UMZIMVUBU LOCAL MUNICIPALITY
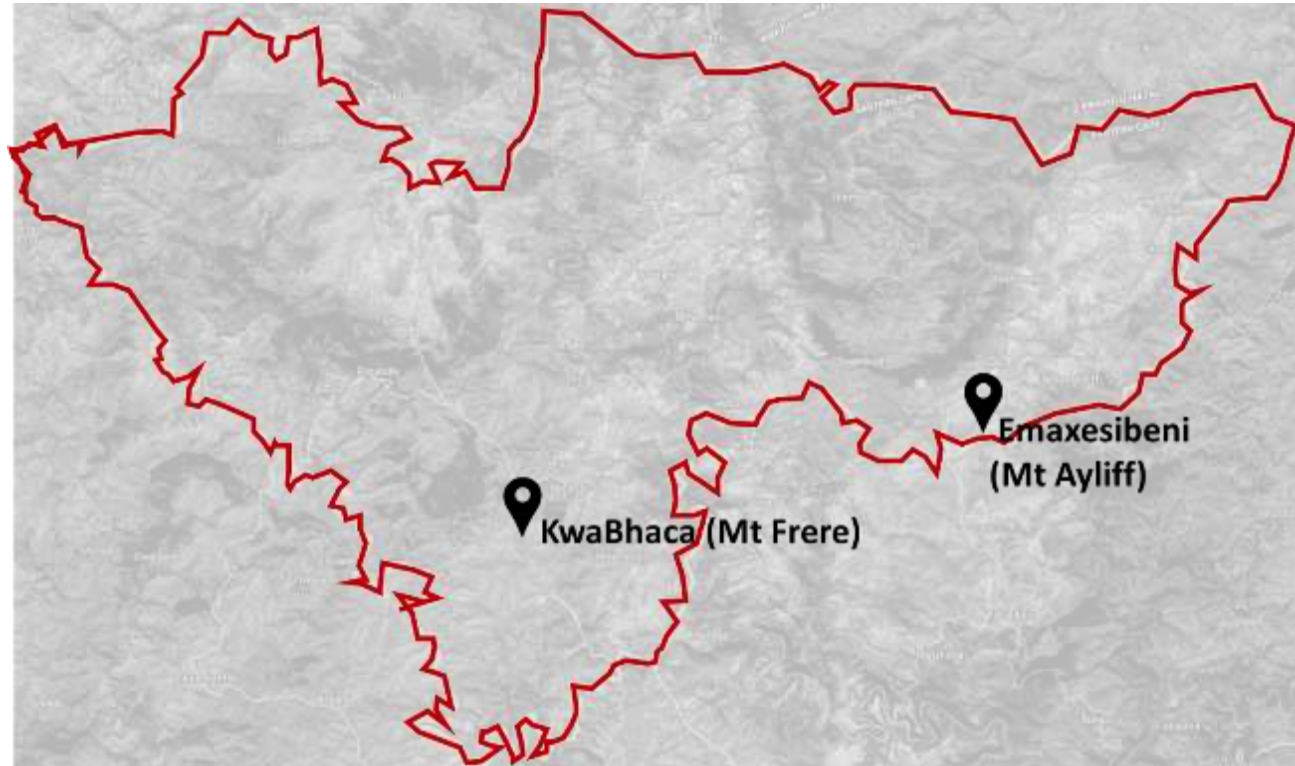**URBAN REGENERATION PLANS AND URBAN DESIGN FRAMEWORK**
CONTRACT NO: UMZ / 2019 – 20 / INFRA / TP / 004

F I N A L   R E P O R T

April 2021
Revision 06

DECLARATION

This Response Document has been prepared by The Workplace / Urban Econ Consortium.

The Consortium has spent a considerable amount of time responding to the Request for Proposal and Client meetings. The Consortium believes that it has responded to the tender document as well as to the additional feedback that has emerged as the study has progressed.

The Consortium believes that it is fully compliant in this regard. Any discrepancies are honest omissions that, it is believed, should not negatively affect the completeness of the submission and should not be outside the intention of the tender document and best practice.

For any queries and further information regarding this submission, please contact:

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[This will be signed once completed.]

……..

April 2021
For **The Workplace / Urban Econ Consortium**

This work has been undertaken by:

THE WORKPLACE AGENCY/URBAN ECON CONSORTIUM

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TABLE OF REVISIONS

REVISION NUMBER	ISSUED TO	DATE	DESCRIPTION
3	Client	18 January 2021	FIRST DRAFT FINAL SUBMISSION
4	Client	01 February 2021	SECOND FINAL DRAFT UPDATED AND ISSUED
5	Client	25 February 2021	THIRD FINAL DRAFT UPDATED AND ISSUED FOR COMMENT.
6	Client	12 April 2021	FOURTH FINAL DRAFT UPDATED AFTER CLIENT MEETING

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NOTES ON PLACE NAMES

Throughout these documents, the following place name changes are identified:

- EmaXesibeni – formerly EmaXesibeni.
- KwaBhaca – formerly Mount Frere.

ABBREVIATIONS

ANDA	Alfred Nzo Development Agency
ANDM	Alfred Nzo District Municipality
CAGR	Compound Annual Growth Rate
CAPEX	Capital Expenditure
CBA1	Critical Biodiversity Area 1
CBA2	Critical Biodiversity Area 2
CBD	Central Business District
CIDB	Construction Industry Development Board
DEDEAT	Department of Economic Development, Environmental Affairs and Tourism
DPW	Department of Public Works
DRDLR	Department of Rural Development and Land Reform
ECDC	Eastern Cape Development Corporation
ECDPW	Eastern Cape Department of Public Works
ECPTA	Eastern Cape Parks and Tourism Agency
FET	Further Education and Training
FPSU	Farmer Production Support Unit
GDP	Gross Domestic Product
GLA	Gross Leasable Area
GVA	Gross Value Added
ICT	Information Communications Technology

IDP	Integrated Development Plan
IUDF	Integrated Urban Development Framework
LED	Local Economic Development
LSDF	Local Spatial Development Plan
LSM	Living Standards Measure
MANCO	Management Committee
MFMA	Municipal Finance Management Act
MTEF	Medium Term Expenditure Framework
NED	Net Effective Demand
NEMA	National Environmental Management Act
NHRA	National Heritage Resources Act
OPEX	Operating Expenditure
PSC	Project Steering Committee
RDF	Regional Development Framework
RDP	Reconstruction Development Programme
RFP	Request for Proposal
SANAMI	SEDA Alfred Nzo Agro-Manufacturing Incubator
SCM	Supply Chain Management
SDF	Spatial Development Framework
SEDA	Small Enterprise Development Agency
SMME	Small, Medium and Micro Enterprise
SPLUMA	Spatial Planning and Land Use Management Act
STDF	Small Town Development Framework
SWOT	Strengths, Weaknesses, Opportunities, Threats
TGCSA	Tourism Grading Council of South Africa
UDF	Urban Design Framework
ULM	Umzimvubu Local Municipality
URMP	ULM Red Meat Project

Figure 1: KWABHACA 2020.

1   INTRODUCTION

In August 2019, The Umzimvubu Local Municipality (ULM) Issued the Tender, ULM Urban Regeneration Plans and Urban Design Framework, (contract no. UMZ / 2019 – 20 / INFRA / TP / 004). This was introduced as follows:

"ULM Local Municipality hereby requests services of creditable and registered Professional Town Planners, Urban Designers, Land Scaping Designers, Civil Engineers and Architectural Consultants to be contracted to undertake the development of credible Urban Design Framework and Urban Regeneration plans.

The Municipality accordingly invites interested parties to submit proposals, to be considered for the appointment."[1]

The Workplace Agency / Urban-Econ Consortium submitted a tender for the above project in August 2019. At that time. the parties invited to this tender had agreed to form a relationship in the interest of submitting the tender. The tender submission was successful, and The Consortium was verbally appointed by the Client in early May 2020.

1.1 SCOPE OF WORK AND STRUCTURE OF THE PROJECT AT TENDER AND APPOINTMENT

Through a detailed review of the ULM Urban Regeneration Plans and Urban Design Framework tender document of August 2019, the following scope of work and phase of the project has been highlighted.

The work has been divided into what was identified in the tender and the submission made in this document.

Below is a breakdown of the scope of works as described in the tender document and further refined through discussion with the client.

This is essentially in 5 parts:

- Phase 1: Inception Report.
- Phase 2: Status Quo Analysis, Role of the Study Area and Localised Vision.
- Phase 3: Development Vision, Concepts and Detailed Implementable Architectural, Urban Design and Landscaping Plan.
- Phase 4: Budget and Implementation plan
- Phase 5: Final ULM Local Municipality Spatial Development Framework.

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[1] ULM, Urban Regeneration Plans and Urban Design Framework, August 2019.

SCOPE OF WORK AS PER ULM TENDER DOCUMENT		
	PHASE	**PHASE DESCRIPTION**
1	Phase 1: Inception Report	**Tender Requirements:** • This phase entails establishing a detailed agreement on the contents and process of the project, compiling the relevant inception report, establishing communication channels, and establishing an appropriate project steering committee within two weeks of appointment. • The report should detail the scope of work, project approach, the process to be followed, timelines (project programme), key deliverables and cash flow, and is to be developed in close consultation with the Municipality. **Actual Submission:** • To navigate the project amidst COVID-19 and the subsequent lockdown, the Consortium undertook digital communication with numerous meetings being held via Microsoft Teams. • A site visit was held from the 6th to the 8th of October 2020 which influenced the nature of the work and gave the project team clear direction. The Consortium believes that the tender requirements above were achieved. • The Inception Report was revised thrice to accommodate the changing needs of the project.
2	Phase 2: Status Quo Analysis, Role of the Study Area and Localised Vision	**Tender Requirements:** • Analysing the present situation and its implications at the various levels indicated above - including technical aspects such as topography, geotechnical conditions, environment as well as economic, social, institutional influences - established an understanding of potential implications for future development opportunities.
3	Phase 3: Development Vision, Concepts and Detailed Implementable Architectural, Urban Design and Landscaping Plans	**Tender Requirement:** • The purpose of this Phase is to develop a detailed understanding of the local and regional development trends, matters, pressures, opportunities, and constraints that impact the study area. • This should not be the main focus of the project but should provide an analysis of the current roles of KwaBhaca and EmaXesibeni. • Once a scenario has been agreed upon by the project steering committee, a comprehensive Urban Design plan needs to be developed for both towns. **Actual Submission:**

			- This was changed with the understanding that the Client has undertaken a significant amount of project proposals and execution since the last work of this nature in 2016. - This is in both major towns. - It is understood that what would be valuable and what is lacking was a consolidated vision that included all projects in the two towns. These are projects in different phases and carried out by other consultants. - The deliverable, therefore, has become to provide the Client with a development vision for both towns that documents all ideas and projects and identifies the gaps that need to be considered. - Strategic projects are to be identified as part of this process.
			Tender Requirements: - The Urban Design plan must consider all four urban design principles as stated above. **Actual Submission:** - The urban design plan is to document all projects proposed and developed and extends the area to close gaps that have not been considered. - This submission aims to give the Client a consolidated development vision for both towns.
			Tender Requirements: - At this stage, there is also a need to establish close cooperation with the professional team, the client, the various stakeholders and potential development funding sources to form a widely supported common vision for the future development and its implementation, agreeing on relevant conceptual approaches and planning strategies in terms of physical/spatial, economic, institutional, social, tourism, etc. approaches. - Furthermore, the Municipality requires that the service provider makes a model, contained in a glass of both towns' Town Centres which will later be displayed in public areas such as the library. **Actual Submission:** - What has emerged from the process, is that the initial focus area was smaller and directed to the existing town centres. Upon better interrogation of the various development proposals for the two towns, and with the number of available development proposals, and the need for the team to include these proposals, the final submission became apparent. - This was discussed with the Client and an agreement was made to re-organise deliverables to accommodate the increased area but to remain within the allocated appointed budget. - The extent of the area had been increased per the extent of future projects which have been identified as part of the process. With the rapid development of a changing work environment, it became evident that a display model for the existing town was no longer most relevant, and a digital 3D visualisation would be produced in its place to include the future development proposals, specifically those that were identified outside of the CDB.

4	Phase 4: Budget and Implementation plan	**Tender Requirements:** • The purpose of Phase 4 is to ensure that the most feasible development plan based on the urban regeneration plans is translated into detailed requirements and a plan of action. • To develop this, a thorough investigation of the social, economic and environmental feasibility and practicability needs to be conducted. **Actual Submission:** • Strategic projects have been identified through a process of a status quo assessment, an urban design understanding and economic relevance. • The key focus of this project is to suggest methods of implementation for the Client and to create a useful project-orientated plan for the Client.
		Tender Requirements: The implementation plan needs to include a prioritized list of the developmental intervention stating: • Spatial location • Cost and budget estimates • Timing and phasing • Sources of finance • Institutional recommendations **Actual Submission:** • The above is responded to in the form of identifying nodes and projects and then applying the above requirements to each.
		Tender Requirements • A thorough stakeholder consultation process with local businesses and stakeholders must be undertaken in all four phases, and minutes should be given to the project steering committee (PSC) **Actual Submission:** • The stakeholder consultation process was achieved using a virtual platform and a site visit. • Each month, a report is issued to document each milestone.
		Tender Requirements The service provider should also prepare a flyover video of the proposed 3D models of the focus areas. **Actual Submission:** • The cardboard model will no longer prepared and so the extent of the area covered by the flyover video is larger than the initial brief.

	Phase 5: Final ULM Local Municipality Spatial Development Framework	**Tender Requirements:** • Deliverable: Final document and plans of the Urban Design Framework and Urban Regeneration Plan **Actual Submission:** • This will be achieved in the form of an A4 document which consists of a main document and annexures.
		Tender Requirements: • This Urban Design Framework and Urban Regeneration Plan must be presented to and adopted by the PSC, the Management Committee and the Council. **Actual Submission:** • The Client is to arrange this platform for the presentation.

Table 1: Detailed description of the Scope of Works for the project.

The tender also indicates the following:

"Furthermore, the objective of the project is not limited to the following:

- Provide a long-term development plan that serves to guide central business district development in KwaBhaca and EmaXesibeni.
- Create efficient town structures and integrate opportunities for economic growth and the creation of job opportunities.
- Identify land for further development within the two nodes and corridors where development should be encouraged and also provide guidelines for the development of the nodes and transport corridors, in terms of land uses to be encouraged.
- Identify all economic activities to develop an integrated economic activity corridor plan and priority interventions in each corridor. Coupled with this is the identification of economic opportunities.
- Advocate strategies towards the promotion of local economic development objectives aimed at reducing unemployment and poverty through finding spatial initiatives that could generate employment and economic activity thus boosting investor confidence.
- Provide data and solutions to well managed informal trading that will ensure maximum contribution to the local economy.
- Assess existing infrastructure and capacity implications.
- Propose projects and measures to enhance the identified opportunities." [2]

The tender also notes:

"To conclude: Urban Design and Architecture should facilitate ease of movement by foot, public transport or private car, and convenient access to a diverse range of amenities. Pedestrian movement should be prioritised over vehicular movement. Landmarks and the creation of 'visual thoroughfares' will aid orientation and make it easy for residents and visitors to find their way around the area. Connections should be made across and between precincts. The historical grid of the towns should be reinforced and emphasised." [3]

1.2 WHERE DOES THIS REPORT FIT IN AND ITS STRUCTURE?

Physically, the works are centred on the two major towns in the ULM in the Alfred Nzo District Municipality of the Eastern Cape.

The two major towns are:

- EmaXesibeni (formerly EmaXesibeni)
- KwaBhaca (formerly Mount Frere)

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[2] ULM, ULM Urban Regeneration Plans and Urban Design Framework, 2019.

[3] ULM, ULM Urban Regeneration Plans and Urban Design Framework, 2019.

Figure 2: The geographic positioning of this report.

Although this project is not specifically a Spatial Development Framework, the Consortium finds the DRDLR Spatial Development Guidelines Final Draft description of the Municipal Spatial Development Framework a useful guide, as elaborated on below.

Figure 3 describes a project process and outlines the primary structure of this document, namely the key chapter structure which consists of the following.

- Policy Review, Principles and Situational Analysis. This relates to the below Policy Context and Vision Directives, in conjunction with Spatial Challenges and Opportunities.
- Spatial Proposals.

- Implementation Plan.

Error! Reference source not found. represents a modified project process as we engaged with the Client and the project. The modified project process has provided some detail to the comments above:

As an outcome of the Policy Review, Principles and Situational Analysis is a series of site plan diagrams collating the various information. It became apparent at this stage (and notably after the site visit) that there had been significant planning work undertaken by the two towns and the local and district municipalities over the past five years and that an important part of this stage of the work was to source and collate all existing information, largely relating to current 'projects'.

- This motivated this report's 'Spatial Proposals' to be presented in two parts:

  1. Long Term Spatial Concepts and Strategies.
  2. Short Term Inventory of Projects.

- The Implementation Plan then focusses on the Short Term Inventory of Projects, by providing guidelines, project prioritisation, and detailed implementation strategies for the priority projects.

- This is then concluded with a set of deliverables including visualisations of the proposals.
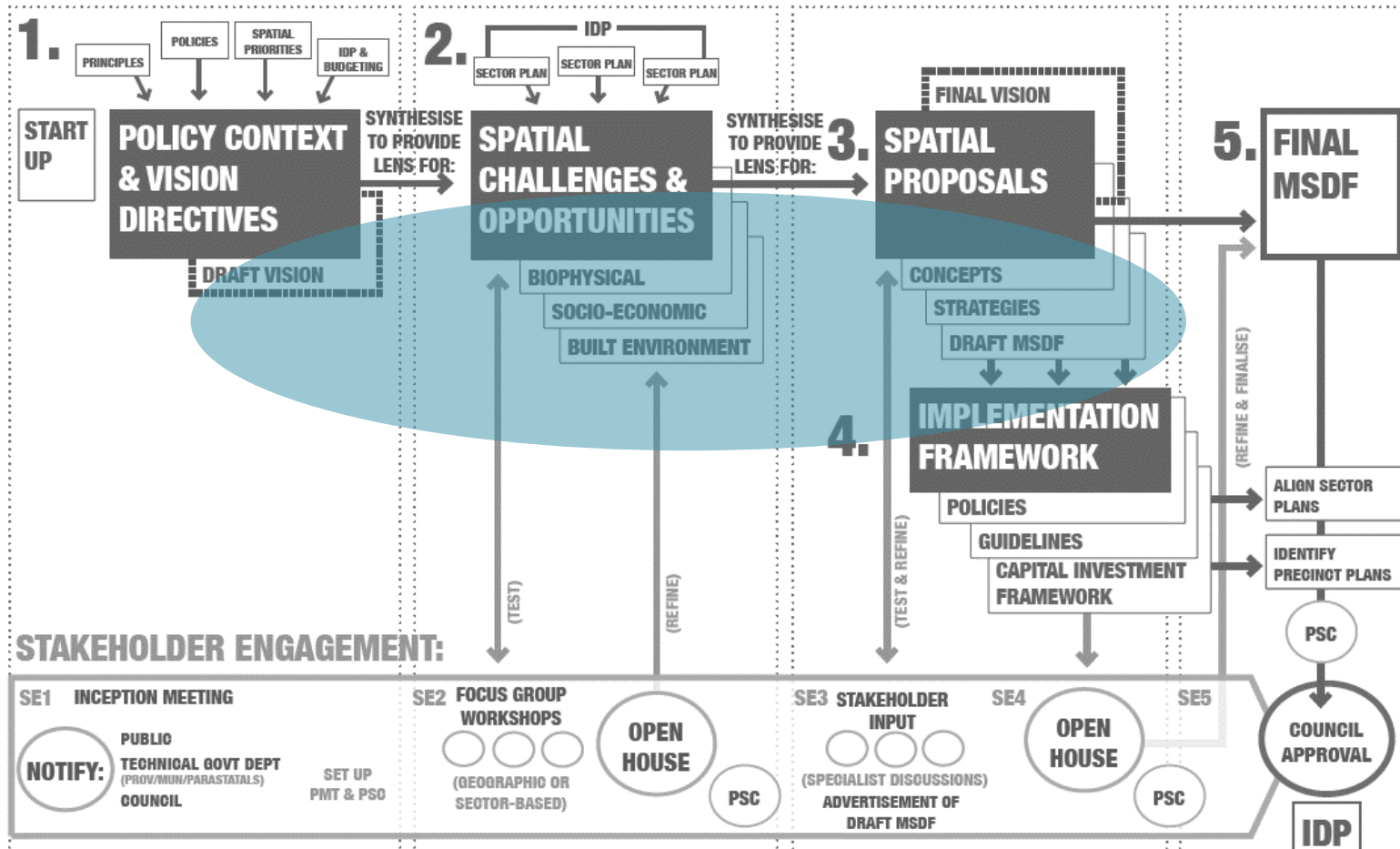
Figure 3: DRDLR Spatial Development Guidelines Final Draft description of the Municipal Spatial Development Framework. The highlighted area is where the initial strucutre for the works and this report are founded.

1.3 THE ROLE AND STRUCTURE OF AN 'IMPLEMENTATION PLAN'

The Inception Report notes the following regarding the role of the Implementation Plan.

"The Consortium sees this project as directed specifically towards implementation matters. This is to be built on the good work already undertaken by the Client and others.

At a strategic level, it is understood that Implementation Plans allow for:

- Further development and integration with existing work already undertaken by the Municipality.
- Promotion and development of design aspirations and guidance.
- Planning for project planning, funding, and resourcing.
- Integration with the delivery of other Service Delivery criteria and public services.
- Stakeholder engagement and support.

1.4 STAKEHOLDER ENGAGEMENT

1.4.1 Approach

A summary of engagement and public participation for this project is as follows:

- The approach to engagement generally and Public Participation specifically for this project was modified as the project progressed.
- The consultant team was appointed in May 2020. Due to COVID Lockdown restrictions for much of 2020, on-site face to face engagements was not possible.

- There was an agreement to change this to virtual meetings and phone calls. We communicated by phone and email and met regularly with various stakeholders from March 2020 to December 2020.
- Formal and Informal Business Surveys were conducted during April and May 2020.
- Property Owners Engagements were conducted during September and October 2020.
- In October 2020, a site visit was undertaken by the consultant team.

In addition to the above, the following was also undertaken:

- A detailed Inception Report was prepared to manage the process. This was updated three times to adjust to the changing environment.
- Regular progress submissions to the Client.
- Minuted meetings.

1.4.2 Site Visit

The site visit of 6 to 8 October 2020 provided the following:

- Various meetings were held with different parties including:
  - 06 October 2020 – With Ms Siphosethu Jijana and colleagues from the municipality.
  - 07 October 2020 – Mr Esmond Rooi.

- The purpose of the site visit was to:
  - Conclude the status quo report using the feedback received from the Client.
  - Sourcing of information on the current developments in the area.
  - Consultants to familiarize themselves with the area.

- Detailed minutes of this site visit was produced and circulated to all.

- This information was included in the development of the documentation for this project.

1.4.3   Engagements with Business and Property Owners

The following participatory engagements and research were undertaken:

- Formal and Informal Business Surveys:
  - Conducted telephonically during April and May 2020.
  - Sample of **23** unique business representatives across both towns.
  - 52% formal and 48% informal.

- Property Owners Engagements:
  - Conducted telephonically during September and October 2020.
  - Sample of **14** property owners (commercial property and vacant land) contacted.
  - Only 36% willing to engage telephonically and provide inputs.

- This information was included in the development of the documentation for this project.

Figure 4: EMAXESIBENI 2020.

2 POLICY REVIEW AND SITUATIONAL ANALYSIS

2.1 STUDY AREA

This is as described in the tender as follows:

"This project will focus on the two ULM major centres i.e., KwaBhaca and EmaXesibeni. Both towns are considered small towns as they are a second home for the rural population and a sense of civic pride for the locals.

Towns such as KwaBhaca and EmaXesibeni act as service hubs for rural communities and reservoirs of labour (skilled and semi-skilled). Production centres for raw material generally occur within town centres and often the town also plays the role of a manufacturing hub. Diversification is what makes the small town so attractive in that they are made up of a range of industries (agriculture, heritage, culture etc.). Government assets such as land, water and buildings are dominant and as small towns expand, they become natural growth point areas.'[4]

2.1.1 DRDLR Spatial Development Guidelines Final Draft as a Guiding Document

A useful focus on Urban Design related work in the Department of Rural Development and Land Reform was found in the SDF Guidelines document of September 2014 which highlights the key spatial directives of the National Development Plan as per the figure below.

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[4] ULM, ULM Urban Regeneration Plans and Urban Design Framework, 2019.
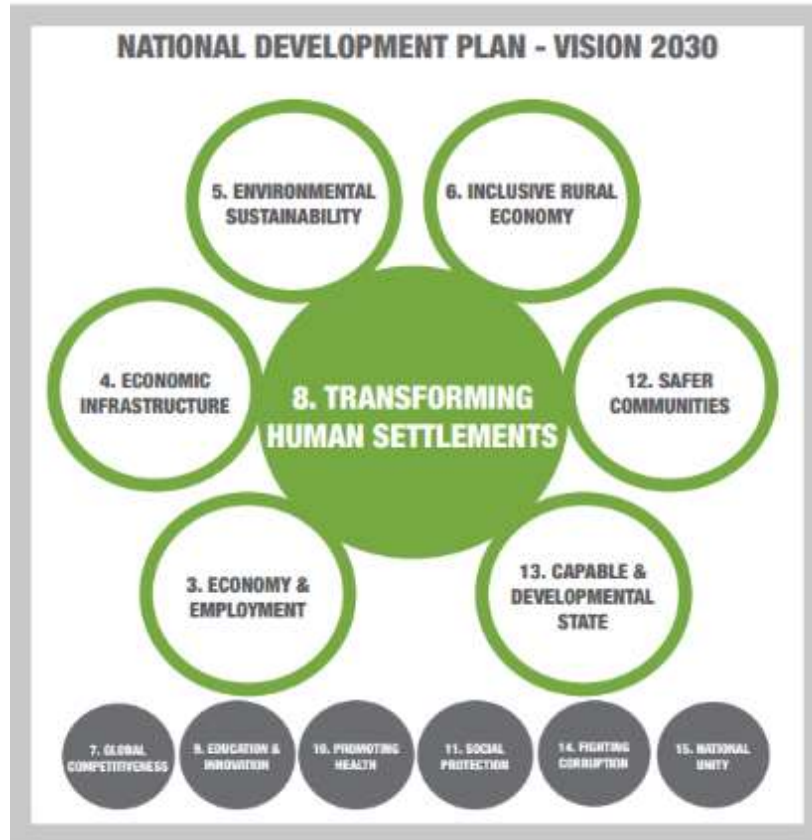
Figure 5: Key spatial directives of the National Development Plan.

It highlights Section 12 (1) of the Spatial Planning and Land Use Management Act (SPUMLA) which sets out the basic principles of Spatial Development Frameworks (SDFs) as the below.

- Interpret and represent the spatial development vision of the responsible sphere of government and competent authority.
- Be informed by a long-term spatial development vision.
- Represent the integration and trade-off of all relevant sector policies and plans.

- Guide planning and development decisions across all sectors of government.
- Guide a provincial department or Municipality in taking any decision or exercising any discretion in terms of this Act or any other law relating to spatial planning and land use management systems.
- Contribute to a coherent, planned approach to spatial development in the national, provincial and municipal spheres.
- Provide clear and accessible information to the public and private sector and provide direction for investment purposes.
- Include previously disadvantaged areas, areas under traditional leadership, rural areas, informal settlements, slums and land holdings of state-owned enterprises and government agencies and address their inclusion and integration into the spatial, economic, social and environmental objectives of the relevant sphere.
- Address historical spatial imbalances in development.
- Identify the long-term risks of particular spatial patterns of growth and development and the policies and strategies necessary to mitigate those risks.
- Provide direction for strategic developments and infrastructure investment, promote efficient, sustainable and planned investments by all sectors and indicate priority areas for investment in land development.
- Promote a rational and predictable land development environment to create trust and stimulate investment.
- Take cognisance of any environmental management instrument adopted by the relevant environmental management authority.
- Give effect to national legislation and policies on mineral resources and sustainable utilisation and protection of agricultural resources.
- Consider and, where necessary, incorporate the outcomes of substantial public engagement, including direct participation in the process through public meetings, public exhibitions, public debates and discourses in the media and any other forum or mechanisms that promote such direct involvement.

It notes the five founding principles of SPLUMA as the following.

1. Spatial Justice:
- Past spatial and other development imbalances must be redressed through improved access to and use of land by disadvantaged communities and persons.

2. Spatial Sustainability:
- Spatial planning and land-use management systems must promote the principles of socio-economic and environmental sustainability through:
- encouraging the protection of prime and unique agricultural land; promoting land development in locations that are sustainable and limit urban sprawl; and
- considering all current and future costs to all parties involved in the provision of infrastructure and social services to ensure the creation of viable communities.

3. Efficiency:
- Land development must optimise the use of existing resources and the accompanying infrastructure.
- Development application procedures and timeframes must be efficient and streamlined to promote growth and employment.

4. Spatial Resilience:
- Securing communities and livelihoods from spatial dimensions of socioeconomic and environmental shocks through mitigation and adaptability that is accommodated by flexibility in spatial plans, policies and land-use management systems.

5. Good Administration:
- All spheres of government must ensure an integrated approach to land use and land development and all departments must provide their sector inputs and comply with prescribed requirements during the preparation or amendment of SDFs.

- This principle is the fulcrum of this framework largely because the implementation of the spatial planning vision and objectives is not only highly dependent upon a strong coordinating role of the central government but is also predicated upon good governance mechanisms, incorporating meaningful consultations and coordination to achieve the desired outcomes across the various planning spheres and domains.

It notes the three themes of the Spatial Development Framework as:
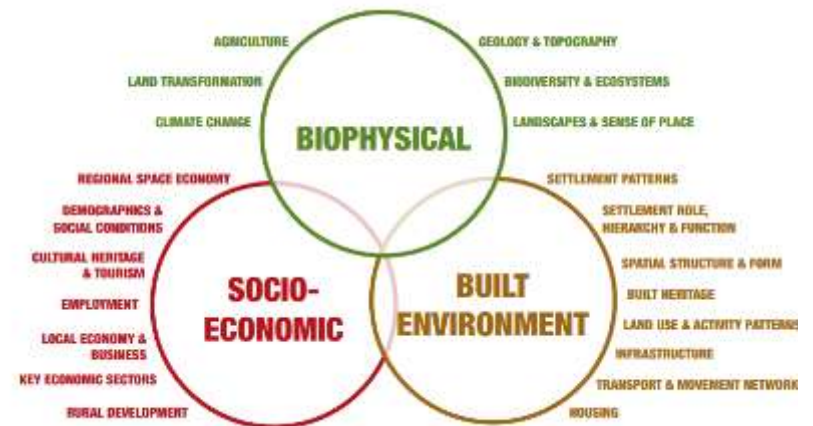
Figure 6: The three themes of the SDF.

It is useful to elaborate on the built environment aspects at the Local (urban and rural) level. This entail:

- scenic landscapes.
- scenic routes.
- cultural heritage and heritage resources.
- gateways and destinations.
- The role of settlements and their interrelationships.
- movement routes
- activity streets and hubs of activity

- public space
- industrial and commercial land use
- land reform
- housing (farmworker/informal/GAP/social etc.)
- future development trends (submitted or approved major developments)
- densities.

Many of these items are key to this current work and understanding the two towns.

The Consortium understands that this is not a conclusive list but a relatively detailed starting point for approaching the works. It is further understood that every urban and rural settlement is different and there is a need for modifications and focuses on each settlement particular special elements.

2.2 NATIONAL AND PROVINCIAL POLICIES AND PLANS

This is not intended to be an exhaustive policy review but rather focuses on key and relevant documents. The national document that gives national context to the works is the National Development Plan of 2011.

2.2.1 National Development Plan, 2011

Chapter 8 of the NDP, focuses on the country's spatial planning system (human settlement), it requires that: all municipal spatial planning is translated into 'spatial contracts that are binding across national, provincial and local governments'; the current planning system should 'actively support the development of plans that cross municipal and even provincial boundaries', especially to deal with biodiversity protection, climate change adaptation, tourism and transportation;

and every Municipality should have an 'explicit spatial restructuring strategy' which must include the identification of 'priority precincts for spatial restructuring'.

Figure 7: Extract from the NDP highlighting the Coastal Transformation Corridor.

2.2.2 Provincial Spatial Development Framework (PSDF)

"The Eastern Cape Provincial Spatial Development Framework provides for a future spatial perspective which needs to comprise a

spatial development framework of managed urban and rural human settlements clustered in settlement regions and corridors, alongside productive precincts, managed ecological natural resource areas and connected to a network of strategic transportation corridors open to the global, national and provincial economy"[5]

Figure 8: The Provincial Spatial Development Framework (PSDF).

Core Values of the Spatial Development Plan include:

-
- Environmental integrity and sustainability
- Economy and efficiency of development
- Safeguarding all-natural resources
- Achieving synergy and linkages between urban and rural areas
- Densification

- Participatory community-based planning as a basis for going forward.
- Integrated Land Use
- The emphasis is placed on "brownfield" development before adopting "greenfield" development.

2.2.3 Small Town Revitalisation Plan

This document highlights the problem of Small Towns as:

'The majority of small towns within the Eastern Cape Province were affected by disinvestment that emanated from the previous apartheid system. The disinvestment resulted in old, overloaded, and collapsing infrastructure, which is increasingly constrained by rising populations within these settlement areas. Furthermore, they are characterised by skills deficit, low levels of economic development and inability to serve as catalysts for regional economic growth, which negatively affects the revenue base of municipalities.' [6]

Further, it describes its vision as:

'In this regard, the restructuring and reconfiguration of the Eastern Cape small-town landscape should be guided by the vision of creating liveable, safe, resource-efficient cities and towns that are socially integrated, economically inclusive and globally competitive, where residents actively participate in the small-town life as contained in the IUDF.'[7]

It may include all or some of the following projects and interventions:

- Infrastructure Projects

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[5] Statement taken from the Umzimvubu Spatial Development Framework, 2015
[6] DRAFT Small-Town Development Framework, Eastern Cape Province, 'A New Paradigm Shift', 2020

[7] DRAFT Small-Town Development Framework, Eastern Cape Province, 'A New Paradigm Shift', 2020

- Beautification and Greening Projects
- Improvement in Social Amenities
- Local Economic Development Projects

The document notes that each small town is unique and requires tailor-made interventions specific to the town rather than a 'one size fit all. approach'. It is necessary to understand the following about each town:

- Its role about the residents within the town and in the context of surrounding communities and villages.
- Its role and position in the Provincial Settlement Hierarchy as set out in the PGDD would determine the nature and quantity of investment that can be expected to be focused on.
- Take account of and responds to unique opportunities, priorities that exist in specific towns. These would include the nature and type of municipal and governmental services already provided or planned to be provided over the MTEF period, the investment already secured or expended, etc.
- Consider the scale and make interventions to fit the town.
- Revitalisation requires strong and dedicated leadership that will drive the process and coordinate the participation of stakeholders at various levels ranging from the local Municipality to the provincial and national level. Revitalisation requires to be coordination at a provincial level to provide strategic direction at local levels, ensure that provincial budget allocations take cognisance of priorities in small towns.

The STRP should respond to local needs priorities and opportunities through the following:

- Unlock latent potential. Recycle vacant derelict and underutilised land and buildings.
- Address incremental and consistent decline through urban renewal and aesthetic improvements.

- Reverse the 'flight' of business from Town Centres and attract new business.
- Improve infrastructure (services, ICT and Social Community Facilities) to serve the residents and surrounding communities who rely on the town for services and amenities better.
- Develop nodes and special places in the small town.
- Improve the property portfolio to generate income streams for the local Municipality through increased rates and taxes.

It is noted that 'The STRP does not replace statutory plans and it does not take away or give away any rights. It is essentially an implementation focussed plan that bridges the gap between the SDF/ IDP/ LSDF and project plans and best fits in the hierarchy of plans as set out below.'
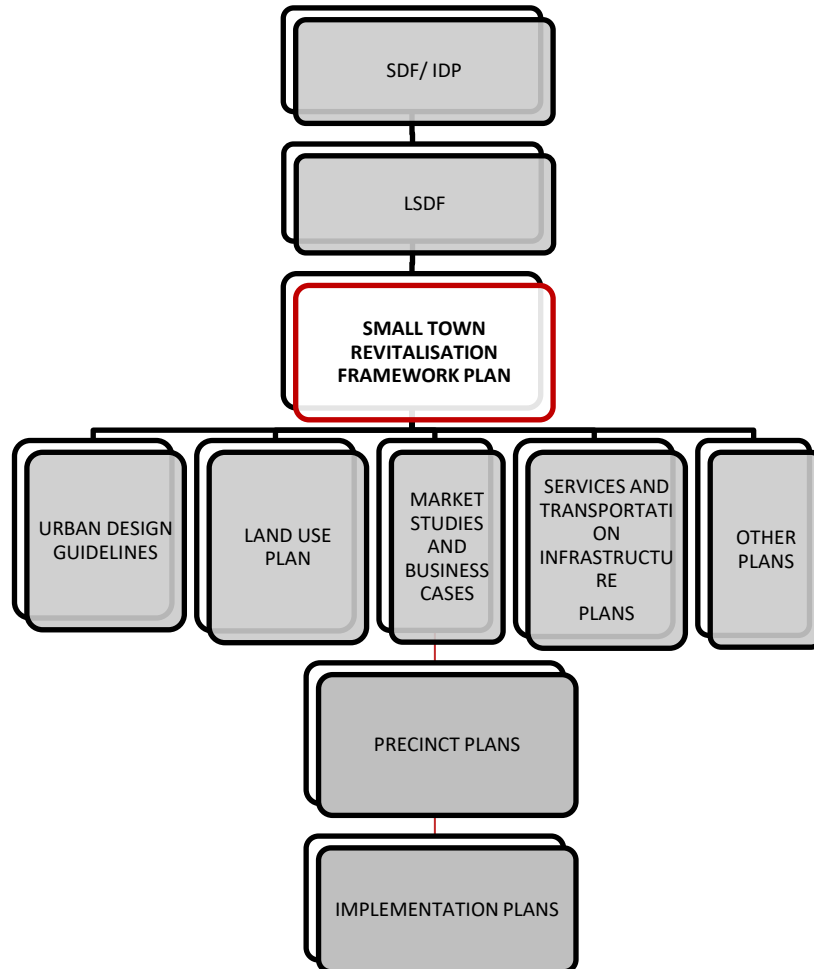
Figure 9: Diagram indicating where the Small Town Revitalisation Framework Plan is positioned.

2.3   UMZIMVUBU LOCAL MUNICIPALITY POLICIES AND PLANS

2.3.1   ULM Precinct Plans, Investor Conference, March 2016

This document highlights some precincts within the ULM in some detail along with indicative development proposals. The precincts identified are:

- EmaXesibeni
- KwaBhaca
- Ntenetyana
- Phuti
- Phakade

Broad spatial development proposals are conceptualised and put forward for future nodal developments in a variety of land uses, including commercial, civic, mixed-use etc.

2.3.2   ULM Land Use Scheme Regulations, 2016

In the preamble, the following is noted:

"These are regulations in terms of Chapter 5 of the Spatial Planning and Land Use Management Act (Act No. 16 of 2013) and Chapter 3 of the Municipality's Spatial Planning and Land Use Management By-laws. These regulations determine use rights and provide for control over user rights and the utilisation of land within the area of jurisdiction of ULM Local Municipality."[8]

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[8] ULM Land Use Scheme Regulations, 2016.

