Project | Situational Analysis Report | 10.03.2021

Map 51: Zoning, Tshelimnyama Micro-Nodes



TSHELIMNYAMA NODE FOCUS AREA TRANSPORT



LOCATION KEY

KEY

Tshelimnyama Node

1. Extents

- PNT_TSHL_Compact Growth zones
- PNT_TSHL_Connectivity
- PNT_TSHL_Micro Node
- PNT_TSHL_Nodes

3. Infrastructure

3.1 Transport

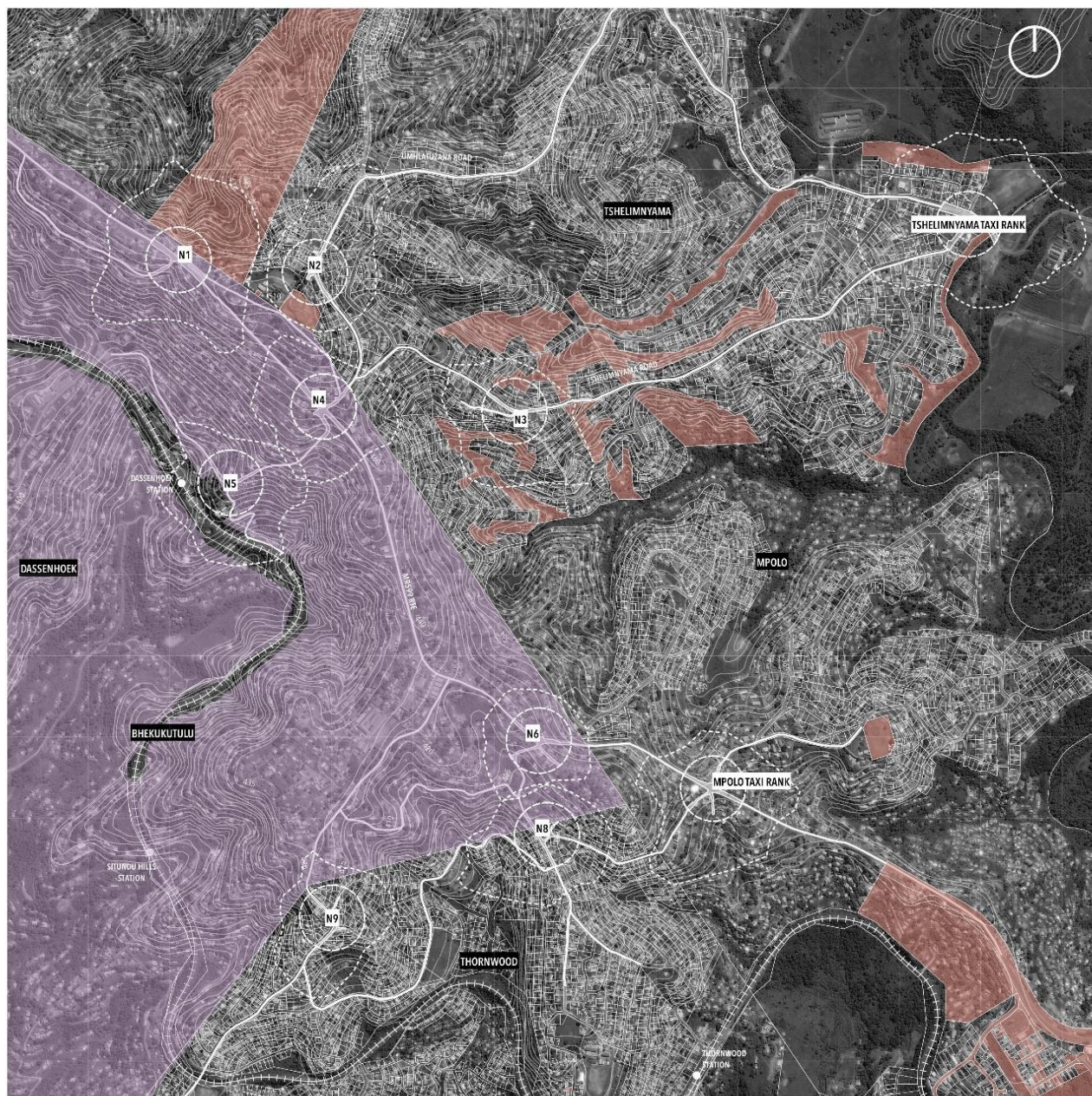
PS_TPT_Public_Transport_Facilities_2012

- 🚏 Taxi Rank
- 🚌 PS_TPT_Bus_Taxi_Ranks
- PS_TPT_CPTR2012_B2_Routes_Final
- PS_TPT_Public_Transport_Routes_2012

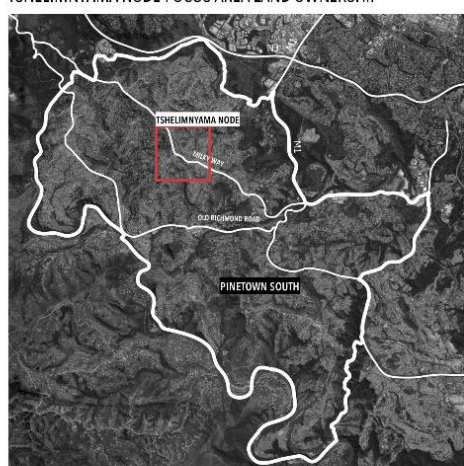
ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | TSHELIMNYAMA NODE | TRANSPORT

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Map 52: Transport Routes and Facilities, Tshelimnyama Micro-Nodes



TSHELIMNYAMA NODE FOCUS AREA LAND OWNERSHIP



LOCATION KEY

KEY

Tshelimnyama Node

1. Extents

- PNT_TSHL_Compact Growth zones
- PNT_TSHL_Connectivity
- PNT_TSHL_Micro Node
- PNT_TSHL_Nodes

2. Land Administration

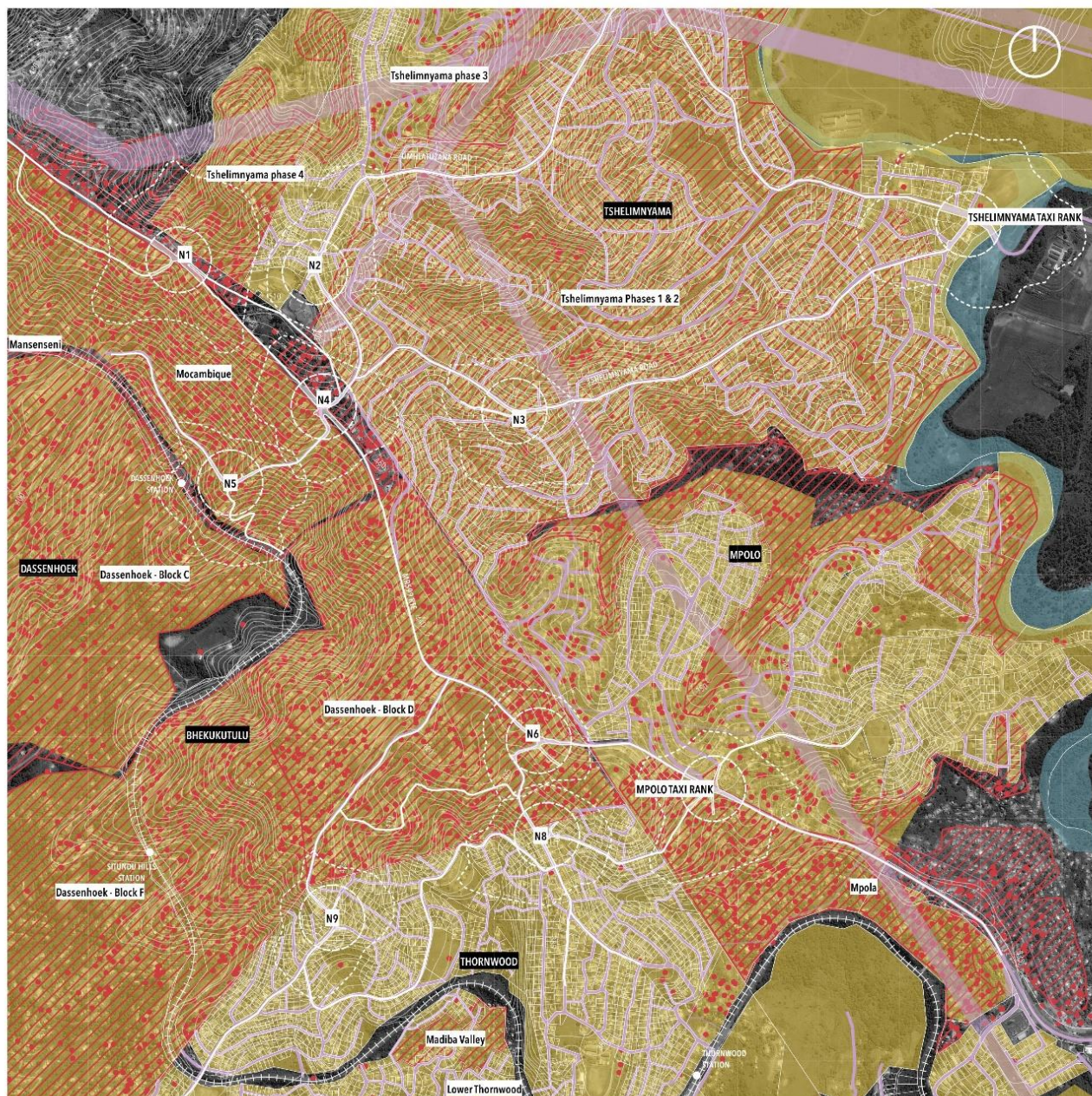
2.2 Land Ownership

- PS_LU_Municipal_Owned_Land
- PS_LU_Traditional_Authorities

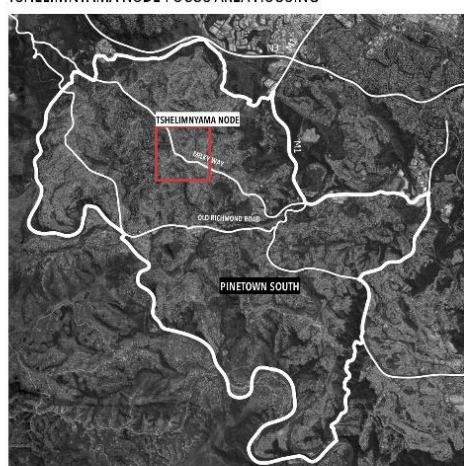
ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | TSHELIMNYAMA NODE | LAND OWNERSHIP

Cities Support Program | Sustainable Livelihoods Foundation | Township Economic Development Project | Situational Analysis Report | 10.03.2021

Map 53: Land Ownership, Tshelimnyama Micro-Nodes



TSELMINYAMA NODE FOCUS AREA HOUSING



LOCATION KEY

KEY

Tselimnyama Node

1. Extents

- PNT_TSHL_Compact Growth zones
- PNT_TSHL_Connectivity
- PNT_TSHL_Micro Node
- PNT_TSHL_Nodes

3. Infrastructure

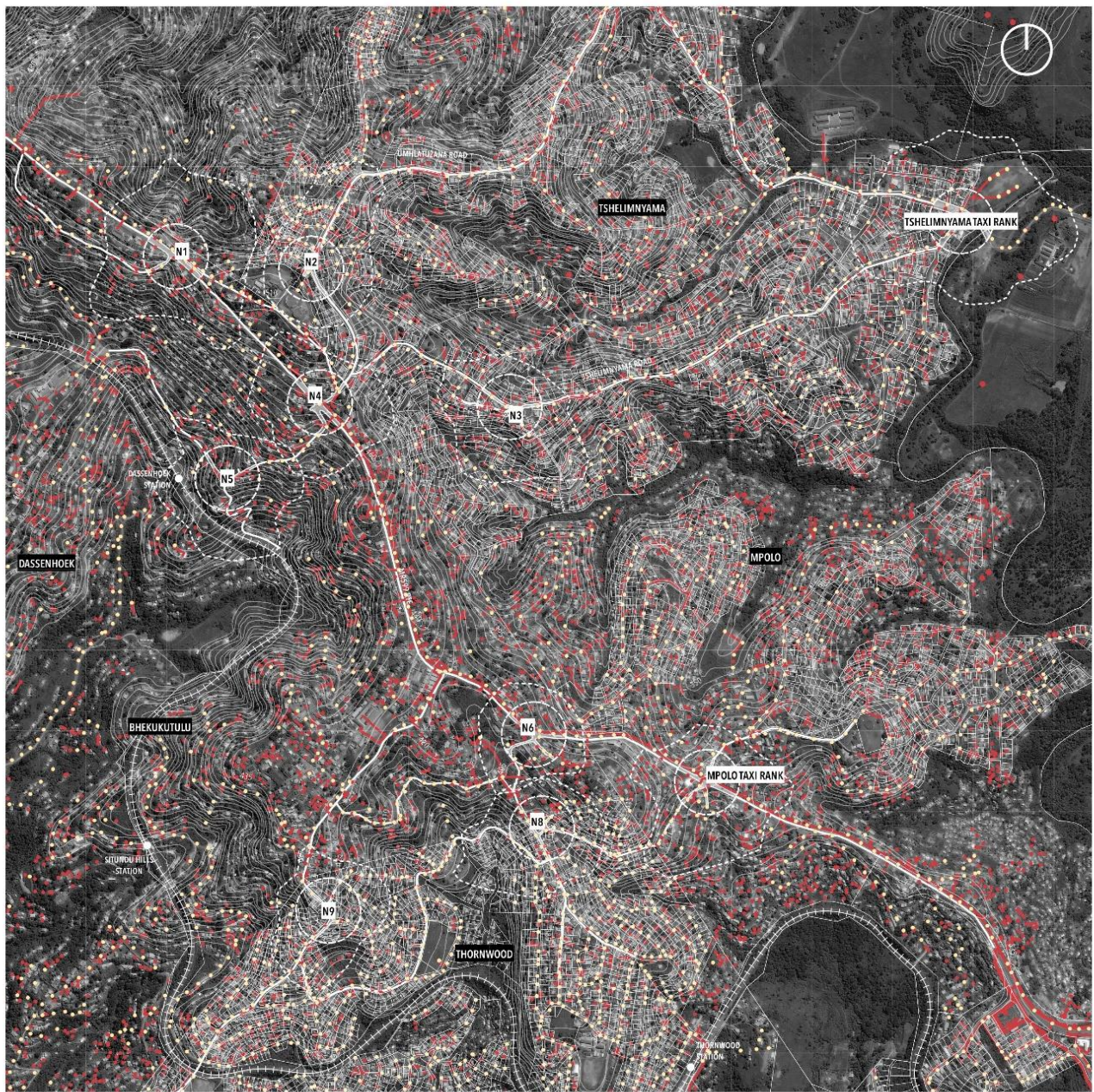
3.6 Housing

- PS_HS_Informal_Units
- ▨ PS_HS_Informal_Settlement_Programme
- PS_HS_Housing_Plan
- PS_HS_CSG_SERVITUDE_LINE
- PS_HS_CSG_SERVITUDE_AREA
- PS_HS_Flood_Plain_100yr

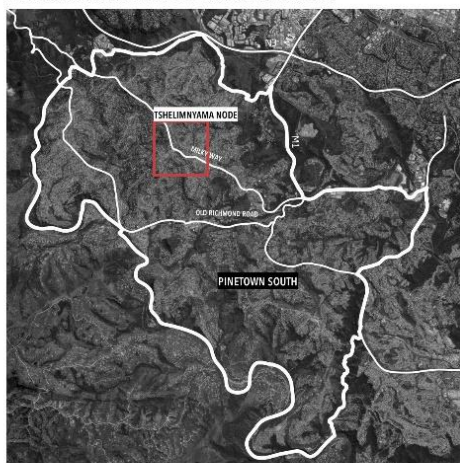
ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | TSELMINYAMA NODE | HOUSING

Cities Support Program | Sustainable Livelihoods Foundation | Township Economic Development Project | Situational Analysis Report | 10.03.2021

Map 54: Housing, Tselimnyama Micro-Nodes



Tshelimnyama Node Focus Area Electricity



LOCATION KEY

KEY

Tshelimnyama Node

1. Extents

- PNT_TSHL_Compact Growth zones
- PNT_TSHL_Connectivity
- PNT_TSHL_Micro Node
- PNT_TSHL_Nodes

3. Infrastructure

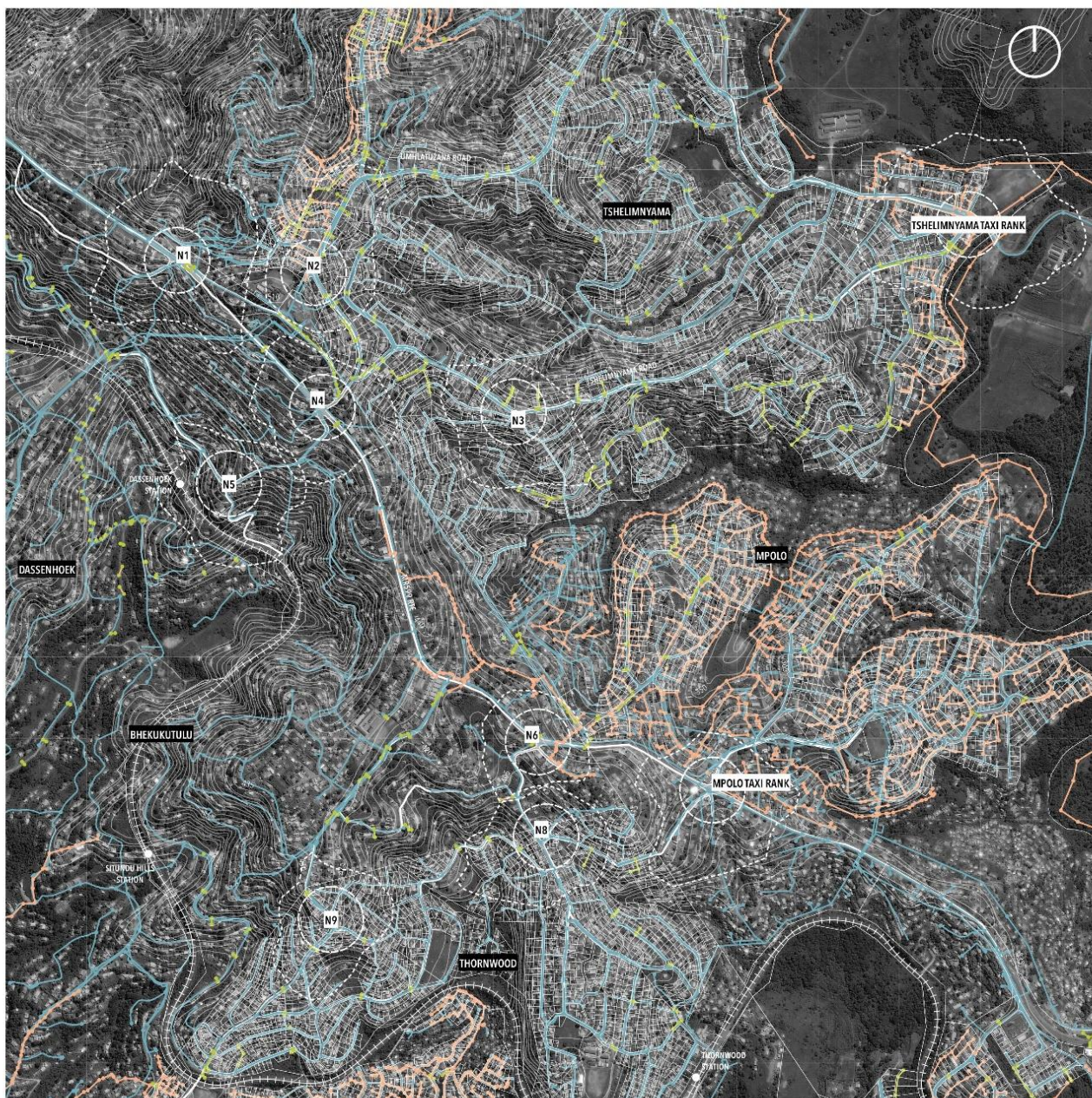
3.3 Electricity

- PS_EL_Lighting
- PS_EL_Pole
- PS_EL_Tower
- PS_EL_Underground Electricity Cable

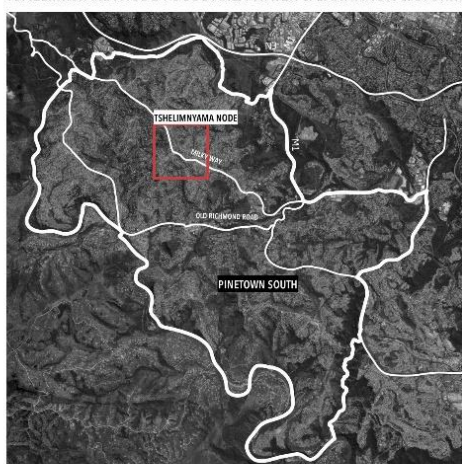
ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | Tshelimnyama Node | ELECTRICITY

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Map 55: Electricity Infrastructure, Tshelimnyama Micro-Nodes



TSHELIMNYAMA NODE FOCUS AREA WATER & SANITATION & STORMWATER



LOCATION KEY

KEY

Tshelimnyama Node

1. Extents

- PNT_TSHL_Compact Growth zones
- PNT_TSHL_Connectivity
- PNT_TSHL_Micro Node
- PNT_TSHL_Nodes

3. Infrastructure

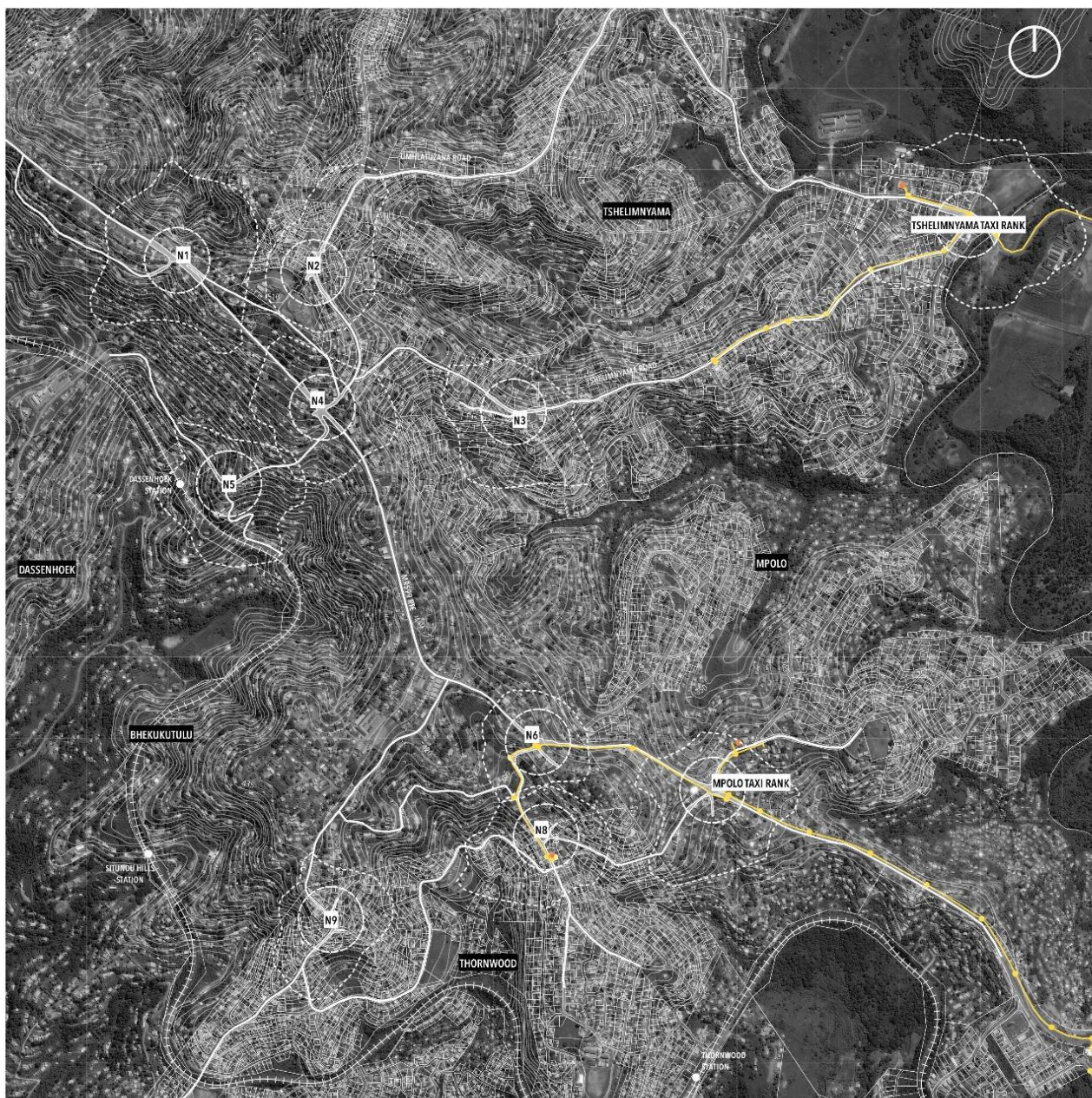
3.4 Water & Sanitation & Stormwater

- PS_WS_StormwaterManholes
- PS_WS_StormwaterPipes
- PS_WS_Sewer_Manholes
- PS_WS_Sewer_Pipes
- PS_WS_Culverts
- PS_WS_WaterFittings
- PS_WS_Watermains

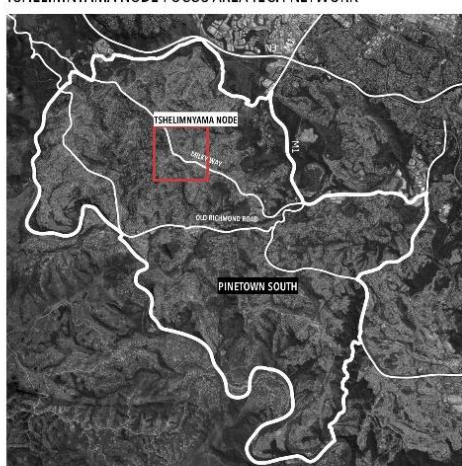
ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | TSHELIMNYAMA NODE | WATER & SANITATION & STORMWATER

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Map 56: Water, Sanitation and Stormwater, Tshelimnyama Micro-Nodes



TSHELIMNYAMA NODE FOCUS AREA TECH NETWORK



LOCATION KEY

KEY

Tshelimnyama Node

1. Extents

- PNT_TSHL_Compact Growth zones
- PNT_TSHL_Connectivity
- PNT_TSHL_Micro Node
- PNT_TSHL_Nodes

3.7 Tech Network

- PS_ICT_MetroConnectManholes
- PS_ICT_MetroConnectLocations
- PS_ICT_MetroConnectFibre

3. Infrastructure

- 3.5 Public & Social Infrastructure
- Libraries

ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | TSHELIMNYAMA NODE | TECH NETWORK

Cities Support Program | Sustainable Livelihoods Foundation | Township Economic Development Project | Situational Analysis Report | 10.03.2021

Map 57: ICT Network, Tshelimnyama Micro-Nodes

Opportunity: The development of hubs and nodes will **foster important economic growth** for Pinetown South through important strategic planning that can **cater for, promote and regulate business activity**. This could include precinct management that could in turn foster partnerships such as the Metro and the NDPP to advance projects and mobilise investment.

12. Housing

12.1. Overview

This section analyses the role of housing in township economic development in Pinetown South. It uses the housing asset framework to analyse the social, economic and financial functions of housing and their contributions to township development. It also draws attention to the roles of place-making and institutions in increasing the all-round value of housing and stimulating economic density, i.e., higher investment in buildings and other physical structures.

The study uses available quantitative and qualitative data to analyse the existing housing situation and the main trends, upon which future opportunities are identified and discussed. Information gaps presented a significant challenge to understanding the housing dynamics in Pinetown South. Limited information on basic issues including population growth, housing demand, density, informal dwellings and local property markets render the analysis incomplete.

12.2. Conceptual Framework: Housing as Social, Economic and Financial asset

The housing asset framework (Rust 2020) ¹ offers a useful conceptual lens to understand the social, economic and financial importance of housing and how they can contribute to township economic development. As a social asset, housing provides township residents with a safe and secure place to live, socialise, study and sleep. As an economic asset, housing generates income and livelihood opportunities for homeowners. The social and economic functions of housing influence its value as a financial asset. As a financial asset, the house can be traded for money, used as collateral to access finance or as an investment to accumulate wealth, which can be passed on to others. The figure below depicts the social, economic and financial asset values of housing and their contribution to township economic development.

¹ Rust, K. (2020). Framing concept: Understanding the housing asset. Centre for Affordable Housing Finance. <http://housingfinanceafrica.org/documents/framing-concept-understanding-the-housing-asset/>

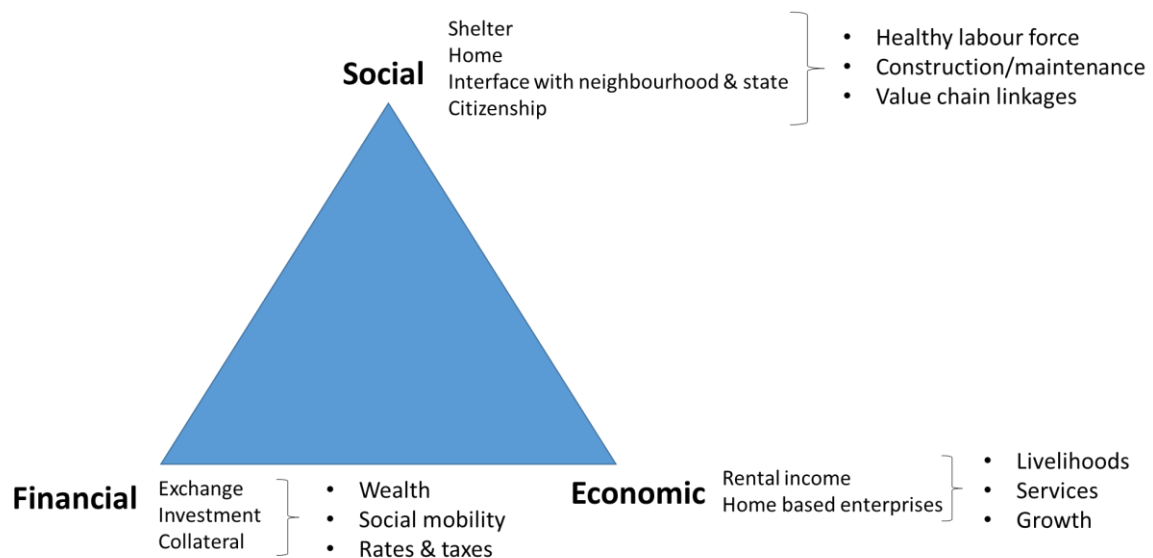


Figure 35: Housing Asset Values and their contribution to TED

12.3. Housing as Social Asset

Pinetown was planned as a dormitory suburb peripheral to social and economic opportunities. The settlement is therefore predominantly residential with a mix of formal, informal and traditional housing typologies. The area is characterised by high levels of unemployment, poverty and low household incomes. Approximately 60% of households remain below the poverty line. However, social stratification is evident in higher quality housing owned by middle-income households. The northern and eastern portion of the study area is composed of middle to high income housing, with areas like Queensburgh, Shallcross, Caversham Glen and Savanna Park. The southern and western areas, as well as the north western area comprises of low to middle income housing. Many of the housing upgrades in the area post 1994, were either in-situ upgrading or RDP type housing. A few hostels, as well as greenfield developments have also been developed. Existing informal settlements within the project area need upgrading.



Figure 38: An example of typologies in Pinetown South



Figure 39: An example of typologies in Pinetown South



Figure 40: An example of typologies in Pinetown South



Figure 41: An example of typologies in Pinetown South

There are stark differences in property values in the study area (see Figure 1.1 in financial asset section below). The average value of registered properties in 2019 was more than R700,000 in Nagina, Washington Heights, Regency Park and Mariannheights. In comparison, it was as low as R150,000 in places like Angola Block E, Coffee Farm, Luganda and Phumphele. In some subplaces, there is a noticeable class of middle-income households living in higher quality houses on larger plots. Homeowners have made substantial investments in their properties, renovating, expanding the original structure and improving place-making. This presents important opportunities for local construction industry and enterprise operating along the value chain.

As of 2019, Pinetown South had a registered housing stock of 19,000, which is only 50% of all the formal houses recorded in the census 2011. The mismatch indicates the challenges with the transfer of formal title deeds to individual homeowners. Between 2015 and 2019, the stock of registered properties grew by 870, which is about 5% of the total registered stock. Of the added stock, 552 were BNG units built in Mawelewele area, 111 BNG units in St Wendolins Ridge and 104 BNG units built in Savannah Park. According to the eThekweni municipality, there are a number of public housing projects planned within the study area. The metro has also identified Pinetown South as an area for densification and mixed-use developments. This does not only mean a variety of housing typologies and densities, but also a range of mixed activities in areas currently functioning as residential towns.

The following table illustrates the municipal housing objectives for the area:

Table 6: Municipal Goals for Higher Density Residential Development (as indicated in the Pinetown South Local Area Plan)

| Objectives | Performance Criteria | Spatial Implications |
|---|--|---|
| <p>To establish more sustainable settlements through densification.</p> <p>To provide more housing options within the study area for local and surrounding residents.</p> <p>To increase residential settlement densities in line with infrastructure capacity and development priorities.</p> <p>To formalise informal settlements and use the process toward increased densification within Pinetown</p> <p>Integrate housing typologies and income levels across the Pinetown South area to provide a variety of housing options</p> | <p>Reduction in regional housing backlogs;</p> <p>Increase in localised accommodation where workers who are employed locally can also live locally;</p> <p>Measurable increase in densities within appropriate areas of the LAP Area;</p> <p>Measurable increase in overlap of activities in identified nodal areas;</p> <p>Measurable decrease in space utilisation of key facilities and activities.</p> | <p>Increased variety of housing opportunities within the study area;</p> <p>Progressive network/structure of public space relative to activity intensities and location;</p> <p>Improve accessibility of housing opportunities;</p> <p>Close proximity of residential and employment option to each other as well as residential to transport corridors along the Cato Ridge Rail line.</p> |

Given the latest announcements by the Department of Human Settlements, indicating that free BNG housing delivery will be drastically reduced and replaced by sites and services schemes, it is unlikely that government investments in formal housing will play a significant role in future. However, there are opportunities for innovative public-private partnerships in delivering higher-density affordable housing. Through unlocking strategic sites and enabling in-fill developments, the city can promote urban consolidation and land use intensification. Pinetown South is currently not part of the declared National Priority Human Settlements Housing Development Areas, which have been set up by the Minister of

Human Settlements to prioritise grant funding and direct human settlements projects. Consideration should be given to motivate for Pinetown South to be declared a national priority area to benefit from the special status of these areas and attract public-private sector investments. Another challenge requiring closer attention is finding more effective ways of promoting higher density residential developments on traditional land or land falling with R293 townships (non SPLUMA compliant).

Within Pinetown South, the St Wendolins area, Nagina node and KwaNdengezi node have been earmarked for strategic investments into mixed-use, higher density developments. Property owners could be incentivised to promote vertical extension with commercial at the bottom and rental accommodation on top. Several properties located in these strategic sites seem to be under-performing. There is very little reinvestment in the building and the surrounding space. Some of these buildings are held by families with multiple beneficiaries / claimants. This process could be supported through regulatory reform (including the consolidation of properties), incentivising vertical expansion, fast-tracking building applications, promoting property market (formal) development.

Another opportunity relates to the subdivision of land owned by educational institutions and social organisations. Past planning practices have allocated large sites for these institutions where buildings can occupy approximately 50% or less of the land. As a consequence, large parcels of land remain vacant and in some cases are used for informal activities. This situation perpetuates spatial fragmentation. The underused portions of the land could be redeveloped into higher density residential blocks.

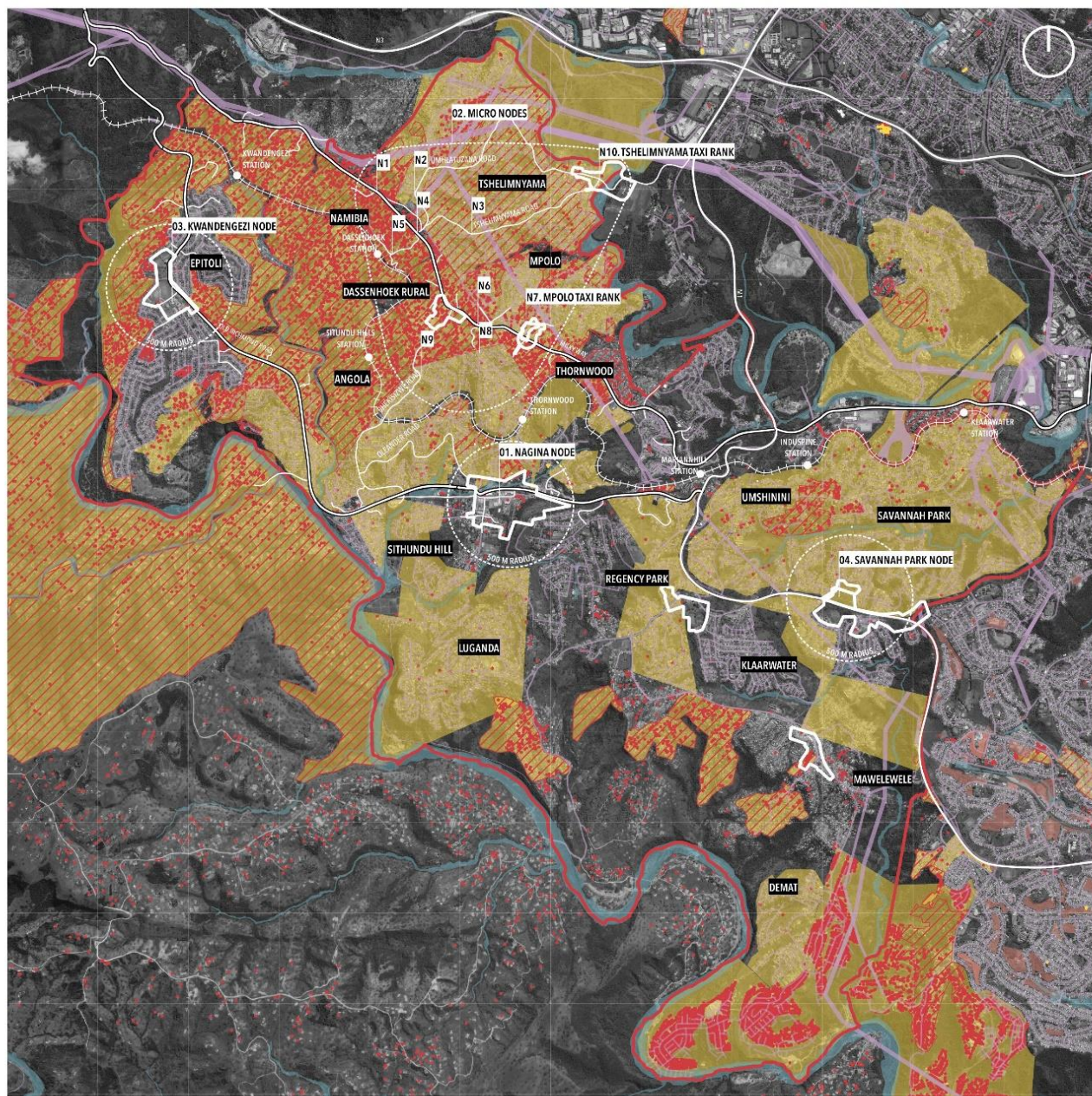
The formalization of informal settlements is another important strategy for the area. The aim is to implement formal layout plans, install bulk infrastructure and formalize individual erven to transfer ownership to households. The Municipality has a dedicated programme for the upgrading of informal settlements. The policy priority is to upgrade informal settlements in-situ and relocate only as last resort. An overview of the state of the housing plan in Pinetown South is visible in the map below. The table below indicates the status of the informal settlements located around the two primary nodes in Pinetown South – KwaNdengezi and Nagina.