2.3.3 ULM Phase 3: Zoning Scheme Maps Amendments and Municipal Policy/By-Law to Deal with Specific Land Development Challenges, 2014

This document notes:

"One of the major aspects of this project is to create new Zoning Maps that will serve for all properties within the urban edge boundary, thus incorporating new development that is not indicated on the current Zoning Scheme Maps." [9]

2.3.4 ULM Precinct Plans, Situational Analysis, 2015.

This is an extensive situational analysis of the Municipality and information about the development of the various Precincts. It describes its project objectives as below.

"The primary objective of the study was to identify the economic role of KwaBhaca and EmaXesibeni in a local and regional context as well as the challenges and opportunities, investment and employment. Through the precinct planning initiative, the study sought to identify catalytic projects and interventions (both public and private, including urban design and public realm upgrades) that respond to the growing economic needs in the region and that will lead to the economic regeneration of the nodes.

The role of the towns and potential linkages with the N2 and other key routes within the study area will be interrogated concerning other planning initiatives in the area to facilitate regional integration. The Precinct Plan study will identify and respond to the social, subsidised and gap housing demand within ULM." [10]

The Precinct Plan's vision is:

"To have well developed CBD's and nodal areas where its people have equal opportunities and justice and support its rural hinterland."

The precinct plan identified the following catalytic projects for **EmaXesibeni:**

- Government Precinct to accommodate future growth of the public sector.
- Establishing industrial precincts to curb settlement invasion and to also drive the local economic base.
- Formalisation and upgrade of the existing Healthcare Precinct (Institutional Precinct).
- Accommodating growth in the commercial and retail sector by identifying primary sites for commercial expansion.
- Maximising development potential by introducing mixed-use developments.
- A range of residential developments, i.e.: High- to Middle-Income, Social Housing and Gated Communities.
- Provision has also been made for a private school to make the town a family-friendly place.
- Private Hospital/Medical Centre
- Financial Institutions
- Abattoir
- Boutique Hotel
- Tertiary Education Premises
- Supporting facilities to residential developments:
- Supermarkets
- National Line Stores
- Restaurants

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[9] ULM Phase 3: Zoning Scheme Maps Amendments and Municipal Policy / By Law to deal with Specific Land Development Challenges, 2014.

[10] ULM, ULM Precinct Plans, Situational Analysis, 2015.

The plan identified the following catalytic projects for **KwaBhaca:**

- Government Precinct to accommodate the existing government offices and the site is to accommodate additional municipal offices as a large number of ULM staff work out of satellite offices.
- Establishing an industrial precinct to curb settlement invasion and also drive the local economic base.
- The commercial site identified was primarily aimed at the development of a regional shopping centre.
- Maximising development potential by introducing mixed-use developments.
- Residential development has been targeted at the existing site earmarked for middle-income housing. The mixed-use developments will also accommodate a residential component.
- Boutique Hotel
- Petrol Filling Station
- Conferencing Facilities

The Precinct Plan identified the importance of a land release approach to leverage investment in ULM's main nodes.

2.3.5   Review of the ULM Spatial Development Framework, 2015

This document notes:

"The Spatial Development Framework is intended to create a holistic approach for the development of KwaBhaca and EmaXesibeni, thereby unleashing development potential, attracting investment, and removing blockages inherited from previous planning methods.

This project is seen as an important tool for supporting adequate planning, service delivery and infrastructure needs. KwaBhaca and EmaXesibeni have existing infrastructure and amenities. The SDF, therefore, needs to be crafted in such a manner that it takes into consideration the existing operations." [11]

The spatial planning vision was identified as:

"To ensure the delivery of quality services that promote economic growth, support development and respond to the community needs in accordance with our development."

The SDF identified EmaXesibeni as a District Centre with the following functionalities:

- The district-level Administrative Centre.
- the major district Service Centre for commercial goods and services.
- a centre of educational excellence; and
- a residential development node (high- to low-income).

KwaBhaca was identified as a Sub-District Centre, with the following functionalities:

- a municipal-scale Administrative Centre.
- a municipal scale Service Centre for commercial and social goods and services.
- a residential development node covering the full range of economic bands (high- to low-income).
- having the potential for value-adding agro-industrial processes; and
- having the potential for event-related tourism events.

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[11] Review of the ULM Spatial Development Framework, 2015

The SDF identified the need for Local Spatial Development Frameworks to be developed for the towns of KwaBhaca and EmaXesibeni. LED projects identified for EmaXesibeni included a peach value addition project. Projects identified for KwaBhaca included a Fresh Produce Market and a poultry rearing project. Projects that were identified for both towns included a pole treatment plant, an aloe vera value addition project and a maize field ploughing project.

2.3.6   ULM LED Strategy Review Workshop Small Town Development Draft Framework by S. Ndyoko, undated.

This PowerPoint presentation shares the Draft Provincial Small-Town Development Framework (STDF) with key stakeholders.

ULM Conceptual Precinct Framework Plan, 2016. This report highlights the five precincts identified by stakeholders as requiring further development, namely:

- EmaXesibeni
- KwaBhaca
- Ntenetyana
- Phuti
- Phakade

It identifies the planning principles of the Precinct Plan as:

- Accessibility - paths and linkages
- Equity - even distribution of resources
- Integration - placemaking
- Functionality - the compatibility of land use activities
- Sustainability - social, economic, institutional enhancement and environmental

2.3.7   ULM Conceptual Precinct Framework Plan, First Draft, May 2016

This report highlights the five precincts identified by stakeholders as requiring further development, namely:

- EmaXesibeni
- KwaBhaca
- Ntenetyana
- Phuti
- Phakade

It identifies the planning principles of the Precinct Plan as:

- Accessibility - paths and linkages.
- Equity - even distribution of resources.
- Integration - placemaking.
- Functionality - the compatibility of land use activities.
- Sustainability- social, economic, institutional enhancement and environmental.

Figure 10: KwaBhaca Urban Development Framework (UDF) as defined in the ULM Conceptual Precinct Framework Plan of 2016.

Figure 11: EmaXesibeni Urban Development Framework (UDF) as defined in the ULM Conceptual Precinct Framework Plan of 2016.

The two UDM's above are the guiding and most detailed 'Development Framework' documentation available for the two towns before this report. They are focussed on the existing town's main roads and the issues of concern to these town centres. These include:

- public transport
- infrastructure
- hawker management
- bypass roads
- Institutional facilities

key development sites.

2.3.8 ULM Conceptual Precinct Framework Plan, Investor Conference Outcomes Report, May 2016

This report notes:

"In aiming to drive the development agenda, which was initiated through the Precinct Plans preparation, the Umzimvubu Local Municipality (ULM) embarked on a development showcase in the form of an 'Investor Conference' which was held on the 17th and 18th of March 2016.

The Investor Conference brought together the private and government sectors to share information and understand the development agenda and infrastructural development potential the ULM envisions for the next 15 years.

Of vital importance was the showcasing of the current situation within the towns of EmaXesibeni and KwaBhaca, in terms of infrastructure, services, commercial and retail potential as well as Tourism opportunities to be harnessed. This report serves as an outcomes

report of the Investor Conference intended to capture the pertinent matters and opportunities identified." [12]

2.3.9   KwaBhaca and EmaXesibeni Zoning Scheme, December 2016, Umhlaba Consulting Group

This document by the Umhlaba Consulting Group in 2016 further extends the Precinct Plan UDF's into a zoning scheme for each town.
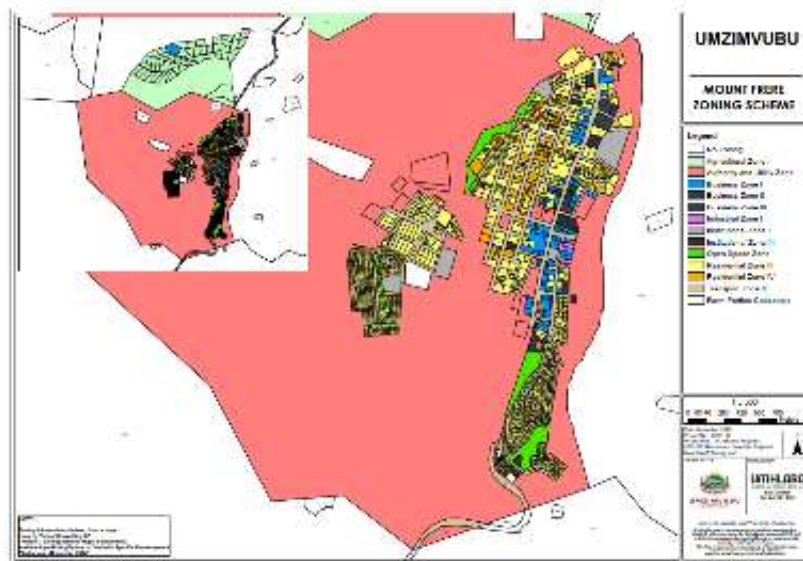
Figure 12: KwaBhaca Zoning Scheme by the Umhlaba Group in 2016.
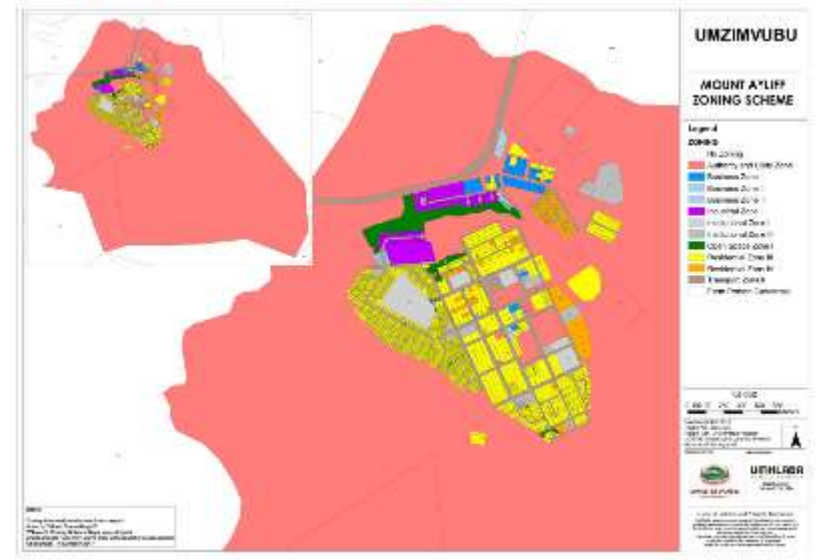
Figure 13: EmaXesibeni Zoning Scheme by the Umhlaba Group in 2016.

2.3.10 Road Design Information from Mataya Engineers regarding EmaXesibeni.

During the process of this work, it was revealed that a significant detailed design was underway for some road infrastructure in EmaXesibeni. This is current work to provide extensive road, road reserve, stormwater and other upgrades to the EmaXesibeni town centre, largely in the area defined in the previous UDF for the town.

The extent of this work is described by the pink area below.

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[12] ULM Conceptual Precinct Framework Plan, Investor Conference Outcomes Report, May 2016.

Figure 14: Extent of proposed road infrastructure upgrade in EmaXesibeni town centre.

Figure 15: Detail of proposed road infrastructure upgrade in EmaXesibeni town centre.

2.3.11 ULM Conceptual Precinct Framework Plan, ULM Infrastructure Funding Requirements, 2019

This is a current document that describes in table form and relative detail the various development zones/precincts and assigns some detail to description and budget estimates.

2.3.12 ULM, ULM Precinct Plans, Traffic and Transportation Situational Analysis, September 2015

This report describes the vehicular and pedestrian movement in some of the key development zones in a fair amount of detail.

2.3.13 ULM Local Economic Development (LED), 2011

The vision of the ULM LED Plan is as follows:

"To develop a diverse and resilient economy, based on the competitive advantages of the area, that develops skills, sustainable business and job creation".

The goals of the strategy are:

- To develop appropriate skills and human resources.
- To develop and support the business sector.
- To facilitate the expansion of the forestry sector and promote value addition through partnerships.
- To develop the regional tourism industry responsibly.
- To promote agriculture as a viable livelihood strategy and as a productive commercial sector.
- To develop good governance and institutional capacity.
- To increase investment and realise an enabling environment for investment.
- To regenerate the urban centres.
- To build resilient and vibrant rural economies.

The objectives per goal are listed in the table below.

Goal	Objectives
To develop appropriate skills and human resources.	• By 2016, local FET colleges offer courses related to skills required in key industries in the Municipality. • By 2016, apprenticeship programmes for artisans are implemented. • By 2016, partnerships have been developed with Higher Education Institutions, FET colleges and/or Centres of Innovation to promote the establishment of new centres of learning, research and education programmes in the region. • Outgoing planning relationship between Municipality and Education Department is developed to ensure that local schools are provided with prioritised services. • By 2016, the Municipality has building contractors certified up to an advanced level.
To develop and support the business sector.	• By 2014, facilitate processes to ensure that all illegal mining activities within the Municipality are regulated. • The ULM to augment SEDA's business support through an extension of services to support SMMEs and cooperatives. • By-laws are enforced and a regulated business environment is put in place. • Implement Business Retention and Expansion Plan.
To facilitate the expansion of the forestry sector and promote value addition through partnerships.	• By 2016, partnerships with commercial plantations and identified communities facilitated value addition, pole treatment plant, new milling facility, forestry expansion and community woodlots. • By 2014, the land is identified for afforestation through environmental assessment and land audit. • Implement the Forestry Sector Plan.
To develop the regional tourism industry responsibly.	• By 2012, have a functioning tourism organisation in place. • By 2016, increase the number of tourism products and identify and package attractions. • Implement the Responsible Tourism Strategy. • By 2016, develop and implement a Tourism Marketing Plan based on the development of route tourism, partnerships, and transient tourism.
	• By 2016 have improved tourism awareness in the community through a programme of tourism awareness.
To promote agriculture as a viable livelihood strategy and as a productive commercial sector.	• By 2016, promote agricultural extension services, research and support to all communities. • Facilitate the establishment of one value-adding enterprise in the region.
To develop good governance and institutional capacity.	• By 2016, improvement in satisfaction levels with service delivery of Municipality. • By 2016, a well-resourced LED unit that can implement LED projects contained in the IDP. • The creation of linkages with the Alfred Nzo Development Agency (ANDA) to implement projects and capacitate the Municipality to implement.
To increase investment and realise an enabling environment for investment.	• Implement the Investment Plan.
To regenerate the urban centres.	• Implement the Spatial Development Framework. • By 2016 have planned and implemented an urban redesign of KwaBhaca CBD. • By 2012 have institutional arrangements in place to support CBD upliftment in all urban centres of the Municipality.
To build resilient and vibrant rural economies.	• By 2016 improve the average rural community's access to basic services. • By 2016 improve rural poverty levels through interventions to reduce costs of transport, food and costs of business start-up experienced by these communities.

Table 2: Elaboration of the strategy of the UDM LED of 2011. (Source: ULM, 2011)

LED interventions identified relating to EmaXesibeni and KwaBhaca specifically included:

• Branding and promoting the region as an N2 stop-over.

- Reviving the image of KwaBhaca and EmaXesibeni.
- Infrastructure roll-out.
- Investment in social infrastructures.
- A comprehensive urban redesign and upliftment policy.
- Urban Regeneration task team. ULM Local Economic Development Strategy Review (LED), 2020.

A review of the LED Strategy is being undertaken in 2020. At the time of drafting this study, Council had yet to approve the document., hence its exclusion from this Policy Review.

2.3.14 ULM Local Municipality Integrated Development Plan (IDP) 2019-2020 Financial Year, 2019

The principal strategic municipal planning document is the Integrated Development Plan (IDP). The IDP guides all other plans, strategies and resource allocation, investment, and management decisions in the Municipality.

The vision of the local Municipality is:

"Moving towards limitless possibilities'.

One of the goals identified in the ULM IDP is the development of agriculture as the primary economic base for the Municipality and to ensure that conducive conditions that will attract investors for job opportunities and other economic development.

Stated objectives are to create and facilitate an enabling environment for sustained local economic growth and job creation with the outcomes being improved and sustained economic viability and the growth of the Municipality's economy.

2.3.15 Five Year Tourism Strategic Plan (2011- 2016): ULM Responsible Tourism Sector Plan, 2011

The Responsible Tourism Sector Plan identified the following vision for tourism:

"ULM strives to be a preferred tourism destination by 2020 while promoting responsible tourism practices."

The following mission was identified:

"ULM will promote responsible tourism practices, thereby ensuring the sustainability of the tourism industry and the development of local communities."

Focus areas were identified as being:

- To develop the various stakeholders to become active participants in the industry.
- To be a preferred tourism destination by 2020.
- To develop a sustainable tourism industry for the benefit of the community.
- To be a major player in the local economic development of the Municipality.
- To promote responsible tourism practices.
- To create employment in the communities.

The strategy's objectives and proposed interventions are listed in the table below.

Strategic Objectives	Strategic Interventions	Strategic Projects/Priorities
To develop new tourism products to grow the destination.	Create an enabling environment for the development of tourism SMME and other experiences.	1. SMME support packaged for interested and emerging entrepreneurs. 2. Municipal by-laws to provide support for tourism development. 3. Capacitate the tourism unit of ULM to manage tourism development. 4. Assist the tourism sector to establish a Local Tourism Organisation (LTO)
	Develop the major centres being the towns of KwaBhaca and EmaXesibeni, tourism SMMEs and tourism projects.	1. Revive and re-align the existing tourism SMMEs and projects. 2. Develop KwaBhaca as the major centre of ULM. 3. Develop water sports and adventure attractions in the EmaXesibeni area. 4. Assist bed and breakfast and boutique hotel owners' owners to sustain their hospitality association and to improve the accommodation standards in their facilities.
	Develop a diverse and competitive tourism product offering for ULM.	1. Ensure the upgrading and development of accommodation (low to upmarket) 2. Increase the visibility and accessibility of arts and culture. 3. Develop recreational activities (e.g., mountain hiking) 4. Develop adventure tourism activities (abseiling, river rafting, mountain climbing, etc.).
	Provide support to existing tourism	1. Tailor-made tourism SMME support programme (marketing
	products in line with industry standards.	materials, marketing platforms, financial resources, capacity building, etc.)
	Ensure compliance of tourism products with legislation.	Information booklet to guide various types of tourism businesses (existing and new) on legislations that must be adhered to.
	Develop investment packages.	1. KwaBhaca and EmaXesibeni urban development. 2. Hiking routes (coal mines, mountains).
	Development of supporting infrastructure	1. Extension or re-direction of the main road in KwaBhaca 2. Information centres in KwaBhaca and EmaXesibeni 3. Infrastructures to identified PPP projects. 4. Bulk infrastructure in identified areas for tourism adventure attractions. 5. Road infrastructure in identified tourism nodes.
To market and position ULM Municipality as a tourism destination	Establish a tourism authentic brand.	1.Brand development 2. Information centres in KwaBhaca and EmaXesibeni 3. Information kiosks at strategic locations. 4. Arts and craft centres along tourist routes. 5. Service orientation programme 6. Marketing platforms. 7. Joint marketing initiatives with the district Municipality and other nearby municipalities 8. Tap into the N2 traffic to entice visitors to stop, stay, and spend. 9. Provide services to tourists that result in marketing spin-offs. 10.Joint marketing Initiatives with other Municipalities and stakeholders.

Table 3: Strategic Objectives, Interventions and Projects of the Five Year Tourism Strategic Plan.

2.3.16 ULM Rural Settlement Development Plan, 2014

The policy was developed to identify and provide an understanding of the needs of the various communities in terms of land, services and housing. The objectives of the Rural Settlement Development Plan were:

- Rationalising the use of land and resources in rural areas.
- Focusing on what is achievable in development terms and how it relates to spatial and economic development proposals.
- Understanding the urban-rural interface in certain parts of the study area.
- Identifying and protecting prime productive land in rural areas.
- Controlling haphazard growth and development, thus promoting optimal use management of land in rural areas.
- Discouraging illegal occupation of land with due regard to the informal land development processes.

The study provides settlement growth estimates and plans per major village settlement per Ward. The plan identified the number of additional sites needed per settlement, as well as community facility sites and additional infrastructure provision.

It is noted with interest that the key objectives of this Development Plan of 2014 appear now to be real challenges to the two towns.

2.3.17 ULM Local Municipality Investment Plan, 2011

The vision of the ULM Investment Plan was:

"The promotion and leveraging of all investment to maximise on latent economic potential."

The goals of the strategy include:

- The realisation of an enabling environment.
- Increasing tangible investment.
- Accelerating the rate of development.

The pillars and thrusts provide an integrative and programmatic approach to arresting the low growth performance of the ULM economy, seizing various opportunities and laying a broader and deeper entrepreneurial foundation for the area.

Pillars	Description	Thrusts
Creation of a conducive environment	This pillar was developed as it considers factors in the business operating environmental matrix that is external to or out of the direct sphere of influence of a business but still has an inherent relationship with the trajectory of market development.	• Infrastructure Rollout • Municipal Institutional Transformation • Urban Land Reform • Partnership as a Growth Lever.
Fostering competitiveness	Fostering competitiveness is about enhancing general areas of opportunities to increase the probability of an investor choosing to invest in ULM, and not in another locality.	• Public Investment into Social Infrastructure. • Incentivisation of Private Sector Investment. • Cooperatives and Small Enterprise Support. • Value Chain Maximization.
Sectoral Interventions	This pillar aims at providing sectoral interventions towards agriculture, forestry and tourism, which is based on the priority sectors of the ANDM.	• Rural Agriculture. • Sustainable Forestry. • Tourism Development.

Table 4: Pillars and Strategic Thrusts (Source: ULM, 2011)

2.4 DISTRICT MUNICIPALITY POLICIES AND PLANS

2.4.1 Alfred Nzo District Municipality Climate Change Response Strategy: Technical Report, 2015

In 2015, the ANDM developed a Climate Change Response Strategy to support the transition of the district towards greater climate responsiveness in all sectors. The strategy identified that these often interlinked and interdependent activities can only be wholly achieved through multiple strategic partnerships, across scales and spheres of government, between actors in the public, private and civil society sectors, and between researchers, strategists and operational implementers.

The strategy identified the following top priorities for action for the District around climate change response:

- Build resilience through avoiding and reversing any loss of, and formally protecting, important ecological infrastructure, including wetlands, river buffers, and water catchment areas.
- Transition to a low-carbon economy by maximising energy efficiency and making the most of natural resources to deliver low-carbon development in the ANDM and aid development.
- Ensure universal access to safe and reliable energy, water, sanitation and housing.
- Ensure integrated land use planning, across sites and sectors, to build climate resilience, risk minimisation, and ecological infrastructure in a way that supports a green economy in the ANDM.
- Influence behavioural change through education and awareness and getting 'buy-in' from all levels.
- Enhance the institutional capacity of the district through the training and capacity development of officials on climate change

and disaster preparedness including enhancing early warning systems and communications on disasters (CSA, 2015: 58).

2.4.2 Beach to Berg Tourism Development Plan, 2015

The Beach to Berg Tourism Route was developed to meet the following responsibilities within the ANDM:

- Promote rural tourism.
- Utilise the unique assets, basic resources and characteristics of the region.
- Have a high level of local participation in decision-making and enterprises.
- Apply Sustainable and Responsible Tourism principles.
- Be pro-poor in its design.
- Be private sector driven (product owners)
- Look to the Government to provide an enabling framework (this development)
- Promote its open space.
- Encourage contact with nature and the natural world.
- Highlight its heritage.
- Present its traditional societies and traditional practices.

Products that were identified in the ULM which could form part of the route included:

- Mkhobeni Forest
- AmaBhaca Craft
- ULM River
- Madzikane Monument
- Ntenetyana Dam

2.5   KEY DOCUMENTATION

As discussed and agreed upon between the Client and the project team, the key documents for this project have been identified and listed on Microsoft Teams under General/Key Reference Documents as follows:

- Small Town Revitalisation Plan
- ULM Local Economic Development (Led), 2011
- ULM Rural Settlement Development Plan, 2014
- Review of the Umzimvubu Local Municipality Spatial Development Framework, 2015.
- ULM Conceptual Precinct Framework Plan, First Draft, May 2016
- KwaBhaca And Emaxesibeni Zoning Scheme, December 2016, Umhlaba Consulting Group, Along with the ULM Land Use Scheme Regulations, 2016.

2.6   CONCLUSION OF POLICY REVIEW

The policy analysis identified the following key takeaways and aspects that should be considered in developing the ULM Regeneration Plan and Urban Design Framework.

- **Priority Nodes:**
  The various Development Frameworks and Precinct Plans identified KwaBhaca, EmaXesibeni, the junctions of Phuti and Phakade and the tourism development node at Ntenetyana Dam as key areas for future development.

- **The Focus for LED:**
  The review also identified that, in general, the focus areas identified in the previous LED strategy are still important and that the vision had relevancy for the Local Municipality at the time. The review also identified that in general the focus areas identified in the previous LED strategy are still important and that the vision has relevancy for the Local Municipality at present.

- **Climate Change:**
  The District's Climate Change Response Strategy offered interventions to be taken forward at a district and local level. However, there is limited evidence of these programmes being incorporated into the IDP for ULM.

  Due to climate change and environmental management being critical problems impacting all sectors of a rural economy, it is imperative that these programmes find expression in the LED Plan.

- **Property Development:**
  The ULM Precinct Plans identified opportunities for residential, office, commercial and industrial development within KwaBhaca and EmaXesibeni. Both towns are at present severely constrained by limited available land for development.

  Thus, interventions around land tenure reform and town planning are critical intervention to unlock the town's development opportunities. An Urban Regeneration Strategy is being undertaken in 2020 to guide the implementation and design of the two main urban nodes.

- **The Focus of Capital Investments for Projects Interventions:**
  The policy review indicated that most of the projects identified for ULM involve assistance to a group of beneficiaries in the form of cooperative formation support, capital goods being purchased; feasibility studies being undertaken, and buildings developed.

  There can be a place for these interventions, but there is also a need for programmatic, support programmes to create an enabling

environment, such as those that offer business services support and advice to all SMMEs.

See the annexure, Umzimvubu Local Municipality Urban Regeneration Strategy, **Town Planning Considerations**, for EmaXesibeni and KwaBhaca, Version 6, February 2021, by Maswana Group of Companies, for further information and detail regarding policy review:

2.7 RENEWAL CONTEXT

Rural town renewal (like urban renewal) is a process of change to towns and especially their centres.

Typically, the levels of desirability or degradation of space, infrastructure and structures in town centres are not static but vary across a town's life cycle. Historical centres are often outgrown, become technologically outdated and are no longer centrally located as a town naturally expands. In addition to this, what is understood to be a key issue in KwaBhaca and EmaXesibeni (as well as many other towns in the former Transkei), the availability of land and the certainty of its ownership can be significant to how the town develops.

Typically, with the historical town centre, as described above, new development centres are then proposed and developed that better cater to contemporary conditions on more available and opportune land. This can be seen in the form of a distinct second centre or, as is evident in the two towns of concern to this report, has resulted in proposals and some development in several new development centres around the historical town centre.

The next period of the cycle can see the moving of several key activities and tenants to the more dispersed development centres and the possible regeneration and upgrading of the historical centre. This can be in the format of smaller businesses, socialising, tourism and niche retail activities.

Within the context of this report, this seems to be an apartment general development scenario for the two towns with notable interest in the planning and development of new facilities in several dispersed development centres around the historical town centre.

A best-case scenario in this respect is that the new development centres are recognised within the context of a larger development plan for the town that allows these new centres AND the historical town centre to develop.

2.8   SITUATIONAL ANALYSIS - OVERVIEW

The site is understood through three interrelated areas:

- The Biophysical
- The Socio-Economic
- The Built Environment

2.9   SITUATIONAL ANALYSIS - BIO PHYSICAL STATUS QUO

This understanding begins with a general understanding of the biophysical status quo of the ULM.
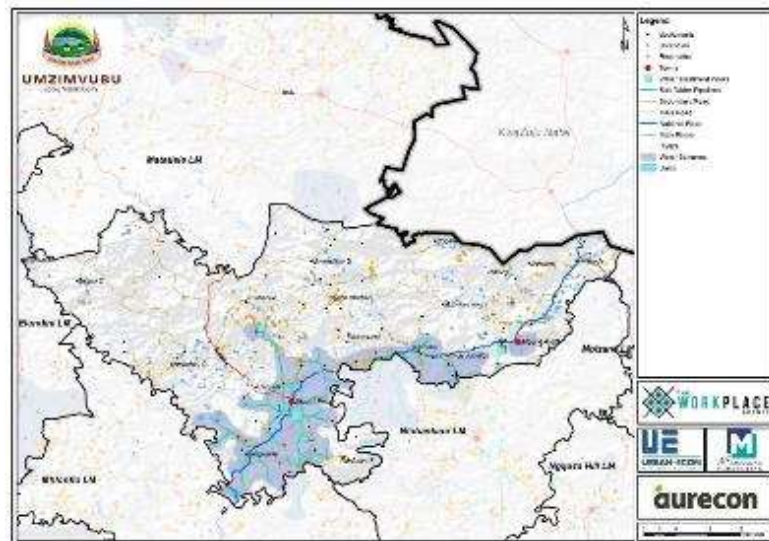
Figure 16: Biophysical Analysis overview of the ULM region (sources: DWA, MDB, Dept of Environment)

Key observations and inputs taken from the ULM Precinct Plan include:

- The topography of Umzimvubu Municipality is directly influenced by two main geomorphological formations i.e., River Valleys and Mountainous formations. The Municipality is mainly drained by the Umzimvubu River Basin, comprised of a few major rivers including the Umzimvubu River, Zintlava River, Tina River, the Kinira River, and other small tributaries which traverse through the Municipality.[13]

- Both towns are characterised by rolling hills and mountainous areas. The elevation varies from approximately 1020 m.a.s.l to approximately 1280 m.a.s.l.

- KwaBhaca and EmaXesibeni are both predominantly rural areas that can be considered environmentally sensitive areas. The town and its immediate surroundings fall within Critical Biodiversity Areas (CBAs) according to the Eastern Cape Biodiversity Conservation Plan (ECBCP).

- The vegetation type in KwaBhaca is characterised as predominantly East Griqualand Grassland. Pockets of Southern Mistbelt Forest, the Drakensberg Foothill Moist Grassland and Eastern Valley Bushland are found within the 5km buffer of the town. Emaxesibeni is similar with pockets of Eastern Valley Bushveld evident.

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[13] Taken from the ULM, Precinct Plans, Situational Analysis, 2015
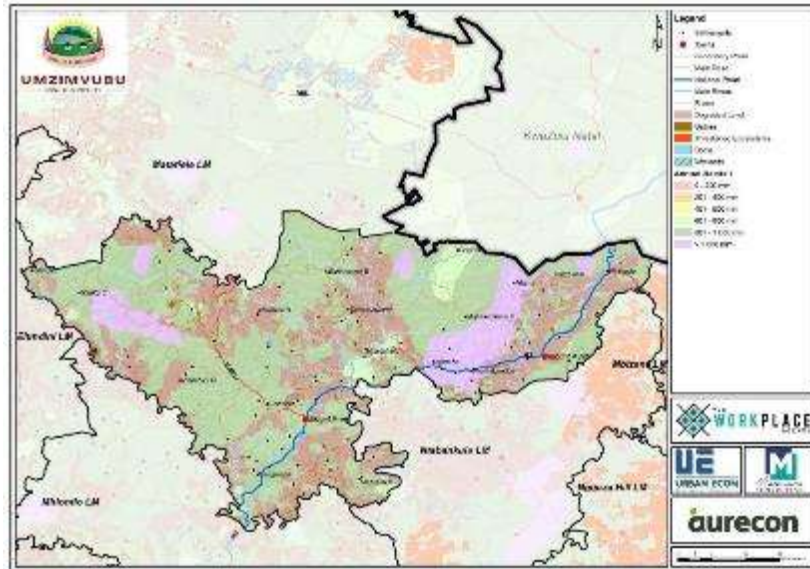
Figure 17: Vulnerability and Climate of ULM (Sources: Dept of Environment, SA Weather Service, DWA)

Key observations and inputs are taken from the ULM Precinct Plan with regards to vulnerability and climate include:

- The rainfall of the Umzimvubu Local Municipality is high with an average of between 750 mm and 1100 mm. The area is a summer rainfall area with 70 to 80% of the rain falling during the summer months. The average annual rainfall generally increases from West to East.

- Both towns normally receive about 670mm of rain per year, with most rainfall occurring mainly during mid-summer. It receives the lowest rainfall (7mm) in June and the highest (110mm) in January. The average midday temperatures for Emaxesibeni (formally EmaXesibeni) range from 18°C in June to 24.9°C in January. The

region is the coldest during July when temperatures drop to 3.8°C on average during the night.

- Thunderstorms are characteristic of the high rainfall summer months with an increase in thundershower activity as you move inland. Hail does occur.

- Rainfall is a key variable that shapes the developmental landscape in Umzimvubu by affecting rural livelihoods, Tourism, subsistence agriculture and commercial agriculture.

- Poor livestock grazing techniques can potentially lead to high levels of land degradation leading to topsoil erosion and the formation of gullies.

- Land degradation is evident within the surrounding areas and special care and programs are required to improve the status quo.

Below is a summary of the findings of the biophysical status quo of each town. This is elaborated on further in the annexure.

2.9.1   KwaBhaca

The area is a heavily modified environmental area and is located in a CBA2 (Critical Biodiversity Area 2).

It is unlikely that full Environmental Impact Assessments (EIAs) would be required for the development proposals, but this may need to be reviewed when further information is available and on a case by case basis.

What is more significant is that the town is developed between and sometimes encroaching on several watercourses. See the map below.

This could have a significant effect on the location of the proposed new development centres and the expansion of existing centres.

Figure 18: Diagram representing the watercourses and wetlands to KwaBhaca.

In summary, the environmental risk factors in this town are as follows:

- Planning needs to take cognisance of the limitations of watercourses and wetlands.
- Wastewater to be separated from stormwater.
- Waste Management. It is suggested that an area needs to be designated for waste separation and storage (for each industry or a communal area).
- There is a need for rehabilitation of the watercourses and other indigenous bush areas.

2.9.2   EmaXesibeni

The area is heavily modified and is located in a CBA1 (Critical Biodiversity Area 1).

The area is bracketed by two watercourses to the northeast and southwest of the development and is highly susceptible to erosion.

An all-inclusive EIA would probably need to be undertaken development; however, detailed planning (which needs to be completed beforehand) and funding may not make this option feasible. An alternative option could be that once proposed development layouts have been approved, an assessment can be done to see which activities will require a Basic Assessment or a full EIA. Additionally, a phased approach to development could be considered aligned to the environmental approvals that could be required.

Figure 19: Diagram representing the watercourses and wetlands to Emaxesibeni.

In summary, the environmental risk factors in the development area are as follows:

- Planning needs to take cognisance of the limitations of watercourses and wetlands.
- Cognisance needs to be taken as to the above environmental approval context in the locating and planning of proposed new development centres.
- Separation of wastewater from stormwater.
- Wastewater to be separated from stormwater.
- Waste Management. It is suggested that an area needs to be designated for waste separation and storage (for each industry or a communal area).
- There is a need for rehabilitation of the watercourses and other indigenous bush areas.

See annexure for further information.

2.10 SITUATIONAL ANALYSIS - SOCIO-ECONOMIC

2.10.1 Socio-Economic Profile

This profile discusses the major demographic and socio-economic trends and characteristics within the ULM, focusing specifically on the towns of KwaBhaca and EmaXesibeni to place the Urban Regeneration Study into a demographic context.

2.10.1.1 Population

The population of ULM in 2018 was estimated at 192 862. The populations of EmaXesibeni and KwaBhaca were estimated at 6 198 and 6 775, respectively. The towns are important to service centres for the rural hinterland but only account for about 5.5% of the total ULM's population.

It should be noted that the populations of the small urban centres of EmaXesibeni and KwaBhaca do not include the many villages and homesteads around the towns.

A notable number of individuals who work and trade in the towns live in surrounding villages. Between 2011 and 2018 the populations of both towns grew by an annual rate of 0.05%, while the ULM's population increased by 0.1% and ANDM's population grew by 0.4% on average per year.

	Eastern Cape	ANDM	ULM	EmaXesibeni	KwaBhaca
Population (2018)	6 522 734	793 236	192 862	6 198	6 775
Area (km²)	168 966	10 731	2 577	3	4
Population Density	39.6	74.9	75.8	1864.8	1693.7

Table 5: Population, 2018 (Source: Urban-Econ forecasts based on StatsSA, 2011 and Quantec, 2018)

The table below gives a breakdown of the estimated household composition.

	Eastern Cape	ANDM	ULM	EmaXesibeni	KwaBhaca
Household (Number)	1 659 171	168 013	46 763	2 070	1 921
Average household size	3.93	4.72	4.12	2.60	2.80

Table 6: Households, 2018 (Source: Urban-Econ forecasts based on StatsSA, 2011 and Quantec, 2018)

The population split in ULM is skewed to a predominantly female population, with 56% female and 44% male. In terms of age structure in ULM, 39.2% of the population are children (aged 0 to 14 years old), this is higher than the Eastern Cape proportion of 34.3% but lower than the district proportion of 41.5%. The population over 65 years old makes up 7.1% of the ULM population. Besides, only 35.1% of the population are aged between 15 to 35 years old, this being the young adult age group.

The population pyramid narrows in the middle-age brackets with only 18.6% of the population aged between 35-65 years old. This is concerning as the 15-65-year-old age group is the economically active age bracket that supports dependents and makes investments in their businesses, their careers and their homes.
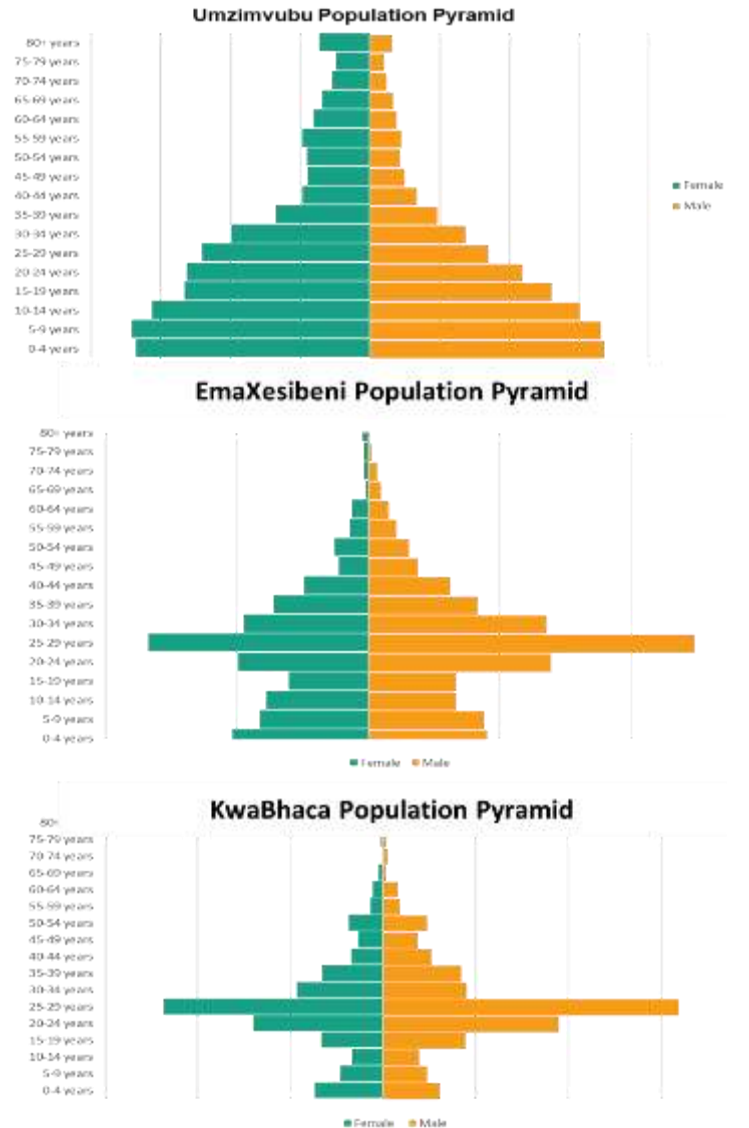
Figure 20: Population Pyramid. (Source: Urban-Econ forecasts based on StatsSA, 2011 and Quantec, 2018).