Opportunity: Formal housing established in strategic sites.

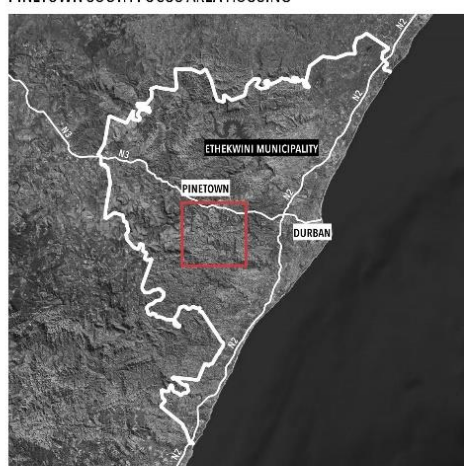
Table 7: Status of Informal Settlements around Nagina Node and KwaNdengezi Node

| Informal Settlement | Size (Ha) | No. of Units | Zoning | Sanitation | Water | Refuse | Electricity | Land Ownership | Proposed Intervention | Status | Environment |
|----------------------------|-----------|--------------|--------------|------------------------------|---------------------------------------|--------|-------------------------|-----------------|-----------------------|---------------------|--------------------------------|
| KwaNdengezi | | | | | | | | | | | |
| Rockdale | 67,36 | 853 | Undetermined | Pit latrines | Standpipes | None | Pre-paid meters | State | In-situ Upgrading | Existing Settlement | EIA Required |
| Sagu (Sandton Phase 3) | 13,27 | 212 | Undetermined | Pit latrines | Standpipes | None | Pre-paid meters or None | State/Private | Rural | Existing Settlement | EIA Required |
| KwaLinda | 39,05 | 626 | Undetermined | Pit latrines | Standpipes | None | None | State/Private | In-situ Upgrading | Existing Settlement | Part of D-MOSS Functional Area |
| Dassenhoek Block A | 21,58 | 431 | Undetermined | Pit latrines | Standpipes | None | None | State/Private | In-situ Upgrading | Existing Settlement | EIA Required |
| Sandton Phase 3 (KwaLinda) | 71,09 | 204 | Undetermined | Pit latrines | Standpipes | None | None | State/Private | In-situ Upgrading | Existing Settlement | EIA Required |
| Nagina | | | | | | | | | | | |
| Lower Thornwood | 27,76 | 345 | Residential | Pit Latrines and Water-Borne | Standpipes and Individual Connections | DSW | Pre-paid meters/None | Council/Private | In-situ Upgrading | Project in Progress | No Objections |

| | | | | | | | | | | | |
|---------------|-------|-----|-------------|----------|------------------------|----------------|-----------------|-----------------|-------------------|---------------------|---------------|
| | | | | Sewerage | | | | | | | |
| Madiba Valley | 52,69 | 181 | Residential | VIPs | Individual Connections | DSW Contractor | Pre-paid meters | Council/Private | In-situ Upgrading | Existing Settlement | No Objections |



PINETOWN SOUTH FOCUS AREA HOUSING



LOCATION KEY

KEY**Pinetown South Map****1. Base Map****1.1 Study Area**

Study_Boundary

1.2 Nodes

Extent

TED Focus Area

1.3 Connectivity

Development Corridor

Main Routes

Railway Stops

Railway Lines

Arterial Road

3. Infrastructure**3.5 Housing**

PS_HS_Formal_Units

PS_HS_Informal_Units

PS_HS_Infill_Projects

PS_HS_Informal_Settlement_Programme

PS_HS_Housing_Plan

PS_HS_CSG_SERVITUDE_LINE

PS_HS_CSG_SERVITUDE_AREA

PS_HS_Flood_Plain_100yr

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Map 58: Housing, Pinetown South

12.4. Housing as Economic Asset

Some homeowners in Pinetown have rented out their space or purpose-built accommodation in the back- or front-yard of their houses. While some of them are rented for free to family or friends, others are exclusively aimed at generating income. The backyard real estate market could offer some opportunities for the local construction and property industry as well as for businesses in up- and downstream industries.

Home-based enterprises are another important use of the house as an economic asset. Homes are the dominant business location for enterprises operating in residential neighbourhoods in the townships. They offer vital products and services to the residential population including food and retail, educare, entertainment, recycling and home maintenance. Homes are also used for businesses in high streets and commercial hotspots, although mobile structures such as containers, tables and stands are much more common. The recently conducted micro enterprise ecosystem survey recorded the location of entrepreneurs operating in the selected high streets and hotspots, which we grouped into businesses operating from property (private house & business premise) and impermanent location (containers, shed/shack, table). The survey recorded the location for 178 businesses out of 318 surveyed. The survey highlights that three-quarter of all businesses (131) operate from mobile structures (74%) and 25% operate from property (47). Street based business activities are dominated by shipping containers and shacks. The survey seems to indicate a missed opportunity for converted properties, including mixed-use buildings, to play a bigger role in strategic nodes. Especially considering that there seems to be a demand for commercial space in properties in those areas, as 66% of businesses operating from properties rented the space compared to 28% who owned it and 6% who did not declare their tenure status.

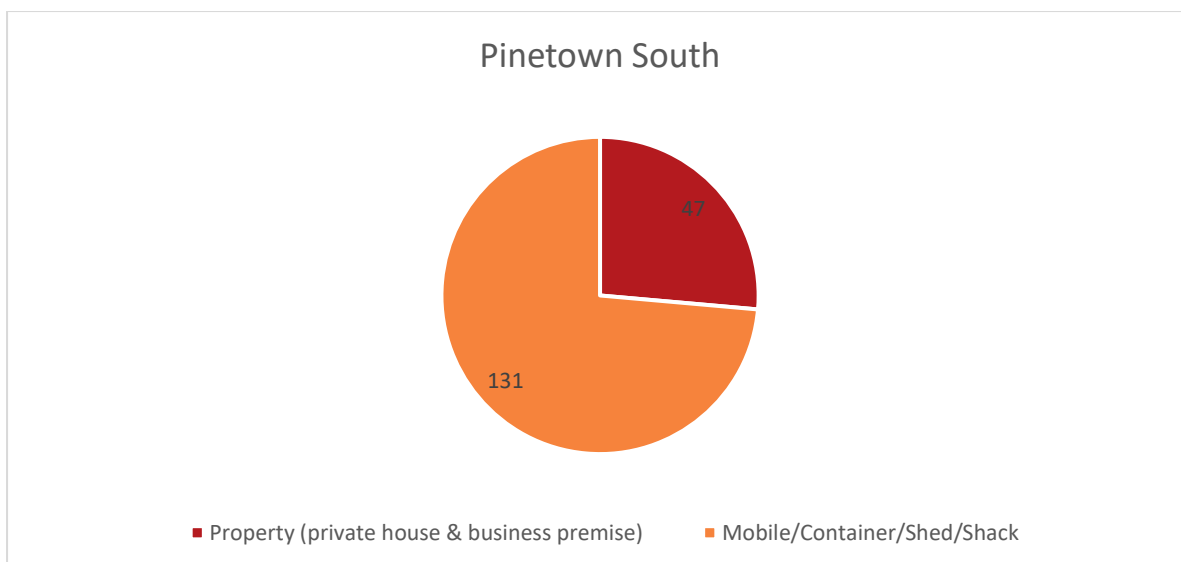


Figure 42: Micro-enterprise use of fixed or impermanent structures

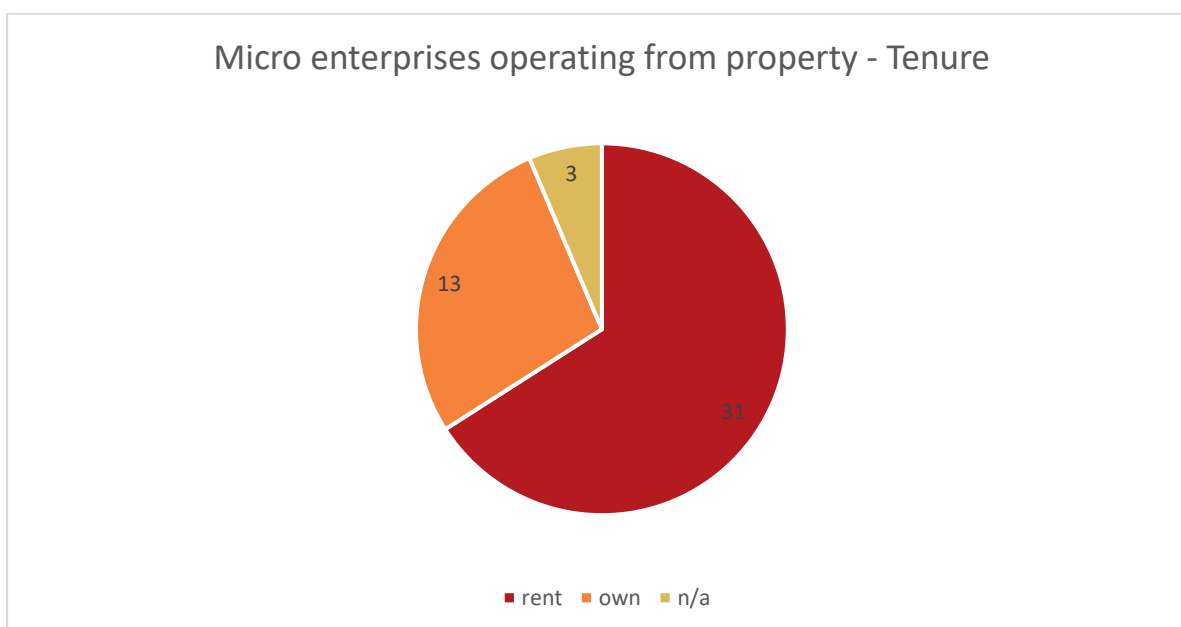
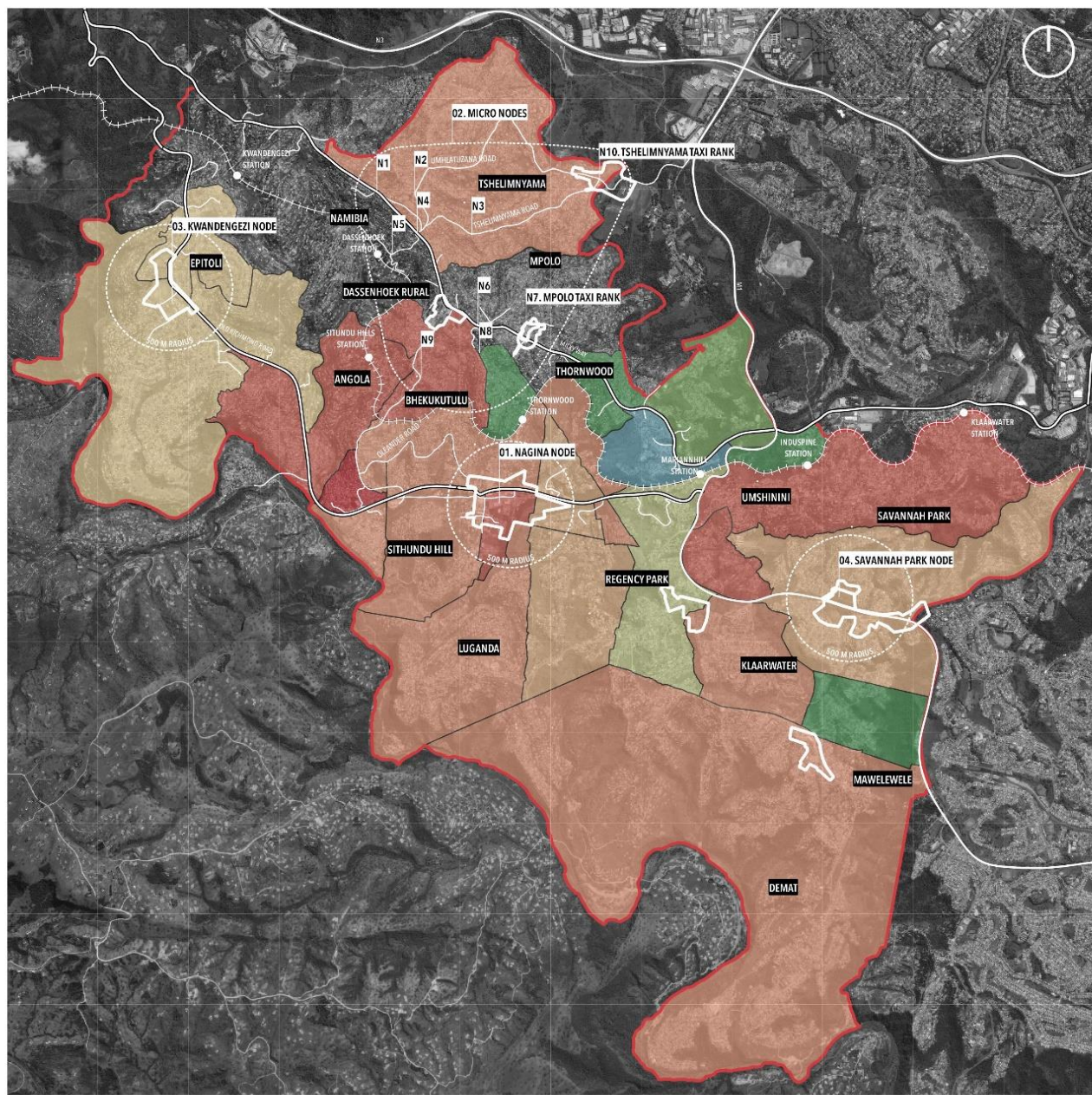


Figure 43: Tenure status of micro-enterprises

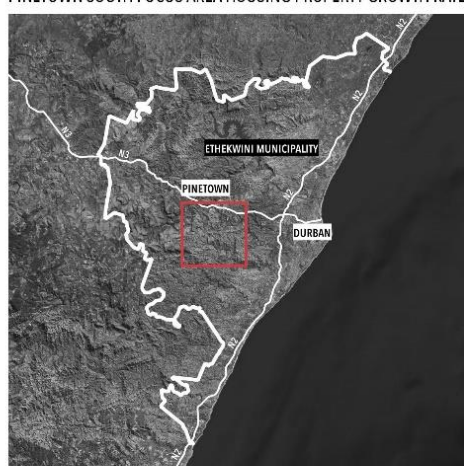
12.5. Housing as Financial Asset

The formal property market in Pinetown South showed greater diversity than in other townships with an average price at R300,000 but ranging between R150,000 to R750,000 in different neighbourhoods. However, the general market performance was weak (with a few notable exceptions) and mostly did not keep up with inflation. As many as half of all residential properties in Pinetown South might not have been registered with the deeds office although this is a rough estimate. In any case, the potential for financial gains was generally low as rates of transactions were extremely low. As in other townships,

owners seemed reluctant to sell their property (or at least, not formally). It appears that many property owners still prefer to trade houses informally, which is difficult to quantify as transactions take place under the radar.



PINETOWN SOUTH FOCUS AREA HOUSING PROPERTY GROWTH RATE



LOCATION KEY

KEY**Pinetown South Map****1. Base Map****1.1 Study Area**

Study_Boundary

1.2 Nodes

Extent

TED Focus Area

1.3 Connectivity

Development Corridor

Main Routes

Railway Stops

Railway Lines

Arterial Road

3. Infrastructure**3.5 Housing**

PS_Prop growth rate 2015-19

-2.47 - -2

-2 - 0

0 - 2

2 - 4

4 - 6

6 - 8

8 - 10

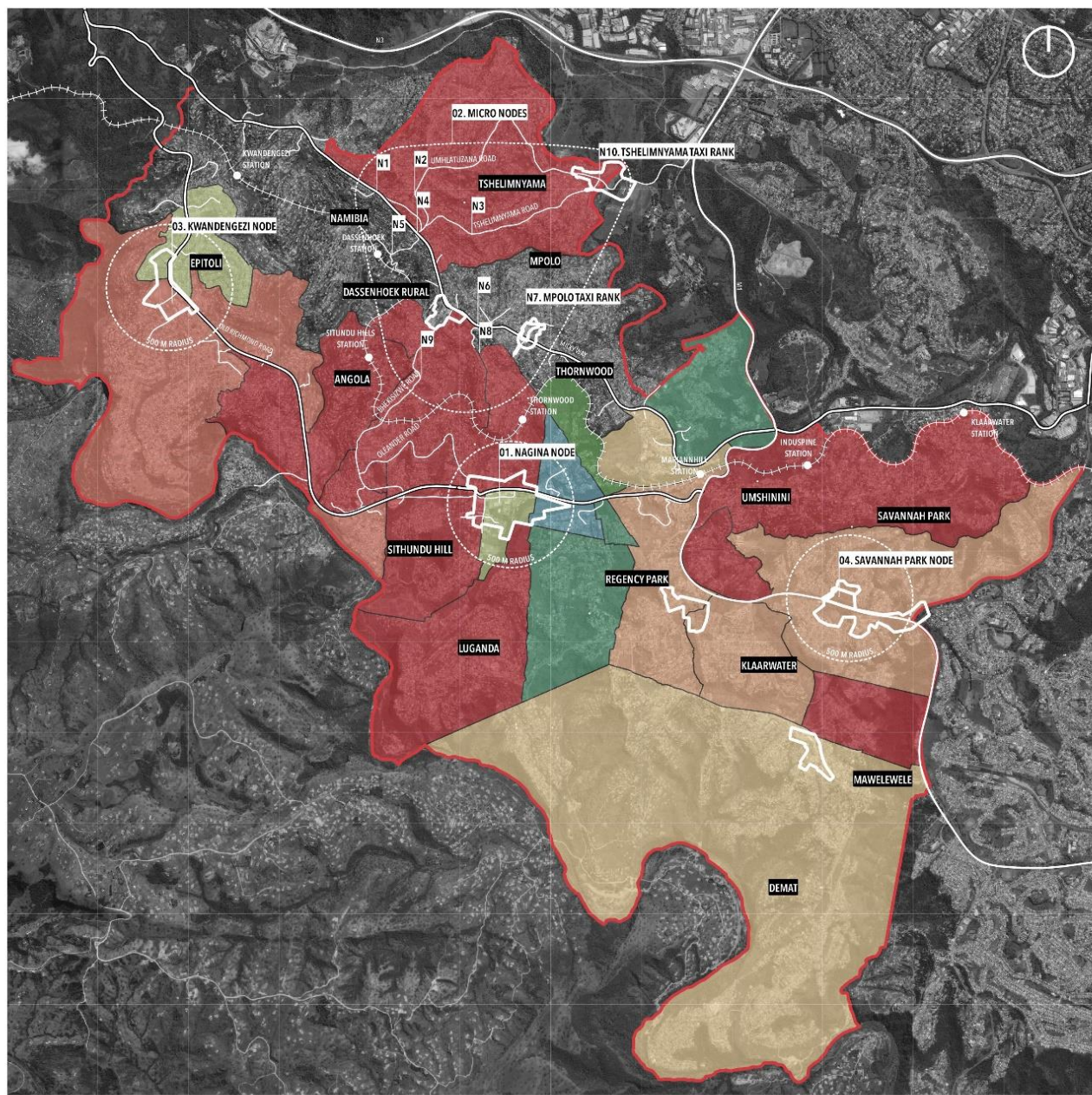
10 - 12

14 - 15.95

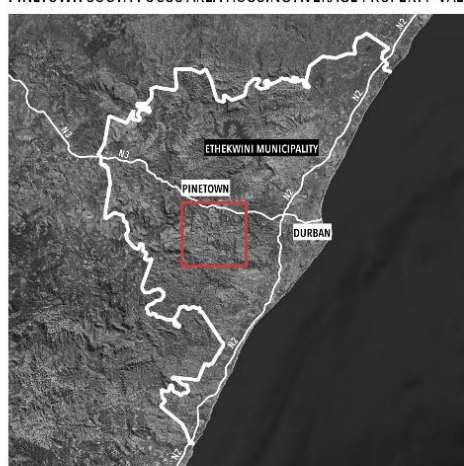
ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | HOUSING PROPERTY GROWTH RATE

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Map 59: Housing Property Growth, Pinetown South



PINETOWN SOUTH FOCUS AREA HOUSING AVERAGE PROPERTY VALUE



LOCATION KEY

KEY**Pinetown South Map****1. Base Map****1.1 Study Area**

Study_Boundary

1.2 Nodes

Extent

TED Focus Area

1.3 Connectivity

Development Corridor

Main Routes

Railway Stops

Railway Lines

Arterial Road

3. Infrastructure**3.5 Housing**

PS_Avg value 2019

111111 - 200000

200000 - 300000

300000 - 400000

400000 - 500000

500000 - 600000

600000 - 700000

700000 - 800000

800000 - 863007

ETHEKWINI MUNICIPALITY | PINETOWN SOUTH | HOUSING AVERAGE PROPERTY VALUE

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Map 60: Average Housing Property Value, Pinetown South

13. The Transport System

The Pinetown South transport network is shown in the maps below.