The population pyramids differ at municipal and town levels, with EmaXesibeni and KwaBhaca having larger proportions of young adults than the Municipality overall. In EmaXesibeni 50.5% of the population are between the ages of 15-35 years old, thus classified as youth. Meanwhile, 25.5% of the population are children aged between the ages of 0 to 14 years old. In KwaBhaca 61.3% of the population are classified as youth, and 15.5% of the population are children. The towns are thus characterised by a larger middle-aged, economically active population than the Local Municipality as a whole.

2.10.1.2   Educational Attainment

Regarding the education attainment levels of adults aged 20 years and older, KwaBhaca had the highest levels of educational attainment, with 36% of its adult population having obtained a matric certificate, and 30% have some secondary education. EmaXesibeni's education trends were aligned with those of the Municipality and the District, with 24% of the adult population having achieved matric and 33% have some secondary education.
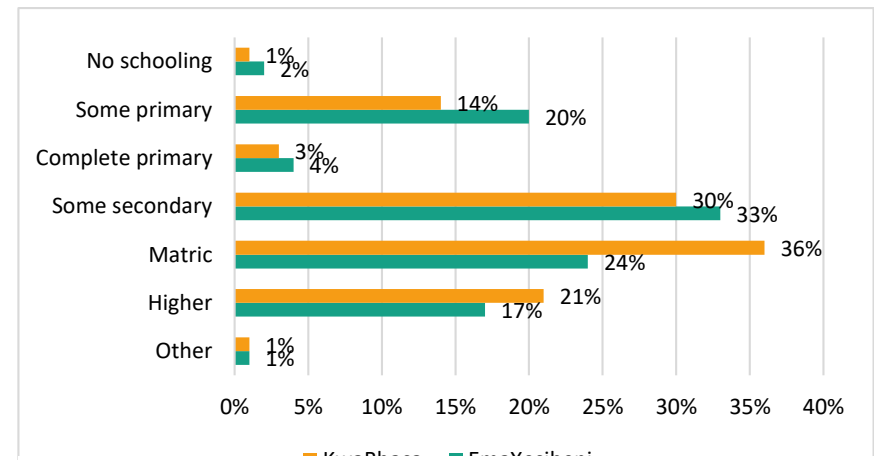
Figure 21: Comparison of EmaXesibeni and KwaBhaca education attainment levels for population over 20 years old (Source: Quantec, 2018)

The education attainment levels for EmaXesibeni and KwaBhaca individuals are higher than the education attainment levels of the province, with 20% of the Eastern Cape's adult population having reached matric and 36% has attained some secondary education. The table below lists the education attainment levels of the province in comparison to the ANDM, ULM and the towns of EmaXesibeni and KwaBhaca.

	Eastern Cape	ANDM	ULM	EmaXesibeni	KwaBhaca
No schooling	11%	14%	9%	2%	1%
Some primary	17%	23%	21%	20%	14%
Completed primary	6%	7%	8%	4%	3%
Some secondary	36%	37%	40%	33%	30%
Matric	20%	13%	14%	24%	36%
Higher	9%	6%	7%	17%	21%
Other	2%	1%	2%	1%	1%
Literacy rate	**71%**	**63%**	**68%**	**77%**	**90%**

Table 7: Education Attainment Levels for the Population aged 20 years and above. (Source: Urban-Econ forecasts based on StatsSA, 2011 and Quantec, 2018)

The literacy rate in the ULM is notably lower than that of the Province as a whole and is estimated at 68%, compared to 71% for the province. The towns of EmaXesibeni and KwaBhaca illustrate the higher employment and education opportunities available in towns for individuals and thus have higher literacy rates than that of ULM overall, at 77% and 90% respectively.

The ULM education profile points to a shortage of the basic literacy and numeracy skills needed to grow the economy and attract investment. Low education levels equate to low levels of formal sector employment, which implies low-income levels and a limited ability to change one's quality of life.

2.10.1.3   Income and Poverty

A standard measure of poverty is the Poverty Line of R400 per month household income (Quantec, 2018). The population of ULM that falls below the poverty line is notably large at 22%, compared to 21% for the province. EmaXesibeni and KwaBhaca have 23% and 15% of their populations living below the poverty line, respectively.

The average weighted monthly household income in ULM is R5 154, which is in line with the district average of R5 126, but this is almost half that of the Eastern Cape average at R8 726.

The two towns which have a notably larger proportion of persons employed have a substantially higher average weighted household income than the Municipality as a whole.

Census 2011	Average Household Income	Poverty Line
Eastern Cape	R8 726	21%
ANDM	R5 126	22%
ULM	R5 154	22%
EmaXesibeni	R 10 763	23%
KwaBhaca	R12 778	15%

Table 8: Average Weighted Monthly Household Income, 2018 (Source: Urban-Econ forecasts based on StatsSA, 2011 and Quantec, 2018)

2.10.1.4   Access to Basic Services

Access to services is considered in terms of access to water, electricity, refuse removal and sanitation. To simplify discussions, access is considered in terms of access at a Reconstruction Development Programme (RDP) level:

- Access to water defined as access within 200 metres from a dwelling.

- Access to electricity defined as access to electricity for lighting.
- Access to refuse removal.
- Access to sanitation defined as access to a flush or chemical toilet.

RDP Service	ANDM	ULM	EmaXesibeni	KwaBhaca
Water	50%	61%	81%	83%
Electricity	46%	46%	67%	90%
Refuse	6%	7%	89%	54%
Sanitation	12%	15%	46%	70%

Table 9: Access to Basic Services, Percentage of Households access as per RDP Levels. (Source: Urban-Econ forecasts based on StatsSA, 2011 and Quantec, 2018)

In terms of sources of electricity, 0.8% of ULM households make use of renewable energy sources. This is comparable to the provincial average. Opportunities thus exist to promote mini-grid and rooftop renewable energy solutions within rural environments.

2.10.1.5   Dwellings

In terms of the most popular dwelling types within the Municipality, 60% of ULM households live in traditional dwellings. The remainder occupies a formal brick house (25%), a house or flat in a backyard (6%) or a flat (5%).

The dwelling typology differs for the urban nodes, with a house being the most popular typology, followed by semi-detached buildings, a room in a backyard and finally traditional dwellings.

	Eastern Cape	ANDM	ULM	EmaXesibeni	Kwa-Bhaca
House on a yard	52%	28%	25%	85%	52%
Traditional dwelling	28%	55%	60%	6%	19%
Flat in a block of flats	5%	5%	5%	4%	2%
Town/cluster/semi-detached house	3%	1%	1%	2%	13%

(simplex, duplex or triplex)					
House/flat/room, in backyard	3%	7%	6%	0%	12%
Informal dwelling/shack, in backyard	2%	1%	0%	1%	0%
Informal dwelling/shack, NOT in backyard, e.g., in an informal/squatter settlement	6%	1%	1%	1%	0%
Room/flatlet not in backyard but on a shared property	0%	1%	1%	0%	1%
Other	1%	2%	1%	1%	1%

Table 10: Types of Dwellings. (Source: Urban-Econ forecasts based on StatsSA, 2011 and Quantec, 2018)

2.10.1.6   Labour Market

The labour force in ULM-i.e., all employed and unemployed persons, amounted to 37 367 in 2018.

The following three tables give breakdowns of the various labour statistics.

	Eastern Cape	ANDM	ULM	EmaXesibeni	KwaBhaca
Working Age Population	3 814 517	410 450	103 607	4 179	4 727
Number of Employed	1 228 511	76178	20 813	1 734	1 966
Number of Unemployed	599 215	57 004	16 545	724	339
Labour Force	1 827 726	133 182	37 367	2 458	2 305

Table 11: Labour Force

	Labour Force	Employment growth 2017-2018	Employment growth 2011-2018 CAGR	Unemployment Rate 2018
Eastern Cape	1 228 511	0.9%	1.9%	33%
ANDM	76 178	1.6%	2.6%	43%
ULM	20 813	1.6%	2.4%	44%
EmaXesibeni	2 305	1.6%	1.5%	30%
KwaBhaca	2 454	1.6%	1.5%	15%

Table 12: Growth in Labour Market Indicators (Source: Urban-Econ forecasts based on StatsSA, 2011 and Quantec, 2018)

The unemployment rates of the main towns are much lower due to the number of local employment opportunities compared to the rural areas. The official unemployment rate in EmaXesibeni is 30% and in KwaBhaca it is 15%. These figures are in some sense arbitrary as the main driver of the labour market is the large population beyond the town boundaries, where the unemployment rate stands at 44%.

The labour force participation rate measures the proportion of the working-age population who are either employed or unemployed. The labour force participation rate was 36% in ULM. In the towns as expected, there is a higher labour force participation rate, with 59% in EmaXesibeni and 49% in KwaBhaca. There is a much higher rate of economic activity within the towns than in the Municipality as a whole. This creates a drive for migration into towns and other areas to find greater economic opportunities.

	Eastern Cape	ANDM	ULM	EmaXesibeni	KwaBhaca
Unemployment Rate	33%	43%	44%	30%	15%
Labour Force Participation Rate	48%	32%	36%	59%	49%

Table 13: Labour Force Participation (Source: Urban-Econ forecasts based on StatsSA, 2011 and Quantec, 2018)

In ULM, the majority of employed persons work in the formal sector (73%); there is a significant informal sector employing 27% of those employed.

	Eastern Cape	ANDN	ULM
Formal	74%	69%	73%
Informal	26%	31%	27%

Table 14: Formal vs Informal Employment (Source: Quantec, 2018)

2.10.1.7 Conclusion

The population of ULM presents with low education attainment levels with literacy levels estimated at only 68%. These statistics point to a shortage of inadequate education provision at a basic education level. Low education levels are linked to low formal sector employment in the longer term, which equates to low household income levels.

The populations residing in the towns of KwaBhaca and EmaXesibeni possess better education attainment rates than those living in the rural periphery. The towns, by their nature, attract persons employed in economic sectors operating within the towns and thus are characterised by higher levels of educational attainment than the rural areas.

The importance of the towns in attracting a youth population is evident in the large population of young adults living in KwaBhaca and EmaXesibeni in comparison to the Municipality as a whole.

Basic service provision within the towns is higher than in the Municipality as a whole, due to the ability to extend services more easily within an urban setting. Most households in EmaXesibeni and KwaBhaca have access to water, electricity and sanitation. However, levels of access to refuse collected by the Municipality are low. The towns also have narrow spatial definitions and thus do not include the villages surrounding the towns. These villages make use of KwaBhaca

and EmaXesibeni for services, but their dispersed, spatial form makes service provision difficult.

2.10.2 Economic Profile

This economic profile focuses on the economic sectoral performance of ULM and its two main urban nodes in comparison to the district and the province.

2.10.2.1 Gross Value Added

Gross Value Added (GVA) is a measure of economic activity or the value of goods and services produced in an area, industry or sector at the municipal or regional level. GVA plus taxes on products minus subsidies on products equals Gross Domestic Product (GDP). The value of ULM's GVA in 2018 was estimated at R2.811 billion, placing it second in the ANDM in terms of economic contribution after Matatiele LM.

	Value 2018	Growth in GVA (2011-2018)
	Rands Millions, Constant Prices	
Eastern Cape	R215 384	1.1%
ANDM	R10 208	2.2%
ULM	R2 811	1.8%

Table 15: Gross Value Added, 2018 (Source: Quantec, 2018)

ULM contributed 27.5% to the ANDM's economy and 1.3% to the provincial economy in terms of GVA.

ULM	To Province	1.3%
	To District	27.5%

Table 16: KwaBhaca and EmaXesibeni Contribution to Gross Value Added, 2018
(Source: Quantec, 2018)

The ULM economy has been growing steadily between 2001 and 2018, however, the growth rates have been slowing since 2011 in comparison to the previous decade.

The highest economic growth rate in the past 12-year period was 5.7% in 2007, followed by 4.7% in 2008. Per annum growth has been steadily declining, from 4% in 2011 to 1.1% in 2018. Between 2008-2018, ULM's economy grew by 1.8% p.a. CAGR growth in GVA. In 2018, year-on-year growth declined by 0.15 percentage points to 1.1%. ULM's growth in 2018
was 0.4 percentage points lower than the district's year-on-year growth rate of 1.5%. The ULM 2018 growth rate was however slightly higher than the province's 0.9% growth rate. This was the lowest year-on-year growth since 2009.

The figure below shows the growth in Gross Value Added of ULM in 2018.
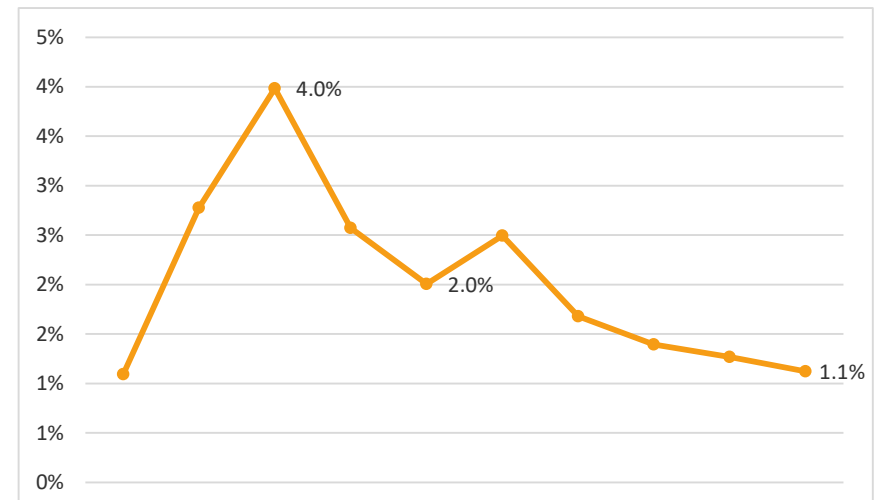
Figure 22: Growth in Gross Value Added - ULM in 2018.

2.10.2.2 Per Capita Gross Value Added

Per capita, Capita Gross Value Added (GVA) is a measure of the economic output of an area divided by the population. It provides a measure of the productivity of an economy.

Per capita, GVA in ULM stands at R14 577 per capita, which is above the district average (R12 868 per capita) but well below the Provincial average (R32 867 per capita).

2.10.2.3 GVA Sectoral Contribution

The primary sector made up only 2.1% of ULM's economic output. The low contribution of the primary sector - that being the agriculture and mining sectors - is associated with low levels of commercialised agriculture in the Municipality and limited value addition within the primary sector. The agricultural sector also in terms of GVA is usually not as large a contributor as sectors in the secondary and tertiary industries.

The three largest sectors in the ULM economy by contribution to GVA, are :

- General Government Services (40.0%).
- Wholesale Trade, Accommodation and Catering Sector (18.3%) and
- Finance and Business Services (13.3%).

Government Services is considered a non-productive sector in economic terms. The Government Services sector contributed R1.123 billion and the Trade Sector R514 million to ULM's economic output.

The top sector by employment in ULM was Community and Personal Services with 25% of total employment or 5 246 persons employed. Closely followed by General Government Services with 24% of total employment or 5 055 staff. Trade employs 23% of those employed or

4 712 staff and Finance and Business Services employs 9% or 2 080 persons. Thus, Trade and Financial and Business Services are the two largest productive sector employers in the local economy. Sectors that do not have large employment numbers within ULM included Utilities, Mining and Transportation.

Sector	GVA (Rands Millions)	Contribution of Sector (%)	Growth in GVA (2008-2018)
Agriculture, forestry and fishing	41	1.4%	0.0%
Mining and quarrying	17	0.6%	0.1%
Manufacturing	88	3.1%	2.6%
Electricity, gas and water	19	0.7%	1.6%
Construction	127	4.5%	3.2%
Wholesale and retail trade, catering and accommodation	514	18.3%	1.2%
Transport, storage and communication	186	6.6%	1.2%
Finance, insurance, real estate and business services	374	13.3%	4.1%
General government	1,123	40.0%	1.5%
Community, social and personal services	322	11.5%	1.9%

Table 17: Sectoral Contribution to GVA.

Sector	Numbers Employed (2018)	Share of Total Employment	Growth in Employment (2017-2018)	Growth in Employment (2008-2018)
Agriculture	1 109	5.4%	-0.5%	1.4%
Mining	56	0.3%	-9.7%	0.5%
Manufacturing	392	1.9%	0.5%	-2.9%
Utilities	31	0.2%	-6.1%	-1.4%
Construction	1 565	7.2%	5.7%	2.8%
Trade	4 712	23.0%	0.1%	4.2%
Transportation	567	2.8%	0.5%	0.8%
Finance and business services	2 080	9.4%	7.5%	1.9%
General government	5 055	24.4%	1.1%	2.4%
Community and personal services	5 246	25.4%	0.8%	1.3%

Table 18: ULM Employment by Sector and Growth in Employment by Sector (Source: Quantec, 2018)

Between 2017 and 2018, the Finance and Business Services sector saw the largest growth in employment growing by 7.5%. Over ten years, the sectors that have seen the largest growth in employment are Construction (4.2% p.a. CAGR) and Utilities (2.8% p.a. CAGR). The sectors that have experienced negative growth in employment over the last ten years include Mining (–2.9% p.a. CAGR) and Manufacturing (–1.4% p.a. CAGR).

2.10.2.4   Conclusion

The ULM economy's growth has been steady between 2011 and 2018 with an average year-on-year growth rate of 1.8%, in the period. This has contributed to a growth in employment over the same period. The local economy is a significant contributor to the ANDM economy, comprising 27.5% of the District's output.

The ULM's economy is concentrated on a few sectors, predominantly on General Government and Community as well as Personal Services. The largest productive sectors of the economy are Trade and Financial Services. These are predominantly located within the main nodes of KwaBhaca and EmaXesibeni. The local agricultural sector is characterised by a substance with limited value-adding, presenting a need to move towards more commercially orientated production and value-adding to expand the sector. Small towns are well placed to assist with this as they offer a central node for the collection, sorting, buying, processing, packaging and distribution of products.

The low GVA per capita of the Municipality indicates that there is a need to foster an entrepreneurial culture to improve economic output and ultimately to improve income levels within households.

2.10.3 Economic Sectoral Analysis

2.10.3.1 Overview of Economic Sectors within Ulm

The section provides an overview of the key economic sectors of ULM. It provides a brief summary of the status quo and highlights challenges and opportunities. These sectors examined are Agriculture, Forestry, Construction, Retail and Wholesale Trade and Catering, Mining, Manufacturing, Finance and Business, Transport and Tourism.

- Agriculture

Commercial agriculture is not well established within ULM. Agricultural activities within ULM are characterised by low-intensity, subsistence farming of livestock (sheep, goats and cattle) and crops (maize, potatoes, cabbage and spinach). Some communal and commercial forestry activities also occur within the Municipality. Although agriculture has been identified as one of the strategic thrusts for economic development in the region, its contribution to the municipal economy shrunk in 2018 by -6% p.a.

Emerging farmers in ULM are organised into commodity groups. Challenges facing agriculture from a spatial perspective include the complexity of land ownership systems in place, overlapping layers of formal and informal rights, uncertainty about title deeds and unresolved land disputes that have become a barrier to development. The scope for commercial agriculture in the area is severely reduced by a sub-optimal land tenure system. This hinders inward private sector investment. It also hinders subsistence farmers from securing loans using their land as collateral. Women may also be locked out of the land market due to customary practices.

Communal land within ULM is also characterised by overgrazing, soil erosion, loss of topsoil and alien invasives. This is in part due to the communal nature of farming practices in the area and impacts on the agricultural yields.

The LED programmes within the region have identified the need to support agricultural incomes and thus some projects have been supported; these include:

- The ULM Red Meat Project (URMP)
- Wool production
- ULM Goat Project, which also aims to include an abattoir and tannery.
- Food and crop production
- Aloe vera co-operative and value addition project
- Revitalising the fresh produce market in KwaBhaca.

The SEDA Agro-Manufacturing Incubator (SANAMI) is located in EmaXesibeni and offers a business incubator for new and existing small businesses in the agricultural sector. The Municipality plans to use the existing infrastructure at SANAMI to establish a fresh produce multiuser facility. The facility will enable smallholder farmers to be able to access external markets and participate actively in the agricultural value chain in the province. The produce that will be processed and packaged at the facility will be sold to different end-users around the EmaXesibeni region. However, SANAMI requires additional funding to access further infrastructure and working capital for the project.

EmaXesibeni has been identified as fulfilling an important role within the planned district Agri-Park Programme, as it would be the site for the Farmer Production Support Unit or FPSU. Currently, EmaXesibeni offers agricultural support and access to markets through the SANAMI Centre. The KwaBhaca fresh produce market requires a turnaround strategy and could offer a clean, modern trading centre for local farmers.

Thus, the towns need to function well as agricultural service centres, supplying inputs to rural communities and assisting these communities to transport, process and sell their agricultural products. Projects that were to develop the trading infrastructure around the fresh produce market and informal traders would assist in improving the town's functioning for the agricultural sector. If plans to expand Agri-processing are followed, then there is a need to identify and service industrial sites for this proposal.

- Forestry

Forestry activities in ULM involve commercial plantations and community woodlots. Most of the forestry activity in ULM is centred around sawmilling and commercial plantations. ULM has 11 established sawmills; seven are in KwaBhaca and four in EmaXesibeni.

The Municipality has identified the opportunity to develop local value addition in the sector through charcoal production, a pole treatment plant and a forestry nursery. Local sawmills can sell some of their products to KwaBhaca and EmaXesibeni wholesalers and hardware stores.

Key interventions to assist this sector would be to consider the movement of timber products through the town and how congestion could be relieved, and also, to identify and service appropriate industrial sites to develop a cluster of forestry value-addition enterprises.

- Construction

As a result of generally low levels of public and private sector development in the area, the construction sector in ULM is reasonably small. Most construction firms within the Municipality have low CIDB grades and thus would not be able to manage higher-value construction projects. Thus, larger construction projects are awarded to construction firms based outside the area.

Construction opportunities can be facilitated by making land available for property development. This involves the coordination of the Department of Rural Development and Land Reform and the Spatial Planning Department of the ULM to undertake recommendations from the SDF. The ULM Precinct Plan of 2016 identified a demand for mixed-use, a range of residential typologies, industrial, retail, commercial and healthcare property investments by the private sector within EmaXesibeni. The study also found a demand in KwaBhaca for industrial, government offices, a regional shopping centre, mixed-use, middle-income housing, conferencing, a hotel and filling station property developments.

Thus, to unlock the construction sector there is a need to implement the previous recommendations of the SDF and LED plans for the Municipality that relate to packaging land for investment and property development. There is also a need to assist in the upskilling of local contractors so that they can take up more opportunities in the construction sector.

- Retail and Wholesale Trade and Catering Sector

The Retail and Wholesale Trade and Catering sector include the Hospitality and Tourism sectors, the latter is considered separately within this profile. The Trade sector within the Municipality is mainly concentrated in the towns of EmaXesibeni and KwaBhaca. These towns are shopping and service centres for a large, rural population. Surveys with formal and informal businesses identified that rural villagers were the main consumer group visiting the towns. Shopping within the towns fluctuates, with certain days being very busy. These correspond with grant pay-out days and when people are paid.

In a 2011 study, it was found that most businesses (52%) in KwaBhaca and EmaXesibeni were locally owned, and the majority had been operating for over ten years.

Informal trading is an important livelihood strategy for many households and offers consumers a variety of products. Most informal traders in ULM are women. There seems to be a larger concentration of informal traders within KwaBhaca as opposed to EmaXesibeni.

Challenges of businesses operating within ULM have been cited in the LED Strategy and previous studies as being:

- Lack of parking in the town centre.
- Traffic congestion due to the N2 intersecting KwaBhaca.
- Large consumer market but with low-income levels which limits the ability of people to spend on retail goods and services. This also results in limited differentiation of products and services and a significant amount of expenditure leakage to other towns.
- Lack of by-law enforcement.
- The cleanliness of the town and its poor image.
- Limited space on pavements for street trading and pedestrians.

The towns offer trading opportunities to a large population of consumers. Opportunities exist to improve the functioning of the town to reduce income leakage and create a more conducive environment for small business development. In the next section, the suggestions of formal and informal businesses mainly in the trade sector, regarding improving the functioning of the towns are discussed.

- Manufacturing

Low Manufacturing sector output can be attributed to ULM being a rural area, located some distance from markets with limited raw material production and a poor transportation network and limited private investment. Current manufacturing activities are linked to

Agro-processing and Forestry products. These are mainly small-scale and non-capital-intensive industries.

Manufacturing opportunities within ULM are in the Agro-processing sector. Opportunities involve leveraging the ULM Goat Project, the Agri-Parks Programme, and the aloe vera and peach value addition projects to create a local manufacturing base. KwaBhaca has been identified for forestry manufacturing opportunities around charcoal, pole treatment works and a commercial forestry nursery.

The revised ULM LED Plan (2020) identified the need for zoned industrial land within the two towns to assist in the development of the manufacturing sector. The Municipality has proposed that this be developed into an industrial park.

- Finance and Business Services Sector

The Finance and Business Services sector in ULM is dominated by financial service providers that cater to mainstream banking needs (such as FNB, Standard Bank and Capitec) and community-oriented lending facilities through entities such as Finbond Microfinance, Eyethu Community Finance and Marang Financial Services. Business services such as accountants, architects and lawyers are not well represented within ULM. Residents and businesses who require these services would access them from other regional centres such as Mthatha or Kokstad.

Opening up land for commercial developments or encouraging the densification of the CBDs could encourage more local financial and business service entities to operate from the towns.

- Transport Sector

The Transportation, Communications, and Logistics sector in ULM is predominantly focused on transportation. Public transportation in

ULM is serviced mainly by Uncedo Taxi Association in KwaBhaca and EmaXesibeni. The association has a combined total of around 204 registered members. Minibus taxis are used for inter-town travel and bakkies are used for travel in and around the rural villages.

KwaBhaca which is the main transport and business hub in ULM currently does not have a dedicated taxi rank facility. The ULM Spatial Development Plan (2015) highlighted a need for public transportation to cater for the disabled and the elderly.

The demographics of ULM Municipality depict large elderly and child populations, it is also from surveys it is evident that grant beneficiaries make up many shoppers in the two towns. Thus, public transportation modes and terminals must consider the profile of the commuters. These terminals should offer covered shelters, safe waiting areas and hygienic toilet facilities.

• Tourism

The tourism sector in ULM is underdeveloped with limited formal tourism attractions and a limited extent and variety of accommodation. ULM's geographical location between major regional towns such as Kokstad and Mthatha which is more widely known as stop-over points on the N2 makes Kwabacha and EmaXesibeni lesser attractions for stopover and business travellers. Despite these challenges, ULM has unique tourism features that could be exploited better to market the region to tourists.

The current profile of visitors to ULM is mainly domestic visitors, whose purpose of the visit is visiting friends and relatives or for business. The area also attracts longer stays from contractors. Business stays are centred around the towns of KwaBhaca and EmaXesibeni. There are limited leisure market offerings or products located outside the two towns.

Currently, there are 20 accommodation establishments within ULM Local Municipality, of which 13 establishments (or 70%) are located in KwaBhaca. EmaXesibeni has a smaller accommodation sector, with five accommodation establishments.

These accommodation providers are listed in the table below.

Location	Name	Description
EmaXesibeni	1. Denipel Lodge	Lodge
	2. Eyethu Bed and Breakfast	Bed and Breakfast
	3. Lisoma Lodge	Lodge
	4. EmaXesibeni Hotel	Hotel
	5. Ntsizwa Guest House	Guest House
KwaBhaca	. 2nd World Bed and Breakfast	Bed and Breakfast
	7. Afrizona Guesthouse	Guest House
	8. Amafana Guest House	Guest House
	9. BCN Makaula Hotel	Hotel
	10. Blitz Bed and Breakfast	Bed and Breakfast
	11. Endulini Guest House	Guest House
	12. Ilitha Bed and Breakfast	Bed and Breakfast
	13. Indwe Guest House	Guest House
	14. Indwe Bed and Breakfast	Bed and Breakfast
	15. Mount Frere Guest House	Guesthouse
	16. Sophia Bed and Breakfast	Bed and Breakfast
	17. Tapi River Lodge	Lodge
	18. Tatenda Bed and Breakfast	Bed and Breakfast

Table 19: EmaXesibeni and KwaBhaca Accommodation Establishments (Source: Urban-Econ, 2020)
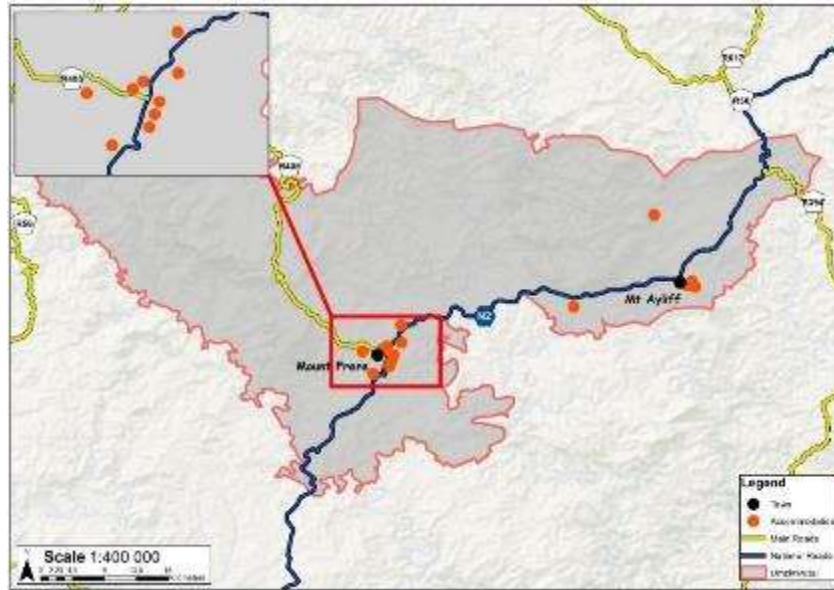
Figure 23: ULM Accommodation Establishments (Source: Urban-Econ GIS, 2020)

The majority of the tourism accommodation establishments in the Municipality are ungraded by the Tourism Grading Council of South Africa (TGCSA). Only 30% were graded by the TGCSA based on desktop research (TGCSA, 2020). There is a limited variety of tourism products as most of the products are bed and breakfasts or guest houses. Accommodation typologies such as backpackers, resorts, hotels, guest farms and self-catering are poorly represented in the area.

ULM has some natural heritage, cultural and historical sites of interest, but none have been formally managed or are well-known as tourist attractions. The table lists identified ULM tourist attractions as per desktop research.

Location	Name	Description
EmaXesibeni	Emaxesibeni Arts and Craft Centre	Arts Centre
AmaBhaca	Amabhaca Arts and Craft Centre	Arts Centre
	Madzikane Memorial	Heritage site
	Umkhosi Wokukhahlela	Traditional Homestead
	Mkhobeni Forest	Indigenous forest
ULM	Beach-to-Berg Route	Tourism route development
	Art Route	Route connecting arts and craft centres
	Msukeni Development Centre	View site of ULM River
	Ntenyana Dam	Proposed accommodation and conference centre development
	Ntsizwa Mountain (Lungelweni) falls	Heritage site and mountains. A memorial stone situated on top of Ntsizwa mountain in remembrance of the 1828 campaign of Zulu forces who were defeated by joint forces of Baca and Xesibe in the area.
	Lady Kok	Natural area

Table 20: ULM Attractions

Some of the identified opportunities for tourism development in the Municipality include the following:

Expanding business tourism market: The presence of many government departments and investment projects in the area is an opportunity for the ULM to target business travellers and encourage them to stay in the two main towns and not lose this business to Mthatha and Kokstad. This can be achieved by urban design improvements to the two business hubs to improve the perception and branding of the towns.

- Tourism is impacted by both real and perceived aspects of safety and security within a locality. Thus, to increase any form of tourism, there is a need to make improvements to policing and visible security.
- Expanding the services of the towns to offer more restaurants, take-aways, coffee shops, banks, vehicle service centres and retail shopping opportunities would encourage business visitors to choose KwaBhaca and EmaXesibeni above other options.

- The Beach-to-Berg tourism route is the marketing and branding project of the ANDM and supported by the Eastern Cape Parks and Tourism Agency (ECPTA).

   It encompasses the Matatiele, Mbizana, Ntabankulu and ULM Municipalities. Initiatives that are part of the route include the AmaBhaca Craft Gateway Centre and the Madzikane Memorial in KwaBhaca.

Improvements to the towns' aesthetics would assist in improving the image and branding for tourism development in the two towns. In addition, developing supporting services in retail, restaurants and services would assist to develop the transient and business visitor market.

Other aspects around developing management structures for tourism sites and actively managing, marketing and developing the sites should assist to develop attractions in the area. Attractions within towns such as the AmaBhaca Arts and Craft Centre, Madzikane Memorial and Mkhobeni Forest in KwaBhaca and the EmaXesibeni Arts and Craft Centre in EmaXesibeni, need to be considered within the context of the town's urban design frameworks.

Opportunities exist to improve signage, activities at the sites, urban design, parking, facilities and security at these attractions to encourage visitors.

2.10.3.2 Perceptions of the Town by Local Businesses

Targeted interviews were undertaken with a sample of 23 formal and informal businesses based in the towns of KwaBhaca and EmaXesibeni. The purpose of the survey was to profile the perceptions of the town and identify urban planning and design aspects that impact business development. The survey sample is noted to be small due to the time constraints of this study, but it offers insights that back up previous more extensive research into the business functioning of the towns.

Business interviews were distributed between the two towns, EmaXesibeni (48%) and KwaBhaca (52%). The sample was comprised of 52% informal and 48% formal businesses.

The informal businesses interviewed sold a variety of products and services with the main products sold being groceries (26.7%), homeware (20%), clothing (13.3%), personal care (13.3%), plants (6.7%) and traditional medicine (6.7%). Services offered included transportation (6.7%) and repair services (6.7%).

Formal businesses interviewed were in the sectors of Wholesale, Retail Trade and Catering (36%), followed by Personal Services (18%), Business and Financial Services (18%) and Construction (18%).

Both formal and informal businesses described their main market as local residents and persons living in outlying villages. The age profile of this market was adults but with a high proportion being elderly and also adults collecting grants.

The towns were identified to be busy on select days of the month, highlighting the importance of grant payments in driving local consumer spending. Thus, a finding would be that the town may need to accommodate large influxes of persons on certain days of the month. This could be planned for in terms of parking availability and mixed-use spaces that can be made available on these days for

retailing and then repurposed on other days. Neither informal nor formal businesses mentioned the transient market from the N2 as being a contributor to their customer base. The lack of a transient market for sales could be remedied by traffic-calming measures and a bypass that allows motorists to enter the town easily for purchases and stopovers.

- The Informal Economy

  o Business Location

Most informal traders interviewed operated from a CBD location (83.3%), only 16.7% operated from a location outside the CBD. Popular locations for hawkers in EmaXesibeni included outside the SPAR, Boxer, village outskirts and the taxi rank. In KwaBhaca, popular hawker locations included outside Boxer, the taxi rank and the CBD in general.

Most hawkers in EmaXesibeni do not have a formal stand to operate from (66.7%). Only 33.3% had a formal stand. In KwaBhaca, 83.3% of hawkers did not have a formal stand to operate from, as opposed to 16.7% who did. There is currently a DEDEAT-funded project to construct hawker stands in EmaXesibeni. It is hoped that this project will be extended to KwaBhaca in 2021. This discrepancy could account for the difference in responses between the two towns.

Most informal traders indicated that they paid for a permit for their stand, with the average permit costing R38 a month.

A few select comments from the respondents regarding trading conditions are presented below.

"We need better facilities to grow our business. Now we can't buy too much stock because there is no safe place to store."

"We need shelter to protect ourselves and our products".

"Too many traders and it's not well organised".

  o Improvements to the Town

Informal traders were asked what could be done to improve the functioning of the town for business. Many mentioned that hawkers needed to be treated better by officials and that there should be a more business-friendly approach in the town (33%). The business-friendly approach refers to the creation of a less antagonistic relationship between the Municipality and traders. They felt they were not properly recognised as offering a useful service in the town. Also mentioned was better infrastructure or facilities (25%) and formal hawkers stalls (25%). Other suggestions included improved safety, better organisation of business, upgrades to the taxi rank specifically and better design.

Some suggestions by informal traders to improve the town included the following:

"Better facilities for people operating on the street because we are part of this economy, like it or not."

"Town is very busy; sometimes there is too much congestion. We need more space."

"We need urgent assistance with the rising crime in the CBD."

- Formal Business Sector

    o Business Location

Most formal businesses interviewed operated from the rented property (55%), while 27% owned the business premises and 18% were unsure. Thus, the survey mainly interviewed businesses that were tenanting their premises. Further areas for research could include an identification of the ownership of commercial property in the towns and a profile of ownership and commercial leases.

When asked to describe their area, responses included that the town was unattractive, rundown, offered limited amenities, and had bad road infrastructure which increased the cost of doing business in the area.

    o Improvements to the Town

Formal businesses were asked what interventions could be undertaken to improve the area for business; suggestions can be categorised as being mainly focused on improvements to infrastructure (64%). Other suggestions put forward by respondents included urban design, town planning, tourism, street lighting, public sector investment, private sector investment, public facilities, to develop outlying villagers better, to employ local staff into the Municipality and to develop a business complex.

    o Satisfaction with Municipal Services

Businesses were asked how satisfied they were with the area where their business was in terms of municipal services, infrastructure and urban design. Most informal businesses (58.3%) and formal businesses (45.5%) were dissatisfied with their area. Only 8.3% of informal businesses and 18.2% of formal businesses indicated that they were satisfied.
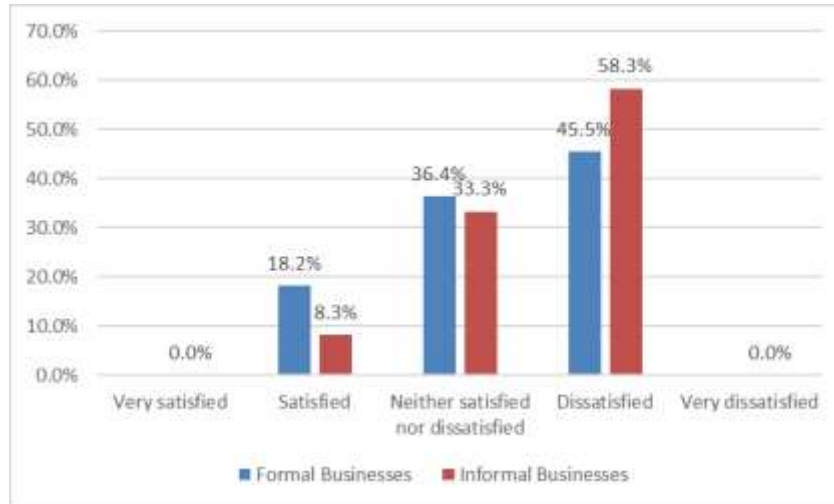
Figure 24: Satisfaction with Municipal Services Towns

Businesses were asked which matters were the most important to the functioning of their business and could select as many as appropriate. All informal businesses indicated that safety was an important item. The top five problems for informal traders were visible security (100%), water provision and access (91.7%), traffic movement and congestion (91.7%), pavements and ease of pedestrian movement (83.3%) and refuse removal (75%).

The top five most highly ranked problems affecting formal business included water provision and quality (90.9%), electricity provision (90.9%), traffic movement and congestion (90.9%), road conditions and maintenance (90.9%) and designated areas for the loading of goods (81.8%).

Formal and informal businesses both highly ranked water provision and quality and traffic movement and congestion highly as problems to be addressed. items that formal businesses identified that were not identified by informal businesses as much of a problem included road

conditions and maintenance; designated loading areas; customer and staff parking and electricity provision.

Problems that were identified by informal businesses but not significantly identified by formal businesses included pavements and ease of pedestrian movements and formalised space for hawkers/informal traders.
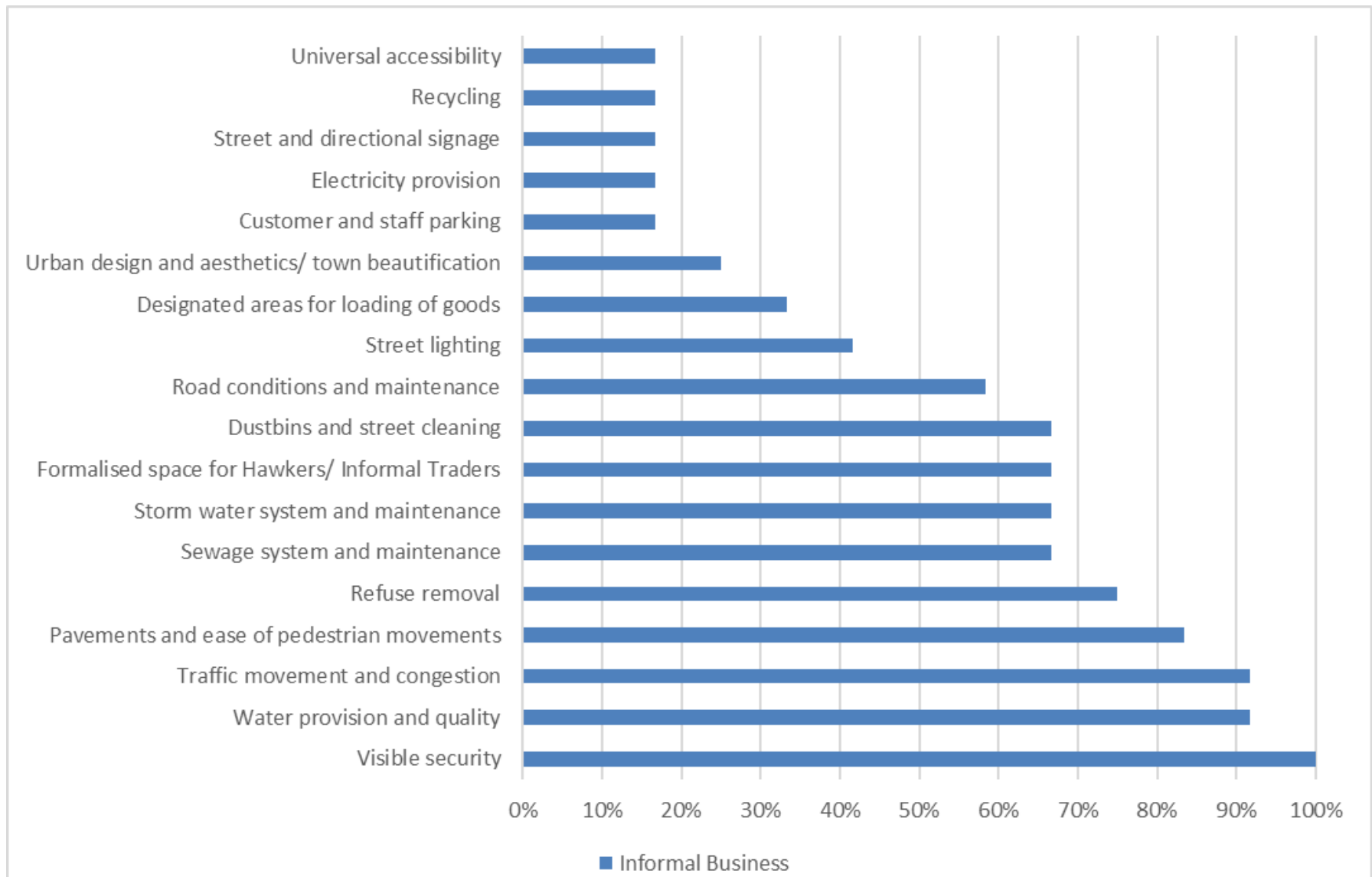
Figure 25: Perceived Importance of concerns relating to the functioning of their business - Informal Businesses.
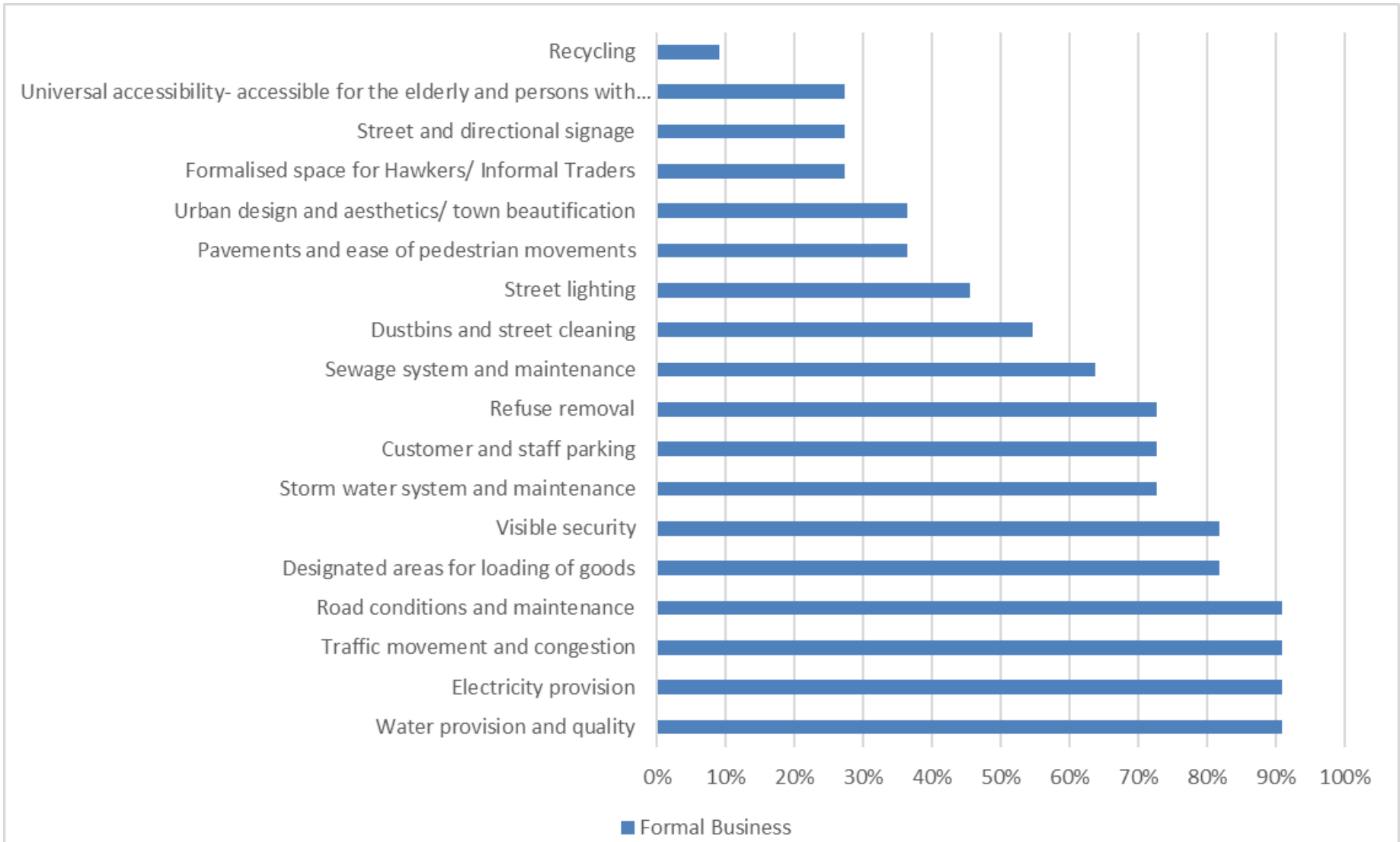
Figure 26: Perceived Importance of concerns relating to the functioning of their business - Formal Businesses.

- Bargaining Power

The bargaining power of local business, whether informal or formal, can be considered poor as only 17% of informal traders indicated they were part of a business association. The association that these informal businesses were members of included the Ncedo Taxi Association and the Women's Business Association. Most informal businesses interviewed (83%) were not affiliated with any business association. Many formal businesses (81%) also indicated that they had no affiliation, only 18% are affiliated with a business association. One respondent indicated membership of an ULM Business Association, which has not been identified in previous studies or enquiries.

- Way Forward

When asked what interventions in the town's design and aesthetics could improve business functioning, most formal businesses noted parking, infrastructure and availability of affordable commercial space. Many informal traders indicated a need for formal trading bays, better facilities (such as access to water, shelter and toilets) as well as improved pavements that are wide enough for trading and pedestrians. One respondent also noted the need to upgrade the KwaBhaca taxi rank as there was no formal taxi rank within the town.

Aspects identified by informal traders that could assist in the town functioning better for business included a more business-friendly approach (33.3%). Many informal traders referred to an antagonistic relationship between themselves and the Local Municipality and that they were considered a nuisance. Following this, 25% mentioned formal hawker stalls and 25% mentioned better infrastructure.

Formal businesses identified infrastructure (63.6%) as the main intervention that could assist the town in better functioning for business. This was followed by urban design (18.2%), a business complex (9%), developing rural areas (9%), the Municipality to employ local staff (9%), private investment attraction (9%), public facilities (9%), public sector investment (9%), street lighting (9%), tourism development (9%) and town planning (9%).

When asked whether a Small-Town Development Forum between business and the Municipality, as set out in the Draft Eastern Cape Small Town Development Plan, would be effective in driving upgrades, 73% of formal businesses agreed, while only 36.4% of informal businesses agreed outright, there was a high number of informal businesses who were unsure. Some cited a need for the mutual sharing of ideas.

Some of the explanations for interest in a small town development forum included:

"The town is for all of us, and we must all share in the work to make it better."

"We can help build the town if they consult us."

"Officials may think they know what our needs are... but they don't really understand our struggle".

There was a strong sense of frustration with continual planning for upgrades and a lack of implementation. Some of the comments to this effect included:

"I'm not going to get my hopes up and wait for these improvements. I'm tired of promises."

"We always hear about plans. What's the point of planning if we never see the changes?"

"The locals must be given a platform to add value".

"There must be more attention given to EmaXesibeni, not just KwaBhaca".

2.10.3.3   Conclusion

The development of the central business districts of ULM, EmaXesibeni and KwaBhaca are well-positioned within municipal planning. The towns fulfil important functions for the agricultural sector. The need to develop industrial land has been identified in previous studies and this could assist in developing larger Manufacturing, Forestry and Agri-processing sectors.

The towns have a small tourism sector, with KwaBhaca presently better positioned at present in terms of an accommodation offering. Boosting the tourism sector depends on the creation of a more appealing CBD with retail and services opportunities to attract more business and stop-over travellers. Meanwhile, the foundation of developing a leisure tourism market is based on developing tourism attractions and activities in communal areas and to some extent, within the towns.

The towns Retail Trade sectors are focused on basic goods and services for a large, population with low household incomes – this causes income leakage out of the towns when a household needs to purchase more specialised services and products.

The two towns play pivotal roles in servicing the basic needs of a large rural population. Thus, the towns must, on select trading gays, accommodate a larger population on select trading days than what the town's population stands at. There may also be seasonal increases in population over the December holidays. This motivates the recommendation to account for heavy congestion on select days of the month in the design aspect. Thus, designing flexible market spaces and trading spaces that could be opened and closed based on the demand in town could be considered.

Many informal traders noted that the pavements were congested, which also hampers the movement of pedestrians many of whom are elderly and disabled. Thus, considerations on the size of the pavements and their functioning should be considered.

The main items facing informal traders differed from those facing formal businesses in many respects. Informal businesses wanted improvements around having a dedicated trading space, shelter, access to water and toilets. The main problems that affected their business operations were the need for visible policing, water provision, traffic movements and congestion, pavement infrastructure and refuse removal. For formal businesses, the main items that impacted their functioning included water and electricity provision, traffic movements and congestion, road conditions and designated loading areas.

The availability of commercial space for rental at an affordable price was also mentioned as a problem, thus indicating that the supply and demand for commercial and retail space in the town may be constrained. In the 2016 Precinct Plans, increasing the retail, commercial and mixed-use developments for both towns were identified as an opportunity.

2.10.4 Property Profile

This section profiles the property market of the two main urban nodes of ULM, EmaXesibeni and KwaBhaca. The section provides a discussion on current property dynamics in each town followed by the identification of potential gaps in the market for additional development.

This analysis is informed through primary research in the form of interviews with property owners, municipal and department officials. Also, data has been sourced from prior studies conducted in the area, together with property transfer and sales data informed by the Lightstone property market report.

The objective of the chapter is to identify potentially viable opportunities for property investment that will contribute to the urban regeneration of both Towns.

2.10.4.1 Property Market Trend Analysis in Emaxesibeni and KwaBhaca

This section provides a discussion of the current property market stock found in EmaXesibeni and KwaBhaca for property types ranging from retail, office, residential and industrial developments.

- Retail Property Market Trends

The ULM retail property market consists of shopping centres and standalone stores which house national and local supermarkets, banking and financial services, clothing retail shops and restaurant franchises. In KwaBhaca there are two shopping centres located on the main road, which are the KwaBhaca Mall (7 508.06 m²) and Ntsizwa Mall (6 498.55 m²). A new mall adjacent to Ntsizwa Mall is currently under construction.

Retail Shops	Banks and Financial Services	
• Edcon (Jet Store)	• FNB Bank	• UBank
• Ideals	• Fin bond Mutual Bank	• Capitec
• Ackermans	• Sanlam Standard Bank	• Nedbank ATM
• Pep Stores	• African Bank	• Absa Bank
• Dunn's Retailer	**Supermarkets**	**Food and Restaurants**
• Fashion World	• Shoprite	• Hungry Lion
• City Express Stores	• Rhino Cash and Carry	
• Jumbo	**Cellphone and Electronics**	**Book Store and Stationery**
• Power		
• Mr Price	• Pep Cell	• Jumpin Solutions
• Rage	• China Mall	
• China Mall Furniture Shop	• Smart Cellular	
• Jumbo		
• WhatsApp Fashion		

Table 21: List of tenants in KwaBhaca Mall and Ntsizwa Mall (Source: ULM, 2019).

In addition to retailers located in the above centres, some standalone shops fall in the same categories of retail; however, most of the shops have small footprints and provide consumers with more affordable, lower-quality products, in the form of clothing shops, cell phone stores, and supermarkets.

Engagements with property owners revealed that smaller standalone retail buildings are in high demand with low vacancy rates and tenant turnover.

Further, some national and local fast-food restaurants are located in standalone properties in the main streets of each town, notably national franchises such as Debonairs, Steers and KFC. In some cases, these are located at fuel stations. National grocery store chains such as Boxer and Spar are also found within both towns, located in standalone buildings in the main street, or within the CBD. These standalone store sizes range from as small as 500 m² to 2 000 m².

The retail property market in EmaXesibeni and KwaBhaca is further characterised by the presence of various wholesalers, hardware stores and informal hawker stalls. Wholesalers play an important role in the distribution of goods in an economy. In KwaBhaca, most of the wholesalers are located on the main street (N2), while in EmaXesibeni, most are located within the CBD on Nolangeni Street.

The following prominent wholesalers can be found in the study area:

- Rhino Cash and Carry
- Sizabantu, Bafana Bafana
- Ndaphuma
- Weirz Cash and Carry

Wholesalers in EmaXesibeni and KwaBhaca play an important role in the economy by providing small businesses and consumers with goods at affordable prices due to bulk sales. The average sizes of these stores range in size from 500 m² to 800 m².

Hawkers play an important role in convenience retail for public transport commuters. Engagements with local hawkers revealed that most of them sell groceries, homeware, personal care items and clothing, and operate in congested, unclean and unsafe environments within the CBDs adjacent to taxi and bus ranks, retail supermarkets, standalone stores and anywhere where high foot traffic occurs. There are limited formal hawker stalls available for occupation.

The retail market in ULM is also characterised by a high number of hardware stores in both towns. Hardware stores play an important role in the provision of materials for residential DIY and construction in the towns and surrounding rural areas. The stores located in the area are a mix of national and local chain stores including Build it, Cashbuild, Masakhane, OK Hardware and Builders City. The table below presents a select list of hardware stores located in EmaXesibeni and KwaBhaca.

KwaBhaca	EmaXesibeni
1. Cashbuild	1. Sizabantu Hardware
2. Build It	2. Build Fast
3. Jabulani Build and Tile	3. Ali's Hardware
4. OK Hardware	4. Hafson Hardware
5. Hardware City	5. Masakhane Hardware

Table 22: List of hardware stores in EmaXesibeni and KwaBhaca. (Source: Urban-Econ Research, 2020)

Most hardware stores are located along the main road (N2) in KwaBhaca and on the main streets of EmaXesibeni within the CBD. The presence of hardware stores in the main streets results in traffic challenges and congestion during the delivery and collection of materials. The Municipality has identified this as a problem that requires attention.

The profile of shoppers (consumers) in the two towns mostly consists of locals and villagers from surrounding rural areas, with the commercial CBDs of the two towns busiest at month-end. The retail sector in ULM predominantly provides low order services (hairdressing, medical, banking services, etc.), perishables basic foodstuffs and semi-durables (lower- to medium-priced clothing ranges) with a limited provision of durable goods and high-order services. Lower-income consumers are well serviced in terms of the supply of standardised and routine convenience goods and services, whilst middle-income consumers are underserviced in terms of specialist and shopping goods such as restaurants and designer apparel (ULM, 2012).

ULM has high levels of poverty amongst its population which limits the ability of consumers to spend on retail goods and services. Also, there is a significant amount of expenditure leakage to other towns by those who have higher levels of income, who often choose to spend in Kokstad and Mthatha where a larger variety of retail outlets can be found (ULM, 2012).

• Property Office Market Trends

Office developments in the two towns of ULM are predominantly government-owned, with few privately owned office premises available. The public offices range from local government-owned to regional department-owned offices. ULM and ANDM own their office buildings while most offices occupied by regional departments are owned by the Department of Public Works.

ULM administrative offices are in both towns, with the main office in KwaBhaca. Most of the offices are located within the CBD in the towns; EmaXesibeni is the civic regional hub housing most of the regional department offices, while KwaBhaca, which is a smaller civic centre, mainly hosting local government based and related offices.

EmaXesibeni	
Office Occupants	**Physical Address**
1. ULM Local Municipality (Satellite Office)	67 Church Street EmaXesibeni4735
2. ANDM	Alfred Nzo Municipality Erf 1400 Ntsizwa Street
3. Department of Labour Centre	26 Bridge Street, EmaXesibeni, 4735
4. Department of Public Works	Cnr of Nkosi Senyukele JoJo of Ngqubusini Street, Block A
5. Traffic Department	
6. Department of Social Development	188 Garane Street EmaXesibeni4735
7. Department of Transport	118 Ngqubusini Street EmaXesibeni4735
8. Department of Sport, Arts and Recreation	67 Church Street, EmaXesibeni, 4735
KwaBhaca	
Office Occupants	**Physical Address**
1. ULM Local Municipality	813 Main Street KwaBhaca

2. Department of Education	Old Mutual Building, Main Road, KwaBhaca, South Africa
3. Department of Home Affairs	184 Main St, KwaBhaca, 5090
4. Department of Correctional Services	Ncapai Street, KwaBhaca, 5090

Table 23: List of Offices in EmaXesibeni and KwaBhaca local and regional offices (Source: Internet sources and government websites 2020)

Certain regional offices for Eastern Cape governmental departments are located outside the province due to limited office space availability in EmaXesibeni. These regional offices include the:

o Eastern Cape Department of Health (regional offices) in Port Shepstone
o Eastern Cape Department of Human Settlements (regional offices) in Kokstad
o Eastern Cape Department of Agriculture, Land Reform and Rural Development (DRDLR) in Matatiele
o

In KwaBhaca, the office space is insufficient resulting in the overflow of staff being housed in temporary office structures. This is a problem that the Municipality plans to address. In EmaXesibeni offices are clustered to the east of the town, while in KwaBhaca they are dispersed throughout the town.

Apart from public sector office space, the majority of ULM based private-sector office space is located within the residential suburbs adjacent to the CBDs of EmaXesibeni and KwaBhaca. These are mostly defined by small businesses within the consulting industry and conferencing facilities that cater to public and private sector events. Most conference venues are linked to accommodation establishments which range from guest houses, lodges and hotels, with most of these establishments located in KwaBhaca. The table shows the local supply of conference venues for EmaXesibeni and KwaBhaca:

Venue Name	Total delegate capacity	Accommodation
EmaXesibeni, KwaBhaca		
Afrizona Guesthouse	300	Yes
Ilita Bed and Breakfast	25	Yes
BCN Makaula Hotel	80	Yes
Amafana Guesthouse	25	Yes
Amabhaca Craft Centre	150	No
Lisomma Lodge	25	Yes
Tapi River Lodge	90 (hall) or 5000 (tent)	Yes

Table 24: Local Supply of Conference Venues for EmaXesibeni and KwaBhaca, 2016 (Source: ANDM, 2016)

Over the past few years, conferencing facilities have been growing in EmaXesibeni and KwaBhaca due to public sector support, where the local government has been promoting the use of local facilities within the ANDM. However, research done in 2016 showed that demand is periodic throughout the year as some venues can experience several months with limited event bookings.

The average package rate for conference facilities in the study area is from R120 per delegate. The package rates include services, such as lunch, notepads, teas, projectors, equipment etc. Most of the businesses in these areas charge a separate fee for the venue hire, which starts at approximately R 2 000 per day.

- Industrial Development

Industrial property is defined as premises dedicated specifically to businesses such as value-adding services, manufacturing, car services and repairs. Industrial development in ULM is mostly characterised by auto services and repairs, with little evidence of formal value-adding

manufacturing entities in EmaXesibeni and KwaBhaca. The table shows a list of automotive service centres and repairs in the two towns.

Auto repairs	Location
Dunlop Express Fitment	N2 Main Road, KwaBhaca, KwaBhaca, 5090
Highway Motor Spares	Bodlela Street
Java Motor Spares	2 N2, KwaBhaca, 5090
KwaBhaca Discount Motor Spares	Madzikane Street
Raza M Spares	Shop Matlaza Street
Speed Up Tyres	Main Street
Vido's Autotronics and Mechanics	Main Street N2-19, 90-4n Mvuzi A/A Bt- 289 KwaBhaca, 5090

Table 25: Automotive service centres and repairs in EmaXesibeni and KwaBhaca. (Source: Urban-Econ Research, 2020.)

In support of industrial development within ULM, the SEDA Alfred Nzo Agro-Manufacturing Incubator (also referred to as SANAMI) was established in 2016 to provide business support to small businesses and cooperatives in the Agriculture and Manufacturing sectors within ULM. The businesses are trained in business and technical skills and assisted to apply for funding with SEDA and other government entities. Cooperatives are assisted with the compilation of business plans in partnership with SEDA and SANAMI. However, currently, SANAMI requires funding to finance additional infrastructure and working capital.

- Residential Property Market Trends

Residential development in ULM is characterised by both urban and rural residential typologies. Urban typologies are predominantly found within the urban edge of EmaXesibeni and KwaBhaca, while rural residential typologies are located in the surrounding rural areas. The urban residential typologies consist of about 25% of the population who stays in

a formal house in a yard and 6% who stay in a house in the backyard and 5% who stay in a flat within a block of flats.

The most popular housing structures within the two urban residential typologies of EmaXesibeni and KwaBhaca are the house in a yard, followed by semi-detached buildings, room in a backyard and traditional dwellings.

	ANDM	ULM	EmaXesibeni	KwaBhaca
House in a yard	28%	25%	85%	52%
Traditional dwelling	55%	60%	6%	19%
Flat in a block of flats	5%	5%	4%	2%
Town/cluster/semi-detached house (simplex, duplex or triplex)	1%	1%	2%	13%
House/flat/room, in backyard	7%	6%	0%	12%
Informal dwelling/shack, in backyard	1%	0%	1%	0%
Informal dwelling/shack, NOT in backyard, e.g., in an informal/squatter settlement	1%	1%	1%	0%
Room/flatlet not in backyard but on a shared property	1%	1%	0%	1%
Other	2%	1%	1%	1%

Table 26: Type of Dwellings in ULM, EmaXesibeni and KwaBhaca as of 2019 (Source: Urban-Econ forecasts based on StatsSA, 2011 and Quantec, 2018)

In EmaXesibeni, the majority of the population (about 85%) reside in a formal house in a yard, followed by (6%) who live in a traditional dwelling, and (4%) who live in a flat within a block of flats. The table below shows the outcomes of a household assessment that was conducted for EmaXesibeni to determine the demand for housing in the town.

The outcome of the Survey for EmaXesibeni	% / km
Are willing to purchase a house	85%
Participants currently rent a house	85%
Average Distance Travelled to work	6.5 km
Currently occupy rent/own Middle-income housing	50%
Currently occupy rent/own low-income housing	45%

Table 27: Outcome of the Survey for EmaXesibeni (Source: ULM, 2018)

In KwaBhaca, the majority of the population 56% stay in a house in a yard, followed by 19% who stay in a traditional dwelling and 13% who stay in a house/flat in a yard, while another 12% stay in an informal dwelling/shack in a backyard. In both towns, few people from the population stay in a flat in a block of flats or a townhouse. The table below shows the outcomes of a household assessment that was conducted for KwaBhaca to determine the status-quo for housing in the town.

The outcome of the Survey for KwaBhaca	% / km
Participants currently rent a house	55%
Participants do not rent a house	70%
Receive housing subsidies which amount to an average of R1 050	25%
Currently occupy (rent/own) middle income housing	55%
Currently, occupy (rent/own) low-income housing	25%
Average distance travelled to work	11 km

Table 28: Outcomes of the survey for KwaBhaca, 2018 (Source: ULM, 2018)

- Residential Property Trends and Dynamics in EmaXesibeni

The formal residential property market stock in EmaXesibeni is predominantly defined by freestanding units, totalling 360 formal housing units. The average household income range is between R10 000 to R20 000 and is mostly LSM 8 low. The figure shows the property ownership statistics in EmaXesibeni by period and age of owners for the period July 2019 to June 2020.
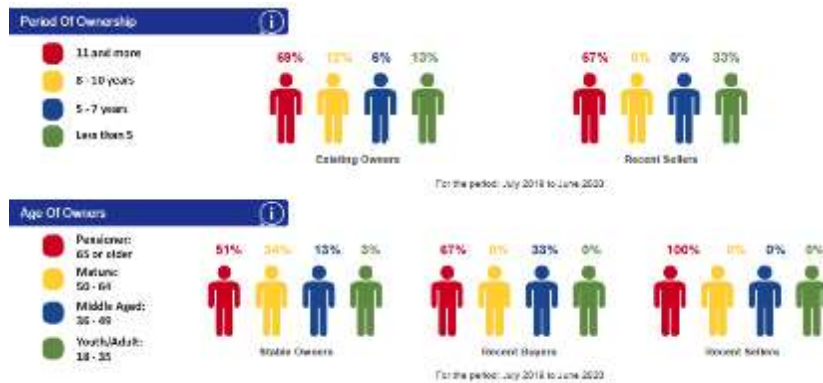
Figure 28: Property ownership statistics by period and age of owners in EmaXesibeni (Source: Lightstone, 2020)

The property ownership statistics for EmaXesibeni for the period under analysis suggest that most owners are long-term owners who have resided in the area for more than 11 years. Whilst the age ownership shows that most of the stable owners are pensioners aged 65 and older which might explain them holding on to a property for so long as part of long-term investments.

- Residential Property Trends and Dynamics in KwaBhaca

The property market stock in KwaBhaca is predominantly characterised by freestanding units amounting to 538 units. The average household income range is between R10 000 to R20 000 and is predominantly LSM 8 lower as measured by the Living Standards Measure (LSM). The figure shows the property ownership in KwaBhaca by period and age of owners for the period of July 2019 to June 2020.
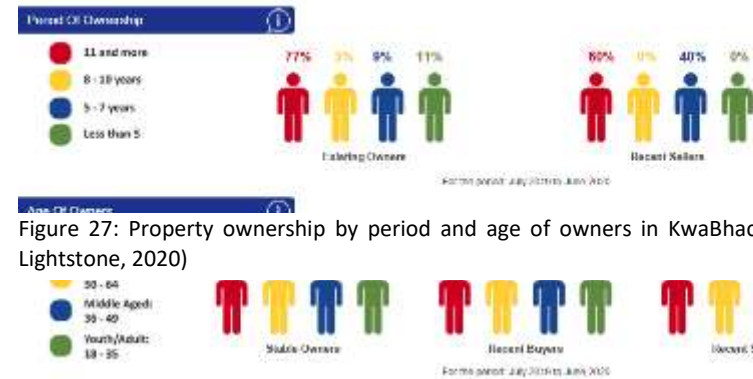
Figure 27: Property ownership by period and age of owners in KwaBhaca (Source: Lightstone, 2020)

The property ownership statistics for KwaBhaca for the year under analysis, suggest that most of the owners are long-term owners who have lived in the area for more than 11 years. The age ownership of property, the most stable owners are pensioners aged 65 or older who might hold on to the property as part of long-term investments.

The table below shows the average residential sale price for both EmaXesibeni and KwaBhaca over the past ten years. This data provides an insight into the overall trends with respect to property prices.

Year	EmaXesibeni		KwaBhaca	
	Freehold	Vacant Land	Freehold	Vacant Land
2010	R198	R75	R260	R34
2011	-	-	R335	-
2012	-	-	R678	R46
2013	-	R100	R1000	R51
2014	-	-	R1075	R75
2015	R500	R40	R570	R80
2016	R475	R50	R898	R42
2017	-	R0	R540	R148
2019	R740	-	R503	R120
Average prices (R'000)	**R475**	**R132**	**R651**	**R74**

Table 29: Average property prices in EmaXesibeni and KwaBhaca between 2010 and 2020 (R x 1000) (Source: Lightstone, 2020)

2.10.4.2   Property Market Opportunity Analysis in Emaxesibeni and KwaBhaca

This section provides a discussion about the future potential for retail, office, residential and industrial property developments in the towns of EmaXesibeni and KwaBhaca.

- Retail Development Opportunities

The findings of the trend analysis for the retail property market reveals there are scope and opportunity for the formalisation of informal trading stations, additional small retail business premises, standalone shops as well as additional shopping centres.

The results of a snapshot survey with informal hawkers showed that informal trading in the towns can be further supported by developing formalised structures. The Department of Economic Development, Environmental Affairs and Tourism (DEDEAT) have plans to develop formalised trading facilities of three types:

○ **Formal Stalls** - There will be 11 units of small, formal brick-and-mortar formal small shops, from which people will be able to enter and purchase. They will cater for informal businesses such as salons, car washes, and food outlets.

○ **Semi-Formal Stalls –** These will be roof covered open stalls. They will cater for informal businesses that sell fruit and vegetables and crafts, like an open market.

○ **Informal Stalls -** Freestanding tables for hawkers to move around selling their products.

The project will be implemented in two phases as follows.
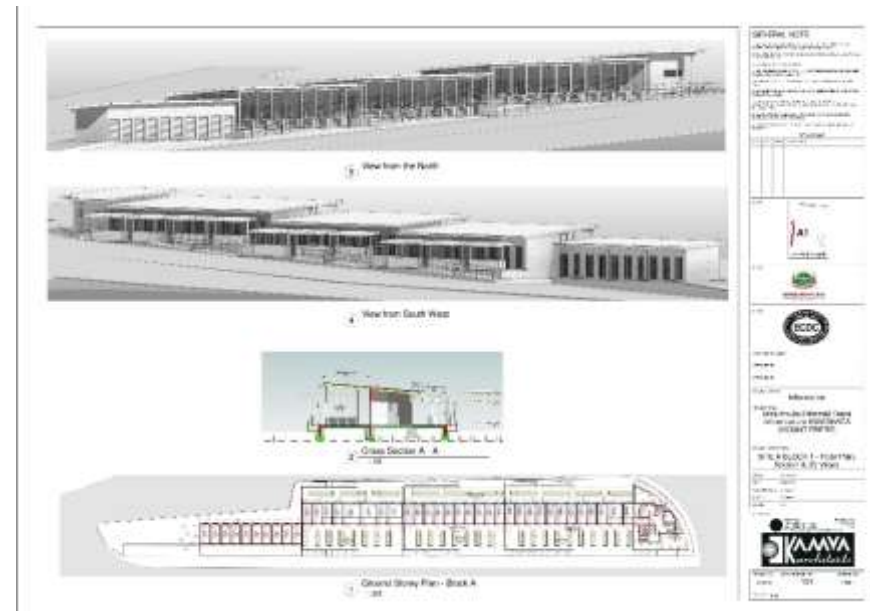
Figure 29: Proposal for hawker stalls in KwaBhaca.

Phase 1 (EmaXesibeni): The project will be done on a greenfield that is currently used by informal motor mechanics. The area is unsurveyed, and forms part of erf 188 (EmaXesibeni Commonage) at 30º 48' 04'' S; 29º 22'' 01' E. The stalls will consist of about 21 enclosed stalls built in brick and mortar measuring approximately 9m² to 11m² floor areas. The development will have a taxi drop off and pick-up area with a public ablution facility. The development will also have about 28 roof sheltered stalls for fruit and vegetable hawkers. Further developments will include a vehicle repair area with a car wash and parking with approximately 38 parking bays.

Phase 2 (KwaBhaca): The project will involve the revamping of the existing stalls and relocating some to more convenient areas that have high foot traffic, like a taxi rank.

In developing the retail property market further, a gap exists for ULM in collaboration with the private sector to establish shared retail spaces for small businesses wanting to graduate from hawker operators to formal retail stores. These retail spaces could be shared by taverns, cell phone shops, hairdressers, seamstresses and cobblers. Also, the Municipality should consider facilitating private sector retail developments on greenfield sites owned by the Municipality or other state departments.

A focus here would be the identification of vacant land parcels on newly established secondary nodes/routes (on the periphery of CBDs). The increase in vehicular traffic on parallel roads to the N2 (by-passes) will facilitate a perception amongst property developers that these land parcels on streets such as Mpila Drive and Ngcingwana Street are desirable for investment.

The retail market property trends analysis further revealed that local and national stores predominantly cater to low-income earners, leaving a gap for speciality stores targeting middle- to higher-income earners living in the two towns. The establishment of new shop outlets targeting middle-

income earners, such as furniture stores, florists, sporting goods stores, homeware stores, designer apparels stores, bookstores, etc. is in demand. The establishment of these stores would help reduce the economic leakage to Mthatha and/or Kokstad.

Another opportunity to be explored is the establishment of safe and secure shopping environments with improved off-street loading zones and parking. These can be Small Free-Standing Convenience Centres or Neighbourhood Centres. Small Free-Standing Convenience Centres will cater to the local needs of the residents within one or two adjoining suburbs, while Neighbourhood Centres would service the larger resident population of ULM.

- Retail Demand Modelling

The main purpose of the retail demand analysis is to test the current and future market feasibility of sustaining a shopping centre in KwaBhaca and EmaXesibeni targeting the growing cohort of middle-income consumers. This specific exercise was identified by the client (ULM) as it was noted that the majority of existing retail outlets in the town, predominantly cater for lower-income residents and that most professionals living and/or working in both towns are forced to conduct their retail purchases outside of the Municipality, thus resulting in a notable amount of economic expenditure leakage. The Municipality thus desires to test the market demand for two retail centres (one each in KwaBhaca and EmaXesibeni) that would entice local middle-income households to conduct more of their spending locally.

Objectives of the exercise:

- o Determining the demand for retail development within the towns of KwaBhaca and EmaXesibeni,
- o Exploring key indicative data to guide the viability of future retail developments.

- Considering likely changes in the socio-economic dynamics of both towns in the medium term (ten years)
- Determining the optimal shopping centre sizes and tenant mix for the development

- Retail Demand Methodology

The methodology used to calculate the market potential of the proposed retail development was developed based on a residual analysis technique that contemplates both demand and supply factors associated with the two retail market areas.

The process compares the relevant supply to the total demand within the market area. Both the supply and demand are measured in terms of floor area (m²) and are defined as Gross Leasable Area (GLA). This process calculates the Net Effective Demand in terms of GLA for retail developments in each spending category. The NED ultimately informs the feasibility of a proposed development.
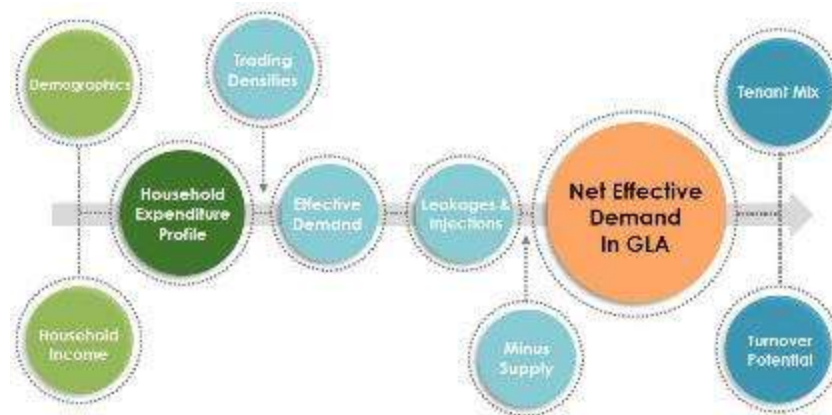
Figure 30: Retail Demand Methodology (Source: Urban-Econ, 2020)

- Market Delineation

The market delineation of the study area consisted of the identification of both a primary market and a secondary market. The primary market is defined as the population within a 5km radius of each town i.e., KwaBhaca and EmaXesibeni.