13.1. Transport Infrastructure

The table below describes the transport options and services available within the site.

Table 8: Pinetown South Transport Infrastructure

| Infrastructure | Comments |
|-----------------------|---|
| Road network planning | <p>The road network in Pinetown South attempts to follow the natural contours to reduce the steep gradients that would otherwise result. This creates a disconnect between dwellings and the pickup points as commuters have to walk up the hill to gain access to public transport services.</p> <p>Hilly or mountainous terrain makes it challenging for public transport initiatives to be implemented because routes need to be designed in a way that allows vehicles to return from the bottom of the hill, making it prohibitively expensive in some cases.</p> |
| Taxi ranks | <p>There are several formal bus and taxi ranks. Important taxi ranks include KwaNdegezi, Nagina, Mpola and Tshelimnyama</p> <p>Mini-bus taxis are the dominant mode of transport.</p> |
| Railway | <p>There are fifteen train stations within the study area.</p> <p>Railway is available and operational in the township although a few trains are provided per day.</p> <p>Engagement with PRASA is required to begin discussions regarding the rehabilitation of rail infrastructure.</p> <p>There is poor connection of train stations and mini-bus taxis. Commuters are required to make use of informal taxis to travel between stations and taxi rank which increases the cost of their trips.</p> <p>A circuitous line between Pinetown CBD and Rossburgh Station on the north-south line exists however the status of its operation is unknown.</p> |
| BRT | <p>No plans for BRT.</p> <p>There are several formal bus stations that are indicated on the GIS map.</p> <p>There is a route indicated on the GIS map however it is unclear whether it is the bus route. The municipality was engaged to determine whether the indicated route is for buses.</p> |
| NMT lanes | Poor condition of NMT infrastructure. |

13.2. Development Challenges

Pinetown South has hilly terrain. The built environment is uneven in that parts are rural or peri-urban while other parts are generally urban. In the rural and peri-rural neighbourhoods, there is inadequate infrastructure which include street and general lighting, engineered roads and access to water. Drainage systems are inadequate. The road shoulders are untarred.

13.3. Connectivity Between Different Modes

The connectivity between different modes of transport is not adequate in Pinetown South. Minibus taxis are widely used however commuters must walk the hilly terrain to access transport which operate from the mobility spines because taxi operators are reluctant to take neighbourhood routes as they are one way in and one way out due to the terrain constraints.

The connectivity between different modes of transport is not adequate. eThekweni Transport Authority (ETA) has developed an IRPTN plan for the entire Metro, which includes Pinetown as a major part of the system, however this plan does not extend to the township.

Corridor 3, 6 and 7 are the IPTN routes (shown below) have been proposed to serve the Pinetown area as follows:

- The C3 connecting KwaMashu Bridge City and Pinetown/ New Germany via the MR577;
- The C6 connecting Mpumalanga and Durban CBD via Pinetown along the N3 and the M13; and
- The C7 as an extension of the C5, connecting Chatsworth and Hillcrest along the M1 and M13.

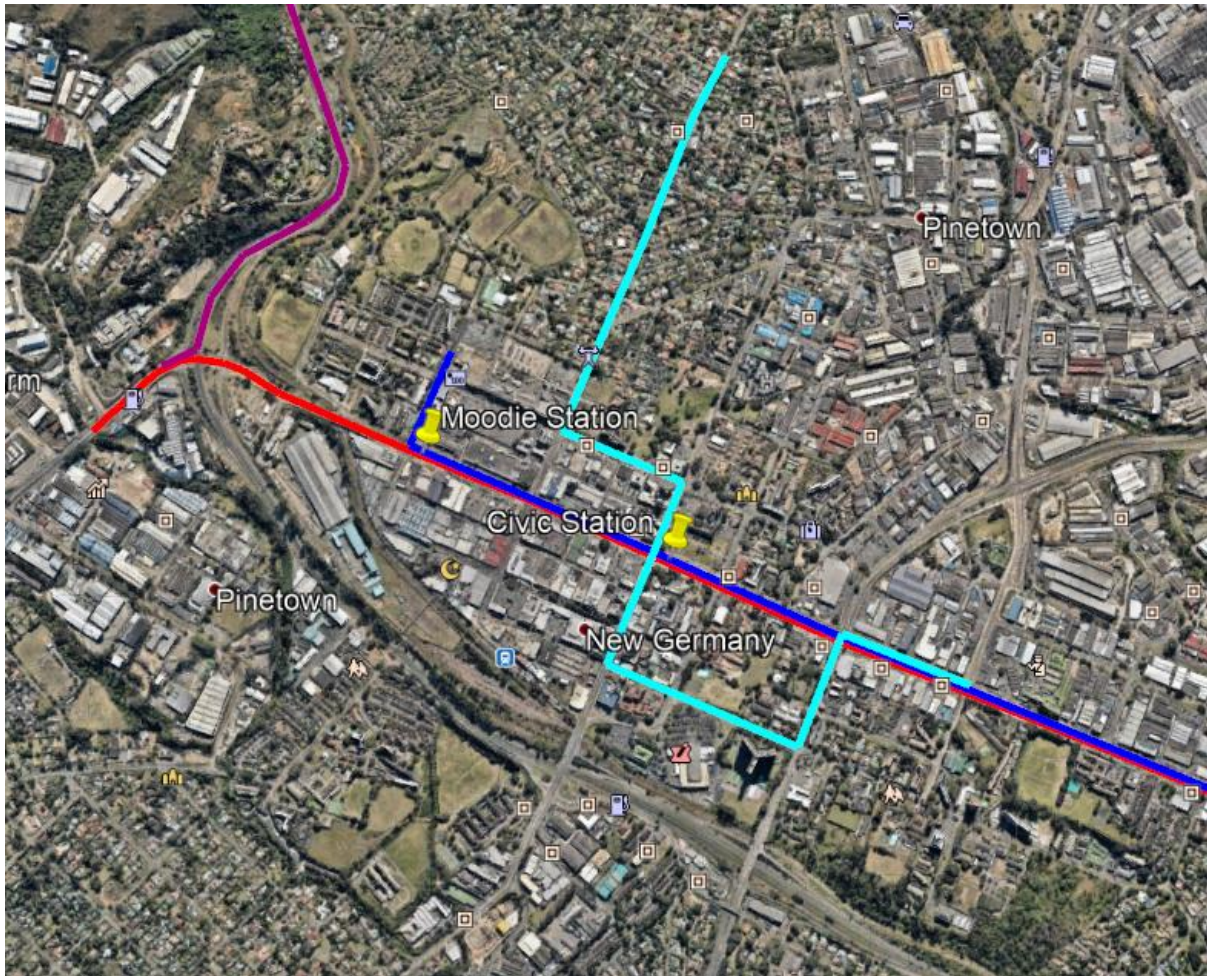


Figure 44: IPTN routes proposed in Pinetown

In terms of the IPTN, mini-bus taxis will be used to transfer passengers to BRT stations. Passengers travelling long distance with public transport services between Durban and Johannesburg will transfer on either of the three BRT services in Pinetown i.e., C3, C6 and C7. The linking and integration of the two public transport modes will create intermodal facilities within Pinetown.

The Metro has the following plans with regards to the taxi use:

- Long distance public transport services between Durban and Johannesburg using mini-bus taxis;
- Improvement of mini-bus taxi services along Anderson Street and Hill Street;
- Metered taxis and e-hailing services packing; and
- The development of holding facilities.

Due to limited land properties owned by the Metro within Pinetown, there are negotiations to enter into a partnership with private property owners to utilise their properties for public transport infrastructure holding facilities.

13.4. Transport Options and Services

The table below describes the transport options and services available within the site.

Table 9: Pinetown South Transport Options and Services

| Transport options and services | Comments |
|--------------------------------|--|
| Private vehicles | There are road users that make use of their private cars. Modal split data required. |
| NMT | Poor NMT facilities. This is especially a challenge in Pinetown South because pedestrians need to navigate hilly terrain safely while sharing facilities with motor vehicles. |
| Motorcycles | Not observed. |
| E-hailing and e-delivery | The use of e-hailing service was not observed, however there is a delivery system in Pinetown South that works closely with the taxi association which offers to assist commuters with delivering their goods to their homes. |
| Informal taxis | Informal taxis are available in the site and assist with transporting commuters from stations to taxi ranks. The goods and furniture delivery taxi system could be considered to be a form of informal taxis. |
| Mini-bus taxis | Mini-bus taxis are widely used. Long distance transport facilities are offered by mini-bus taxis between Durban and Johannesburg. |
| Metro buses | Routes to be confirmed. Information unknown at the time of writing of this report. |
| Long distance buses | Information unknown at the time of writing of this report. |
| Walkability | Walking in Pinetown South is challenging due to the hilly terrain. Commuters that have to access public transport have to walk long distances to the pickup points. The poor NMT facilities also have a negative impact on the walkability within the site. |

Whilst minibus taxi services are well supplied, alternative modes of transport, including e-hailing and motorcycles are under-served despite their growth potential.

Opportunity: Affordable public transport enhanced through expansion of local e-hailing services.

13.5. Non-Motorised Transport / Universal Access

There is a proposal to widen pedestrian sidewalks on the southern side of Josiah Gumede between the M13 interchange and Anderson Street. The volumes along this corridor are more than 2000 pedestrians in the afternoon peak hour.

Throughout the site, sidewalks require upgrading and maintenance. The Metro recognises the need to provide sidewalks where feasible in areas where they are currently unavailable.

In transportation, the concept of the complete street is a design approach that requires streets to be planned, designed and operated in a way that ensures the safety, convenience and comfort of users of all ages and abilities regardless of their mode of transportation. A complete street is consideration of motorists, pedestrians, cyclists and persons living with disabilities. Figure 45 below, extracted from the National Department of Transport NMT Facility Guidelines of 2014, displays a typical example of a road cross section that accommodates all road users, and it is recommended that it be considered in the non-motorised transport and universal access improvements.

The objective of universal access design is to provide infrastructure and services that cater to the widest range of users possible². Streets that are not designed for universal access result in the limitation of access to opportunities and services, imposing reliance on others to assist with movement and reduced safety.

A need to improve NMT and universal access design in Pinetown South has been identified. The following are some of the advantages of the implementation of NMT infrastructure:

- Improved accessibility to opportunities and services,
- Increased safety of road users,
- Reduced road fatalities,
- Increased multi-modal travel,
- Promotion of more energy-efficient and less pollutant modes of transport,
- Greater integration of road users.

Typical infrastructure interventions that could be put in place to improve NMT and universal access in the township include:

- Formal walkways (sidewalks, off-road paths, safe crossings),
- Dedicated bicycle lanes,

² National Department of Transport Non-Motorised Transport Facility Guidelines, 2014.

- Traffic calming measures (street humps/bumps/tables),
- Relevant traffic signalling and signage,
- Tactile paving,
- Audio traffic lights,
- Dropped kerbs.

The figures below provide examples of UA interventions and of a complete street typical road cross section.

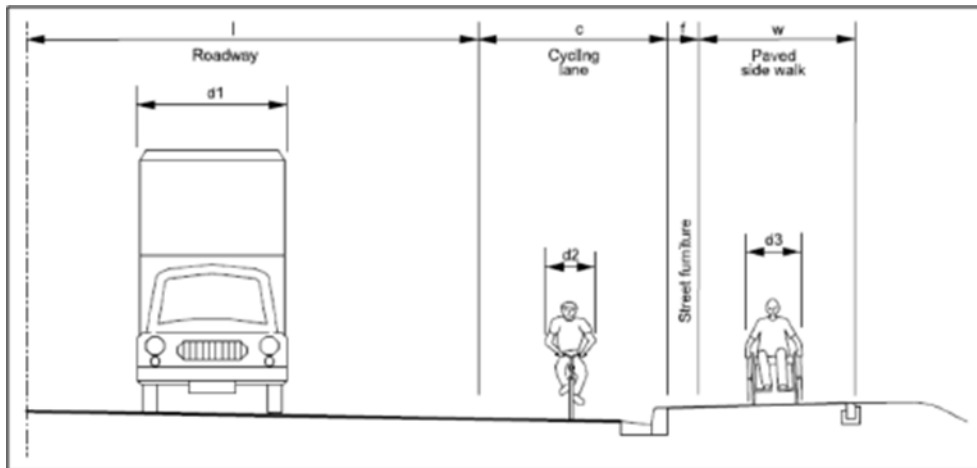


Figure 45: Typical cross-section of a complete street with a walkway/cycle track



1. Bus Stop



2. Dropped Kerbs



3. Pedestrian Controlled Audio Signal



4. Tactile Paving



5. Speed Humps



6. Cycling Lanes



7. Sidewalks

Figure 46: Examples of non-motorised and universal access infrastructure interventions

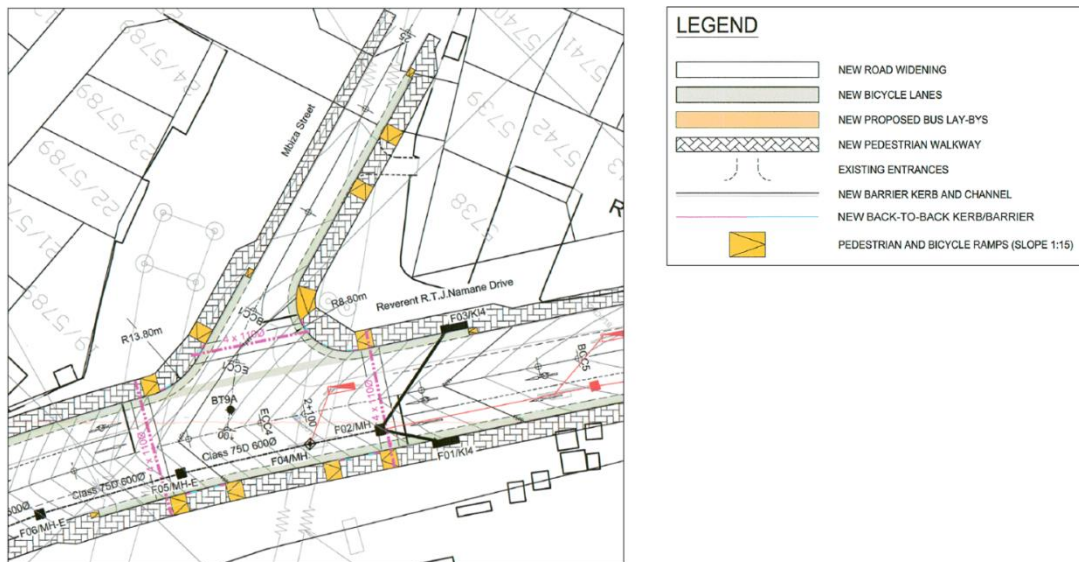


Figure 47: Typical intersection layout with universal access design

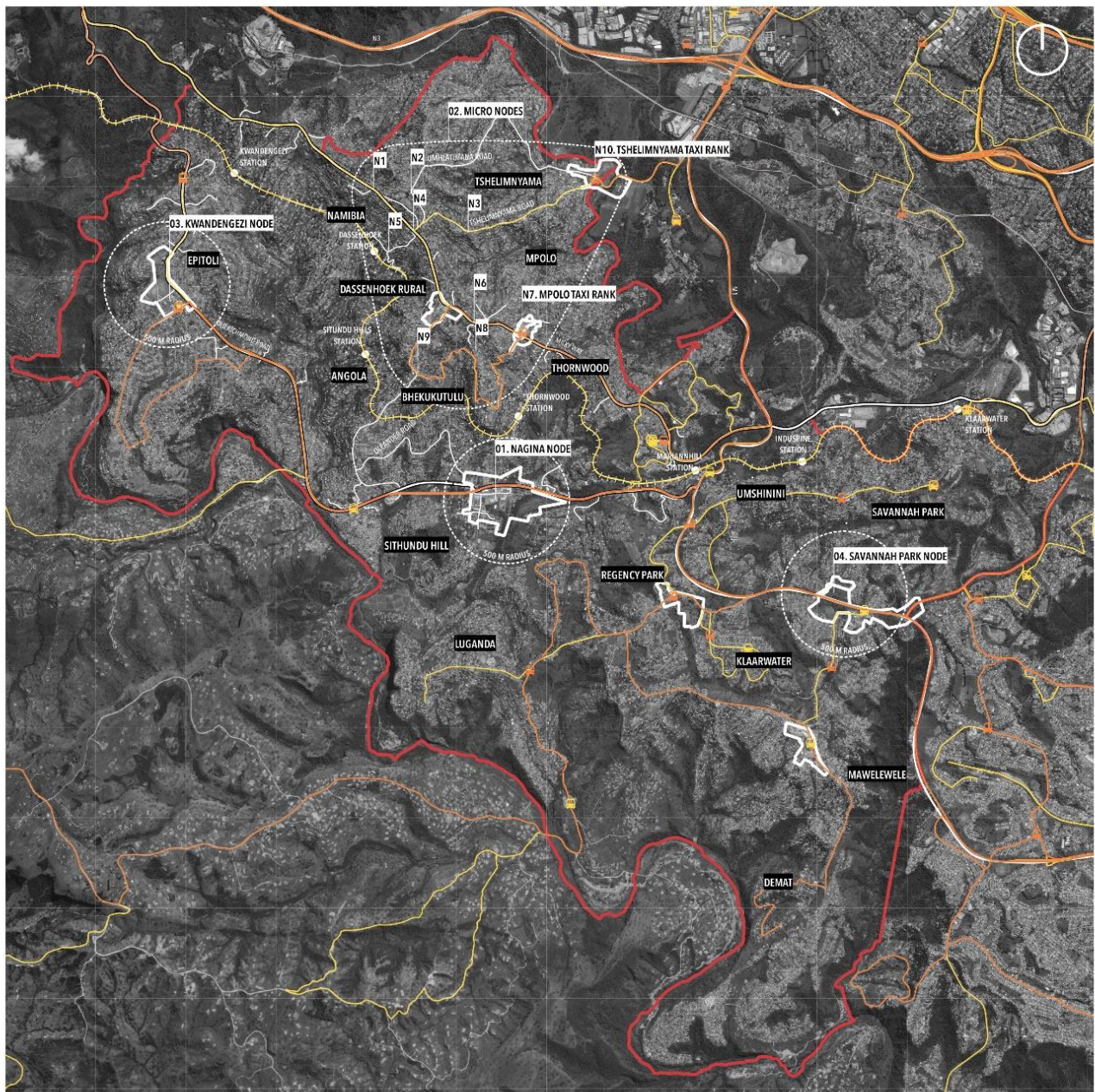
Note: The intersection layout with universal design considerations, including dropped kerbs and walkways for pedestrians as well as new bicycle lanes, was completed as part of the Metro's IRPTN strategy.