The secondary market is the population of the variety of rural villages within 20km from each town, where these urban towns are the closest service centres for the households that reside within these areas. The market delineation thus allows for the quantification of the total population size that will likely support these future retail developments.
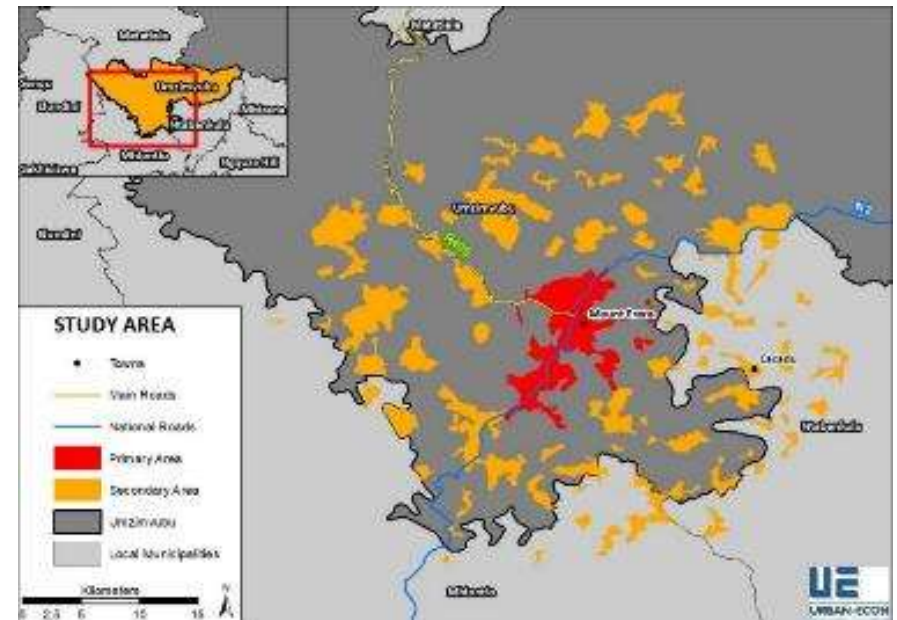
Figure 31: Primary and Secondary Market in KwaBhaca (Source; Urban Econ GIS, 2020)
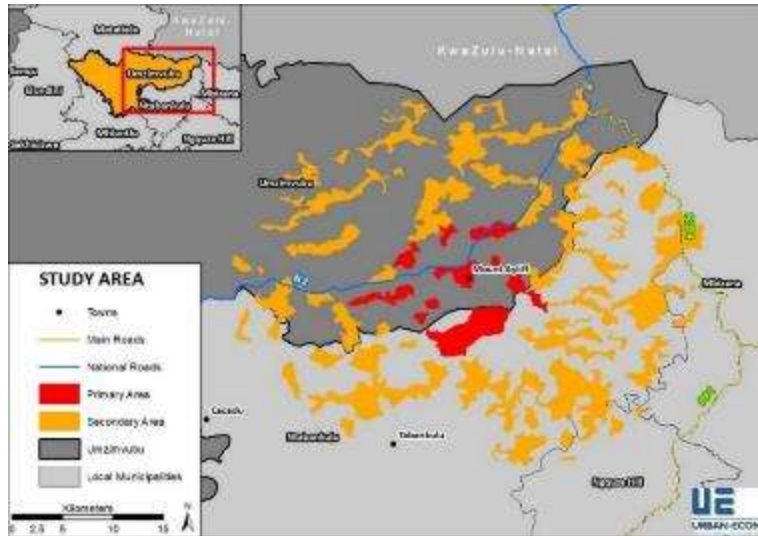
Figure 32: Primary and Secondary Market in EmaXesibeni (Source: Urban-Econ GIS, 2020)

- Market Demand Indicators

The retail demand analysis determines the total demand (expressed as GLA in terms of square metres [m²]) for the proposed developments in the delineated market areas. The retail demand model is based on the interaction between the following factors:

- Population and number of households
- Household income
- Household expenditure (disposable income)
- Leakages and injections
- Trading densities

The completed retail demand analysis will be presented as the Net Effective Demand (NED) for retail development in the market area.

- Target Market Populations

The income and expenditure patterns of a market area are essential to determine because they indicate the availability of disposable income within that market area to spend at a proposed retail centre. The disposable income can, in turn, be used to calculate the demand for a retail facility based on the money that the population would be willing to spend on retail goods and services within the market area.

The table below illustrates the income distribution for the market area. This is important because it highlights the proportions of income groups and the potential spending power in the market area.

The specific target market population for this study comprises households that are considered to be middle-income, defined as having a minimum annual income of R38 401 per annum. The table below shows the middle-income household populations in KwaBhaca and EmaXesibeni. In the KwaBhaca primary area, the average middle-income population grew by 224 households from 2011 to 2020, while in EmaXesibeni it was estimated to grow by 120 in the same period.

KwaBhaca			EmaXesibeni	
Household Income	**Primary Market**	**Secondary Market**	**Primary Market**	**Secondary Market**
R 38 401-R 76 800	812	1 028	480	1117
R 76 801-R 153 600	865	427	439	506
R 153 601-R 307 200	442	312	239	287
R 307 201-R 614 400	182	130	93	136
R 614 401-R 1 228 800	45	14	10	3
R 1 228 801-R 2 457 600	17	13	20	14

R 2 457 601 or more	26	15	0	0
Total (2011)	**2 389**	**1 939**	**1281**	**2063**
Total (2020)	**2 613**	**2 121**	**1 401**	**2 168**

Table 30: Annual Household Income of Middle Income Population, 2020 (Source: Stats SA, 2011 and Urban-Econ Calculations, 2020)

As an additional source of information to support the middle-income populations shown in the table below, the total numbers of professional employees who fall within the middle-income range in KwaBhaca and EmaXesibeni were considered.

The data were extracted from the ULM Housing Sector Review Plan of 2018. The table shows the total number of employees from both the public and private sectors at a management level that works in KwaBhaca and EmaXesibeni.

List of Employers	**KwaBhaca**	**EmaXesibeni**
First National Bank	13	7
South African Police Service	151	155
Department of Health	107	107
Post Office	8	4
Department of Justice	24	0
ULM Local Municipality	105	105
Department of Public Works	178	0
Department of Human Settlement	2	3
Department of Sports, Arts and Culture	40	40
Department of Roads and Transport	95	95
Traffic Department	8	4
Metropolitan	8	0
Department of Labour	0	17

Department of Treasury	0	10
ANDM	0	250
Total	**726**	**797**
Total	**1523**	

Table 31: Total No of Employees by Middle Income Range in KwaBhaca and EmaXesibeni (Source: ULM, 2018)

● Leakages and Injections

Leakages represent the expected net outflow of purchasing power from within the market area - in other words, potential consumers who choose to purchase their goods outside of the boundaries of the market area contribute towards the leakage factor. Injections represent the opposite of leakages; an injection occurs when potential consumers from outside the boundaries of the market area purchase goods within the market area.

Leakages out of the study area have been estimated based on experience with rural retail markets and high-level assessments of competitive market supply outside of the primary market study area. A full retail market assessment is required to provide greater clarity about the exact market leakages and injections relevant to the primary market area and to provide greater detail on the demand for various product classes in the market area.

For middle-income households in both the primary market areas in both KwaBhaca and EmaXesibeni, it is estimated that the retail expenditure leakage on a variety of goods and services is high; however, it is estimated that leakages will reduce with the development of a new retail centre in each town. For this study, leakages of between 30% and 70% were applied. Simultaneously, retail expenditure injections from the secondary area are anticipated to be favourable with the development of two new

retail centres. For this study, injections of between 30% and 85% were applied for the secondary market areas.

- Trading Densities

Trading densities are defined as the annual turnover per square metre that a typical enterprise should generate to remain viable. Each category of retail tenants requires a distinct number of expenditures per square metre to remain sustainable. This is determined through their operational expenses and profit margins. Expenditure is in monetary value (Rand) and therefore needs to be translated and expressed as square metres to measure the potential sustainability of a development site.

Trading densities are, therefore, incorporated into the calculations. The application of trading densities ensures the translation of expenditure (in Rand) to GLA (in square metres) per annum. The listed trading densities were obtained from SAPOA Retail Trends Report and are illustrated in the table below.

Trading Density	
Retail Category	**Rand per square metre (R/m²)**
Home Furnishings/Antiques/Décor	20 963
Travel Stores	74 140
Health and Beauty	59 956
Department Stores	34 221
Apparel	33 014
Eyewear	56 505
Jewellery	115 977
Electronic/Photography/Music	50 053
Books/Cards/Stationery	32 726
Luggage	56 558
Food	32 656

Food Service	36 814
Speciality	27 802

Table 32: Neighbourhood Centre trading densities value, 2020 (Source: Q1 2020, SAPOA, MSCI, UE Calculations)

- Household Expenditure Patterns

To quantify the proportion of household expenditure dedicated to retail goods and service, it is necessary to undertake a household expenditure distribution analysis. Together with the population and income data identified earlier, this information is used to ascertain the total market populations expenditure on various retail items.

Expenditure analysis indicated that 33.9% of expenditure in the market areas is spent on food, beverages, and tobacco. Miscellaneous services constitute the second highest expenditure in the market area at 9.5%, while clothing and footwear follow in third at 6.2% of total expenditure. This indicates the importance of a strong food anchor tenant for any new retail development, even if targeting middle-income households.

- Existing Supply of Retail

Given that the proposed centres will predominantly cater to the middle-income market population, it was necessary to quantify the extent of existing retail outlets in the two towns that service the needs of middle-income households. The results of the supply audit are presented in the table below.

The total GLA determined for KwaBhaca in 2020 is estimated at 7,508m², while for EmaXesibeni it was determined to be in the order of 5,500m².

- Net Effective Demand

The retail demand analysis is based on three growth forecast scenarios for the primary areas of KwaBhaca and EmaXesibeni. The first scenario assumes that the middle-income population will grow at 5% per annum over the next ten years. The second scenario estimates a growth of 7.5% for the same period, and for the third scenario, growth at 10% per annum

is shown. The scenarios of growth are presented based on the assumptions below.

- o Two new government precincts are to be developed in the towns of KwaBhaca and EmaXesibeni. In KwaBhaca, four-story office buildings are being developed to replace temporary structures housing some municipal structures. The new municipal offices are to be located in Ward 1. The project involves the construction of a four-story building.

- o There are future housing developments planned in both towns of KwaBhaca and EmaXesibeni. KwaBhaca has 3 526 units proposed to be built with a total area of 50.0339ha. The units will range from high-density residential (1 420), middle-income residential units (780) and community residential units (545), among others. EmaXesibeni has 1 323 proposed units to be built with a total area of 24.149ha. The units will range from residential flats (600), middle-income units (336), and community residential units (180), among others.

KwaBhaca		EmaXesibeni	
Mall Tenants	**Line Stores**	**Mall Tenants**	**Line Stores**
• Shoprite • Liquor Shop • Hungry Lion	• Jet • Ackermans • IDEALS • OK Furniture • Pep Cell • Capitec • Nedbank • UBank	• Shoprite • Liquor Shop	• Jet • OK Furniture • Pep Cell • Ackermans • Debonairs Pizza • KFC

Table 33: Retail Supply Audit (Source: Urban-Econ, 2020)

o Relocation of provincial departments to EmaXesibeni. The Eastern Cape Department of Public Works (DPW) has plans to build a government precinct that will house regional offices and some.

o units of Alfred Nzo District Municipality. The regional offices located outside the Province will be relocated; this is expected to unlock major development potential for the town as it will likely result in an influx of economically active individuals and households to the area. These households are likely to take up occupations in the housing development projects described above.

o Organic growth in household incomes is also a factor of consideration, as overall economic growth anticipated for the area is likely to result in the demand for additional workers in skilled positions.

The tables below present the Net Effective Demand calculated for both KwaBhaca and EmaXesibeni for 2020 to 2030.

Year	Low (5%)	Medium (7.5%)	High (10%)
2020	5 486		
2023	6 536	6 819	7 101
2026	8 504	9 634	10 763
2030	11 142	13 402	15 662

Table 34: KwaBhaca Net Effective Demand, 2020, 2023, 2026, 2030 (GLA, m²) (Source: Urban-Econ Calculations, 2020)

Year	Low (5%)	Medium (7.5%)	High (10%)
2020	3 672		
2023	4 289	4 410	4 531
2026	5 304	5 788	6 272
2030	6 674	7 643	8 611

Table 35: EmaXesibeni Net Effective Demand, 2020, 2023, 2026, 2030 (GLA, m²) (Source: Urban-Econ Calculations, 2020)

Demand modelling indicates that there is currently, and in future, the justification for the development of shopping centres that target middle to higher income (aspirational) consumers.

Scenario growth forecasting shows that even at the most optimistic levels, the development should not exceed the size of a small neighbourhood shopping centre of 5 486 GLA and 15 662 GLA for KwaBhaca and 3 672 GLA to 8 611 GLA in EmaXesibeni.

Figure 33: Possible tenants for new retail opportunities KwaBhaca

Figure 34: Possible tenants for new retail opportunities in Emaxesibeni.

- Office Development Opportunities

Future potential demand for office development in EmaXesibeni and KwaBhaca is considered for both public office space, and private office developments. Public office development opportunities are defined by a demand for larger government precincts due to the growing public sector staff contingent. In private office development, there is the market potential for shared offices and rezoning of residential property into business commercial property and conference centres.

In public office space, the government has plans to build dedicated government office precincts in anticipation of growth in the public sector. In EmaXesibeni, the Eastern Cape Department of Public Works (DPW) has plans to build a government precinct that will house regional offices and some units of Alfred Nzo District Municipality. The regional offices located outside the Province will be relocated; this is expected to unlock major development potential for the town as it will bring economically active individuals to the area. The proposed location for the government precinct is north of the CBD in EmaXesibeni along the N2. (See page 18 of the 2016 Conceptual Precinct Framework Plan for the proposed location of the government precinct in EmaXesibeni.)

In KwaBhaca, the proposed government precinct is intended to be built by the ULM and will replace the temporary structures currently housing a number of the Municipality's staff. The new municipal offices are to be located in Ward 18 (30º 54' 31'' S; 28º 58' 53'' E.). The project involves the construction of a four-story building.

The new offices will host all the Municipality's internal departments, which include:

- Corporate Services
- Budget and Treasury
- Citizen and Community Services
- Infrastructure and Planning
- Local Economic Development
- Special Programme and Communications
- Office of the Municipal Manager

The offices will consist of more than 93 individual office spaces measuring 3710m² in total, as well contain a conference venue, cafeteria, male and female change rooms, a public-serving area, a classroom, a foyer, etc.

The existing occupied offices in KwaBhaca will be revamped and extended to serve as the Council Chambers.

Figure 35: Proposed ULM Municipal Offices (Source: ULM, 2020)

Figure 36: Proposed ULM Municipality Council Chambers (Source: ULM, 2020)

In terms of private-sector office space, future potential demand lies in the development of shared office space and conference facilities. The office property market trend analysis indicated a gap in the market for private commercial offices.

A potential market exists for the rezoning of residential properties along the main street or close to the CBDs of EmaXesibeni and KwaBhaca into commercial business properties. This will help to meet the demand for office space for small standalone companies.

Another opportunity to be explored is the establishment of medium to longer-term private sector investment opportunities through greenfield office parks. The office parks will involve the private investors wanting to redevelop underutilised properties into shared workspaces for SMMEs and start-ups. The workspaces will accommodate either individual start-ups or small businesses and their staff on a permanent or temporary basis

as per their needs. The shared workspaces will be designed to provide SMMEs with key facilities such as desk, Wi-Fi, printing, meeting rooms, and audio and video conferencing technology.

In the conference market, future potential demand is expected to increase due to demand in the event and conferencing space by government and municipality as well as private households and businesses. The Government and Community Services industry consists of the main clientele for venues in the towns of EmaXesibeni and KwaBhaca as it is the largest employer and contributor to the local GDP. This sector is also responsible for the greatest demand for conference venues in the area. Based on a survey undertaken in 2016 on government departments and municipalities within Alfred Nzo District, 85% of the government and municipal representatives believed that there is a gap in the market for additional conference facilities, specifically those which host medium- to larger-sized events (Alfred Nzo District LM, 2016).

The private household demand for conference venues is mainly for venues to host weddings, functions, meetings, etc. This demand by private households is influenced by middle-income earners. In contrast, the private sector businesses require venue spaces to host meetings, exhibitions, local sports events and other annual events such as closing functions and awards ceremonies. For the municipality to meet the demand for the conference market, they should invite private sector investors to develop a medium-sized conference centre in KwaBhaca, accommodating 100 people with an additional marquee to accommodate greater numbers for seasonal demand.

- Industrial Development Opportunities

The ULM has plans in place to establish industrial precincts in both EmaXesibeni and KwaBhaca to curb settlement invasion and to drive the local economic base. The industrial zoned land is set to target new light industrial manufacturing tenants which include manufacturing activities

that have limited vibration, noise, odour or a high volume of moto car and truck traffic.

In EmaXesibeni, a large portion of land is earmarked for industrial development, located adjacent to the entrance of the town and alongside the N2. An additional industrial precinct is proposed within the town near the town centre (ULM, 2016). In KwaBhaca, the Municipality has plans to establish two industrial areas; one will be located along with the R 405 on route to Matatiele, and the second will be located near the N2 bridge east of the CBD (ULM, 2016). (See pages 18 and 28 of the 2016 Conceptual Precinct Framework Plan for the proposed locations of the industrial precincts in EmaXesibeni and KwaBhaca.)

The establishment of these industrial precincts will be targeted for the establishment of value-adding agro-industrial businesses focusing on the processing of local primary harvested products such as aloe, peaches and timber.

The SEDA Alfred Nzo Agro-Manufacturing Incubator (SANAMI), located in EmaXesibeni, will help to drive manufacturing activities in ULM. The status quo analysis showed that SANAMI is not currently operating at full capacity due to funding challenges and its inability to generate its own income. The Municipality should mobilise resources for SANAMI to operate at optimal capacity through the establishment of a partnership with government development finance entities and the private sector. Another opportunity entails the use of the infrastructure at SANAMI to establish a Fresh Produce Multiuser Facility to enable smallholder farmers to access external markets and actively participate in the agricultural value chain in the province. The produce that will be processed and packaged at the facility will be sold to different end-users around the EmaXesibeni region.

Other opportunities within industrial development include the establishment of a greenfield industrial property development in the form of shared industrial spaces for small businesses. These could take the form of an industrial park or incubation hubs. This would involve the rezoning of undeveloped land on the periphery of the CBD into industrial retail and light industrial property developments for small businesses. The properties will be targeted at light industrial manufacturing tenants and/or construction trade retailers, e.g., hardware stores.

- Residential Development

The household assessment conducted in 2018 for EmaXesibeni and KwaBhaca revealed a potential demand for different housing typologies. The outcomes of the survey indicated that in EmaXesibeni participants are not interested in long-term leases, but rather a desire to own their own houses, predominantly in the form of free-standing units.

Item	Percentage
Do not express in buying Land only	70%
Are interested in renting Low Income Housing	40%
Most desired free-standing Units	50%
Long term leases (Are not interested)	75%
Do not show interest in Rental Stock	60%
Most Desired complex style housing	25%

Table 36: Outcome of Survey EmaXesibeni, 2018 (Source: ULM, 2018)

The housing assessment further considered housing development opportunities in both towns. In EmaXesibeni the average number of people living in a household is four and there is a greater need for rental accommodation. Most survey participants are renting houses and flats and expressed the desire to own property, with most of the respondents earning between R3 501 to R7 500 per month. The table below shows the overall housing opportunities in EmaXesibeni.

Site	Area	Proposed Density Units (Du)	Proposed Yield (No. of Units)
EmaXesibeni			
Middle Income	4.754ha	20du/ha	95
High Income	5.632ha	20du/ha	112
Residential Flats	6.029ha	100du/ha	600
Middle Income	6.726ha	50du/ha	336
Community Res Units	1.8ha	100du/ha	180
Total	**24.149ha**		**1 323**

Table 37: Overall housing opportunities in EmaXesibeni, 2018 (Source: ULM, 2018)

EmaXesibeni has 1 323 proposed units to be built with a total area of 24,149ha. The units will range from residential flats (600), middle-income units (336), and community residential units (180), among others.

The outcomes of the survey for KwaBhaca revealed that the majority of the respondents showed a willingness to purchase a house, and the most viable option is middle-income housing as respondents were unwilling to rent high- or low-income housing. The table shows the outcomes of the survey for KwaBhaca.

Item	Percentage
Are interested in renting high-income housing	20%
Are willing to purchase a house	70%
Not interested in Long term Leases	90%
Most desire lock up and go style housing	40%
Did not show interest rental stock	80%
Are interested in renting low-income housing	20%

Table 38: Outcomes of Survey KwaBhaca, 2018 (Source: ULM, 2020)

For KwaBhaca, the average number of people living in a household is five, results of the housing assessment study showed that participants had little to no interest in continuing to rent but wanted to buy houses. The results further illustrated a shortage of middle-income accommodation. The table below shows the overall housing opportunities in KwaBhaca:

Site	Area - ha	Proposed Density Units per hectare	Proposed Yield (No. of Units)
KwaBhaca			
Infill Single Res	0.5257	50	26
Infill Single Residential	0.6575	50	32
Infill Single Residential	0.711	50	35
Townhouses Flats	1.9897	80	159
High Density Flats	1.65	100	165

Residential	10.9	50	545
High Density Residential	14.2	100	1420
Middle Income Residential	15.6	50	780
General Res CRU	1.8	100	180
General Res Townhouses	0.8	80	64
General Res (Flats)	1.2	100	120
TOTAL	**50.0339ha**		**3526**

Table 39: Overall housing opportunities in KwaBhaca, 2018 (Source: ULM, 2018)

KwaBhaca has 3 526 proposed units to be built with a total area of 50,0339ha. The units will range from high-density residential units (1 420), middle-income residential units (780) and community residential units (545), among others.

For the ULM Municipality to realise the development of the proposed units the following steps should be taken:

o Accelerate the approval of the Township Establishment projects in both towns, EmaXesibeni and KwaBhaca, accelerate the EIA approval process and resolve any potential land claim disputes and any community social unrests based on land ownership contestation.
o Register all sites as new townships with erven with the Surveyor-General.
o Prioritise bulk services and internal infrastructure.
o Review the status of the shortlisted housing projects, assess council approval processes on each project, and consider any challenges/bottlenecks and required interventions, and assess approved sources of funding for projects.
o Assess financial and other forms of the capacity of the Municipality to implement the targeted housing projects and the confirmed funding envelopes for the projects on the IDP report.

- CONCLUSION

The property market profile revealed current trends and opportunities in the retail, industrial, office and residential property markets. Retail market findings revealed there are scope and opportunity for the formalisation of informal trading stations, additional small retail business premises, standalone shops as well as additional shopping centres.

Demand modelling indicates that there is, currently and in future, a justification for the development of shopping centres that target middle- to higher-income (aspirational) consumers. Scenario growth forecasting shows that even at the most optimistic levels, the development should not exceed the size of a small community shopping centre.

A mix of tenants is recommended, with an emphasis on recognised national chain retailers, offering a convenience grocery store as the anchor supported by restaurants, clothing and apparel stores. Specialised product and service stores, as well as furniture and equipment (durable goods), are unlikely to be viable (due to leakage). The location of the proposed centres is critical, and it is important to note that these will mainly cater to the local urban population and weekly/daily employee commuters.

The industrial property market analysis revealed opportunities for the establishment of industrial precincts in both EmaXesibeni and KwaBhaca to curb settlement invasion and drive the local economic base. The industrial zoned land is set to target new light industrial manufacturing tenants and provide retail-industrial space for the relocation of some of the hardware stores from within CBD main streets into warehouses to reduce traffic and delivery/collection congestion in the towns. The ULM Local Municipality has plans in place to establish industrial precincts in both EmaXesibeni and KwaBhaca.

From an office market perspective, the potential demand for new office developments in EmaXesibeni and KwaBhaca exists in both public office and private office space. Public office development opportunities are defined by a demand for larger government precincts due to the growing public sector staff contingent and the fact that many regional government offices are located with KZN. Meanwhile, in the private office development space, the market potential exists for shared office facilities and the rezoning of residential property into business commercial property and conference/function venues.

The ULM has plans in place to establish industrial precincts in both EmaXesibeni and KwaBhaca to curb settlement invasion and drive the local economic base. The industrial zoned land is set to target new light industrial manufacturing tenants which include manufacturing activities that present limited vibration, noise, odour or a high volume of automobile and heavy vehicle traffic. When it comes to the residential market, in EmaXesibeni there is a demand for middle-income housing, while in KwaBhaca there is an opportunity for low- and middle-income housing.

2.11 SITUATIONAL ANALYSIS - BUILT ENVIRONMENT STATUS QUO

This portion of the Situational Analysis starts with a brief comment on the larger context and then focuses on the Spatial Structure and Form of the two towns. This is discussed by understanding the following:

- Movement routes to and through the towns.
- Activities and uses in the towns, including current observations regarding land use.
- General physical characteristics including housing.
- Finally, building massing, 'enclosure' and townscape aspects.

2.11.1 Macro Context of Settlement Pattern

Some key items with regards to the macro context of settlement pattern are as defined in the Umzimvubu Spatial development Framework of 2015. The SDF outlines guiding principles, strategies, approaches, and concepts about nodal development, clustering, investment, and urban edges within the locality.

It identifies the two towns as primary nodes for investment in infrastructure. There are a Precinct plan and a rural settlement development plan in place which was approved by the Council in 2014 which further outlines developmental priorities of the Municipality in relation to its land.
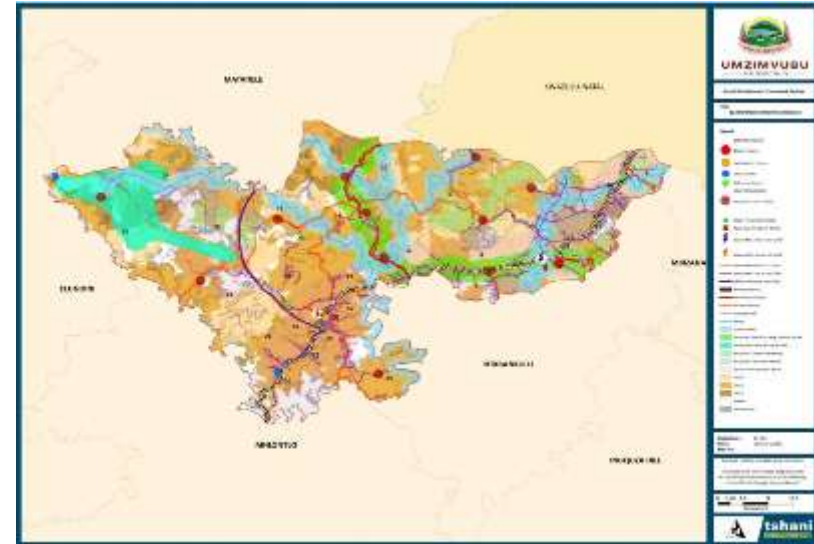
Figure 37: The current approved Spatial Development Framework (SDF) for the ULM Local Municipality by Tshani Consulting, February 2015.

Key observations from the proposals include that relate to EmaXesibeni include:

- High concentration of business, commercial, institutional and Government uses towards the north along the N2 (Primary Transport Route). This area is regarded as the central business area with high communal business activities taking place around the public transport facility (taxi rank).
- Many land-use activities evident in unregistered areas (illegal activities), this has a detrimental impact on the Municipality's revenue enhancement strategy.
- Many vacant stands along the N2 towards the west of the central business area (Industrial Zoned).
- Future development within the proposed urban edge is restricted by topographical conditions (e.g., Rivers, streams, gradients, gullies, mountainous areas)

- Some mixed-use activities are evident towards the southwest of the central business area (uses include institutional, government, financial services, and educational use)
- Many abandoned buildings are evident within the central business area and mixed-use area.
- Flood line buffers are proposed along major streams and river systems (100m buffer from the centre line of the river)
- Some Industrial activities are evident.
- The SDF is not clear in terms of structuring elements (e.g., activity spines, main roads, development zones, development corridors).
- Most of the land is zoned as undetermined (unregistered land).

Key observations from the proposals that relate to KwaBhaca include:

- A wide range and mix of different formal and informal business, commercial and institutional activities are evident along the N2 that bisects the town.
- Many land-use activities towards the far north of KwaBhaca occurs on unregistered land.
- Residential uses are more dominant towards the east of town whereas mixed land uses are more concentrated towards the east and south-east of the town.
- Limited access and linkages are evident to and from the central business area creating traffic congestion.
- Lack of land use management and development control is evident along the N2 as many unfavourable uses are evident along the N2, contributing to traffic congestions (Deliveries of goods and services)
- Limited growth potential is possible as the topographic conditions and rural settlement patterns allow for limited land availability.

- A proposal for future industrial use is evident towards the northwest that could support the possibility for agro-processing and value chain development.
- A proposal for future business use activities is evident towards the far east of town. This could allow for future business development and an alternative main access road into town.
- No formal central business area has been identified for KwaBhaca.
- Predominant zonings along the N2 (Primary route)

2.11.2 Spatial Structure and Form

It is understood that the spatial structure and form of the study area is a function of the following characteristics:

2.11.2.1   Movement means Connections:

This refers to all types of movement to and through the study area.

Starting positions are the movement routes and the relationship between these and the physical frameworks (roads and building edges, for example). Several sources[14] suggest that there are two types of movement and it is important for successful places that there be a healthy balance between through-movement and destination travel.

- through movement
- destination travel

and a balance of the two is required.

In most successful towns, these routes develop more naturally, they define the places, and the built environment develops around them. In

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14 Hillier, B, Space is the Machine: a configurational theory of Architecture, London, 2007.

artificially over-planned cities, it often happens the other way around and tends to generate sterile, inefficient and unauthentic places[15].

Thus, the deliberate overlapping (integrating) of activities and movement routes create an interdependent system integrating the social aspects of the system with the other aspects—socialising and recreation happens everywhere (especially on the streets) rather than in dedicated zones.[16]

Finally, movement routes need to link into the macroscale as well as on the microscale for places to maximise their ability to be healthy destinations and through routes.[17]

Presently the movement routes of the project areas in both towns can currently be characterised by:

- There is a relatively well-established hierarchy of major and minor streets to both towns used by vehicles and pedestrians. The structure of this is largely based on the historical gridded street layouts of the original towns and their centres. This is a strong and adaptable street system that allows for some expansion and contractor of movement.

- Both towns have strong through routes, with KwaBhacha's being directly through the town and EmaXesibeni's major route moving past it. Other secondary routes also connect the towns to their rural hinterland.

- It is observed that both towns cater to strong destination travel. This is largely rural populations travelling to the towns to shop, socialise and attend to business issues.

- Although there is congestion (especially on the main roads) there is balance vehicles and pedestrians. The vehicles also are of a variety from public transport to privately owned vehicles.

Figure 38: Street view from KwaBhaca displaying the important role of vehicles and the need to consider the vehicle/pedestrian engagement. (Source: Author).

In summary, both towns have relatively strong higher-order movement routes and connections. It is observed that these movement routes and connections are less successful at the local level and this is a focus of the Implementation Plan.

2.11.2.2   Activities and Use, Including Current Land Use:

This refers to all the activities in the study area and, more importantly, how the users use the study area.

An important factor in maintaining sufficient levels of pedestrian activity and making streets and public spaces attractive and safe is the way

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[15] Alexander, C, A City is not a Tree, Berkley, 1967.
[16] Gehl, J, Cities for People, Washington, 2010.

[17] Hillier, B, Space is the Machine: a configurational theory of Architecture, London, 2007.

buildings are laid out about these streets and public spaces. Also important are the location and number of building entrances and windows.

Generally, there needs to be a clear distinction between public and private spaces to provide 'defensible space'. In this way, uncertainty over the ownership and abuse of spaces can be avoided. Poorly defined and ambiguous spaces should be avoided. A gradation of this definition is sometimes appropriate, though the ownership and purpose of the space should still be clear.

It is also important that building entrances open directly into the public realm and that the public realm is overlooked by building windows, rather than putting uses such as parking and servicing between the main activity and the street.

Figure 39: Retail facilities at EmaXesibeni.

In summary, land use observations in the current study area in EmaXesibeni are characterised by:

- The land usage within EmaXesibeni CBD is dominated by Business uses. Such businesses are made up of small retail stores, hardware and building suppliers and large supermarkets such as Spar and Boxer. The lack of financial institutions within the town is a major challenge

and drives locals to other service centres. A major issue that presents itself is the numerous vacant sites which are located in the CBD and throughout EmaXesibeni town. Such presents the town with an opportunity for growth, expansion, and maximising development potential.

- Facilities within the town are made up of many crèches, followed by two Primary Schools, a Secondary School, a post office and Hospital. A majority of the population are youthful and fall within the 15 – 34-year age category. Such raises the need for adequate facilities been provided such as additional secondary schools, FET and Technical schools, recreational facilities. Places of worship are also lacking which could be utilised by the community at large.

- Buildings in a dilapidated state are located within the CBD and near the Municipal offices. Building in such condition cannot be located along with the main entrances into the town, as mentioned above investor confidence is diminished and the character of the town is poorly envisaged.

- Four main informal trade zones have been identified within the CBD. One area exists in conjunction with the taxi rank. Trading Facilities are not formalised however the taxi shelters for passengers form a dual purpose for the traders. Traders can also be found along the pavements of the CBD main street.

- Informal traders occupy valuable pedestrian space which results in people having to walk on the road. The urban character of the CBD is also damaged by having informal traders situated at the entrances of shops and retailers.

- The lack of demarcated loading zones and enforcement thereof has resulted in trucks using shop frontages as their loading space. This is a major problem as there is only one way in and out of the town. Obstructions also occur at the entrance of the town around the Spar and Boxer Store which can cause timeous delays during peak hours.

- Since the public transport activity is spread across the length of the CBD, the core pedestrian movement is similarly spread across the CBD. The concentration is along the N2 between the Engen Garage and the Total garage and along the side road in-between.

- There are two public transport points in Emaxesibeni, one is a formal off-street facility and the other an informal facility close to the Boxer store.

Figure 40: Street view of EmaXesibeni describing active pedestrian movement. (Source: Author).

In summary, land use observations in the current study area in KwaBhaca are characterised by:

- The array of land usages in KwaBhaca is considerably wider than EmaXesibeni. The trend of business owners wanting to open shop along the N2 has resulted in the concentration of business uses of properties in the CBD. Such a trend has resulted in the CBD becoming extremely congested as there is no need for people to move out of the CBD to obtain good and services. As seen in EmaXesibeni many vacant sites hold high development potential.

- The facilities provided within the town are to some extent adequate however many need upgrades. Attention also needs to be directed towards 20 % of the 34 – 65-year age group. Facilities need adequately cater to their needs. There are several clinics within EmaXesibeni and a Hospital on the periphery. However, facilities such as old age homes and frail care facilities need to be considered.

- Properties within the CBD are primarily privately owned. The majority of the remaining properties within the study area is municipal-owned land. The onus lies with the Municipality to foster relationships with the owners of property within the CBD to identify ways in which collaborative efforts can drive developments within the CBD. The focus needs to direct toward mixed-use facilities with densified social housing components.

- KwaBhaca experiences an issue of dilapidated buildings been in the heart of their CBD. Buildings have been in this condition for a long time and the potential for development within these high demand areas can be achieved through the eradication of these unused, derelict plots.

- Informal trade within KwaBhaca is a lot more common. The use of pavements for trading is more dominant than that of pedestrian

movement. Areas 1 – 5 are particularly chaotic as they are positioned in busy nodal points of the town. There is a continuous struggle for space and facilities and competition between product offerings are rife. A formalised trading facility is much needed and development proposals will take cognisance of this.

- KwaBhaca experiences a lot more challenges around congestion than Mt Ayliff. This can be attributed to the fact that the N2 dissects precisely through the CBD. Several large chain stores receive stock every week. Loading and offloading takes place on the main street. Bus coaches also use the main street as their pickup and drop off point in the town as seen in Area 3.

- The congestion created by the hardware stores delivery is a major issue in the town. The congestion does not only affect the main street, but the pavements also become occupied with supplies.

- The following statistic derived on EmaXesibeni identified that the town is home to two taxi ranks. Public transport travelled to a total of 95 destinations and transported a total of 12600 passengers. A total of 670 unique vehicles were identified and 1300 trips are made in Mt Ayliff. Stats are captured for a single day, from dawn until dusk.

- There are 10 public transport points (ranks) in KwaBhaca and none of them can be classified as formal. The majority of these points accommodate all four modes viz. Minibus taxis, cars, buses, and Light Delivery Vehicle (LDVs). It was also noted that several PT ranks serve the same destination, and this is mainly due to space constraints at other facilities Majority of the loading, off-loading and ranking occurs on-street thus impacting traffic operations and pedestrian safety along the N2.