Opportunity: NMT and pedestrian lanes established.

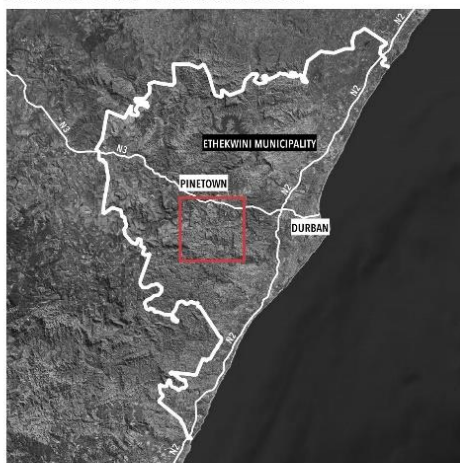
13.6. Integrated Public Transport Networks

The Metro aims to improve access and movement of people and goods between areas of need and opportunity within the municipal area. The eThekweni Transport Authority aims to implement an effective, efficient, sustainable and safe public transport system that would further assist in spatially transforming the city. NMT is seen as an essential components of land use and transport planning. Specific planning for Pinetown South was not identified. Strategic plans recognise that the unduly long travel times have had negative impact on the productivity of the workforce.

Opportunity: An integrated public transport system achieved.



PINETOWN SOUTH FOCUS AREA TRANSPORT



LOCATION KEY

KEY**Pinetown South Map****1. Base Map****1.1 Study Area**

Study_Boundary

1.2 Nodes

Extent

TED Focus Area

1.3 Connectivity

Development Corridor

Main Routes

Railway Stops

Railway Lines

Arterial Road

3. Infrastructure**3.1 Transport**

PS_TPT_Public_Transport_Facilities_2012

Bus Terminal

Pickup Point

Taxi Rank

PS_TPT_Bus_Taxi_Ranks

PS_TPT_CPTR2012_82_Routes_Final

PS_TPT_Public_Transport_Routes_2012

PS_TPT_Transnet_TPL_Servs_eThekweni

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Map 61: Transport, Pinetown South

14. Infrastructure

14.1. Overview

Public infrastructure has an important role in Township Economic Development (TED), but each township has specific (and hence different) infrastructure needs. It is therefore important to examine the ways that infrastructure facilitates the transport of resources between the wider economy to townships, and how it distributes resources to households and individuals in specific township sites. In the inner west region, South Pinetown's main infrastructure provider is the eThekweni municipality as this area is included in the Integrated City Development Grant (ICDG) received by eThekweni. Additional providers linked to road development are the KZN Department of Transport (DoT) and South African National Roads Agency (SANRAL). Key infrastructure issues that South Pinetown has faced include adequate stormwater drainage, increased demand on water supply, road development and sewerage works (eThekweni Municipality, 2015).

Within the site of Pinetown South, an assessment of current 'grey' infrastructure requires three substantive considerations. The first assesses current gaps or shortfalls at a community and sector level. The second identifies future supply/demand influences that may hinder the efficient/affordable/sustainable flow of these resources. The third proposes ways in which traditional infrastructure systems can be enhanced or adapted to build local resilience, through for example, including more sustainable, innovative, or decentralised systems (on-site biodigesters, rainfall harvesting, solar PVs etc.).

14.2. Digital Infrastructure

Pinetown South has recently gained access to Fibre lines, with Link Africa and Metro Connect Fibre as the two operators in the area. Fibre is not equally distributed through Pinetown South though, with only Mpolo, Thornwood, Nagina Node, Regency Park, and Umshini having fibre cabling so far (this can be noted in **Error! Reference source not found.**). This is expected to extend further into the whole of Pinetown South in the coming years.

The growth of the digital economy has important business development and operational opportunities for assisting SMMEs to maintain customer relationships, internal operations, competitive edge, and investment. A key question is how opportunities can be focused on the need at a township economy

level. Existing ICT technologies and involved infrastructure may be optimised to achieve this in conjunction with the physical attributes. eThekweni has already engaged in work around the Digital economy:

In 2013 the Broadband Policy, SA Connect, was commenced with support from National Treasury with the aim to connect all schools, health facilities, government offices, Thusong centres, and post offices to broadband services with 970 government facilities connected by the end of 2020. Telkom was announced as the lead agency for the project. In Durban, this project started within the city's core and periphery, but financial resources were a challenge in Pinetown West. The project looked at laying down fibre as well as other providing other technologies such as satellite dishes. However, progress was halted due to planning blockages. The Development Bank of Southern Africa (DBSA) is playing an important role in determining the best way forward for the next phase, with the Universal Services and Access Fund providing support through either once-off smart initiation subsidies or long term support programmes.

Durban Edge is the eThekweni Municipality's opensource platforms to provide economic intelligence and insight to economic decision-makers. It was established in 2011 by the City's Economic Development Unit, and provides reliable data on the global, domestic, and local economy for researchers, investors, business leaders, politicians, and other stakeholders to use. It was developed with the South African Cities Open Data Almanac, Open Data Durban, and the SA Cities Network (The Durban Edge, n.d.).

Most economic activities in Pinetown South are informal, and the COVID-19 pandemic has made it difficult for these businesses to continue. However, COVID-19 has also triggered the "digitisation of small businesses", such as the following:

SmartXChange is a Durban Technology Hub, with the aims of providing enterprise development services to SMMEs in the Media, ICT, and electronics (MICTe) sector, as well as upskilling entrepreneurs and the youth. SmartXchange manages a programme that identifies and assists in developing quality skilled MICTe SMMEs in KwaZulu Natal and also to build a pool of skilled MICTe workers that will enable KwaZulu Natal businesses to flourish. Through partnerships with corporates from the MICTe industry, tertiary institutions and the government sectors, SmartXchange is able to contribute towards the creation of sustainable jobs, economic growth and the competitiveness of the province.

Innovate Durban is a non-profit company aimed at supporting innovators (including government, businesses, academic and tertiary institutions, and other organisations) and innovation in the region. They provide programmes, research, capacity building and skills development to help advance innovators, using virtual as well as physical platforms (such as the Innovation Co-Lab). Innovate Durban aims to nurture, coordinate and facilitate an inclusive innovation ecosystem through utilising the fourth

industrial revolution for economic growth and job creation, with a focus on industry, spatially excluded or marginalised persons, the public sector and SMMEs.

Another key need that offers opportunity in Pinetown South lies in industry. The three main industrial areas, Westmead Industrial Park, Wiltshire Road Industrial area, and Marian Industrial Park offer potential for expansion within or around these areas (eThekweni Municipality, 2015) and that can be further explored.

The digital economy can work positively in boosting the operations of the small businesses in Pinetown South. This move includes the upgrading of existing utility infrastructure, and the addition of digital methods of trading. Online trading has gained popularity in recent years as people found digital applications for trade increasingly convenient. Existing ICT technologies and involved infrastructure may be optimised to achieve this in conjunction with the physical attributes.

Opportunity: Provision of digital infrastructure to **enhance local microenterprise access to internet, digital services and 4IR opportunities** – potentially building upon initial efforts made by the Metro to roll out the Fibre network and activate wi-fi hotspots in places such as schools, shopping centres and transport interchanges.

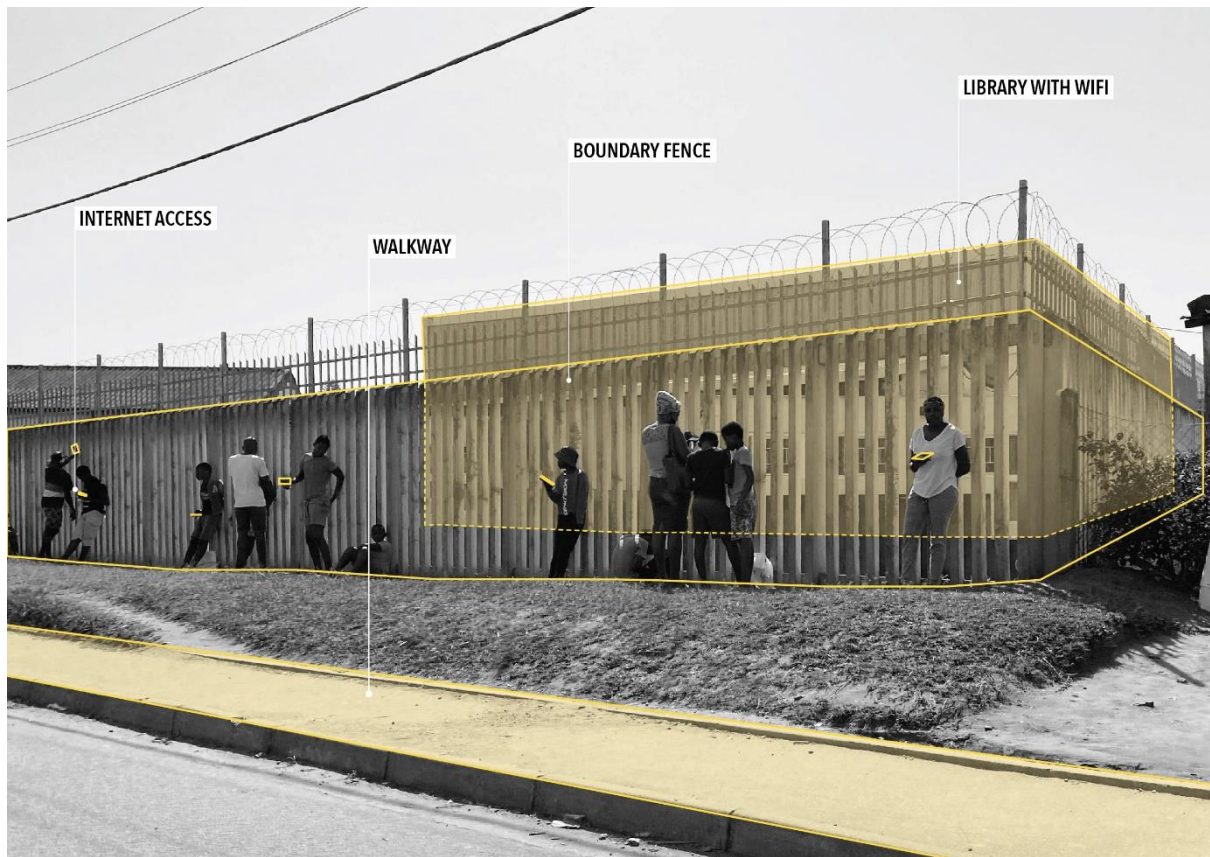
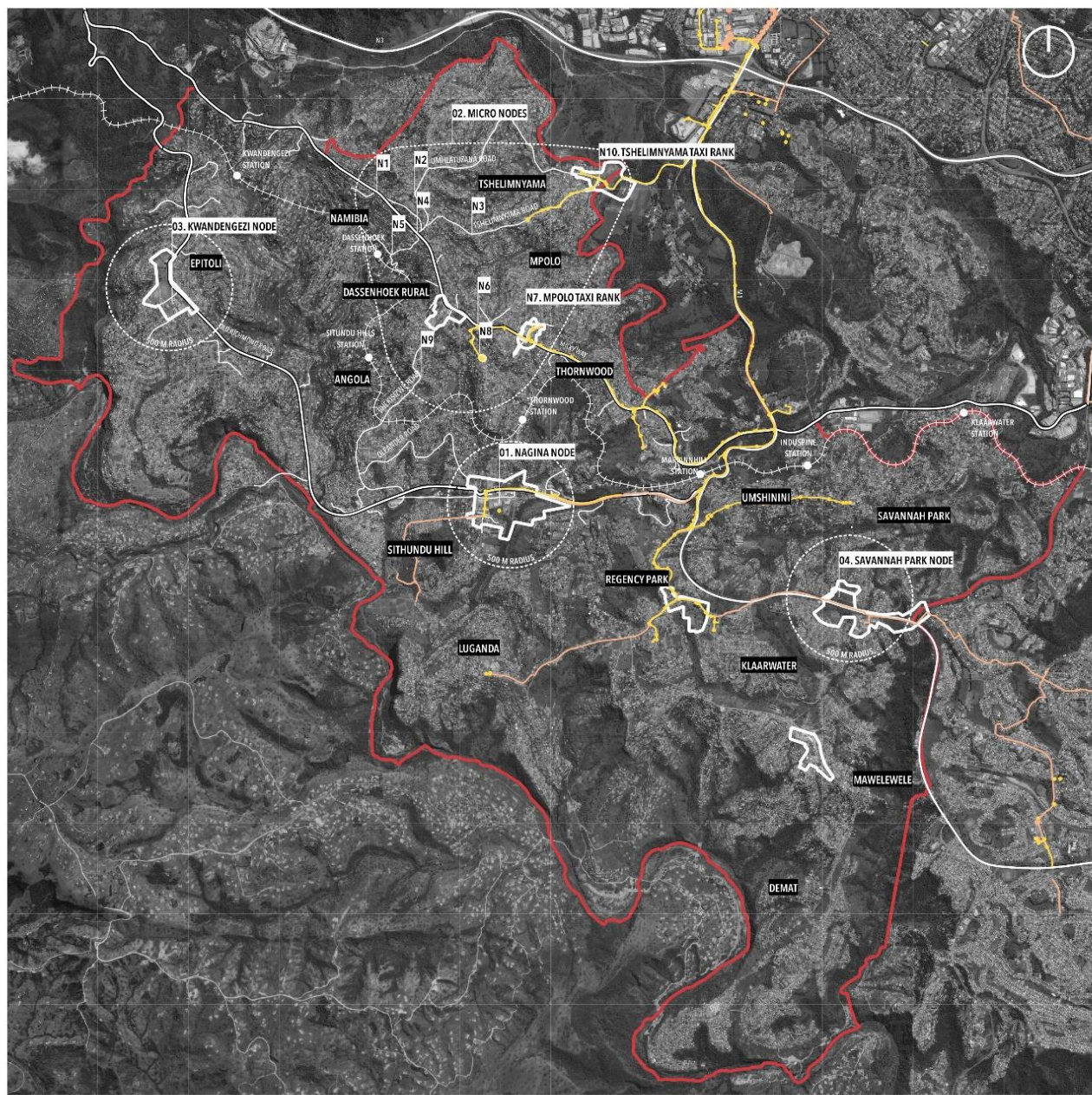
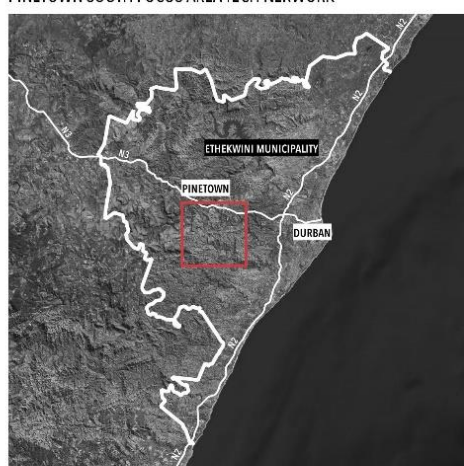


Figure 48: Digital access is provided for via public libraries. These building are protected by fences, resulting in users concentrating along the fence edge to access WiFi.



PINETOWN SOUTH FOCUS AREA TECH NETWORK



LOCATION KEY

KEY**Pinetown South Map****1. Base Map****1.1 Study Area**

Study_Boundary

1.2 Nodes

Extent

TED Focus Area

1.3 Connectivity

Development Corridor

Main Routes

Railway Stops

Railway Lines

Arterial Road

3. Infrastructure**3.7 Tech Network**

PS_ICT_LinkAfricaFibre

PS_ICT_MetroConnectFibre

PS_ICT_MetroConnectLocations

PS_ICT_MetroConnectManholes

PS_ICT_LegacyManholes

PS_ICT_CCTV_Manholes

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Map 62: ICT Network, Pinetown South

14.3. Stormwater Infrastructure

The quality of stormwater pipes around Pinetown South varies from area to area. There are specific areas in Pinetown South that show evidence of lower quality infrastructure provision for storm water runoff. The other areas in Pinetown South, specifically Luganda, Mawelewele, Dassenhoek Rural, Namibia, Angola, Tshelimnyama, Thornwood, and Mpolo, are severely lacking in this infrastructure, where there is either none developed, or it is developed below capacity. This would have serious implications on flooding in the area. An area with high gradient, this leads to frequent erosion of roads as well as slopes, putting houses at risk of collapse. Reports of increased erosion of river/stream banks and pollution of catchments. Areas which are struggling with increased soil erosion include Wards 13, 14, 15, 71 and 72 (eThekweni Municipality, 2015). Since no management principles have been applied to illegal expansion, it results in further erosion of banks and the movement of pollutants into catchments. Densification and hardening of surfaces also impact on catchment areas, since the stormwater management is insufficient to control the stormwater flow.

14.4. Bulk Water Supply and Wastewater Treatment

The Durban Heights Waterworks has reached its capacity and has since been experiencing increased pressure to provide to Pinetown South as the area continues to grow. The eThekweni Water Services Development Plan (EWSDP) intends to connect the Pinetown South area to the Western Aqueduct to ensure the constant supply of water to the area, relieve pressure on Durban Heights Waterworks, and lessen operational costs.

The Klaarwater Reservoir site does not have the space to expand, so the plan for expansion requires a new site to be identified. Certain areas in Pinetown South make use of 200 litre water tanks to distribute water in the households. This method limits distribution of water, and tanks are slow in filling up to maximum capacity. A census study shows that more than 80% of households in Pinetown South have access to piped tap water, while the remaining 20% of households access water through the community stands.

Two sewerage treatment centres service Pinetown South: KwaNdengezi Works and Dassenhoek Works. The infill and west/south end areas in Pinetown South need improvements in bulk sewers, while rural areas have no sanitation or pit latrines. There are reports of illegal water connections and flushing toilets in some parts of Pinetown South.

There are opportunities for water harvesting (rainfall, frequency and distribution) in Pinetown South, but there has been minimal investment in infrastructure to promote this. Pinetown South also has the potential to utilise spring water, which many water-bottling companies exploit.

14.5. Bulk Sewer Infrastructure

eThekweni Municipality owns and operates 27 Sewage Treatment Works, of these two sewerage treatment centres service Pinetown South: KwaNdengezi Works and Dassenhoek Works. The infill and west/south end areas in Pinetown South need improvements in bulk sewers, while rural areas have no sanitation or pit latrines. There are reports of illegal water connections in some parts of the community.

Bulk sewer service is well provisioned in Ward 16, Ward 63, and the Industrial areas in Pinetown South. This is due to these areas being the most urban in the site. The infill areas, as well as the south and west ends of Pinetown South require bulk sewer service improvement. The less urban areas have a waterborne sewerage system in place. Where this is not the case, pit latrines or no sanitation is a common characteristic. Plans are in place for a new bulk main to be established from Klaarwater South to Dassenhoek, with a later extension of this main to Kwandengezi Treatment Works (PSDF, 2015).