Figure 41: Street view of KwaBhaca showing a well-used and active public realm. (Source: Author).
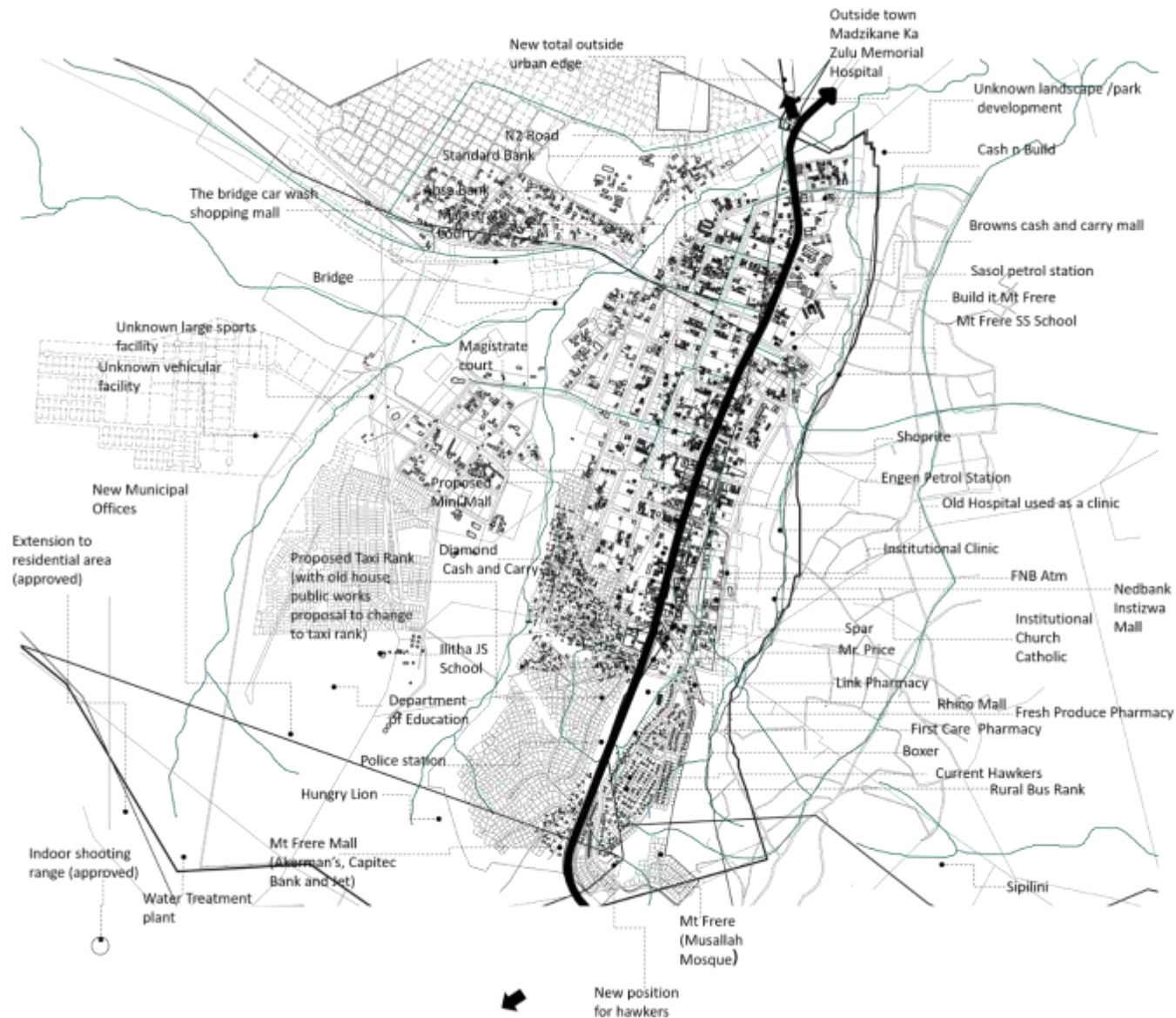
Figure 42: Existing Site Plan of KwaBhaca after site visit of 6 to 8 October 2020 indicating key facilities and activities. (Source: Author).
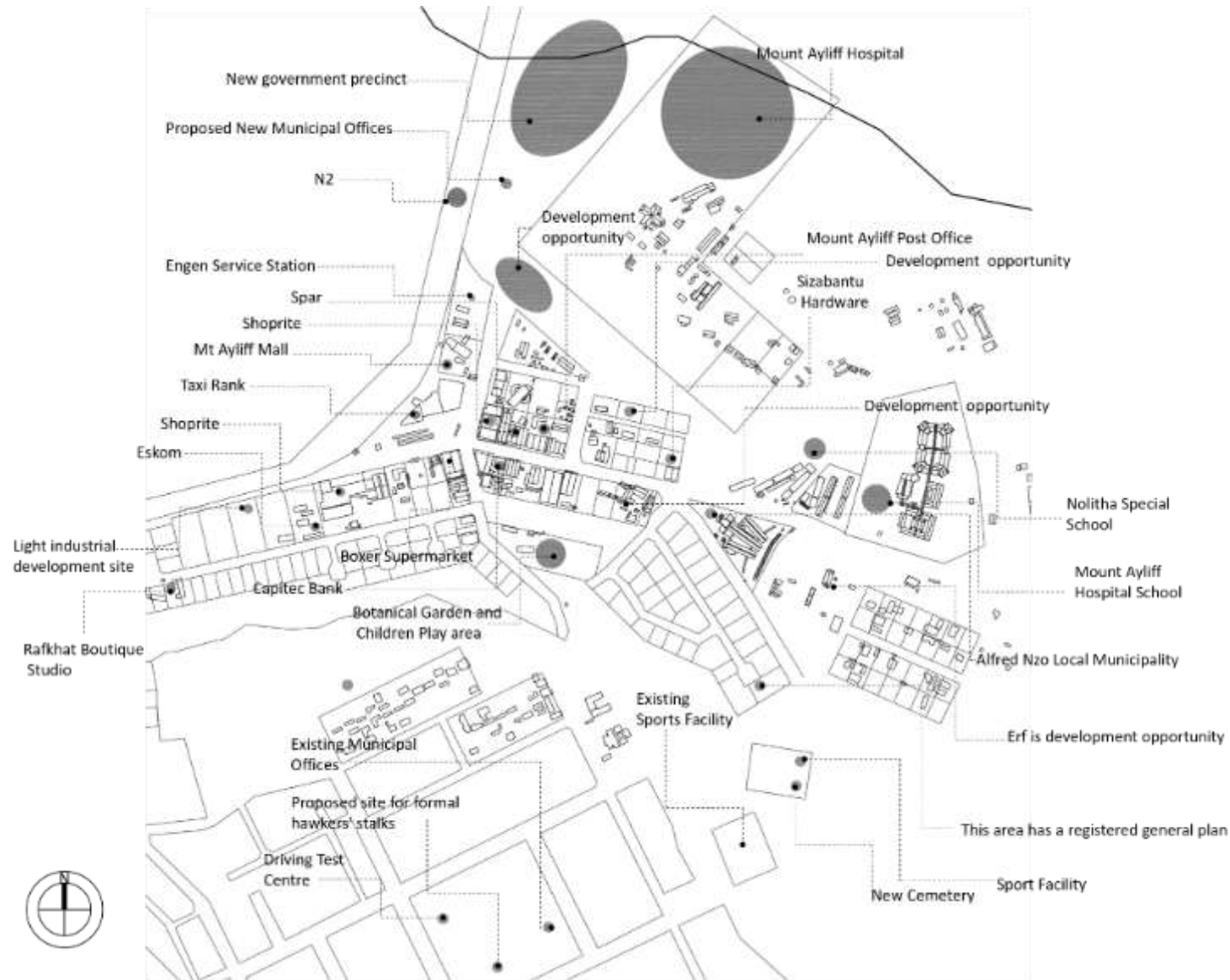
Figure 43: Existing Site Plan of Emaxesibeni after the site visit of 6 to 8 October 2020 indicating key facilities and activities. (Source: Author).

2.11.2.3   General Physical Character of the Built Environment:

This refers to what the study area in general and the buildings of the study look like and what character/feeling is experienced.

The general physical characteristics of both towns, with a focus on their built environment, is described by the following images:

Figure 44: Street view of EmaXesibeni showing Shoprite commercial structure. (Source: Author).

Figure 45: View from the existing turning circle to new Alfred Nzo Municipal offices in EmaXesibeni.

Figure 46: General street view in EmaXesibeni.

Figure 47: Engen Garage at the western entrance to EmaXesibeni.

Figure 48: General view of Main Road, EmaXesibeni.

Figure 49: General street view of Main Road, KwaBhaca.

Figure 50: View of approaching KwaBhaca from the west.

Figure 51: Park and Landfill site in KwaBhaca.

Figure 52: New Municipal Offices currently under construction in KwaBhaca.

A significant aspect of both towns that informs their physical character is housing.

The Municipality is currently formalizing all informal settlements in the two urban areas. The Department of Human Settlement is currently constructing rural housing to curb the migration of people to urban areas. The Municipality has a housing sector plan which was approved by Council in March 2017.

The housing sector plan outlines how issues of urbanization, migration plan, planned housing projects including rental stock housing public servants, blocked projects informal settlement formalization, housing needs register in terms of the housing database should be dealt with by the Municipality.

Urbanisation trends are led by the migration of people from their rural to urban areas to seek better education, better jobs, and better lifestyle. This urbanisation leads to an increase in informal houses on available vacant land adjacent to the town.

The Municipality is currently formalizing all informal settlements in the two urban areas.

The Department of Human Settlement is currently constructing rural housing to curb the migration of people to urban areas. The Municipality is also disposing of land for residential and business developments in both towns.

(See attached for further information regarding current housing provision.)

In summary, both towns are similar in their bustling main streets with higher density and larger buildings close together, with a variety of older and newer mostly residential structures surrounding this and then with these residential areas blending into the rural residential areas to the outskirts of the towns.

A more recent aspect is the location and construction of large institutional buildings not in the town centres but more haphazardly placed on the town edges.

2.12 SUMMARY OF INFRASTRUCTURE ASPECTS

A summary of the status quo of the infrastructure aspects of the project is given below. Please note that this is to be updated for the final document, and the supporting, more detailed document is in the annexure.

2.12.1 Electrical

2.12.1.1   KwaBhaca:

Electrical data from the client show that the greater part of KwaBhaca is serviced by an electrical grid. Visual observations indicate that it is mainly provided through elevated 22Kv electrical supply lines between poles.

Closer analysis reveals that the data may be outdated because visual observation has found that some areas from where the data were received lack electrical lines but do have elevated supply lines.

2.12.1.2   EmaXesibeni:

Electrical data from the client show that the greater part of the EmaXesibeni is serviced by an electrical grid. Visual observations indicate that it is mainly provided by means of elevated 22Kv electrical supply lines between poles. Closer analysis reveals that the data may be outdated because visual observation has found that some areas from where the data were received lack electrical lines but do have elevated supply lines. While it is assumed that these are also 22kV lines, this will have to be verified by the client.

This has specifically been noted in the area around some of the newer developments such as the Engen garage and Quick Stop, and the new shopping centre on Nolangeni Street.

2.12.2 Roads

2.12.2.1   KwaBhaca:

The road network in Mount Frere consists of municipal, provincial and national roads.

In terms of **TRH26: South African Road Classification and Access Management Manual**, the N2 Section 19 (national route) passing through the Mount Frere CBD is a Class 1 route. All traffic from and to destinations to the north and south of Mount Frere must travel along this route through the town centre to reach their destination.

There are no other obvious routes similar to the N2 near Mount Frere that would keep through traffic out of the town centre.

Two provincial roads pass through the study area precinct, namely DR08015 (R405), a class 3 route that links the town with the R56 to the north approximately 25km west of Matatiele, and DR 80129, a class 4 route that serves villages and communities to the south-east of the town.

All other routes are municipal routes classified as either class 4 or 5 routes.

Observations regarding the condition and management of roads in KwaBhaca include:

- The N2 functions as the main road of the town. The R405 (Class U3) is a provincial road linking to the N2 from the west, while another provincial road (Class U4) joins the N2 to the south of the town from the east. The latter is a gravel road and does not seem to feature prominently. The N2 serving as the main road of the town is not ideal and causes much congestion throughout the CBD. Road

surfaces are generally in fair condition, but many need resurfacing/resealing. Road calming measures, especially along the main road/N2 through the CBD area, are inadequate.

- The Arup Traffic Study (2015) highlighted this problem as significant, but to date, it appears that none of the recommendations regarding traffic safety have been implemented. Pedestrian crossings and other road markings have faded and need repainting. The intersections along the N2 in the CBD are unsafe due to inadequate road signage and poor paint markings.

- Vehicles parked along both sides of the road on either side of the intersections also cause drivers from side roads to be largely unsighted before entering the main through-fare of traffic, creating extremely hazardous situations for vehicles and pedestrians.

- Parallel roads vary in condition but are generally fair.

- All roads in the CBD are generally congested due to current uncontrolled parking and loading operations impacting on through traffic flow, and which is aggravated by a general shortage of formal parking, lack of compliance with traffic regulations and possibly a lack of enforcement of such regulations. This is especially problematic along the N2. as through traffic is delayed by these conditions.

- Congestion occurs when parking bays are occupied and when delivery bays are occupied with private vehicles or minibus-taxis. This results in delivery vehicles having to park in the traffic lane and obstructing other traffic.

- A **Traffic Impact Study for Mount Frere** prepared by Emonti Consulting Engineers cc during 2011 for the Umzimvubu Local Municipality proposed some infrastructural and management measures to improve traffic operations in the town.

- The infrastructure measures include reconfiguring road markings and parking bays, providing exclusive right-turn lanes at the major junctions along the N2, provision of raised pedestrian tables on the N2, provision of new public transport facilities, provision of street lighting, provision of additional lanes on major streets approaching the N2 and provision of speed humps on residential streets.

2.12.2.2   EmaXesibeni:

The road network in EmaXesibeni consists of municipal, provincial and national roads.

In terms of TRH26: South African Road Classification and Access Management Manual, the N2 Section 20 (national route) passing EmaXesibeni is a Class 1 route. All traffic from the north and south travels along this route to reach their destination.

The only safe formal access to the town from the N2 is located at the existing Engen filling station on the north-eastern edge of EmaXesibeni. The access road currently traverses private property, and it is the author's understanding that there is currently a dispute between the Municipality and the landowner.

Additional informal access is situated on the western edge of the town centre. This location is unsafe given the road layout and lack of sight distance that can be achieved along the N2 both to the north and the south.

A provincial road, DR08102, a class 4 route that links the town with villages and communities to the east of the town, passes through the study area precinct.

All other routes are municipal routes classified as either class 4 or 5.

Construction drawings on the Main Road between the Municipal Offices and the N2 are available and were analysed. The following observations have been made regarding the existing road infrastructure in EmaXesibeni, and more specifically the area around the CBD.

2.12.2.3   Traffic Management

Observations regarding traffic management of roads in KwaBhaca and EmaXesibeni include:

- The roads in the CBDs are generally adequate to accommodate traffic demand. However, localised congestion occurs as a result of the high levels of pedestrian traffic associated with public transport activity as well as the use of sidewalks and verges for informal loading and parking. Pedestrians are forced to walk in the roadway and compete for space with vehicular traffic – an unsafe situation.

- Also, a lack of formal off-street parking places pressures on the limited on-street parking that is available with the result that sidewalks are used for parking.

- A general lack of compliance with traffic regulations and possibly a lack of enforcement of such regulations contributes to the congested conditions.

- The management measures include the increased law enforcement and prohibition of parking along street sections.

(See attached annexure for more detailed status quo assessment of the roads of the two towns).

2.12.3 Sewerage

2.12.3.1   KwaBhaca:

No technical sewerage information (GIS, drawings, etc.) has been received to date. The Wastewater Treatment Works (WWTW) is located on the north-eastern edge of town, next to the residential area (according to Google Earth).

The Client confirmed the following via email correspondence:

- o The WWTW can accommodate the current wastewater flows.
- o The peri-urban areas of Spilini, Lubacweni and Badibanisi are provided with VIP pit latrines.
- o No water-born sanitation systems are available, except at St Georges School in Lubacweni.
- o Problems such as ageing sewer infrastructure, dilapidated and vandalised sewer infrastructure, and theft of sewer infrastructure are experienced.

2.12.3.2   EmaXesibeni:

No technical sewerage information (GIS, drawings, etc.) has been received to date. The Wastewater Treatment Works (WWTW) is located on the outskirts of town about 1km west of the residential area (according to Google Earth).

The Client confirmed the following via email correspondence:

- o   The WWTW capacity is 1.5 ML/day and can accommodate the current wastewater flows.
- o   Santombe makes use of pit/septic tanks.
- o   The area of Chitwa experiences a high volume of blockages as a result of a design problem and the dumping of illegal foreign objects in the sanitation system.
- o   Problems such as ageing sewer infrastructure, dilapidated and vandalised sewer infrastructure, and theft of sewer

infrastructure are experienced.

2.12.4 Stormwater

2.12.4.1 KwaBhaca:

No technical stormwater information (GIS, drawings, etc.) has been received to date. It is assumed that the stormwater system consists of a standard kerb/channel combination or open drainage canals (V-drains) and is not a piped network with catch pits. Visual checks via Google Earth reveal areas with damaged channels and grids.

- **EmaXesibeni:**

No technical stormwater information (GIS, drawings, etc.) has been received to date. It is assumed that the stormwater system consists of a standard kerb/channel combination or open drainage canals (V-drains) and is not a piped network with catch pits. Visual checks via Google Earth reveal areas with damaged channels and grids.

2.12.5 Water

2.12.5.1 KwaBhaca:

During its investigation, the Consortium received water data regarding the following from the Client in the form of shapefiles:

- o Abstraction Points
- o Boreholes
- o Reservoirs
- o Standpipes
- o Water pipes

These shapefiles were converted into kmz files on GIS that can be viewed in Google Earth. Layout drawings were produced in PDF format

to show the existing water infrastructure. The following shapefiles were received without any useful information linked to them:

- o Reservoirs
- o Boreholes

2.12.5.2 EmaXesibeni:

During its investigation, the Consortium received water data regarding the following from the Client in the form of shapefiles:

- o Abstraction Points
- o Boreholes
- o Reservoirs
- o Standpipes
- o Water pipes

These shapefiles were converted into kmz files on GIS that can be viewed in Google Earth. Layout drawings were produced in PDF format to show the existing water infrastructure. The following shapefiles were received without any useful information linked to them:

- o Reservoirs
- o Boreholes

2.12.6 General

The following problems were identified by the Client and affect the overall Operation and Maintenance (OandM) of infrastructure.

- Administrative Elements:

  - o Lack of law enforcement
  - o Budget constraints
  - o Ageing OandM staff with no staff replacements

- o Transfer of skills
- o Levels of poverty/crime which impact vandalism and theft of infrastructure (sale for cash)
- o Increases in population growth.

- Operation and Maintenance problems:

  - o Dilapidated infrastructure
  - o Ageing water and sewer infrastructure
  - o Vandalism/theft of water and sanitation infrastructure
  - o Growth of villages around town expecting the same service levels as in town.
  - o Eskom load-shedding results in water shortages due to insufficient pumping.

See annexure for further information and maps.

2.13 HERITAGE CONSIDERATIONS

Although not specifically indicated in the tender, there is an understanding that items relating to history and heritage can play a significant part in urban development.

2.13.1 Legislative Context

The role of heritage is highlighted in law and policy documentation. Below is a summary of some of these.

2.13.1.1 ULM Integrated Development Plan, May 2017:

Notably, this document only makes limited mention of heritage and culture. It states, "Our Municipality is a hub of different cultures. We will always respect this diversity, nurture it and promote it to be the defining character of our service approach to our people." In addition to this, the importance of tourism is noted: "The Municipality is exploring competitive advantage through a diverse culture that it possesses; tourism DVD and brochure is showcasing our unique products and as such each year there are tourism celebrations at EmaXesibeni Craft Centre."[18]

2.13.1.2 The ULM Spatial Development Framework, April 2015, Tshani Consulting Cc:

This document identifies the National Heritage Resources Act which highlights Cultural Heritage and Tourism as one of six key socio-economic sections, noting that the vision as a tourism destination is to offer "the most accessible, unique and pristine coastal and mountainous environment and the most authentic heritage and cultural experiences in South Africa attract eco-tourists, nature lovers, cultural tourists, adventure seekers, and sports and businesspeople."[19]

It also notes that "no development should be permitted to disturb declared (or potential) cultural/heritage areas within development nodes."

- Starting with the Constitution:

The notion of Heritage begins in the Constitution of South Africa, Section 24:

"Everyone has the right to an environment that is not harmful to their health and well-being; and to have the environment protected for the present and future generations, through reasonable legislative and other measures that prevent pollution and ecological degradation, promote conservation and secure ecologically sustainable development and use of natural resources whilst promoting justifiable economic and social development".

2.13.1.3 The National Heritage Resources Act (NHRA) – The Notion of a National Estate:

The National Heritage Resources Act (NHRA) [20] sets out a series of concepts that define a starting position for a discussion regarding heritage significance. Important to this is the concept of a '**national estate**' [21] stating that a place or object can be considered part of the national estate if it has cultural significance or other special value by some attributes. Further, in terms of the NHRA, Section 27, SAHRA

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18 ULM Integrated Development Plan, May 2017
19 Review of the ULM Spatial Development Framework, April 2015, Tshani Consulting cc
20 National Heritage Resources Act, 25 of 1999.

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21 Section 3 (3) National Heritage Resources Act, 25 of 1999. The national estate is defined in Section 3 of the NHRA as,' ... those heritage resources of South Africa which are of cultural significance or other special value for the present community and for future generations must be considered part of the national estate and fall within the sphere of operations of heritage resource authorities.

must identify those places with qualities so exceptional that they are of special national significance in terms of the heritage assessment criteria and must investigate the desirability of their declaration as national heritage sites. Section 3 of the Act makes provision for the protection of places to which oral traditions are attached or which are associated with living heritage, and such places must be considered part of the National Estate.

These sites include:

- Places, buildings, structures and equipment of cultural significance
- Historical settlements and townscapes
- Landscapes and natural features of cultural significance
- Geological sites of scientific or cultural importance
- Archaeological and palaeontological sites
- Graves and burial grounds
- Sites of significance relating to the history of slavery in South Africa.

2.13.2 Who is the Community?

Heritage needs a community. The subject of the composition of this community is an interesting and important contemporary heritage question. Who is this precinct, its places, structures, objects and stories important to? The premise here is that heritage is intrinsically linked to an individual or group and without this link, there is, arguably, no heritage. It is to be emphasised that the heritage resources concerned satisfy the attributes contemplated by Section 3 (3) to form part of the national estate and that the degree of their significances can be described in the definition of cultural significance in the Act and further elaborated on by Heritage Western Cape [22] and others.

Important questions to ask here are:

- Who is the community/communities?
- What are their interests in the heritage concerned and how do they benefit from it?
- Are there specific heritage-related interest groups that focus on particular (and often important) heritage aspects in the area?

Figure 53: Aerial view of the historical building in EmaXesibeni.

Address: N2, Mt Frere
Contact Person: Shirley Batyi
Tel: 039 255 8506
Cell: 082 747 0435

Figure 54: Memorial to King Madzikane.

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[22]Heritage Western Cape, 'A Short Guide and Policy Statement on Grading, Version 6'. It is noted that Heritage Western Cape documentation is referenced here not because it is the relevant authority but rather because they have the most detailed documentation relating to these matters.

2.14 SUMMARY OF SPATIAL CHALLENGES AND OPPORTUNITIES

Considering the development of this project towards a project-based implementation report, a useful summary of the status quo understanding of both towns is found through describing the towns individually through two methods:

By defining edges, thresholds and gateways, so that the towns are understood in terms of scale, future development, sprawl and the urban edge. This approach is informed by the National Development Plan's description of the Built Environment aspects of a Spatial Development Framework, such as gateways and destinations, movement routes, activity streets and hubs of activity, future development trends and densities. It also allows for issues of concern such as town sprawl, the haphazard edge of town development and the 'urban edge' to be observed.

The following definitions are useful:

- Edges.

    These are perceived edges to the town as a compact development that is different from the lower density and sprawling rural development around the town. This is not the formally defined urban edge but rather the elements of topography, roads, watercourses and density edges that define the town as different from its larger context. This is an exercise that is highlighted in several policy documents regarding a concern for town sprawl and for attending to the practicalities of providing infrastructure.[23]

It is observed that policy and good town development practice promotes increased densities and compaction of towns.

- Thresholds and gateways.

    These are places in the town where there is an observable sense of the place being a threshold (between different parts of the town) or being important entrances and exits from the town or parts of the town.

    It is observed that good town development practice is to strengthen these gateways and thresholds, increase their capacity and safety and improve their wayfinding signage.

- Development projects.

    These are largely infrastructure and building projects that are developed and owned by the state that are in the proposal and implementation phase.

    What has been observable and a key part of the engagements with various parties on this project has been creating an 'inventory' of these development projects. This includes development projects recorded in the work undertaken up to 2016 and summarised in the Precinct Plan documentation. It also includes development projects initiated after this period by various parties that are not part of the Precinct Plan documentation.

2.14.1 KwaBhaca Spatial Challenges and Opportunities

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[23] This provision of infrastructure to the residential areas on the edge of the towns was highlighted by officials.
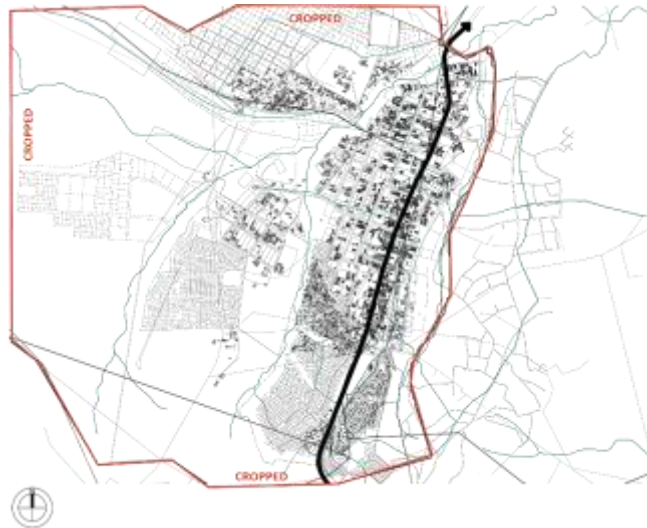
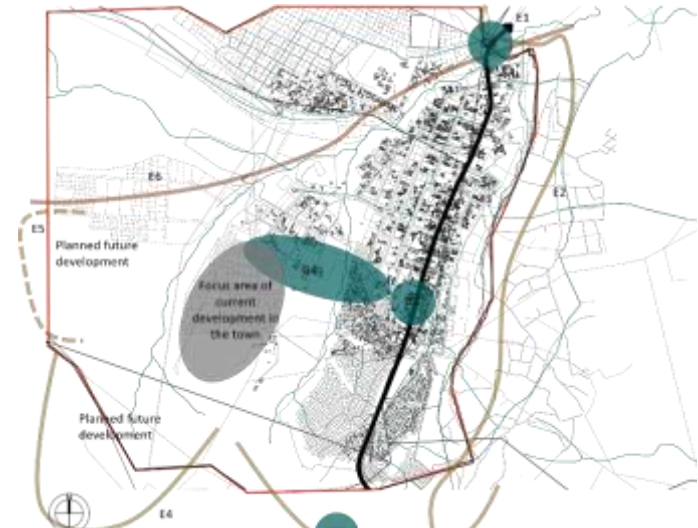Figure 55: Site Plan of KwaBhaca indicating the extent of the study area for the town. (Source: Author).

Figure 56: Site Plan of KwaBhaca indicating Edges, Thresholds and Gateways. (Source: Author).
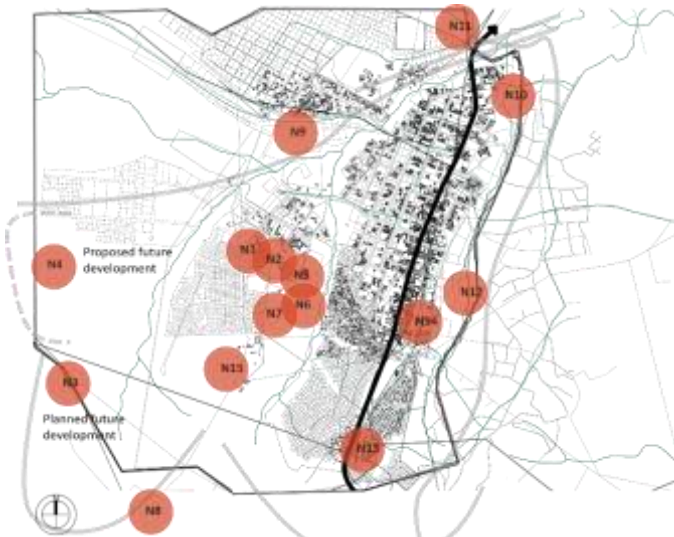

Figure 57: Site Plan of KwaBhaca projects as the identified on-site visit of 6 to 8 October 2020. (Source: Author).
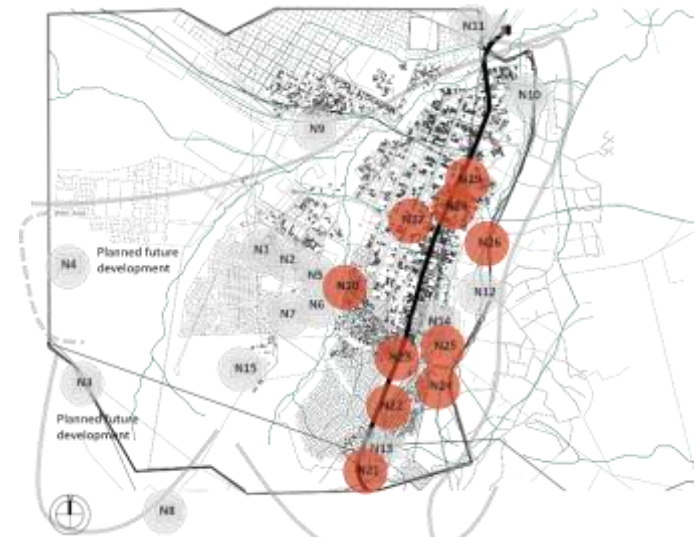

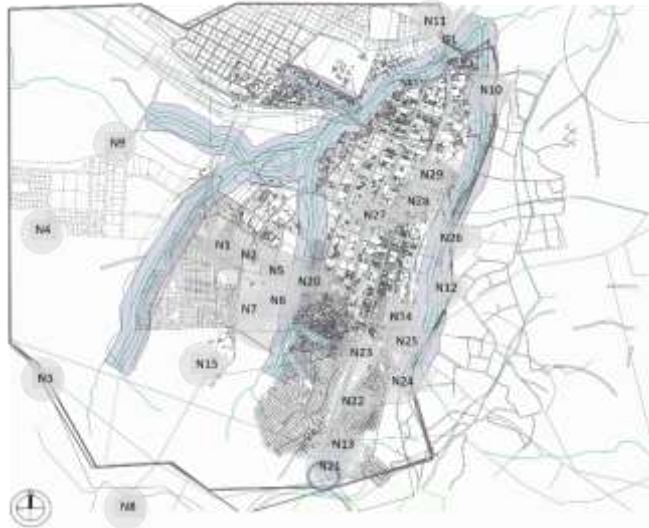Figure 58: Site Plan of KwaBhaca projects as identified in 2016. (Source: Author).

Figure 59: Site Plan of KwaBhaca identifying watercourses. (Source: Author).

Figure 60: Site Plan of KwaBhaca identifying key movement routes. (Source: Author).

Figure 61: Site Plan of KwaBhaca identifying key areas to the town. (Source: Author).
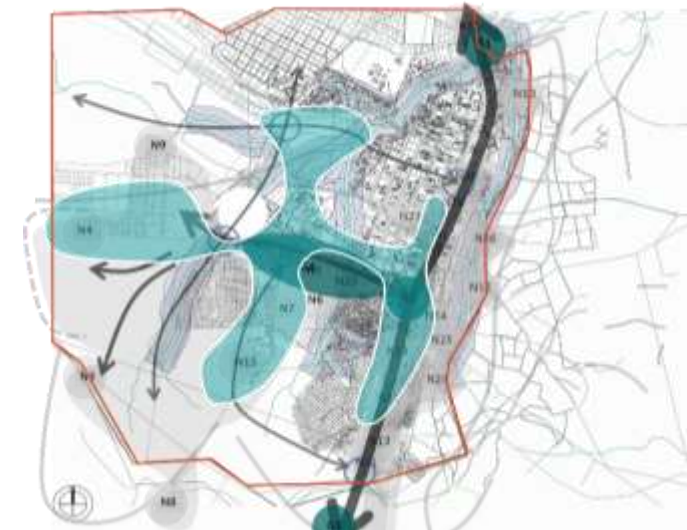

Figure 62: Composite Site Plan of KwaBhaca identifying all aspects. (Source: Author).

2.14.1.1 Edges, thresholds and gateways for Kwabacha

In the understanding of the study area, there are some notable edges, thresholds and gateways. For this town, these are described as follows.

- Thresholds and Gateways

  o G1: Arrival in the town from the north. This is a relatively well-defined gateway of the N2 road arriving at the northern end of the town's main street. This is done by crossing the watercourse over a small bridge.

  o G2: Current 'centre of the town'. This is observed on the N2 at about the centre of the town at the intersection of the N2 and the road to the proposed western development projects of the town. At this intersection, there is significant activity including the current location of the Umzimvubu Local Municipality, banks, shops and public transport.

  o G3: Arrival in the town from the south. This a poorly defined arrival on the N2 entering the town's main road from the south. This arrival is through low density rural residential settlements and, arguably, the sense of arrival into the town is at the Mount Frere Shopping Centre.

  o G4: Threshold between the current town centre and new development centres to the west. This is a key part of the town that connects the existing town and main street to the current and proposed development projects to the west. The existing town and the western part are currently separated by a watercourse.

- Edges

  o E1: This is a not well-defined entrance edge from the north where the town blends into the neighbouring rural residential areas.

  o E2: This is a relatively well-defined eastern edge by the Kucaphothi watercourse. This edge separates the perception of 'town' from the rural residential settlements to the east.

  o E3: This is the defined southern edge where the town blends into the neighbouring rural residential areas.

  o E4: Well defined edge to the southwest where the town and the neighbouring rural residential areas are separated by topography. This is part of the proposed future development of the town.

  o E5: Relatively well-defined edge to the west where the town and the neighbouring rural residential areas are separated by topography. This is part of the proposed future development of the town.

  o E6: The edges to the north-west are not clear in that there is some edge definition by the watercourse here but there is also significant development to the north of this watercourse that then blends into the neighbouring rural residential areas.

Generally, The town does not have strong outer edges and gateways and is observed as a sprawling rural town that blends into its neighbouring rural residential settlements.

Its internal gateways (identified as G2 and G4) and strong observable gateway places can be used to strengthen the Concept Proposal for the town.

2.14.1.2   Development Projects for KwaBhaca

In the understanding of the study area above, some areas are notable areas of focus, interest and development. This has focussed largely on infrastructure-driven 'projects'.

Key development projects as identified after a site visit from the 6th to the 8th of October 2020:

N Number	Name	Description / Notes
N1	Infill1: Proposed church and shop.	o Provision for a church and a shop. o The church site is 2455 m2 and the shop site is 2682 m2. o Subdivision Plan for erf 351 Mount Frere. o The subdivision diagram is dated November 2016. o Identified elsewhere as "Infill 1."
N2	Infill 1b: Proposed single erf residential.	o Subdivision Plan for erf 351 Mount Frere. o This subdivision allows for 9 erven of 500 to 800 m2. o These erven are intended to be for single residential development. o The subdivision diagram is dated November 2016. o Identified elsewhere as "Infill 1B."
N3	Proposed middle-income residential.	o Subdivision Plan for erf 351 Mount Frere. o This subdivision allows for 244 erven for single residential development. o The subdivision diagram is dated November 2016.
N4	Proposed mixed-use with a regional mall.	o Large subdivision to the west of the town for various mixed-use land use, including a proposed 'Regional Mall'. o Subdivision Plan for erf 351 Mount Frere. o The subdivision diagram is dated November
		o 2016. o Known as Portion 1 (Site C).
N5	Infill 2: Proposed townhouses, flats and Public Open Space (POS).	o Subdivision Plan for erf 351 Mount Frere. o This subdivision allows for townhouses, flats and public open space. o The subdivision diagram is dated November 2016. o Identified elsewhere as "Infill 2."
N6	Infill 2b: Proposed single erf residential.	o Subdivision Plan for erf 351 Mount Frere. o This subdivision allows 9 single residential units. o The subdivision diagram is dated November 2016. o Identified elsewhere as "Infill 2B."
N7	Infill 3: Proposed commercial, institutional, residential.	o Subdivision Plan for erf 351 Mount Frere. o This subdivision allows for commercial, institutional and residential development. o The subdivision diagram is dated November 2016. o Identified elsewhere as "Infill 3."
N8	Proposed Indoor shooting range.	o Locality Plan for Shooting Range on erf 351 Mount Frere. o This is not a subdivision but the provision of an Indoor Shooting Range facility on the parent erf 351.
N9	Portion 2 site 1	o Subdivision Plan for erf 351 Mount Frere. o This subdivision allows for industrial development. o The subdivision diagram is dated November 2016.
N10	Infill 4 - Proposed business.	o Subdivision Plan for erf 351 Mount Frere. o This subdivision allows for business and Public Open Space development. o The subdivision diagram is dated November 2016. o Identified elsewhere as "Infill 4."
N11	Infill 5 - Proposed commercial.	o Subdivision Plan for erf 351 Mount Frere. o This subdivision allows for commercial development. o The subdivision diagram is dated November 2016. o Identified elsewhere as "Infill 5."

N12	Portion 3 site mu 2.	o Subdivision Plan for erf 351 Mount Frere. o This subdivision allows for mixed-use, taxi holding, residential and parking development. o The subdivision diagram is dated November 2016. o Identified elsewhere as "Infill 3 (site MU2)."
N13	Proposed new hawker stalls.	o Project funded by the ECDC. o Drawing 2185B – 102 – PR02 for Site A – Block 2 Plan, Sections and 3D Views by Ikamva Architects. o Drawing dated 19 February 2018.
N14	Existing fresh produce market.	o The existing facility in KwaBhaca.
N15	Proposed new Government Precinct including new municipal offices.	o The existing facility in KwaBhaca.

These development projects are defined in further detail in the annexure.

In addition to the above projects/development nodes, previous development planning (largely from 2016) has also been considered.

This is not an exhaustive summary of the possible outcomes from the Conceptual Precinct Framework Plan, May 2016 by Tshani Consulting, but rather a selection of possible development projects largely focused on the Transportation aspects. These relate to the important aspect of movement that is highlighted further in this document.

The following has been identified:

N Number	Name	Description[24]
N20	Road upgrade link to Sophia Grace.	o This is the key connecting road from the existing main road westwards over the watercourse to the current and future development to the west. o The importance of this road is highlighted further in this document.
N21	Traffic circle.	o This is a proposed traffic circle to the southern entrance to the main street.
N22	Public transport rank 3.	o Upgrade to the existing Bus Rank
N23	Public transport rank 2.	o New Taxi Rank in the centre of the CBD, in the vicinity of the Police Station
N24	Primary bypass road.	o The construction/completion of a mobility road around the core of the CBD. The road will run along the eastern side of the CBD. o The road to being designed to accommodate freight and truck traffic. o The road will be a two-lane single carriageway road.
N25	Public transport holding area.	o Construction of a new taxi holding area, west of the new PT Rank #2
N26	Truckstop and holding area.	o Construction of a new truck stop/truck holding area along the new primary by-pass road.
N27	Secondary bypass road.	o The construction/completion of a mobility road around the core of the CBD. The road will run along the western side of the CBD. o The road to being designed to

[24] Most of these descriptions are from the Conceptual Precinct Framework Plan, May 2016 by Tshani Consulting,

		accommodate light vehicle primarily. o The road will be a two-lane single carriageway road.
N28	Public transport rank 1.	o New Taxi Rank on the northern side of the CBD
N29	Traffic circle.	o This is a proposed traffic circle to the northern entrance to the main street. o

These projects identified in previous development planning are well documented in those previous reports and are not further elaborated on here unless directed to the focus of this document.

Figure 63: Site Plan of EmaXesibeni indicating the extent of the study area for the town. (Source: Author).

Figure 64: Site Plan of EmaXesibeni indicating Edges, Thresholds and Gateways. (Source: Author).

Figure 65: Site Plan of EmaXesibeni projects as the identified on-site visit of 6 to 8 October 2020. (Source: Author).

Figure 66: Site Plan of EmaXesibeni indicating some projects as identified in 2016. (Source: Author).

Figure 67: Site Plan of EmaXesibeni identifying watercourses. (Source: Author).

Figure 68: Site Plan of EmaXesibeni identifying key movement routes.. (Source: Author).

Figure 69: Site Plan of EmaXesibeni identifying areas of the town. (Source: Author).
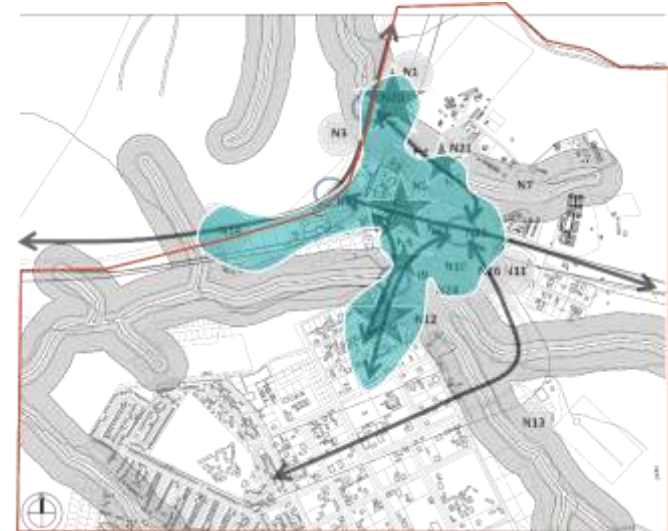

Figure 70: Composite Site Plan of EmaXesibeni identifying all elements. (Source: Author).