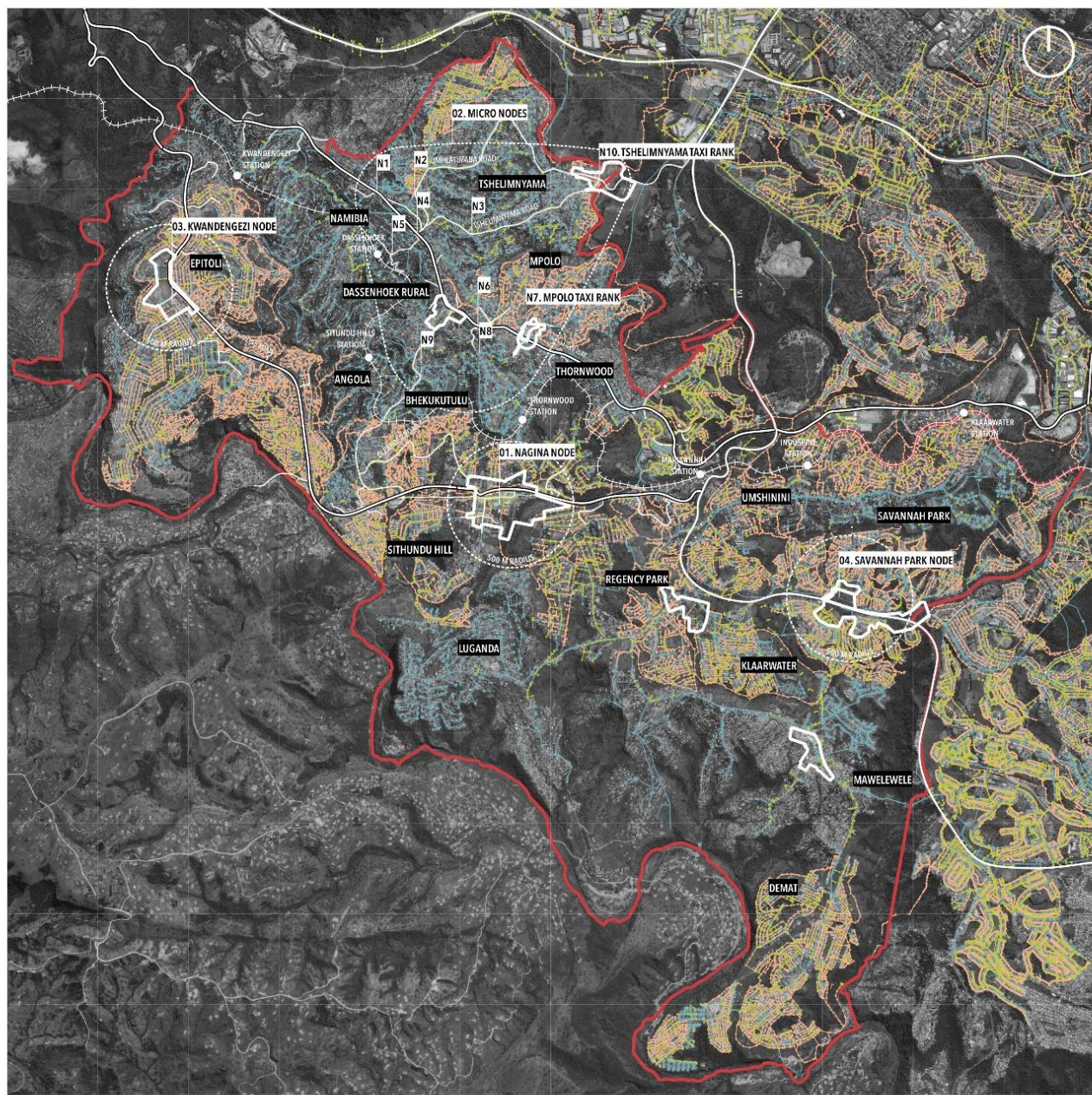
14.6. Solid Waste

Durban Solid Waste (DSW) currently has 23 operational centres, 6 transfer stations, 3 active landfill sites, 23 recycling plants, 3 landfill gas projects, and 2 leachate plants. There are no waste sites or recycling facilities within the Pinetown South boundary. Of the landfill sites, Mariannhill is in closest proximity to South Pinetown. However, this landfill site faces imminent closure due to capacity being reached, and has restricted the waste it accepts to garden, cover material and builders' rubble (Mngadi, 2020). This will have an impact on businesses in the western areas which now have to take their solid waste either to Buffelsdraai landfill site in Verulam or Lovu landfill site on the south coast (Mngadi, 2020). These arrangements will have a financial impact on the businesses which have to travel a distance for solid waste disposal. The city has identified another site for a new landfill in Shongweni, and the EIA for this has already been approved and plans been submitted (Mngadi, 2020). It is hoped that it shall be complete in 2022.

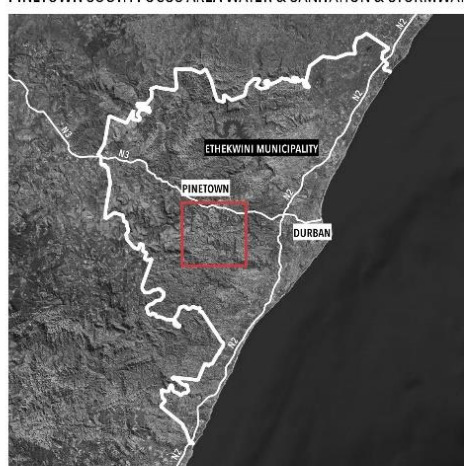
Most Pinetown South residents have their refuse collected by the municipal service once a week, while a much smaller portion of the community makes use of unauthorised refuse dumps (eThekweni

Municipality, 2015). Households that do not get serviced regularly are forced to bury, burn or dump their refuse, which has several environmental and health risks.

The City collects recyclable material from households with the orange bag system that has been implemented to encourage home-owners to recycle (Nene, 2018). There are numerous recycling centres throughout the metro as well as at shopping centres. The eThekweni Integrate Waste Management Plan (IWMP) states the desire to meet waste minimisation goals for waste disposal by separation at source of recyclable materials for all households, commercial and industrial premises; diversion of organic waste where feasible from waste stream for alternative treatment to maximise benefits, and a significant reduction of volume of residual wastes for disposal; and alternative economically feasible waste treatment of contaminated recyclable materials and non-recyclable residuals (eThekweni Municipality, 2016). While the DSW does not undertake any waste treatment processes prior to landfilling, the IWMP states that this could be a future recommendation as treatment of waste is an important concept that needs to be undertaken as it ultimately results in a reduction of waste being landfilled (eThekweni Municipality, 2016).



PINETOWN SOUTH FOCUS AREA WATER & SANITATION & STORMWATER



LOCATION KEY

KEY**Pinetown South Map****1. Base Map****1.1 Study Area**

Study_Boundary

1.2 Nodes

Extent

TED Focus Area

1.3 Connectivity

Development Corridor

Main Routes

Railway Stops

Railway Lines

Arterial Road

3. Infrastructure**3.3 Water & Sanitation & Stormwater**

PS_WS_StormwaterManholes

PS_WS_StormwaterPipes

PS_WS_Culverts

PS_WS_Sewer_Manholes

PS_WS_Sewer_Pipes

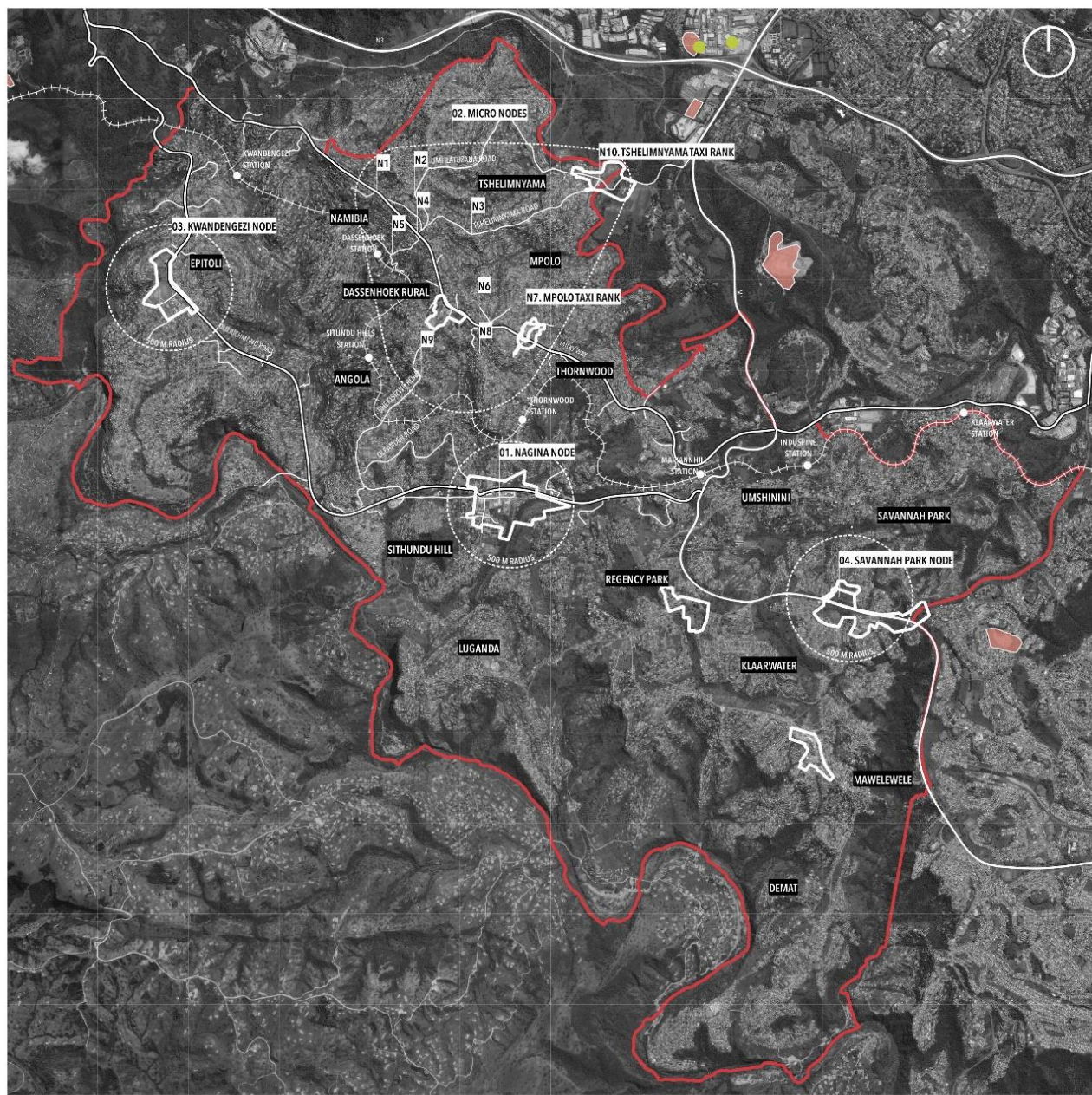
PS_WS_WaterFittings

PS_WS_Watermains

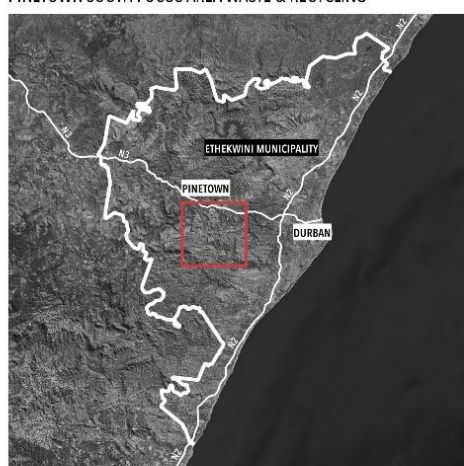
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Map 63: Water, Sanitation and Stormwater, Pinetown South



PINETOWN SOUTH FOCUS AREA WASTE & RECYCLING



LOCATION KEY

KEY**Pinetown South Map****1. Base Map****1.1 Study Area**

Study_Boundary

1.2 Nodes

Extent

TED Focus Area

1.3 Connectivity

Development Corridor

Main Routes

Railway Stops

Railway Lines

Arterial Road

3. Infrastructure**3.6 Waste & Recycling**

Waste_Sites

Recycling_Facilities

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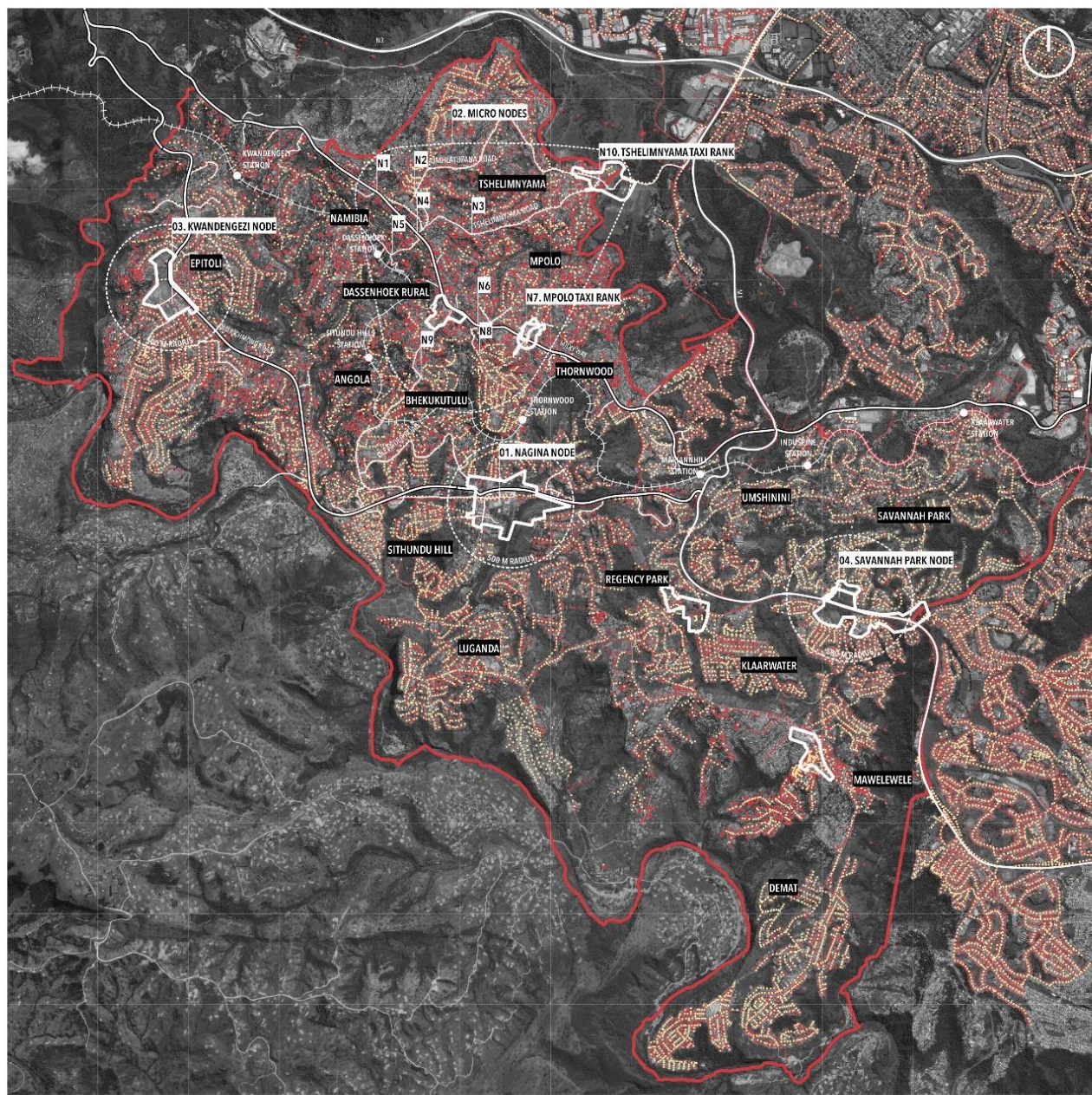
Cities Support Program | Sustainable Livelihoods Foundation | Township Economic Development Project | Situational Analysis Report | 29.03.2021

Map 64: Waste and Recycling, Pinetown South

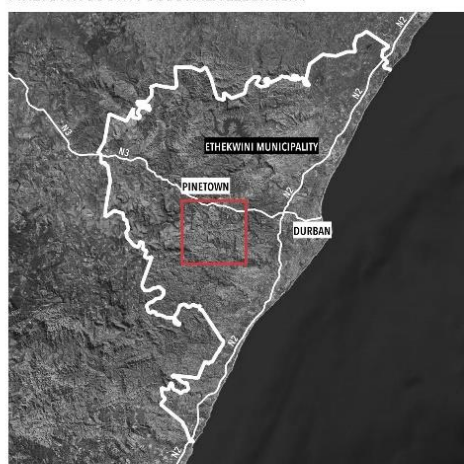
14.7. Energy Provision

Electricity and streetlighting in Pinetown South are not even, with areas like Namibia and Dassenhoek Rural, and Angola having a shortage of streetlighting, which is the municipality's responsibility. Conversely Luganda, Mawelewele, and Savanna Park have decent adequate access to streetlighting but a lack of access to electricity poles. Although many households use electricity, the use of candles, paraffin, and solar power is also common. Solar power is used the least out of all the other forms of energy. There is also no evidence of electricity infrastructure in the undeveloped areas of South Pinetown. Future expansion plans will be subject to Eskom's capacity to supply the additional power.

Of the developed areas with electrical infrastructure, improvement plans are in place. These upgrades are in the Underwood Station, four transformers in Klaarwater Substation and the new Stockville Switching Station. Once the scope and category of proposed land uses and developments have been determined, an estimated electrical load needs to be communicated to the eThekweni Electricity Department to provide final assessments on available capacity (eThekweni Municipality, 2015).



PINETOWN SOUTH FOCUS AREA ELECTRICITY



LOCATION KEY

KEY**Pinetown South Map****1. Base Map****1.1 Study Area**

Study_Boundary

1.2 Nodes

Extent

TED Focus Area

1.3 Connectivity

Development Corridor

Main Routes

Railway Stops

Railway Lines

Arterial Road

3. Infrastructure**3.2 Electricity**

PS_EL_Pole

PS_EL_Lighting

PS_EL_Tower

PS_EL_Underground Electricity Cable

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Map 65: Electricity Infrastructure, Pinetown South

14.8. Environment

14.9. Overview

Where many cities are now mainstreaming 'green economy' considerations to address sustainability challenges, the view that an inclusive green economy should explicitly recognise and integrate the informal economy is gaining traction. Some provinces are starting to mainstream green economy strategies, (Götz and Schäffler, 2015), circular economy thinking, and engage in informal economy upliftment planning (Rogerson, 2016), there has been little crossover or integration of these into economic development discourses.