2.14.2 EmaXesibeni Spatial Challenges and Opportunities

2.14.2.1   Edges, thresholds and gateways for EmaXesibeni

In the understanding of the study area, there are some notable edges, thresholds and gateways. For this town, these are described as:

- Gateways and Thresholds

  o G1: Arrival Town From West is on the N2 and this first potential entrance to the main street of the town (identified as G1) is problematic and discussed further in this report.

  o G2: Arrival To Town From West is on the N2 and the second entrance to the town (identified as G2) is further to the north and is observed as the primary entrance to the town. This is alongside the current Engen Service Station.

  o G3: Arrival To Town From East is observed to be created by the larger institutional buildings here such as a school and the new Alfred Nzo Local Municipality offices.

  o G4: This is the key existing threshold to the town on the eastern end of the existing main street.

  o G5: This is an underdeveloped but important threshold to the south of the existing main street that connects the 'upper' town to the 'lower' town.

- Edges

  o E1: This is a well-Defined Western Edge created by the N2 Road And the topography.

  o E2: Relatively well-Defined Eastern Edge created by larger institutional buildings in this part of the town.

  o E3: This is a poorly Defined Southern Edge where the lower town residential areas blend into the neighbouring rural residential areas.

In general, this town is relatively well defined by edges, except those to the south. The town has limited and relatively well-defined gateways, with the two internal gateways (identified as G4 and G5) being important for the future development of the town.

| N13 | New Cemetery. | |
| N14 | Retail, Industrial, | |

2.14.2.2 Development Projects for EmaXesibeni

In the understanding of the study area above, some areas are notable areas of focus, interest and development. This has focussed largely on infrastructure driven 'projects'.

Key projects as identified after a site visit of 6 to 8 October 2020:

N Number	Name	Description
N1	New Government Precinct Including New Municipal Offices.	o New Government Precinct including new municipal offices. o Proposed precinct to the north of the existing CBD. o This precinct is to include N2 below.
N2	Future Municipal Offices.	
N3	'Welcome' Signage.	
N4	Development Site:	
N5	New Linking Road	
N6	New Development Site:	
N7	Road To Hospital Upgrade.	
N8	Development Site: Hawker Trading Stalls.	
N9	Botanical Garden And Children's Play Area.	
N10	Development Site: Retail And Commercial Development.	
N11	Development Site - Residential	o Erf 15 Development Site: Middle Income Housing Residential Development.
N12	Sports Facility	o With a new school adjacent.

These development projects are defined in further detail in the annexure.

Further, development projects identified previously (largely in 2016) are identified as:

N Number	Name	Description
N20	New truck stop at the western entrance to the town.	
N21	Possible CBD Bypass Road.	
N22	Public Transport Rank 1.	
N23	Pedestrian Priority Area.	
N24	Road formalisation.	
N25	Loading bays and traffic circle.	
N26	Off-street parking.	

2.14.3 Comment on Recent Development in Both Towns

Further to the Consortium's site visit to both towns from the 6th to the 8th of October 2020, it is notable that there have been significant new project proposals and implementation since the Development Framework Plan of 2016. Much of the new proposals and implementation projects do not seem to align fully with this previous plan.

Some observations on the recent developments of the towns:

- There are noticeable uncontrolled developments and illegal building works in both towns.
- There is a lack of definition and enforcement of an urban edge to the towns. This may lead to town sprawl and the negative impacts that accompany this.
- It is understood that bulk services are a significant challenge to both towns.
- It is understood that land availability and land ownership is a significant challenge to both towns.

Some observations regarding the alignment of the recent developments of the towns concerning the Precinct Plan work of 2016:

- Although there is land being made available anticipated for much needed future growth, this seems to be located simply to allow the best access for bulk service to the sites and nodes not fully consider other factors such as the Precinct Plan work of 2016.
- The sites for this future growth are largely poorly connected, at the edge of the existing towns and often at odds with sustainable planning and urban design principles of compact and well-connected towns.
- The proposed allocation of large sites on the edges of the towns to shopping malls is at odds with sustainable planning and urban design principles of compact and well-connected towns.
- Experience in small towns in South Africa is that the development of large retail malls on the outskirts of towns can have a negative effect on the sustainability of the existing town centre, it is business and 'purpose for being'.

There are mitigating factors that can improve on these potential risks. These are highlighted in the various 'Renewal Principles' and the

'Concept Proposals' for the two towns. This is then further elaborated and defined in the 'Key Development Themes' of the Implementation Plan.

2.14.4 Potential Risks Related to Recent Development in Both Towns

In summary, the issues of risk and concern at this stage of summarising the situational analysis and providing a Concept Proposal for moving forward are physically observable and also highlighted in several policy documents.

The ULM Rural Settlement Development Plan of 2014 highlights, amongst others, issues such as:

- "Understand the urban-rural interface in certain parts of the study area.
- Controlling haphazard growth and development, thus promoting optimal use management of land in rural areas.
- Discouraging illegal occupation of land with due regard to the informal land development processes."[25]

The potential mitigating factors to these perceived risks, as defined in this report, are summarised as follows.
- An understanding of the current biophysical, socio-economic and built environment context.
- Understand how this situational analysis relates to an existing policy, notably the 'key documentation' highlighted previously in this report.
- Create a Concept Proposal that considers this more complex context and allows for further development of the towns to be undertaken in a considered, controlled and appropriate way.

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[25] ULM Rural Settlement Development Plan, 2014

2.15 SUMMARY TO SITUATIONAL ANALYSIS

To summarise the Situational Analysis chapter, each town is defined by a concept proposal in two parts:

- A summary Concept Proposal diagram.
- A composite Concept Proposal diagram. This highlights an element of the Concept Proposal such as gateways, movement routes and development projects.

2.15.1 KwaBhaca – A Concept Proposal

KwaBhaca is observed to be a town of several parts. Three notable parts that have become apparent through this work are:

- The original town centre, as identified in light blue. This a long north to south aligned part of the town centre on the main road of the town centre – the N2. It is structured by the mostly straight N2 road and a traditional grid of streets.

- The future development western part of the town is identified in red. This is a partially developed large part of the town to the west of the original town centre with limited established infrastructure. There are significant proposals for the development of this part of the town.

- The connecting central part of the town is identified by the dark green. This is the small but important part of the town that connects the two previous parts. It is a threshold defined by a watercourse and a road that connects the 'centre of town' westwards to the new development part.

Figure 71: Summary Concept Proposal diagram for KwaBhaca. (Source: Author).
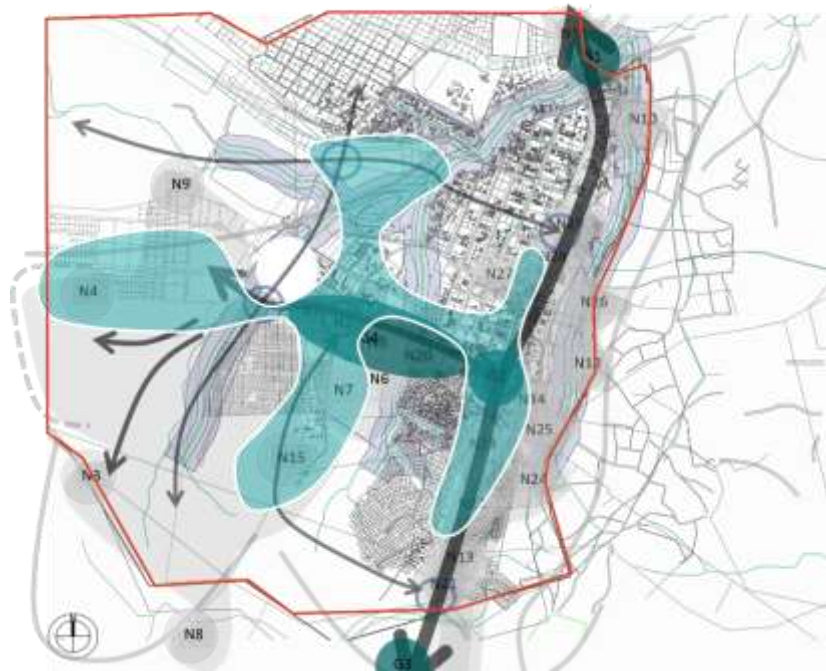
Figure 72:: Composite Concept Proposal diagram for KwaBhaca. (Source: Author).

The composite Concept Proposal diagram for KwaBhaca expands on the previous diagram and overlays key information relating to town edges, gateways, movement routes and development projects.

What is significant is the strategic position of the connecting part (identified as G4). This needs to be considered within the context of other aspects of the Situational Analysis, but notably the Bio Physical observations regarding watercourses.

2.15.2 Emaxesibeni – A Concept Proposal

As with KwaBhaca, the concept proposal for EmaXesibeni is informed by the layout of the town, its historical development and current development aspirations. In this, there are different parts of the town. The smaller upper part (identified in red below) includes the main commercial street, public transport and institutional offices. It is well connected to the N2 freeway to the west.

To the south of this, over the existing watercourse, is the larger residential areas of the traditional grid of streets and newer areas to the west of this. This traditional grid of streets was the original layout of the town and is home to older institutional buildings, several churches and some historical buildings.

The area between the 'upper' and 'lower' town, highlighted in darker green, is an important connecting space along the existing watercourse that connects the two parts.

Figure 73: Summary Concept Proposal diagram for EmaXesibeni describing the current town centre in red, the larger residential areas to the south and the linking area between the two. (Source: Author).
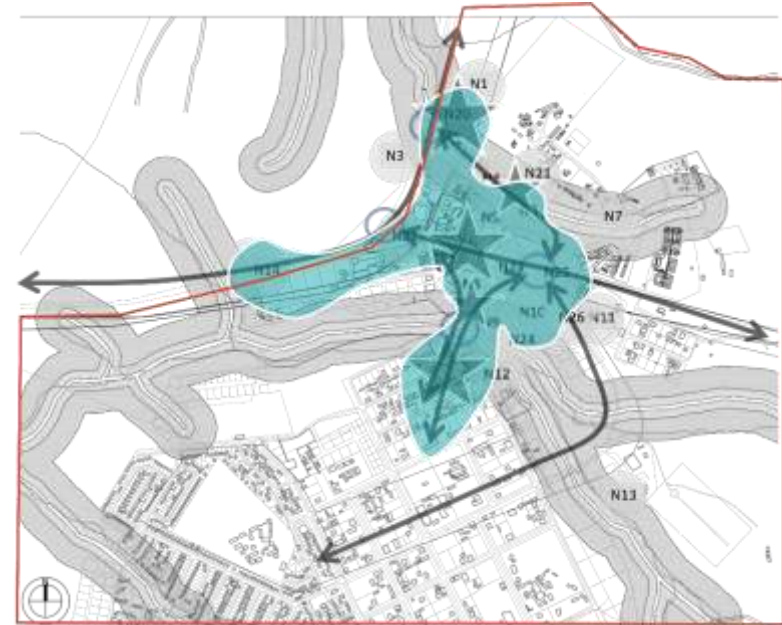

Figure 74: Composite Concept Proposal diagram for EmaXesibeni highlighting key gateway, threshold and development projects. (Source: Author).

The overlay of the key gateway, threshold and development projects above suggests a north to the south line of elements and projects that are important to the future development of this town. These are, in summary, and starting from the north:

- The focus is on current development in the town (indicated by N1) is to the north of the town alongside the N2 freeway and the important entrance to the town from this side (indicated by G2).
- This part of the town is then connected to the existing main street to the south by development project and infrastructure proposals.
- The existing main street of the town runs from the N2 in the west, eastward. Several development project proposals (including those identified in the 2016 Precinct Plan exercise) and the important intersection/gateway (identified as G4) are identified here.

- Southwards from this towards and over the existing watercourse and towards the southern residential areas key linking infrastructure and development projects are identified.

Figure 75: EMAXESIBENI 2020.

3   SPATIAL PROPOSALS

An outcome of the Policy Review, Principles and Situational Analysis above is a series of site plan diagrams collating the various information gleaned. It became apparent at this stage (and notably after the site visit) that there had been significant planning work undertaken by the two towns, the local and district municipalities over the past five years, and that an important part of this stage of the work was to source and collate all existing information, largely relating to current 'projects'.

This needs to be coordinated in the short term and the long term. Both towns have approved Zoning Schemes and 'Conceptual Precinct Framework Plans'. The Umzimvubu Local Municipality also has significant documentation including an IDP and an LED strategy. Each of these, as a deliverable, identify needs, growth and strategic development. These have been summarised earlier in the report.

As a summary of these and focus of works going forward, the following specific items are noted:

- Potential for additional appropriate development sites to be identified and developed. This includes institutional, commercial, industrial and residential.
- The necessity for upgrading physical linkages of the area. This includes improvements to existing roads and pavements as well as new linkages to better connect the towns.
- The necessity for increased local economic development. This is extensively described in the LED and other strategic documentation and is an underlying key aspect of the works.
- Further, develop the Municipality and town's tourism potential. This is highlighted in several documents noted previously and is not a key focus of this report.

- The necessity to protect environmentally sensitive areas with a focus on watercourses.
- Providing improved physical and social services with a focus on infrastructure, its current limitations and Maintenance issues.
- Places for community and economic activities, such as informal trading.
- Public transport and the aspects that relate to the movement of people.
- Residential accommodation and a wider range of accommodation choices.
- Prioritising infill development and brownfields developments before new greenfield development is planned.

This motivated the development approach to this project is identified as two parts:

- Long Term Spatial Concepts and Strategies.
  This is a long-term Town Planning driven response to the two towns that consider the status quo and provides for long term strategic planning.

- Short Term Inventory of Projects.
  This is a summary of the investigations into what development projects have historically been considered for the two towns and what new development projects are in the planning or implementation stage after the last work of this nature.

3.1 LONG TERM SPATIAL CONCEPTS AND STRATEGIES

3.1.1 Development Approach

Opportunities, issues, and challenges identified in the preceding section provide a status quo of the study area.
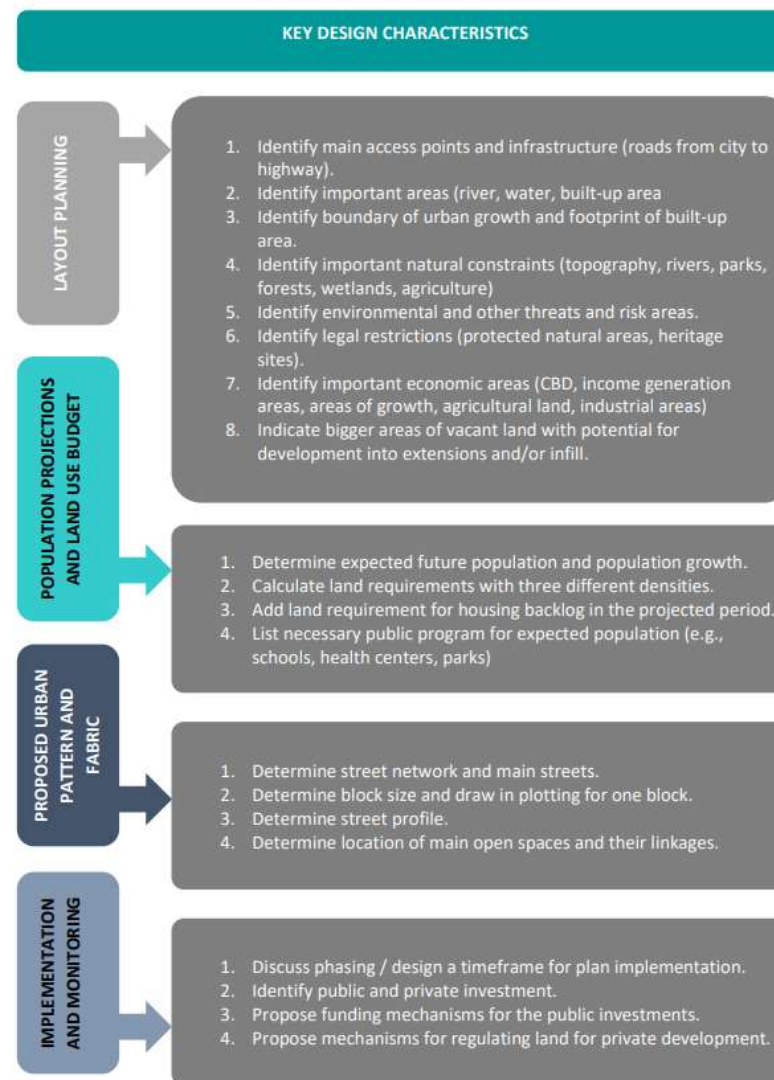

Figure 76: Key 'Design Characteristics' used to guide the Long Term Spatial Proposals.

To set the scene towards the future development of the study area the following principles and approaches needs to be observed. This provides the foundation for future monitoring and evaluation of any development within the study area.

Underlying planning principles followed:

- Establishing a development structure, i.e., identifying basic structuring elements which provide development guidance, certainty, growth opportunities and flexibility.
- Facilitating integration, i.e., ensuring appropriate vertical and horizontal linkage of policies, intensions, and development realities, integrating plans at various levels
- Creating generative systems, i.e., encouraging the establishment of development which generates additional activities, variety, and growth.
- Promoting incrementalism, i.e., acknowledging development as a continuous process, and facilitating an ongoing development process.
- Spatial planning, as a reflection of both physical realities as well as economic, social, environmental, and institutional issues identified in sector-specific investigations.
- Clustering development, i.e., discouraging development sprawl, and encouraging the clustering of compatible development and creating a hierarchy of nodal clusters.
- Drainage Direction, i.e., acknowledging the environmental sensitivity areas surrounding the study area.
- Integrating the natural environment, i.e., positively integrating natural elements in the creation of human and sustainable development.
- Hierarchy of access routes, i.e., utilising various levels of accessibility and guidance for the location of development components.

- Applying urban design principles, i.e., basic planning, and development of design intentions such as permeability, legibility, appropriateness, uniqueness, adaptability, and flexibility.
- Providing realistic development guidance, i.e., ensuring that planning and design are based on physical, economic, social, institutional realities.

While the spatial vision for the long-term development of KwaBhaca and EmaXesibeni, is represented in the land use and movement framework, certain development actions must be taken over the short term. These are as follows.

- Urban Management: existing urban areas and facilities must be managed and maintained to create a high-quality environment for communities. To this effect, priority areas requiring operational interventions have been identified in this plan.

- Urban Design / Place Marketing: due to the nature of both towns as regional service nodes, it is important to create a distinct visual character and a sense of cohesion and legibility for visitors entering the area. To this effect, several urban design principles and priority area are proposed.

3.1.2 Long Term Spatial Development Proposals

3.1.2.1 KwaBhaca Long Term Spatial Development Proposal

Spatial Development Proposals have been provided to indicate the desired future spatial pattern of the focus areas. Key aspects addressed include:

- Proposed development nodes to accommodate the Town Core, Secondary Nodes and suburban areas with supporting linkages and corridors.

- Proposed densification areas to support the town core as well as sub-centres.
- Proposed linkages between the parts of the town.
- Recommended land-use changes and uses as indicated for nodes and corridors identified.

3.1.2.2   EmaXesibeni Long Term Development Proposals

Spatial Development Proposals have been provided to indicate the desired future spatial pattern of the focus areas. Key aspects addressed include:

- Proposed development nodes to accommodate the town core, secondary nodes and suburban areas with supporting linkages and corridors.
- Proposed access points to-and-from EmaXesibeni along the northern and southwestern part of the town.
- Proposed densification areas to support the town core as well as sub-centres.
- Recommended land-use changes and uses as indicated for nodes and corridors identified.
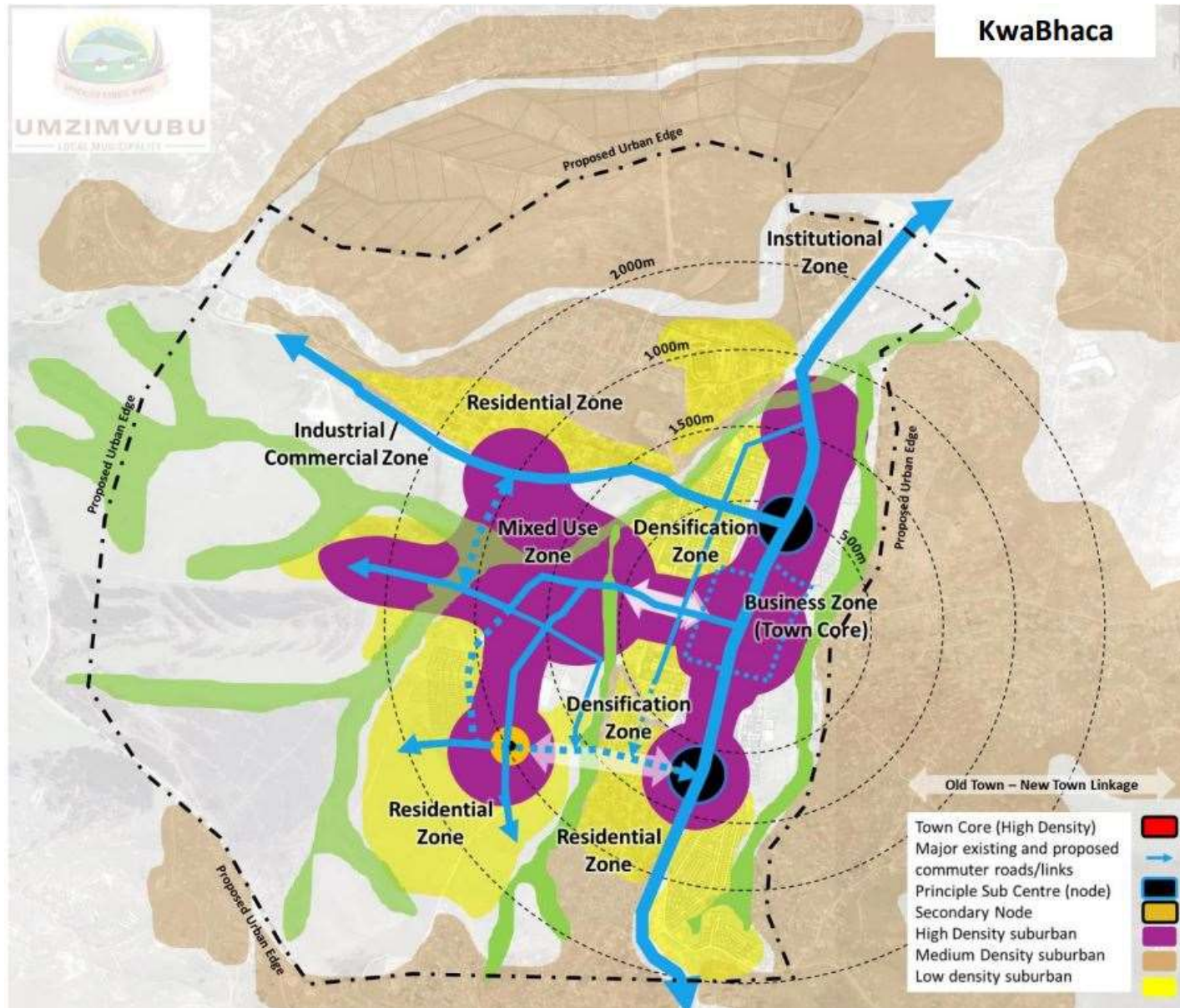
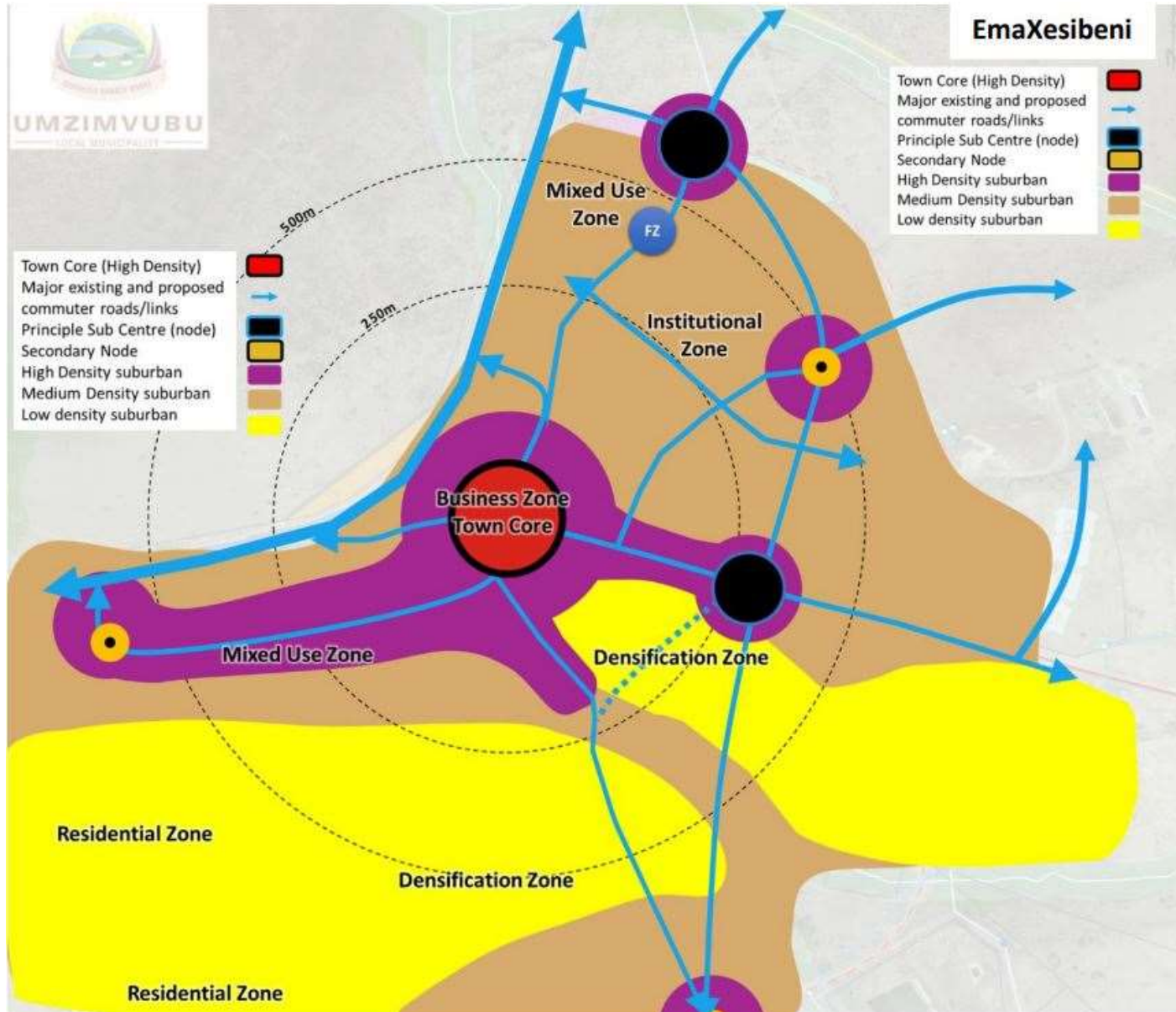Figure 77: KwaBhaca Long Term Spatial Development Proposal.

Figure 78:EmaXesibeni Long Term Spatial Development Proposal.

3.1.3   Long Term Movement Framework[26]

3.1.3.1   General Comments Related to Proposed Road Hierarchy

In new development areas, the width of the roads should be determined by road hierarchy. Uses or activities that generate a lot of traffic should be located along or near the main road, and easily accessed by the public Distributor roads are through roads that go from one part of the town to another, in which ease of movement is prioritized over access to individual plots.

Access roads provide access to individual plots, in which local spatial and environmental quality is prioritized and through traffic is discouraged. When planning the road layout, topography should also be carefully considered.

Roads should be planned perpendicular or parallel to the slope direction, so that water can run off the street. Indicate the main streets for economic activity. If possible, the main road orientation should follow the prevailing wind direction to assure natural ventilation and dust removal for all buildings along the road.

3.1.3.2   General Comments Related to Parking

Provision for parking shall form an inherent part of any new development. Vehicles mustn't be parked within sight triangles at intersections or bends. Designers should consider the provision of on or off-street parking in conjunction with other issues such as driveway access, waste collection etc. In developments with narrow frontages, on-street parking may be problematic and setbacks of entrances and

garages need to be considered to avoid parking back-up into the street system.

Parking provision for commercial and residential developments will be the major challenge that urbanising suburban neighbourhoods will face. Changes in the behaviour and expectations of the population will have to be promoted to get people to shift from a total dependency on the car to walking, cycling, and adopting public transport.

Parking and Loading specifications are clearly defined in the ULM Land Use Scheme.

A summary of the Movement Framework for the two towns is described further by the diagrams below:

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[26] For further information on this, see, Traffic and Transportation Input, For Mount Frere and Mount Ayliff Precinct Plans, Umzimvubu Local Municipality, **Mount Frere**, dated January 2021, by Engineering Advice and Services.
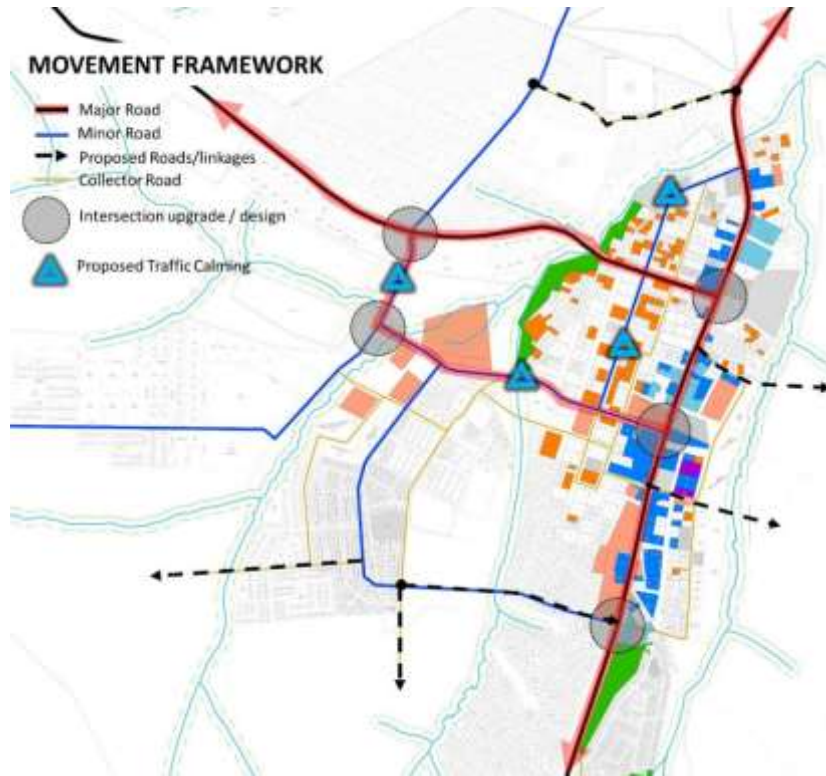
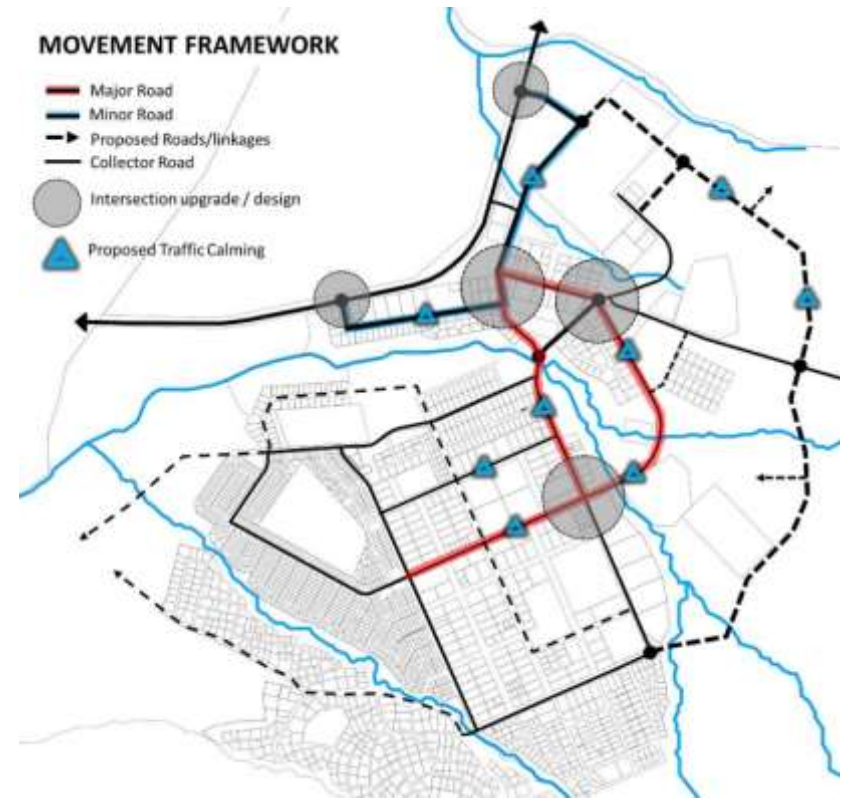Figure 79: KwaBhaca Location Plan - Proposed Long Term Movement Network.

Figure 80: EmaXesibeni Location Plan - Long Term Movement Network.

3.1.4 Long Term Land Use Framework and Land Use Management

3.1.4.1   KwaBhaca

From a Land Use perspective, the priority for KwaBhaca is:

- Infill development (largely of current development projects)
- Consolidating and formalising the current urban structure
- Developing a "new town" towards the west of the N2.

Regarding the CBD for KwaBhaca, the following is noted:

- The current CBD area is relatively unstructured and serves as a corridor with a mix of land uses, serving the surrounding rural and residential communities in terms of retail, personal services, and government services.
- Opportunity exists to develop a secondary neighbourhood development centre that would support the proposed CBD area.
- A development link (activity spine) between the undefined CBD and the proposed "new town" development is proposed.
- Hawker facilities are proposed towards the south along the N2 (Main Road).
- Secondary public transportation facilities would be required to service the proposed neighbourhood centre towards the east.
- Secondary linkages from the east and west are recommended towards the CBD area to ease the existing traffic congestion along the N2 (Main Road).
- The Implementation of the Umzimvubu Precinct Plan and recommendations made will ensure that high quality, attractive environment is established to serve not only the local and surrounding communities but also the passing tourism trade.

Regarding residential development, the following is noted:

- It is proposed that new medium to high-density residential development be confined towards the outer parts of KwaBhaca, more specifically towards the south, southeast, east, north, and north-west.
- Densification should be supported along the secondary collector/minor roads west of the proposed CBD (especially stands more than 1000m²).
- Residential development should ideally be supported towards the north east, southeast and south of KwaBhaca.

Regarding Industrial and Commercial development, the following is noted:

- KwaBhaca currently has a narrow economic base, consisting primarily of retail and services. To expand this base and provide more employment opportunities in future, it is recommended that provision be made for light industrial/commercial development.
- It is proposed that these uses should be located towards the west and southwest of the CBD as well as the east (just south of the major road leading to Matatiele.

Regarding Mixed Use development and densification, the following is noted:

- It is proposed that the area to the north and south of the proposed CBD be reserved for mixed-use development, e.g., professional services, financial services, service industries and business/retail facilities.
- Densification areas are proposed to increase the opportunity for infill and brownfield development, thus creating a more compact town.

Regarding Government Services, the following is noted:

- Development towards the south of the major road towards Matatiele as well as the new Municipal Buildings are recommended for government/municipal services.
- Access from the Matatiele major road and from the N2 along the east of the proposed CBD is proposed to improve accessibility to this zone. [27]
- Public transportation facilities would be required as part of this zone as many residents within the rural community are to visits these services.

Regarding Open Space Networks, the following is noted:

- The river system and related natural areas are not only important from an ecological point of view but also form an integral part of the setting of the town that makes it a more desirable destination.
- This system should be protected and managed.

Regarding the Urban Edge, the following is noted:

- To ensure that urban development does not encroach on important natural and agricultural areas, it is proposed that the urban edge be amended to combat the urban sprawl currently experienced.
- In terms of recent development pressure, no need has been identified to allow for the existing urban edge.
- Ample open land still exists within the proposed edge and options such as densification should also be considered over the long term as opposed to expanding the urban edge.

3.1.4.2 EmaXesibeni

From a Land Use perspective, the priority for EmaXesibeni is:

- Infill development.
- Consolidating the current urban structure.

Regarding the CBD, the following is noted:

- The current CBD area is small, undefined and serves the surrounding rural and residential communities in terms of retail, personal services, and government services.
- Opportunity exists to expand the CBD towards the District Municipal Offices and in the longer term also in the infill area between the District Hospital and the Fire Station towards the north and east.
- The proposed CBD should also include appropriate public transport facilities to ensure accessibility for the surrounding rural residential areas relying on public transport.
- Due to its importance in servicing the surrounding rural community, the EmaXesibeni CBD should increasingly focus on serving the region with both essential and non-essential services.
- The Implementation of the Umzimvubu Precinct Plan and recommendations made will ensure that high quality, attractive environment is established to serve not only the local and surrounding communities but also the passing tourism trade.

Regarding Residential Development, the following is noted:

- It is proposed that new medium to high-density residential development be confined around the CBD and mixed-use corridors/zones as this would improve accessibility to business, government and other services and would decrease the reliance on own/public transport, therefore decreasing traffic congestion within the CBD.

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[27] For further information on this, see, Traffic and Transportation Input, For Mount Frere and Mount Ayliff Precinct Plans, Umzimvubu Local Municipality, **Mount Frere**, dated January 2021, by Engineering Advice and Services.

Regarding Industrial and Commercial Development, the following is noted:

- EmaXesibeni currently has a narrow economic base, consisting primarily of retail and services.
- To expand this base and provide more employment opportunities in future, it is recommended that provision be made for light industrial/commercial development.

Regarding Mixed-Use Development, the following is noted:

- It is proposed that the area to the southwest as well as the northeast (north of Main Road) of the CBD be reserved for mixed-use development, e.g., professional services, financial services, service industries and business/retail facilities.

Regarding Government Services Development, the following is noted:

- Development towards the east, west, and north of the existing District Hospital is envisaged.
- Access directly from the N2 is recommended to improve accessibility to this zone as this will greatly improve access to the Hospital. [28]
- Public transportation facilities would be required as part of this zone as many residents within the rural community are to visits these services.

Regarding Open Space Networks, the following is noted:

- The river system and related natural areas are not only important from an ecological point of view but also form an integral part of the setting of the town that makes it a more desirable destination. This system should be protected and managed.

Regarding the Urban Edge, the following is noted:

- To ensure that urban development does not encroach on important natural and agricultural areas, it is proposed that the urban edge be amended to combat the urban sprawl currently experienced.
- In terms of recent development pressure, no need has been identified to allow for the existing urban edge.
- Ample open land still exists within the proposed edge and options such as densification should also be considered over the long term as opposed to expanding the urban edge.

For both towns, see the Umzimvubu Local Municipality Urban Regeneration Strategy, **Town Planning Proposals**, for EmaXesibeni and KwaBhaca, Version 6, February 2021, by Maswana Group of Companies Annexure for further information and detail, including:

- Detail regarding land-use proposals.
- Proposed zoning and development controls.
- Population projections about the future demand for housing, including the need for related infrastructure.