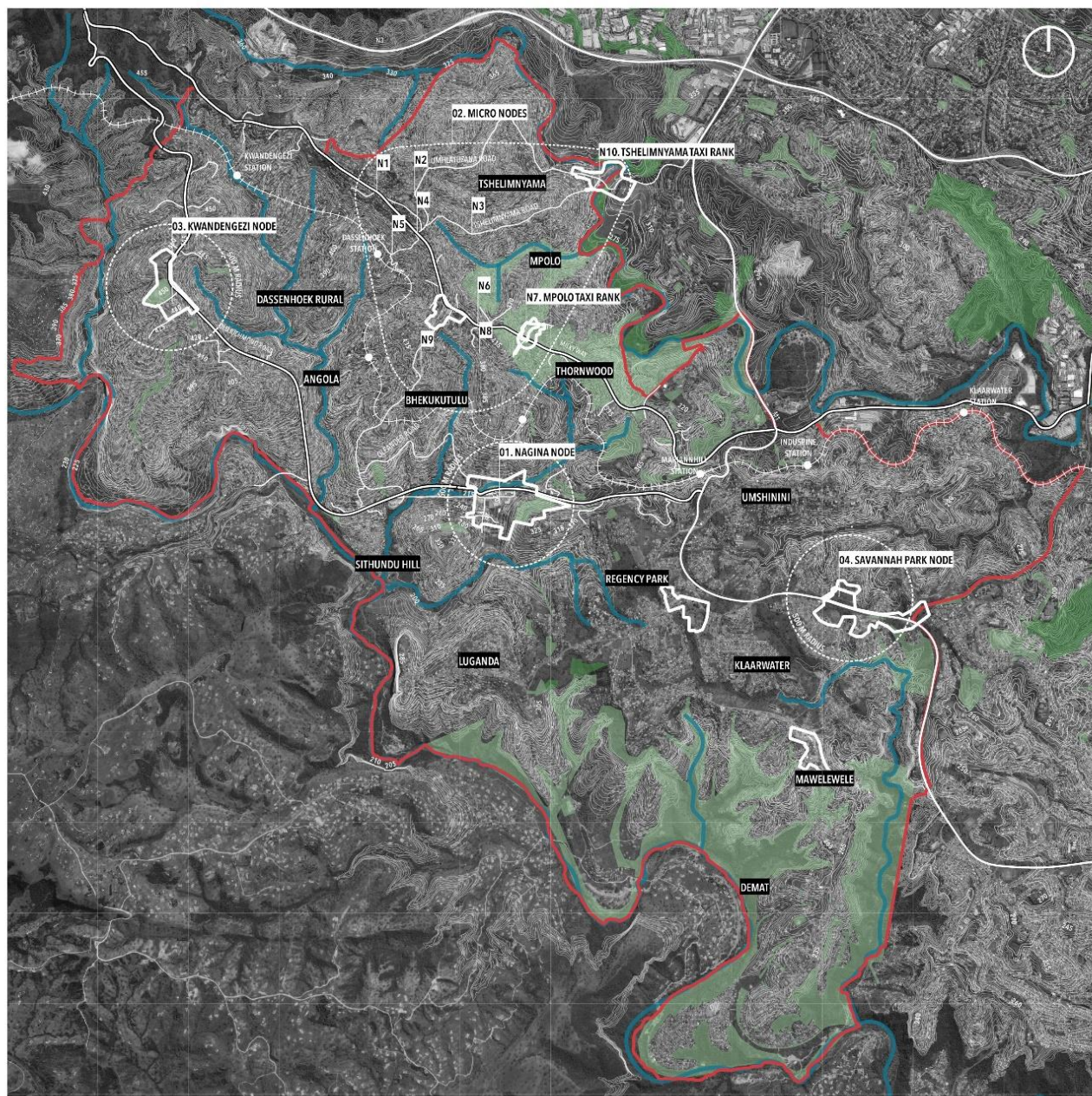
The assessment defines those involved, either as direct good/service providers or contributors along the value chains, as 'green entrepreneurs', despite varying levels of activity. It is important to note that the business intention for the activities identified may not be defined by explicit motivations related to the green economy. However, the green economy 'co-benefit' (sustainability/ecologically enhancing outcomes) of these activities should be leveraged for additional support from institutions and programmes where the green economy is a priority.

14.10. Green Infrastructure

The terrain in the Pinetown South settlement is steep and hilly, with numerous rivers running throughout, the three main ones being the Umlaas, Umhlatuzana, and Umbilo Rivers. The Umlaas River drains into the Indian Ocean via the Umlaas Canal, while both the Umhlatuzana and Umbilo Rivers drain into Durban Bay. These natural assets, given their location, are important generators of water-related ecosystem services, such as water cycling, water purification, and natural hazard protection. This poses challenge for service delivery and infrastructure, especially noting that houses are set back from roads and servitudes due to the terrain. River restoration pilot projects (Pretorius, 2020), like those running in Clermont (Aller project), Westville (Palmiet Project), KwaMashu (Sihlanzimvelo), and Folweni/Ezimbokodweni (Wize Ways Water Care) have become a key focus of the City's environmental departments' 'Transformative Adaptation' agenda. Models similar to such pilots might be applicable in South Pinetown and synergies could be explored. River restoration pilots represent an opportunity to restore ecological infrastructure as well as provide employment and skills development. The municipality has already placed ecological infrastructure at the core of their approach to respond to climate change, establishing themselves as a leader in supporting this kind of green economy activity.

Likely to this, the development of public parks and green belts along restored river ways might support local recreation opportunities that link to a broader network of recreational infrastructure (such as Giba Gorge).

Pinetown South contains significant natural assets. This includes Marionwood, Roosfontein and North Park Nature Reserves, the Umlaas, Umhlatuzana, and Umbilo Rivers, wetlands, grasslands, and forest / woodland areas. Paradise Valley Nature Reserve borders the Pinetown South study area in the west and is the site of a flagship municipal project which is restoring ecological infrastructure as a climate change adaptation intervention (eThekweni Municipality, 2015).



PINETOWN SOUTH FOCUS AREA NATURAL FEATURES



LOCATION KEY

KEY**Pinetown South Map****1. Base Map****1.1 Study Area**

Study_Boundary

1.2 Nodes

Extent

TED Focus Area

1.3 Connectivity

Development Corridor

Main Routes

Railway Stops

Railway Lines

Arterial Road

4. Natural Features

Rivers

Active Open Space

Cemetery

Conservation Reserve

Environmental Conservation Reserve

Passive Open Space

Public Open Space

Not Zoned

PUBLIC OPEN SPACE

Relief_Lines_5m

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14.11. Urban Agriculture

Food security has also been an issue in Pinetown South, exacerbated during the lockdown. There are successful food garden projects running, like the Luganda garden which is supported by Shoprite, as well as the Food and Trees for Africa campaign. This garden has been running since 2008 and helps provide 600 people with additional fresh vegetables from its one-hectare operation, employing 12 people. Other agriculture-related activities may include pest control services, vending/trading of urban agriculture produce (especially in the sale of cooked food) and integrating indigenous knowledge about plants and produce for traditional healing into agriculture efforts.

In 2019, the KZN MEC for agriculture launched a programme to encourage urban agriculture (African News Agency, 2019). As well as this, the Pinetown South Local Area Plan, Functional Area Plan and Scheme Review has acknowledged scope for increases localised urban agriculture, stating that the “agricultural potential will be most successfully realized when agriculture is planned at a localized scale and integrated into urban design and storm water management strategies” (eThekweni Municipality, 2015: 50). It has identified the Department of Agriculture as being a funding department, having already funded fencing projects, poultry projects, agricultural massification, and assistance with local co-operatives (eThekweni Municipality, 2015). It is further suggested that urban agriculture should only occur in areas which are not prioritised for development.

14.12. Waste Management and Recycling

Pinetown South is close to the newly established Hammarsdale Waste Beneficiation Centre which aims to facilitate market access for waste sector entrepreneurs in the informal economy. The eThekweni Municipality has recognised the importance of the informal economy in the recycling sector, for which trader shelters and cardboard recycling centres for informal traders were built. The municipality has invested over R70 million for the provision of facilities to unlock jobs and grow the informal economy (Walford, 2018).

DSW provides numerous buy-back centres across the municipality. Buy-back centres are the primary source of income for informal collectors, as the collectors sell their materials to the buyback centres (Ferreira, 2016). Waste pickers in eThekweni play an integral role by contributing to the reduction of greenhouse gas, cost savings to the municipality, and cleaning the city. On average waste pickers in eThekweni collect 59 kgs per day, each saving the city R122 per day, which is significantly more than

what many waste pickers earn per day (Ferreira, 2016). This service provided by waste pickers contributes to growing of awareness about the green economy.

Opportunity: Building on prior and ongoing efforts, the City should **facilitate partnerships and market linkages** to enable township recyclers to more effectively **obtain and package waste materials**, and to enhance their **access to markets**.

14.13. Urban Ecosystem Risks and Opportunities

A key urban ecosystem risk in South Pinetown is flooding / rain damage to physical infrastructure and road networks after heavy rain events. A key response measure would be to ensure grey infrastructure is implemented with green infrastructure to ensure mitigation of climate impacts and protection of investments.

14.13.1. Green/Ecological Infrastructure

In Pinetown South, ecosystem services are supplied by the natural assets which make up approximately 31% of the study area (eThekweni Municipality, 2015). There are a number of local ecosystem services of critical importance to the municipality and its residents:

- Regulated fresh water supply (for domestic and industrial uses)
- Water purification (dilute and treat wastes and pollutants)
- Spiritual and religious values (cultural practices)
- Recreation and aesthetic values (e.g. birding, swimming, picnicking and angling)
- Soil formation and fertility (supporting agriculture)
- Climate regulation (e.g. reduce heat-island effect, assimilate particulate matter)
- Natural hazard protection (e.g. reduction of flooding and storm surge impacts)

The areas delivering the greatest ecosystem services (and those of highest conservation value and environmental sensitivity) surround KwaNdengezi to the south west and surround Tshelimnyama to the north.

However, the rivers in South Pinetown are increasingly polluted, with ongoing issues of sewerage leaks into the rivers. This is especially true for the main Mhathuzana and uMbilo rivers. There are also compounded issues from the maintenance of the uMbilo Wastewater Treatment Works to outdated sewerage systems and manholes situated around the river. In response to this polluting of the rivers,

numerous conservancies and NGOs have been set up to protect the river systems in South Pinetown specifically the Pinetown Conservancy, Pinetown Industrial Conservancy and the Conservancy of the uMbilu River Valley, which focusses on alien plant eradication and rehabilitation of indigenous assets. Greenpeace Durban volunteers support the activities undertaken by these conservancies.

The uMbilu River Watch was established by surrounding communities to monitor and report the river pollution incidents - sewerage leaks/spills in the Pinetown/Queensburgh area and chemicals being released into the river from around Westmead region (Pillay, 2020). The uMbilu river and tributaries flows through several communities and informal settlements where the pollution of the river system has had serious environmental and human health issues. Since the Watch's founding, the Durban Mayor Mxolisi Kaunda, visited the uMbilu wastewater treatment plant and ordered city officials to fast track maintenance work in the plant - effluent of which discharges into the river system (Pillay, 2020).

The metro has recognised that river pollution is a major issue and various interventions have been put in place. These interventions are comprised of both social (educational) and technical (engineering solutions) (Nene, 2018). To further combat endemic river pollution, the eThekweni municipality has designed and installed "trash traps and oil separation" weirs on various rivers and canals around the city (Nene, 2018).

14.13.2. Micro-Enterprise Development

14.13.2.1. Green/Ecological Infrastructure activities

The EM has also committed to protecting, restoring, and managing the metro's ecological infrastructure through its IDP. Part of this commitment is a focus on the Green Economy. The metro has numerous river restoration projects which partner with local community-based organisations, usually co-operatives, to undertake alien invasive clearing and other green infrastructure restoration/maintenance. The EM is currently managing 300km of rivers, employing 59 community cooperatives with the goal of using this type of river management for all 7400km of rivers across the metropolitan area. Funding for river management programmes comes from commitments from various departments' operational budgets, as well as international climate adaptation funding from organisations like C40 cities through its Climate Finance Facility (CFF). As transformative river management practices become more mainstreamed, metropolitan municipalities should also be able to access funding from national programmes like Working for Water.

The Mlazi river and Cutshwayo streams and surrounding catchment areas have high potential for undertaking river restoration work with potential to partner with the Shongweni Dam and Nature Reserve upstream.

In addition to river restoration, eco-tourism may also be a viable opportunity given the conservation value of many of the biological resources, and scenic landscape surrounding this site. For example, tourism potential of the Mariannhill Monastery (west of the study site) is listed as a potential project in the Pinetown South Integrated Development Framework (eThekweni Municipality, 2015).

14.13.2.2. Urban Agriculture activities

The support of urban agriculture enterprises is somewhat limited in the study area of Pinetown South. The eThekweni municipality serves as the main contributing institution to farming in these peri-urban areas as there is limited activity of other actors such as NGOs in this area specifically. Support ranges from working materials, compost, seeds, water and professional advice. Building resilience and adaptive to capacity of farmers is another potential avenue for engagement as farmers claim very limited knowledge on issues pertaining to climate change and adaptations to it (Shezi, 2015).

There are several points of access to market around this area which will enable farming enterprises to move beyond subsistence. These include local supermarkets and malls around the KwaNdengezi area, as well as closer to Mariannhill on the western side of the study area.

14.13.3. Policy and Regulatory Obstacles

Several promising policy initiatives and pilots are either only in conceptual phase or in their infancy. While this suggests positive thinking in relation to green economic activities for township enterprises, there may be little in the way of material and tangible initiatives for TED process to leverage. Rather, the CSP TED programme might consider further lobbying/encouragement for eThekweni to kickstart these initiatives with a view of having CSP support in the near future.

TED also remains hampered by restrictive public health laws, especially for informal traders and spaza shop owners. The eThekweni public health by-law states:

- c) Use any bakehouse, store, or other place where articles of food or foodstuffs are prepared, manufactured, or stored for the purpose of sale, as a sleeping apartment; or keep, prepare, manufacture, or store in any sleeping apartment any article of food which is intended for sale.*

- d) Use any room or store where articles of merchandise are stored for the purpose of sale as a sleeping apartment*

The public health by-law is restrictive for informal traders who many need to operate their businesses from informal dwelling or backyard rooms

15. Urban conditions and management

There is a deficit of public facilities in the site. The EM investments, nonetheless, include sports fields and a municipal service centre at Kwandengezi, a community hall and sports field at Tshelimnyama, a community hall at Nagina, a public library and councillor offices. There are few public parks in the site. The area is also poorly serviced with footpaths, non-motorised-transport lane, public Wi-Fi and investments in place-making, such as public art installations.

The TAT identified the following urban management challenges:

- Some of the recreational infrastructure is in a state of disrepair; this needs to be addressed as there is a strong demand for soccer and netball facilities. The play park equipment at Kwandengezi is not functional.
- The road infrastructure is under considerable strain, in part as a result of the physical terrain and high rainfall. The potholes on mobility spines including Milky Way present opportunities for residents to utilise 'entrepreneurial' strategies that entail patching-up these holes to extract tribute from road users. This intervention is non-sustainable and possibly exploitative towards road users.
- The informal portions of the site, as well as the land under traditional authorities, are poorly serviced with physical infrastructure, especially in terms of tarred roads and potable water supply. Numerous residents obtain their water from communal standpipes.
- The road / street morphology along both Old Richmond Road and Milky Way has not been developed for off-street parking. Off-street parking is especially important in the emerging retail and commercial hubs that have developed along these road spines.
- The encroachment of business infrastructure on public land, including public open spaces and road reserves, poses a threat to orderly spatial development. This encroachment includes the placement of shipping containers in these sites. Whilst shipping containers are an important business, their placement has been haphazard, which as a result, means that land is inefficiently used and the manner of the container alignment is not necessarily conducive to other users, including pedestrians. Whereas high street brick and mortar properties can evolve in ways that support multiple functions, the placement of containers on these sites inhibits infrastructural development.
- The expansion of urban settlement on land under traditional administration presents numerous development challenges. The need for expanded infrastructure in these areas is widely accepted. There is evidence that a number of land holders have built spacious homes or 'mansions' (in comparative terms, equivalent to residential properties of status) on traditional

land. These properties fall outside the inner-west zoning scheme and therefore are not liable for municipal rates and other levies. Yet the landholders nevertheless benefit from EM public services and facilities.

Opportunity: Public Employment Programmes enhance urban management and contribute to infrastructure repair.



1.



2.



3.



4.



5.



6.

Figure 49: Urban Management Issues, Pinetown South

Description of figures 1 – 6:

1. *Recreational facilities are in a state of disrepair, although they are being used.*
2. *There is a need for off-street parking, especially along Old Richmond and Milky Way.*
3. *Houses and businesses rely on communal standpipes.*
4. *Containers are used by many, but these structures – and the way they are configured – have limited growth potential.*
5. *Inadequate physical infrastructures, including roads/water/lights in land held by the traditional authority.*
6. *Parks are not well integrated into the urban fabric; we saw several instances of illegal dumping on open space.*

16. Social and Cultural Considerations

Some of the townships of Pinetown South were established on land that was once part of the Roman Catholic Marianhill Mission Institute, which was founded in the 1800's. Over time, part of the mission land was released for residential and industrial development. As a result of apartheid policies of urban segregation, different races were required to reside in geographically segmented locations and hence the greater Pinetown area developed as a patchwork of communities. This patchwork hinders the processes of development planning and programme .

The project site is of considerable geographical scale and socio-economic complexity. The area includes both Metro and traditional authority administered land, which necessitates that development strategies are differentiated. Residential settlements include formal housing, informal-formal (in other words brick and mortar housing on unauthorised sites), informal (shack settlements) and a mixture of housing typologies on trust land. There is notable social stratification within Pinetown South, as evident in contrasting residential situations wherein middle-income neighbourhoods and informal settlements can be clearly distinguished.

The population in Pinetown South is largely homogenous, predominantly of Zulu ethnicity although the site includes pockets of mix-race and Indian ethnicities. In the ecosystem surveys, we have noted that many micro-enterprises are operated by non-South Africans, especially immigrants from SADC countries in respects to street trader and Somali in the spaza sector. There is evidence of tensions between South African and non-South Africans in respect to business competition.

According to the Pinetown South Local Area Plan (2015), the people of Pinetown South have a higher education level relative to the whole Province, with 75% having a secondary education, and 31% having some of higher education / skillset.

16.1. Urban Everyday

In our scan of newspaper articles and social media, the following stories received attention. The review was conducted between May and July, but some of the newspaper articles accessed are from years preceding 2020:

During the initial stages of Covid-19, people have dealt with a range of challenges. One report indicated that ward councillors in Durban established lines of patronage around food parcel distribution, which

meant that many people did not receive parcels – an issue that concerned civil society organisations who were involved with supporting people during lockdown. Another report indicated that an essential health worker who lives in Marrianridge, who contracted Covid-19 while working experienced ostracism and cyberbullying by neighbours.

Other concerns in this area related to students who have been unable to go to campus to continue with their studies. The University of Kwa-Zulu Natal has provided data to students who do not have internet connections at home and NSFAS has provided laptops to students who could not afford to buy one.

Charitable organisations, such as Rotary, have been involved with making donations to schools and crèches in the Pinetown South area. There have also been multiple news reports of drives to collect school shoes and youth-oriented NPOs. There is also a food gardening initiative taking place in Luganda, which has been in place since 2008.

There have several instances of protest and disputes over land occupations, lack of engagement around government initiatives to refurbish state-subsidised housing. There have been multiple reports on incidents that relate to violent crimes, as well as raids on organised crime, such as a haul of heroin capsules and illegal cigarette sales. These incidents have been reported in different parts of the study site.

17. Potential Project Opportunities

Based on the extensive fieldwork evidence and consultation with Metro specialists, the TAT have identified a range of potential project interventions. These have been considered in view of the socio-economic, institutional and spatial situation. In highlighting the below opportunities, the TAT has been guided by the following variables:

- I. Alignment with City / Metro programmes and development priorities,
- II. The availability of funding within City / Metro budgets,
- III. The identification of project implementing lead departments and units within the City / Metro,
- IV. The potential for accessing external funding and partnerships,
- V. The role of the TAT in providing technical assistance and adding value to project implementation,
- VI. The potential for projects to have strong economic multipliers and result in a catalytic impact on development,
- VII. The potential for projects to leverage productivity enhancement,
- VIII. The potential for projects to strengthen social cohesion and enhance community well-being, including considerations of safety and security,
- IX. The potential of project to contribute towards environmental sustainability and reduce the risks from climate change,
- X. The reach of projects and targeting of specific beneficiaries, including women, youth, informal micro-enterprises and established SMEs,
- XI. The timeframe for project implementation, recognising the need for immediate, short-term and medium-term projects with varying levels of complexity,
- XII. And the potential for projects to be replicable in other township localities.

The scope of potential projects is wide; the proposed opportunities allow for discussion of the merits or otherwise of each intervention before final selection.



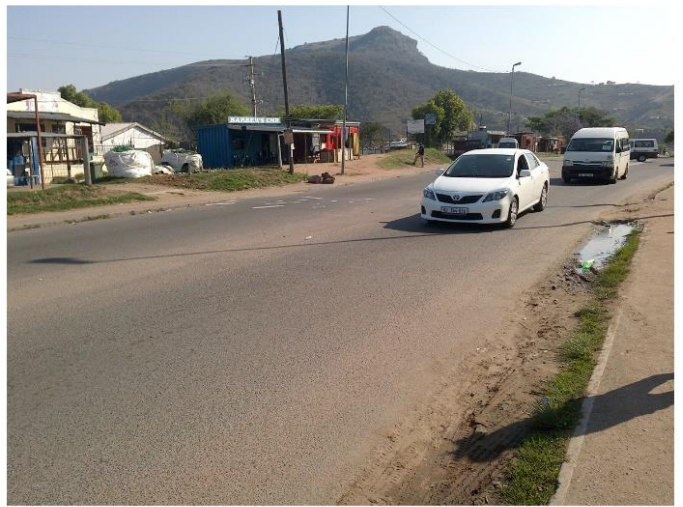
1.



2.



3.



4.



5.



6.

Figure 50: Spatial Development Opportunities

Description of figures 1 – 6:

1. *Nagina Node*
2. *Street Trader Management*
3. *KwaNdengezi Node*
4. *High Street Development*
5. *Leisure Economy*
6. *Micro-nodes*

The identified opportunities have been categorised within 7 headings: A) Policy and Strategy; B) Enterprise Development; C) Nodal Development; D) Spatial Integration; E) Housing and Property; F) Social and Community Infrastructure and G) Urban Management. The range of identified opportunities within these categories are:

Table 10: TED Opportunities for Pinetown South

17.1. Policy and Strategy

| Opportunity | Notes |
|--|--|
| Revenue collection from rates improved. | The Metro to develop and implement a plan to generate rates revenue from commercial businesses, including home-based enterprises and businesses operating in retail nodes. |
| TED evidence utilised in area-base strategic plans. | The Metro to incorporate the evidence from the TED situation analysis into strategic plans, including the IDP, SDF, and BEPP. |
| Informal land use prevented along high-street and floodplains. | Metro acts to stop unauthorised developments along high streets and environmentally sensitive areas. |
| Business in shipping containers are situated in approved sites / configurations. | The Metro to revise the policy on using shipping containers to promote adherence with spatial plans / nodal growth objectives. |

17.2. Enterprise Development

| Opportunity | Notes |
|--|---|
| Micro-enterprises have improved access to business development support services. | The Metro to integrate the DSBD district ecosystem facilitation approach and district information management system within enterprise development programme, building upon the learning from a pilot initiative. |
| Micro-enterprises have improved access to digital services to participate in the digital economy & 4IR technologies. | The Metro to facilitate partnerships to improve digital access in Pinetown South, through (inter alia) digital hubs and expanded free wi-fi. |
| The income and productivity of township recyclers improved. | The Metro to facilitate partnerships to enable township waste recyclers to more effectively obtain and package material, including glass bottles from taverns, and improve their returns. |
| Opportunities unlocked in the creative and leisure economies, provide youth a pathway to transition into jobs and livelihoods. | The Metro to support the development of creative sector / hobbies via social enterprise / community- based organisation programmes, use of Metro facilities, the staging of events, and linkages to BDS services. |
| Annual trade marketing events held in Pinetown South to link the community to retail business opportunities. | The Metro to facilitate a trade promotion event to stimulate opportunities for direct marketing, supplier agreements and digital services; connecting home based traders to companies. |
| Regulated business sectors are formalised and able to access state-subsidies / industry programmes. | The Metro to facilitate transversal engagement as well as with national and KZN Prov. Gov to address constraints on ECDC, taverns / restaurants, undertakers and other regulated sectors from attaining compliance with business licencing. |
| Personal service businesses have access to products and business development support services. | The Metro to identify BDS opportunities and facilitate partnerships to support hairdressers and barber shops with skills, supplies and marketing. |
| Infrastructure facilities established and supported to enhance efficiencies for recycling and upcycling programs. | The Metro to develop a strategy for improving infrastructure (including repositories for the collection, sorting and processing of recycled materials and waste) through PPPs and Metro led initiatives. |
| Businesses have greater financial literacy and have access to services and technologies, including digital platforms. | The Metro to facilitate partnerships to extend financial literacy training and improve access to services and technologies. |
| Mechanics / panel beaters and associated businesses in the after-sales automotive | The Metro to facilitate partnerships with private sector companies, BDS stakeholders including DSBD / SEDA, to |

sector have access to business development support services to grow and professionalise.

provide equipment / skills training / supply agreements / finance to automotive sector micro-enterprises.

17.3. Nodal Development

| Opportunity | Notes |
|---|---|
| An economic strategy to revitalise the Nagina node developed and implemented. | The Metro to advance the situational analysis for this node, identifying suitable projects, undertaking planning and secure funding for implementation. |
| Micro-nodes developed with supporting land-use and urban management strategies. | The Metro to identify sites and opportunities to develop micro-nodes (including the Tshelimnyama and Mpola) and other transport related nodes, including measures through which economic activities and the use of space can be enhanced in these places. |
| A business micro-node established within the Kwandengezi node. | The Metro to design, plan, resource and implement a business micro-node at Kwandengezi, enhancing the taxi rank, unlocking vacant land and activating the high street. |

17.4. Spatial Integration

| Opportunity | Notes |
|--|---|
| Street traders in the Nagina node operate with tenure security and have improved facilities. | The Metro to conceptualise and implement a street trader plan within Nagina node, expanding on the existing plan. The plan may include infrastructure aspects that require additional scoping and technical support. |
| An integrated public transport system achieved. | The Metro to devise strategies for integrating mini-bus taxi, train, BRT and long-distance bus modes and payment systems. |
| Affordable public transport enhanced through expansion of local e-hailing services. | The Metro to develop a strategy to promote the use of e-hailing via information awareness and safety campaigns. Mobility as a service is provided via the use of smart devices, connecting the supply of drivers seeking fares and the demand of commuters seeking lifts. |
| Shopping malls foster and enable opportunities for micro-enterprises. | The Metro to facilitate engagement with shopping mall owners to agree on strategies to integrate micro-enterprises into the shopping mall precinct, through |

| | |
|---------------------------------------|---|
| | adherence to development planning agreements and proactive measures to support micro-enterprises. |
| NMT and pedestrian lanes established. | The Metro to establish NMT and pedestrian lanes, formalising existing routes and enhancing connections between transport nodes and commercial hubs. |

17.5. Housing and Property

| Opportunity | Notes |
|---|--|
| Land-use obstacles reduced to enable business formalisation and investment in commercial property. | The Metro to develop a strategy for reducing land-use obstacles via overlay zones or other suitable instruments. |
| Homeowners utilise water harvesting and solar PV technologies. | The Metro to develop a strategy and partnerships (including incentives) to enable homeowners invest in water harvesting and energy generation (solar). |
| Encourage housing investments by the public and private sectors in strategic sites to raise population densities, encourage mixed land uses and stimulate additional economic activity. | The Metro will introduce procedures to fast-track higher density housing investments, including PPPs, in strategic sites, including Nagina. |

17.6. Social and Community Infrastructure

| Opportunity | Notes |
|---|--|
| Sports facilities within the KwaNdegezi node developed and maintained. | The Metro to revise the situational analysis for Kwandegezi node, identifying suitable recreation projects, secure funding and advise on implementation. |
| Fibre network expanded and wi-fi hotspots established in business / transport hubs. | The Metro to advance the roll-out of the Fibre network and establishing wi-fi hotspots in shopping complexes, high street nodes, local schools and public transport systems, including the train stations and taxi ranks. |
| A public-park developed in Tshelimnyama. | The Metro to conceptualise and implement a public park in Tshelimnyama, with pedestrian linkages to the sports facility / public toilets, braai stands, public gym, and a precinct management strategy to safeguard the greenbelt. |

17.7. Urban Management

| Opportunity | Notes |
|--|---|
| Public Employment Programmes enhance urban management and contribute to infrastructure repair. | The Metro to repurpose PEP to improve urban management and infrastructure maintenance challenges, including waste collection and road repairs, through identifying partnerships and new approaches. |

18. Next Steps

In the Second Phase of the TED Project, the TAT will support the Metro to conduct an evaluation of the merits of the identified opportunities. This process will require high-level transversal engagement with all affected line departments and units. An evaluation matrix tool will be utilised to record the outcome of this engagement process. The results of the evaluation will guide the project steering team to re-assess the identified opportunities to be incorporated in the TAT supported township economy development strategy for Pinetown South townships.

The selection of the 8 projects will be determined in consideration of the following criteria AND weighting (minimum number of projects) to ensure that the range of project interventions address economic, socio-spatial and institutional change necessary for transformative development. The TAT will provide a high-level indication of the 'value-add' from technical assistance in respect to the selected projects in support of the need for a range of project interventions across the categories indicated above.

Table 11: Criteria for Project Selection

| Criteria | Minimum # of Projects |
|---|-----------------------|
| aligns with identified City programme and project priorities. | 4 |
| can be funded by the City. | 4 |
| has an identified lead department / unit for implementation. | 4 |
| can unlock new partnerships via the CSP and non-state actors. | 2 |
| will benefit from CSP technical assistance. | 4 |
| can enhance productivity and stimulate economic multipliers. | 4 |
| will benefit emerging entrepreneurs and marginalised groups. | 4 |
| will enhance social cohesion, improve safety, and contribute to environmental sustainability. | 1 |
| will strengthen spatial integration. | 1 |
| will enhance the availability of decent housing and accommodation. | 2 |
| will enable immediate wins (within a 24-month timeframe). | 4 |

| | |
|--|---|
| will improve the township business environment and ecosystem services. | 2 |
| is replicable in other townships. | 4 |

The TAT support may include:

- Partnership facilitation,
- Strategic and policy advice,
- Project conceptualisation and design,
- Business case development,
- Research support and knowledge sharing,
- Project monitoring & evaluation and impact assessment,
- Project submission within City and NT budgeting process,
- Project spatial and architectural design,
- Quick-win implementation,
- Support in the preparation of calls for proposals or tenders.

At the conclusion of the assessment process, and agreement on the ranking and weighting of the identified opportunities, the TAT will then support the eThekweni Municipality to advance 8 projects within the framework of an overarching township development strategy.

19. Annexures

19.1. References

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- eThekwini Municipality (Economic Development & Investment Promotion Unit). Kwardengezi node precinct plan.
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- eThekwini Municipality. 2019. Inner west scheme of eThekwini Municipality.
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- <http://www.nyda.gov.za/Products-Services/NYDA-Grant-Programme>
- <https://kzntopbusiness.co.za/site/kzn-perspectives>
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KwaZulu-Natal Provincial Planning Commission (2012) Kwazulu-Natal Provincial Growth and Development Strategy and Plan: 2012-2030

SEDA, Annual Report 2019, <http://www.seda.org.za/Publications/Pages/Annual-Reports.aspx>

19.2. Persons Consulted

| Surname | Name | Unit / Department |
|----------|-------------|--|
| Bengu | Mlamuli | EM |
| Chetty | Vivegi | EM, Land Use Management: Inner West Region |
| Cullen | Gary | EM, Economic Development |
| Dlamini | Thobekile | EM |
| Fenton | Peter | EM, Transport Planning |
| Gilmore | Peter | EM, Economic Development and Investment Promotion Unit |
| Govender | Buddy | EM, Development Planning, Environment & Management |
| Gumede | Bongs | EM |
| Konar | Devoshini | EM, Development Planning, Environment & Management |
| Kunene | Oscar | EM |
| Maduna | Lungile | EM |
| Maharaj | Ajiv | EM |
| Mdladla | Nomzamo | EM |
| Mkhize | Nkululeko | EM |
| Mthembu | Nelisiwe | EM, Area Based Management |
| Mthembu | Nonkululeko | EM |
| Mtolo | Ernest | EM |
| Ndlovu | Thenjiwe | EM, Development Planning, Environment & Management |
| Ndokweni | Mimi | EM |
| Nzama | Oswald | EM |
| Radebe | Gugu | EM, Economic Development and Investment Promotion Unit |

| | | |
|-----------|------------|------------------------------|
| Rampersad | Manoj | EM, Transport Planning |
| Ramloutan | Ashena | EM |
| Rathiyaya | Takalani | EM, Business and Programmes |
| Seedat | Faizal | EM |
| Sudhama | Vinesh | EM |
| Thaver | Denny | EM |
| Tulsiram | Shunnon | EM, HOD Economic Development |
| Vilakazi | Prosperity | EM, Housing Department |
| Watson | Sarah | EM, Housing Department |

19.3. Business Development Services

| Name of Organisation | Services Provided | National/Provincial/Local |
|--|---|---------------------------|
| NATIONAL | | |
| Dept. of Small Business Development - | <ul style="list-style-type: none"> - Debt Relief Fund - Business Growth /Resilience Fund - Township & Rural Entrepreneurship Programme (TREP) * Autobody Repairers & Mechanics * Bakeries & Confectioneries * Butcheries support * Shisanyamas & Cooked Food support | |
| Dept. of Science & Innovation * Mmamose Seloane – Director Technology Localisation Unit | <ul style="list-style-type: none"> - Technology Stations programme) https://www.tia.org.za/blog/20202/06/15tia-partners-with-black-vc-partner-wz-capital | |
| Department of Trade, Industries & Competition – dtic www.thedtic.gov.za > incentives > black-industrialists-scheme | <ul style="list-style-type: none"> - Black Industrialists Programme (seeks to increase the level of participation of black South Africans in ownership & control of productive enterprises in key sectors & value chains) - SMEs & township & rural - SEZ & Industrial Parks | |
| Small Enterprise Development Agency- SEDA http://www.seda.org/MYBUSINESS/STP/Pages/Incubation.aspx | <p>Various including:</p> <ul style="list-style-type: none"> - Supplier Development Programme - Hubs & Incubators (Seda Technology Programme) - Fem_In-Tech Development Programme:https://youtube.be/_-M1Oxgdn4 - COVID-19 One-Stop Information Portal - www.seda.org.za - https://pmg.org.za/cpmmittee-meeting/305221/ & 30616/ & 30665/ - South African Furniture Industry – SAFI - District Development Model – https://www.cogta.gov.za/ddm/ - SEDA Automotive Technology Centre http://www.satec.co.za/ | |
| National Youth Development Agency – NYDA http://www.nyda.gov.za/ | <p>Youth Development Agency</p> <ul style="list-style-type: none"> - Various youth-focused services both financial and non-financial - Youth Micro Enterprise Relief Fund (YMERF) | National and Provincial |

| | | |
|--|--|---------------------------|
| Little Fish – www.itweb https://www.itweb.co.za/content/RgeVDqPYGegvKJN3 | Platform for 600 SMMEs two-way communication consumes & businesses, geo-location services connecting consumers to SMMEs in their vicinity & in-app stock orders. Also provides access to finance through its alternative credit scoring | |
| Success Unleashed Nationally Address: NO. 54, Ny 43, Guguletu, Cape Town, 7750 Phone: 081 321 2727 | Business development service | |
| PILLAR 5 GROUP Address: Baruch Regent House (3rd Floor), Cnr Voortrekker &, Durban Rd, Bellville, 7530 Phone: 074 932 4911 | Business development service The PILLAR 5 GROUP is a leading Business Development Group with a strong focus on entrepreneurial support. Our aim is to deliver superior strategic content and provide brand support to aspiring entrepreneurs and young innovators seeking to expand into international markets and rise to the top echelons of their respective industries. | |
| Fetola www.fetola.co.za https://fetola.co.za/mentor-hotline/ | Tailor-made enterprise & supplier development programmes - Mentorship - Business Incubation - Reputation & brand building - Youth, Women & People with disabilities enterprises - Green/Sustainable sector, food security, & farming, local manufacturing & technology | - National - Cape Town |
| The Awethu Project www.awethuprojects.co.za | The Awethu Project Launch Pad Incubator aims to grow businesses focusing on micro businesses throughout South Africa | National |
| Red Bull Amaphiko Academy www.redbull.com | - A launch pad for start-up social entrepreneurs - 10 day of connection & collaboration with leading innovators, entrepreneurs & storytellers - One-on-one mentor who will assist you to develop business, personal & strategic development plans that will take 18 months | |
| BizQube www.abbc.co.za/index.php/incubator | - Offers accredited business training - Customised mentoring - Enterprise supplier development opportunities in food, beverage, cosmetic & pharmaceutical manufacturing | |

| | | |
|--|---|---|
| Smorgasbord https://smorgasbord.co.za/ | An organisation dedicated to supporting & incubating food start-ups (food & beverage related) Focus on building & sustaining food & beverage sector in South Africa - Invest in & create market opportunities for early stage food od business | |
| Raizcorp https://raizcorp.com | Works with entrepreneurs at stages of their life cycle - Incubation services Business acceleration for entrepreneurs - Execute enterprise & Supplier development on behalf of corporates | |
| The Furniture Technology Centre Trust – Furntech furntech.org.za | Support to existing & start-up businesses providing incubation to entrepreneurs with skills in the furniture manufacturing industry | Cape Town Johannesburg |
| French Tech capetown.lafrenchtech.com | A global incubator that aims to connect entrepreneurs from France & South Africa & also find funding for these start-ups in Africa | |
| The Cape Innovation & Technology Initiative www.citi.org.za | The incubator offers several enterprise development programmes: | |
| Private Sector | | |
| SAB Foundation Tholoane Enterprise Programme – www.sabfoundation.co.za/tholoana-enterprise-programme Kick-Start SABInbev | R157 million invested in supporting 473 entrepreneurs Youth Enterprise Programme Women Owned Taverns Programme | SAB Tholoana First Floor, Block C Plum Park 25 Gabriel Road Plumstead, Cape Town |
| Kuba | Online ecosystem for small business development. Job Booster programme aimed at accelerating job creation through supporting & empowering micro-enterprises (https://www.iol.co.za/business-report/careers/50-entrepreneurs-set-to-benefit-from-job-booster-programme-8e4e6fc9-0e32-4b9e-9f3e-2e08b01abc63) | Cape Town based with a national footprint |
| Kandua | An online market place which focuses on providing home services with 10 000 vetted SMME and independent individuals in 100 service categories. | Johannesburg base with a national footprint |

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|---|---|----------|
| | https://ventureburn.com/2020/09/sa-tech-startup-partners-with-french-development-agency | |
| Transnet Hub http://www.transnet.net/BusinessWit/h/Pages/EnterpriseDevelopment-HUB.aspx | <ul style="list-style-type: none"> - This is an enterprise development hub - Aimed at expanding business opportunities for smaller enterprises & new business entrants | National |
| SA Business Hub http://www.sabusinesshub.co.za/ | <ul style="list-style-type: none"> - A website based hub that offers affordable & on demand business training, knowledge and information, coaching, an online marketplace for goods & services | |
| Pick “n Pay Small Business – Enterprise Foundation http://www.picknpay.co.za/foundation-our-projects/small-business-incubation | <ul style="list-style-type: none"> - Financial & non-financial support for enterprises _ Committed to enterprises currently receiving their support - Opportunities for new BEE suppliers | National |
| Shanduka Black Umbrellas www.shandukablackumbrellas.org/ | <p>Emerging businesses support infrastructure</p> <p>mentorship and collaboration to assist their transition from incubation to viable independent businesses</p> <p>office space & facilities</p> <p>business software & database of business tools</p> <p>bookkeeping</p> <p>drivers and vehicles</p> | National |



SITUATIONAL ANALYSIS REPORT

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