The long term land use framework and land use are summarised in the Location Plans below:

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[28] For further information on this, see, Traffic and Transportation Input, For Mount Frere and Mount Ayliff Precinct Plans, Umzimvubu Local Municipality, **Mount Ayliff**, dated January 2021, by Engineering Advice and Services.
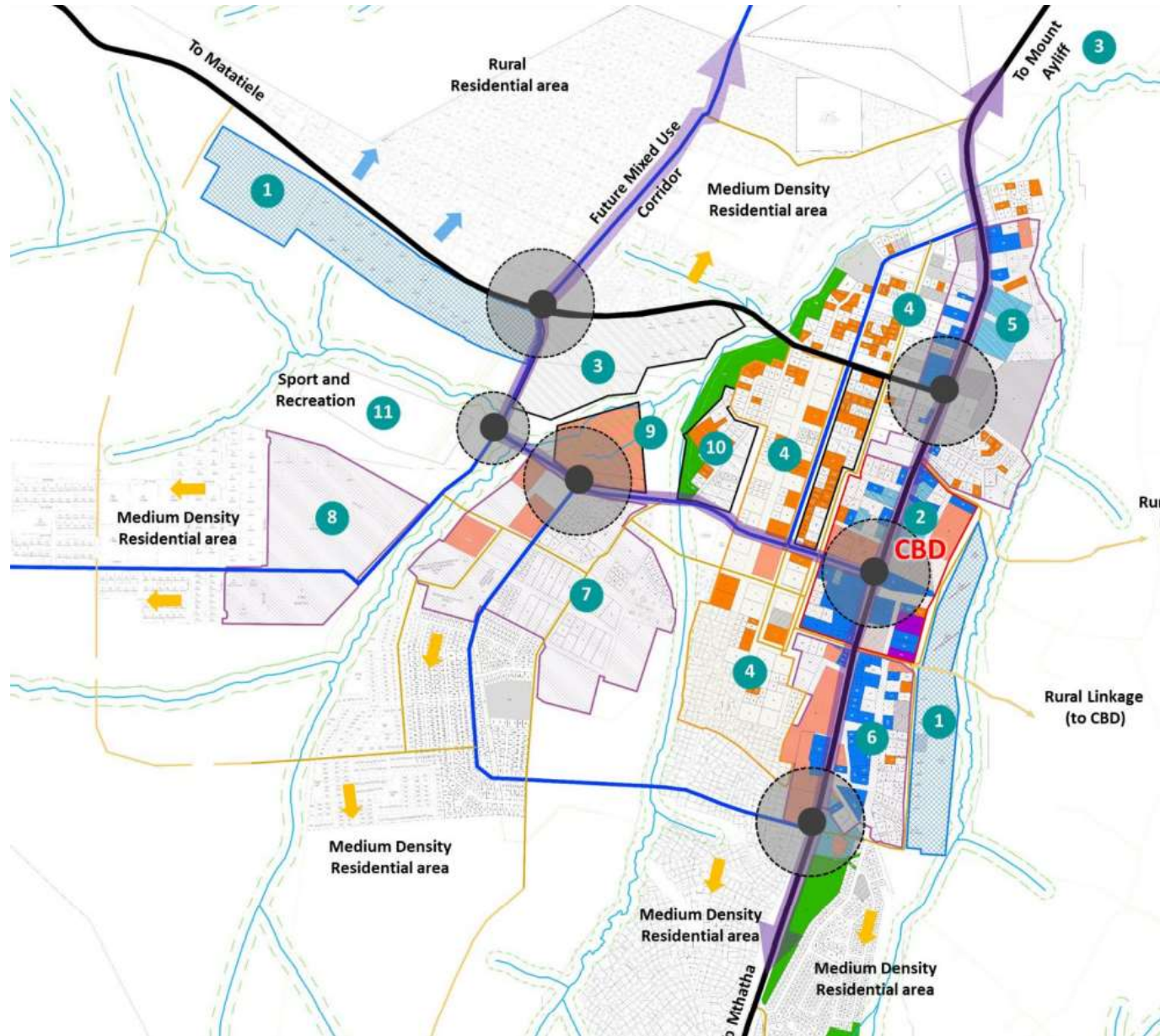
Figure 81: KwaBhaca Location Plan - Long Term Spatial and Land Use Proposal. (Note: the numbers identified in the proposal above and detailed in the annexure.)
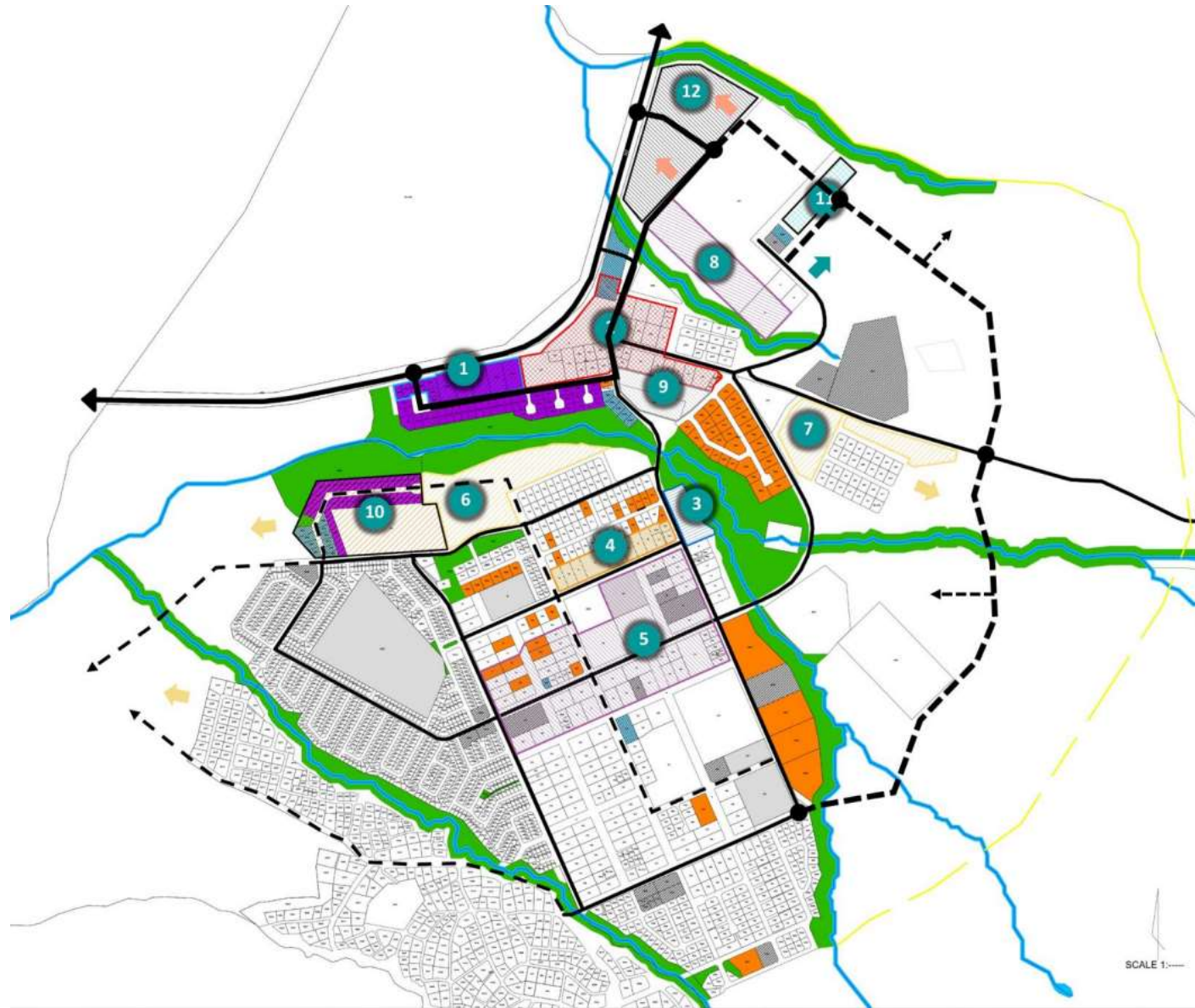
Figure 82: EmaXesibeni Location Plan - Long Term Land Use Proposal. (Note: the numbers identified in the proposal above and detailed in the annexure.)

3.2   SHORT TERM SPATIAL INVENTORY OF PROJECTS

The second aspect of the spatial proposals is the Short-Term Spatial Inventory of Projects. This is a direct result of the investigations and engagements with the Client that developed an understanding of the range and scope of 'projects' that were associated with the two towns. Some of these projects have been well-established in the planning documentation and as an outcome of earlier work. Other projects are more current and in either the planning phase or the construction phase.

Most of these projects are of construction or infrastructural nature and are managed by a variety of government agencies, including the Umzimvubu Local Municipality, the Alfred Nzo District Municipality and the Department of Public Works.

These projects are all initiated by government agencies and some have private sector involvement.

The process of compiling this inventory and its deliverable is as follows:

- Detailed policy review to understand the policy history and context of the two towns.
- Compilation of 'projects' that were identified as a result of this.
- Sourcing of information to understand the status of these projects.
- Sourcing of information and engagement with the client to review projects that have developed after the above.
- Review of all the projects.
- Selection of 'priority projects' for each town. These are projects that are understood to be important, and which have the greatest impact on the further development of the towns.
- These priority projects are then categorised by type and given a priority rating.

This is all elaborated in detail in Chapter 4: Implementation Plan and Chapter 5: Final Plan Deliverables.

Figure 83: KWABHACA 2020.

4   IMPLEMENTATION PLAN

Chapter 4: Implementation Plan and Chapter 5: Final Plan Deliverables, are the deliverables of this project.

The Implementation Plan describes the Key Performance Indicators and the Implementation Strategy. From this, the Key Development themes and guidelines are provided.

The Project Prioritisation and Multi-Criteria Results describe the method used to review all projects ('old' and 'new'). The outcome of this is recorded in Chapter 5: Final Plan Deliverables.

4.1   KEY PERFORMANCE INDICATORS (SWOT)

This section will summarise and confirm the key outcomes of the property analysis and where the development 'gaps' lie in terms of retail, office and other opportunities.

To define an overall implementation strategy for both EmaXesibeni and KwaBhaca it is important to summarise and highlight the key development opportunities which pertain to both enabling interventions (municipal funded), as well as catalytic investment opportunities that could be led by the private sector. This is achieved by developing a SWOT analysis which is presented below:

Strengths	Weaknesses
• The Municipality boasts two well-established regional urban centres, i.e., KwaBhaca and EmaXesibeni. • KwaBhaca serves at the regional transport and business hub of ULM, while EmaXesibeni serves as the regional government civic centre,	• Traffic and congestion in the CBD main street due to limited parking, delivery, and collection for hardware stores. • Limited public office space resulting in the erection of temporary office structures.

- housing the majority of Provincial and regional offices. - There is a range of diversified national grocery chain stores catering for low-income earners in both towns, supported by a large rural population residing in villages through the Municipality. - In addition to national chain stores, smaller locally owned retail shops offer affordable goods and services to the local market. - The largest productive sectors (private sector) of the economy are trade and financial services, while government and community services remain the largest contributors to the local economy. - The informal economy (hawkers etc.) play a pivotal role in the livelihoods of residents, providing work opportunities not available in the formal sectors.	- Evidence of dispersed residential settlement patterns. - Land ownership in the periphery of the towns is predominantly communal. - The retail market predominantly caters for low-income earners, with limited local offerings for middle-income employees and residents. - Municipal owned hawker stalls are dilapidated resulting in hawkers renting out stalls and temporary structures from which to operate. - Narrowed population pyramid in the middle-aged cohort indicating 'brain drain' of the economically active population group. - Low commercial agriculture activity in the Municipality and limited value addition within the primary sector. - The economy of the towns of ULM is highly reliant on non-productive economic sectors, e.g., the government sector is the largest contributor to the economy. - Significant uncertainty in the towns about title deeds and unresolved land disputes. - Local construction firms have low CIDB grades which hinder their potential to benefit from higher-value construction projects. - Limited space on pavements for street trading and for pedestrians to walk with ease. - The limited presence of professional business services such as accountants, architects, and lawyers in the towns. - No formal taxi rank facilities in KwaBhaca.		Industrial development in ULM is mostly characterised by auto services and repairs with little evidence of formal value-adding manufacturing entities in the towns of EmaXesibeni and KwaBhaca.
		Opportunities	**Threats**
		- Position EmaXesibeni as a civic regional hub while KwaBhaca is prioritised as the business and trade hub of the region. - Development of formal retail hawker stalls within the towns of KwaBhaca and EmaXesibeni, including regular maintenance and upkeep of such. - Development of an industrial development park targeted at hardware stores and light industrial manufacturing tenants. - Development of retail shopping centres catering for middle-income earners with speciality stores, restaurants, and national retail chain stores. - Development of formalised government precincts (new offices are currently being built in KwaBhaca and in EmaXesibeni, layout plans have been approved to build offices that will house some of the provincial departments). - The market potential exists for the development of shared offices and the rezoning of residential property into a business commercial property to meet the office needs of small businesses. - Resolve land disputes that hinder development.	- Settlement invasion-rising number of illegal land occupations by the local population on public or private property zoned for other developments. - A large number of land claims on many land parcels close to both towns hinder development. - Household expenditure leakage to Mthatha and Kokstad due to lack of specialised stores, restaurants, and services catering for middle-income earners. - Criminal activity in the towns threatens the safety of local businesses and their customers. - Poor water provision and quality in the CBDs impact business operations.

- Revive ULM value-adding projects to contribute to the manufacturing base.
- Develop transport hubs to offer covered shelters, safe waiting areas and hygienic toilet facilities.
- The presence of many government departments and investment projects can be an opportunity for the ULM to target business tourism to boost the tourism sector.
- By expanding the services of the towns to offer more restaurants, coffee shops, banks, vehicle service centres and retail shopping opportunities would encourage business visitors to choose KwaBhaca and EmaXesibeni above other regional options.
- Improvements in the town's aesthetics would assist in improving the image and branding for tourism development in the two towns.
- Establish industrial precincts in both EmaXesibeni and KwaBhaca to curb settlement invasion and to drive the local economic base.

Table 40: Strengths, Weaknesses, Opportunities and Threats in KwaBhaca and EmaXesibeni (Source: Urban-Econ, 2020)

4.2   IMPLEMENTATION STRATEGY

This section focuses on the formulation of a development vision for the towns which ties into their other planning documents and presents an integrated way forward (statement) for the Client.

The implementation strategy sets out to guide the implementation of the integrated and consolidated urban design framework and urban regeneration plans.

Given that this study is seen as a consolidation of various prior planning documents as presented in the policy review section (Section 5.2)

The three key policies and plans that underpin this Implementation Plan are:

- 2016 Conceptual Precinct Framework
- Local Economic Development (LED) 2011
- Spatial Development Framework, 2015

The vision statements of these documents are quoted as follows.

Precinct Plan 2016

"To have well developed CBD's and nodal areas where its people have equal opportunities and justice and supports its rural hinterland"

LED Plan 2011

"To ensure the delivery of quality services that promote economic growth, support development and respond to the community needs in accordance with our development"

SDF Vision 2015

"To develop a diverse and resilient economy, based on the competitive advantages of the area, that develops skills, sustainable business and job creation"

In addition to the stated vision, some key objectives stated within these planning documents that apply to the implementation plan include:

"To increase investment and realise an enabling environment for investment" LED 2011.

"To regenerate the urban centres" LED 2011.

"Manage land development in line with a structured approach to ensure sustainability" SDF, 2015.

In the consolidation of the above, the adopted implementation plan mission for KwaBhaca and EmaXesibeni towns is as follows:

"To create integrated and balanced environments within the CBDs and nodal areas that promotes safe spaces to live, work and play."

Following on from the above, the implementation strategy focusses on:

- Implementation of Long Term Spatial Proposals.
  The implementation of the Long Term Spatial Plan identified in the previous chapter focusses on:

  o The implementation of various Land Use Management aspects.
  o The implementation of various Planning Tools.
  o The implementation of various Management Tools.
  o The implementation of future policy review.

- Infrastructure Aspects.
  These are aspects of both towns that are an outcome of the Situational Analysis and Spatial Proposals in previous chapters. These aspects are summarised for each town according to the previously identified infrastructure aspects of:

  o Electrical.
  o Roads and Transportation.
  o Sewerage.
  o Stormwater.
  o Water.

- Project Related Implementation.
  This is a proposal for both towns that is an outcome of the Situational Analysis and Spatial Proposals in previous chapters. Detail is provided regarding the identification of development projects and selection of Priority Projects.

4.3   DEVELOPMENT FUNDING

The following section provides guidelines for the various development options that the ULM has at its disposal to realise the above-packaged projects. Privately funded as well as publicly funded options are presented for consideration below.

4.3.1   PRIVATELY FUNDED DEVELOPMENTS

It is anticipated that for almost all projects identified the ULM would lease the respective land portions for each of the proposed developments to a private sector developer at a market-related rate, discounted by the cost of insuring the property and the cost of maintenance, for a period of ten to ninety-nine years. The private sector developer would subsequently be responsible for all the costs associated with building and operating each of the respective projects for the duration of the lease.

Over this period the ULM's involvement would be confined to the provision of associated services linked to each project site. This would include aspects such as ensuring the necessary statutory compliance (e.g., zoning, Environmental Impact Assessment), landscaping and maintenance of the periphery of each site, i.e., road upgrading, verge repair etc.

After the lease term, the private sector developer would have two options:

1. Return the land to the ULM in the condition that it was before the development, or
2. Apply for a new lease for the land on which the development is located (note that this would need to be undertaken in line with the relevant Public Finance Act at the time, e.g., MFMA).

4.3.2 Publicly Funded Developments

Such examples are applicable for projects that are seen as enablers i.e., gateway projects, hawker stalls, etc. Adopting this approach would first require the ULM to earmark and prioritise the release of the necessary land for the proposed development, and subsequently for funding the construction of the development project either out of their own funds or from funding obtained from other public sector entities.

Under this approach, a new asset would be created under the sole ownership of the ULM. The Municipality would then have two options in respect of the operation and maintenance of each project.

4.3.2.1 Option 1: Lease out the developed project to a private operator.

Adopting this approach would require the ULM to enter into a lease agreement with a private sector property management company to operate the respective projects. This lease agreement would be administered by the applicable department within the Municipality, e.g., the Local Economic Development Unit, for a defined period of five or ten years with the option for renewal for a further five or ten years.

It should also specify which party will be responsible for the maintenance of the project. Ideally, all maintenance costs should be incurred by the operator, with the Municipality discounting the rental rate based on the value of the maintenance. The Municipality should be solely responsible for ensuring the structural asset, with this cost being built into the annual rental rate.

This entire process would be governed by the regulations set out in Chapter 4 of Municipal Asset Transfer Regulations read in conjunction with the Municipality's SCM policy.

4.3.2.2 Option 2: Establish a new entity to manage.

This option is not necessarily appliable to any of the prioritised projects but could be an option should the Municipality decide to develop a commercial project such as an Industrial Park. This option would entail the establishment of a new entity, wholly owned by the ULM, to manage and operate the relevant project. This entity would be incorporated as a private company (Pty. Ltd.) in terms of the Companies Act (Act No. 71 of 2008) as amended and report directly to the ULM.

This new entity would comprise a manager and the staff necessary to operate the project daily. Alternatively, the Municipality could appoint a private sector operator to manage this entity. This operator would subsequently be responsible for appointing and managing the staff necessary to run the respective developments.

4.4 LEGISLATIVE CONSIDERATIONS

The following section outlines the applicable laws that the various development projects may need to adhere to during both their operational and establishment phases. It also sets out the required registration and certification processes that need to be complied with based on the relevant legislation. These would be necessary for the applicable businesses to be legally compliant.

4.4.1 Municipal Finance Management Act (MFMA), No. 56 of 2003

The Municipal Finance Management Act regulates the financial affairs of municipalities. Specifically, the Act sets out the powers and functions of municipal entities and their internal departments, as well as these entities ability to play a role in the realisation of certain development projects. This Act, read in conjunction with National Treasury's Municipal Asset Transfer Regulations (General Notice No. 878 of 2008)

and the ULM's Policy and Procedures for the Disposal of Immovable Capital Assets (within their Supply Chain Management Policy), will govern any future lease agreements entered between the private developers and the ULM.

4.4.2   Broad-Based Black Economic Empowerment Act, No. 53 of 2003

This Act aims to contribute to the empowerment of previously disadvantaged groups. This is to be achieved by developing more ethnically integrated partnerships via preferential procurement and the empowerment of black entrepreneurs. When seeking a potential developer for the projects through the Request for Proposal Process, the ULM should actively seek developers and leaseholds that promote the desired outcomes of the Broad-Based Black Economic Empowerment Act.

4.4.3   National Environmental Management Act, No. 107 of 1998

The National Environmental Management Act (NEMA) sets out the basic principles and practices of environmental management in South Africa. The Act further provides a framework for individuals, institutions, and government decision-makers as it relates to environmental matters. The developers of the various proposed projects should ensure that all environmental regulations are adhered to, starting from the pre-scoping phase of the proposed site before construction up to the full operationalisation of the precinct and its associated activities.

4.4.4   National Heritage Resources Act, No. 25 of 1999

This Act seeks to promote the good management of heritage assets and to encourage communities to nurture and conserve their heritage for future generations. Each development project will need to comply with

requirements, if any, imposed by the Eastern Cape Provincial Heritage Resource Authority.

4.4.5   Competition Act, No. 89 of 1998

The Act is responsible for the investigation, control and evaluation of restrictive practices, abuse of dominant positions, and mergers. This act ensures that the relevant developments' marketing and operations can compete fairly within the respective economic sector in South Africa. It will also protect the similar existing facilities that may already be developed in the ULM area against unfair competition attempts from other similar establishments.

4.4.6   Consumers Protection Act, No. 68 of 2008

The Act serves to promote a fair, accessible and sustainable marketplace to protect the interests of the future customers/visitors of the proposed development projects. The Act further makes provision for improved standards of consumer information by prohibiting unfair marketing. Each development should ensure that a clear, transparent list of the services rendered is provided to all visitors before or upon their arrival.

4.4.7   Labour Relations Act, No. 6 of 2014

This Act regulates the employment practices of both fixed-term and part-time employees. This is to ensure that they receive fair and equal treatment. Each development will need to adhere to this act as it relates to working hours. It will also need to comply with the relevant sectoral wage determinations or the national minimum wage rate.

4.4.8   Occupational Health and Safety Act, No 85 of 1993

This Act aims to provide for the health and safety of future project employees as well as those individuals who will visit associated

activities. It further aims to establish an advisory council for occupational health and safety. Each development's project management office should commit to the health and safety of all its employees as well as the visitors to the precinct. This includes the implementation of health initiatives to prohibit the smoking of tobacco and the use of illegal substances within the precinct.

Figure 84: KWABHACA 2020.

4.5 IMPLEMENTATION OF THE LONG TERM SPATIAL PLAN

The implementation of the Long Term Spatial Plan identified in the previous chapter focusses on:

4.5.1 The Implementation Of Various Land Use Management Aspects

Detailed land-use guidelines have been prepared to specifically address development proposals that are contained within this main report and its annexures. Provision has therefore been made only for land uses that are proposed within the spatial development proposals.

Key aspects of this are noted as:

- The use of land and/or buildings for all activities related to low impact, a non-pollutant mix of logistics, warehousing, professional services, shopping centres, business uses medium to high-density residential developments, hawker facilities, parking areas, institutional uses as well as light and service industrial activities primarily associated with the agro-processing value chain and the movement of goods.
- The sites promote functional integration and mixed-use as a key component of sustainable development. Integration between "old" town areas and "new" areas are also being addressed through mixed-use development corridors and associated land uses.
- Incentives should be put in place to attract economic activities close to dormitory residential areas, facilitate brownfield development (e.g., mixed-use development and densification in appropriate locations within proximity of the CBD and proposed mixed-use development zones).

- It is realistic to accept that fragmented development of the area could occur for a long time. Future or ad-hoc development can be flexible to accommodate future needs and circumstances. It could then happen that access linkages and service networks between the developed portions are impeded. In such cases, it may be necessary to negotiate servitudes across such undeveloped portions.
- Non-permanent temporary land uses are being applied for from time to time which is a normal situation where an area is in a planning and transition stage.

For more information regarding this, and detailed Land Use Guidelines, please see the attached Umzimvubu Local Municipality Urban Regeneration Strategy, **Town Planning Proposals**, for EmaXesibeni and KwaBhaca, Version 6, February 2021, by Maswana Group of Companies.

4.5.2   The Implementation Of Various Planning Tools

The following Additional Development Controls to support the ULM Land Use Scheme are proposed to ensure sufficient management throughout the implementation of the Long Term Spatial Plan:

- Where the land is excessively steep, the municipality may require a geo-technical report or larger lots than the minimum proposed.
- Vehicular access to each site and the disposal of sewage will be to the satisfaction of the municipality.
- Densification of residential areas should be promoted before any green field developments, full use of the existing capacity of the infrastructure installed is required.
- It is expected that the municipality will continue efforts to establish, maintain and preserve an open space system.
- Any development within the open space system will require appropriate offsets (32m from the centre line of rivers) and an EIA.
- Control/regulate development in the river catchment areas.

- Encourage and support efforts of local conservancies in removing alien vegetation and repopulating with indigenous plants.
- Air quality issues need to be considered when considering locations for new developments.
- The potential impacts of water quality in the major river systems need to be considered for developments.
- Monitor and regulate existing land degradation patterns to restrict and contain soil erosion.
- Ensure any new development remains outside flood lines and wetlands buffers.
- Ensure new developments do take account of land contouring.
- Any Change in land use within the proposed CBD should be accompanied by a landscaping plan adhering to the sidewalk and urban landscaping requirements proposed in the Urban Regeneration and ULM Precinct Plans.
- Provision should be made for the accommodation of Public Transport Uses such as a Taxi Rank, Taxi Lay by's, Truck Overnight Stops as well as Non-Motorised Transport modes.
- Cognisance towards the alignment of proposed new, upgraded, or extended roads should be considered as conceptual. The movement framework identifies a functional hierarchy of streets and roads which inter alia guides the location of the various development components.
- The architectural treatment of new and refurbished developments in the study area is expected to relate to and express the cultural, agricultural, rural, and low-intensity character of the town.
- Mixed-Use development should be promoted and supported along major roads and linkages.

For more information regarding this, please see the attached Umzimvubu Local Municipality Urban Regeneration Strategy, **Town Planning Proposals**, for EmaXesibeni and KwaBhaca, Version 6, February 2021, by Maswana Group of Companies.

4.5.3   The Implementation Of Various Management Tools

The identification of planning responses for achieving the development vision still leaves a substantial gap between what is to be done and how it is to be done. As little suitable land is owned by the Municipality and most of the land more suitable land is owned by traditional leadership, the opportunities available for redeveloping the area is limited.

It is, therefore, necessary to understand that the planning and management tools identified for the areas are substantially different from what will be used in areas where substantial land areas are available within formalised areas. The tools identified must have the potential to impact and change how the land use is managed.

Proposed planning tools include:

- Planning Tools
  - Scheme amendments
  - Conditions of approval
  - Site development plans

- Design codes, guidelines
  - Landscape planning
  - Signage
  - Financial Tools
  - Rates rebates

- Development contributions
  - Subsidies
  - Trade-offs
  - Levies

- Business incentives

Another key management tool is the definition and review of the Urban Edge. Current land-use patterns in both towns contradict the real essence and purpose of an urban edge and require re-alignment to discourage urban sprawl.

Recommendations towards the proposed delineation of the urban edge for both towns need to be considered against the following principles:

- Sufficient protection is given to land requiring protection, inter alia, agricultural land currently under cultivation, wetlands and river corridors, steep slopes, biodiversity conservation and critical biodiversity areas, and scenic landscapes.
- Compaction rather than expansion of urban settlements are encouraged to promote non-motorised transport modes where appropriate.
- Furthermore, it should be noted that all the low-income settlements are on one side or "slice" of the settlement only and their extensions all move outwards along this axis.
- Urban Edges which provide sufficient land for the development of the needs of the area for about 20 years, given the current growth rate, is proposed around the existing urban footprint.
- It is proposed that this urban edge only be realigned based on actual need and once all the existing under or unutilized vacant land has been developed.

Based on the above a new Urban Edge (using hard and soft edges) for each town is recommended. The proposed Urban edge can be adopted as part of the ULM SDF review process. The micro/local frameworks for each town should adopt the proposed urban edge proposals, this process would enforce the management and control of development outside the "new urban edge". The SDF process allows for effective public participation and consultation to approve the refined urban edge proposals.

For more information regarding this, please see the attached Umzimvubu Local Municipality Urban Regeneration Strategy, **Town Planning Proposals**, for EmaXesibeni and KwaBhaca, Version 6, February 2021, by Maswana Group of Companies.

4.5.4 The Implementation Of Future Policy Review

The following high-level Policy recommendations could improve the implementation and development of the Spatial Proposals:

- Development of a Municipal Incentive Scheme (business incentive scheme policy) which needs to accommodate and support Local businesses.
- Revising the ULM SDF to accommodate the following:
  o Reviewed and re-aligned urban edge
  o The inclusion of Intensification Corridors, a formalised CBD, Mixed Use Zones and Development Nodes within each town to accommodate the proposals made in this strategy.
  o The inclusion of activity spines to accommodate future and proposed developments.
  o Delineation of future Precinct/development focus areas within the SDF that requires more detailed studies and interventions to accommodate future growth.
  o To include interventions, strategies that accommodate non-motorised traffic routes and infrastructure.
  o Addressing Urban-Rural Linkages.

For more information regarding this, please see the attached Umzimvubu Local Municipality Urban Regeneration Strategy, **Town Planning Proposals**, for EmaXesibeni and KwaBhaca, Version 6, February 2021, by Maswana Group of Companies.

4.6 IMPLEMENTATION ASPECTS FOR SPECIFIC INFRASTRUCTURE

4.6.1 KwaBhaca

4.6.1.1 Electrical

While preliminary observations seem to indicate that future developments can be serviced with electrical supply which is nearby throughout the main CBD area and along the N2 and the R405, the unknown factors such as capacity and age of the infrastructure make it difficult to make any definitive decisions regarding specific planned developments in the town.

4.6.1.2 Roads and Transportation

Transport requirements in support of development to the west of the town centre include:

- This area is the focus of the expansion of Mount Frere. Currently, this area is only accessible via Solis Street. Should this remain so, the road network is likely to experience significant congestion at the Solis Street / N2 junctions, as well as rat-running through the adjacent residential and commercial streets impacting negatively on landowners on these streets.
- For these proposals to be feasible from a road network perspective, accessibility would need to be improved.
- It is thus recommended that further investigation into the provision of a new class 4 collector road link between Solis Street and the N2 at km 92.0 as indicated in the Traffic and Transportation Annexure, be conducted. Similarly, the current road linkages between Solis Street and the R405 should be strengthened in a bid to encourage

traffic from the north (N2) or west (R405) to bypass the N2 through the CBD to improve access to the precinct from these gateways.

- Solis Street will also require upgrading to accommodate the proposed development in this area, in particular additional turning lanes on the approaches to the N2 and the access roads to the north and south.

Transport requirements in support of development to the east of the town centre include:

- The Spatial Development Framework earmarks expansion of light industrial land use along the eastern edge of the CBD. It is difficult to access this area directly from the west due to steep gradients. It may however be possible to access the area from the north and south as indicated in the Traffic and Transportation Annexure

A more detailed review of the implementation of alternative routes to avoid the CBD includes:

- At present, traffic passing through Mount Frere is subjected to congestion at times as a result of a lack of parking for local users which leads to uncontrolled parking, loading and public transport activity coupled with heavy pedestrian traffic volumes.
- To avoid this congestion, traffic is currently able to make use of roads parallel to the N2 both to the east and west of the N2.
- These routes are described in further detail below.

- **Road east of the N2**

  o Southbound traffic can avoid congestion in the CBD by turning off the N2 at Sikelem Street, following Sikelem Street to its junction with Sonyangwe Street, then following Sonyangwe Street to Chris Hani Street until the N2 south of the town.
  o The road is narrow and is not designed to accommodate high through traffic volumes particularly heavy vehicle traffic. The

northern portion up to Chris Hani Street is characterized by mixed land uses, while the land use along the southern section is residential.

o It is thus not conducive to accommodating high traffic volumes as this could lead to traffic safety concerns especially though the residential area.

o However, the route serves a useful purpose in that it allows the motorists to pass through the town centre with a minimal delay compared to navigating through congestion in the town centre.

o The route is however not suitable signposted, and it is recommended that additional direction signage be erected at least 200m in advance of Sikelem Street.

o It is further suggested that this alternative be restricted to light vehicles.

- **The road west of the N2**

  o An option for northbound traffic exists to the west of the N2. Traffic can turn off onto B Mazwi Drive at the Shoprite Centre and follow the road to the rear to Ncapai Street and then follow Ncapai Street all the way to its junction with the N2 on the northern edge of the CBD.
  o These roads are designed to accommodate predominantly residential traffic volumes with a low percentage of through traffic and not as a bypass road for faster moving through traffic and certainly not heavy vehicle traffic. Given the nature of abutting land uses there are also relatively high pedestrian volumes.
  o Should traffic be diverted along these roads, then it would be necessary to provide suitable traffic calming interventions along the route in the form of raised pedestrian crossing and speed humps.
  o This alternative route is also a suitable quicker alternative for those motorists wishing to avoid congestion in the town centre.
  o

Transport requirements related to Bypass proposals for the town include:

- The "bypass" proposals initially discussed with SANRAL take the form of reconfiguring the Main road (N2) and a parallel road to the west as a one-way pair.
- This would mean that the road to the west, probably Ncapai Street would need to be reconfigured to accommodate one-way traffic for northbound traffic flow and the N2 reconfigured to accommodate southbound traffic (possibly from the Mngcisane Street (R405). Junction.
- It would seem that this option would not be appropriate as it would mean that northbound heavy vehicular traffic would have to navigate through an area that is essentially residential and would require significant capital investment to upgrade the route for such vehicles (both from a horizontal alignment and road pavement structure perspective).
- Also, SANRAL is currently constructing portions of the Wild Coast Highway from Mthatha through to Port Edward. Current discussions with SANRAL officials have indicated that this highway is expected to significantly reduce through traffic volumes along the N2 between Kwazulu Natal and Mthatha given that this route would significantly reduce travel time for through traffic.
- As such congestion levels are likely to be reduced.
- It is thus considered that the current alternative routes are suitable for light vehicular traffic to avoid congestion in the town centre when it occurs, provided that the routes are signposted (at all junctions along the routes) and that vehicular speeds along the routes are controlled to ensure safety for other road users, both motorised and non-motorised.
- Therefore, it would seem that the current situation with through traffic being delayed as it passes through the CBD can be managed by this traffic making use of the current alternative routes.

Figure 85: KwaBhaca Alternative Routes and Access Roads.

Conclusions to the above transport-related implementation items are as follows:

- The Traffic Study prepared by Emonti Consulting Engineers identified various congestion and operational problems in the CBD and has identified projects that can improve traffic operations in the CBD.

- A new access road link be provided from the N2 (opposite the DR08129 junction at km 92.0) to Solis Street along the western edge of the current built-up area to improve access to the proposed development expansion area to the west of the CBD as indicated in the Transport and Traffic Annexure.
- Road links between the R405 (via Ncapai Street) and the proposed development expansion area to the west of the CBD should be strengthened such that traffic destined for the new area can access the new area from all directions, thus relieving pressure on the Solis Street/N2 junction.
- Road access to the proposed light industrial area to the east of the CBD can be strengthened by providing access roads at the northern and southern ends of this area.
- The roads both east and west of the N2 used as alternative routes to the N2 serve the purposes of providing an alternative option for light vehicular traffic to bypass the N2 when it is congested.
- The alternative route options would need to be better signposted in advance of the proposed turn-offs; and
- SANRAL are unlikely to pursue the proposed bypass options (one-way system using N2 for southbound and Ncapai Street for northbound traffic given the construction of the N2 Wild Coast Highway which will reduce through traffic on the N2

Recommendations to the above transport-related implementation items are as follows:

- The traffic improvement measures identified in the Traffic Study prepared by Emonti Consulting Engineers cc be implemented.
- Additional signage advising light motor vehicles of the alternative routes to avoid traffic congestion in the town centre be installed on the N2 in advance of the Sikelem Street and B Mazwi Drive junctions
- Additional access roads indicated in Figure 5 attached in the Transport and Traffic Annexure. be implemented to improve access to the proposed development expansion area to the west of the CBD.

- Additional access roads indicated in Figure 5 in the Transport and Traffic Annexure. be provided to accommodate the development of a light industrial area to the east of the CBD; and
- Subject to detailed investigation, Solis Street be upgraded by the provision of additional turning lanes on the approaches to the N2 and the north and south access roads to accommodate the proposed development expansion to the west of the town.

4.6.1.3   Sewerage

Based on the information received, the following will be required for future development projects:
- Repair/replacement of dilapidated infrastructure.
- Installation of water-borne sanitation systems for surrounding residential and peri-urban areas.
- Installation of infrastructure with "anti-theft" criteria (air valve chambers, security fencing around pump stations and WTW's)

4.6.1.4   Stormwater

The Precinct Plans Situational Analysis of December 2015 by Tshani Consulting CC notes the following:

' Stormwater which runs along the main roads is piped however, the network is in an extremely poor condition. All other stormwater in the area is catered for in surface drains.'

4.6.1.5   Water

The following gaps in the existing water infrastructure are identified as:

- Generally small water pipe diameters in surrounding residential areas that might have to be increased to larger diameters to provide pressures of 2.4 bar to 6 bar, at adequate velocities of 0.6 m/s to 1.2 m/s.

- Water pipes to be sized to accommodate fire flow conditions (Low risk – group 2 in "Red book")Project number: 509751 001_Zutari_Infrastructure Review Report_20200904.docx, 2020/09/04 Revision 0 22.
- Bulk water supply to be extended for possible development at the open spaces West and North-West of the CBD.
- Lack of domestic house connections for houses in the surrounding residential areas.
- Non-functional and/ non-existent fire hydrants in town and surrounding residential areas.

The following will be required for future development projects:

- Repair/replacement of dilapidated infrastructure.
- Installation of water pipes with house connections/standpipes for new villages emerging around town.
- Installation of isolating valves and fire hydrants.
- Installation of infrastructure with "anti-theft" criteria (valve and hydrant chambers, air valve and scour valve chambers, security fencing around pump stations, boreholes and WTW's

4.6.2 EmaXesibeni

4.6.2.1 Electrical

While preliminary observations seem to indicate that future developments can be serviced with electrical supply which is nearby throughout the main CBD area, the unknown factors such as capacity and age of the infrastructure make it difficult to make any definitive decisions regarding specific planned developments in the town. The vacant erven on the western side of the CBD next to the N2 is not serviced according to the data that has been received, but it is not sure if the data is accurate / up to date.

4.6.2.2 Roads and Transportation

Transport requirements in support of various priority project proposals include:

- This area to the north and northwest of the town and the hospital is the focus for further development in EmaXesibeni.
- At present, access to this area is only possible via the hospital access road. Should this remain so, there is likely to be significant congestion at the Ntsizwa Street / Church Street / DR08102 junction, as all traffic destined for this area from outside EmaXesibeni will need to enter EmaXesibeni at the N2 / Hlanekela Street junction to access the area.
- The preferable solution would be to create additional access to this area directly from the N2, ensuring that the area is easily accessible from all directions. A preliminary investigation of the N2 alignment north of the existing access road indicates two possible locations for the proposed access road junction as indicated in Figure 5 attached as Annexure E.
- Option 1 (km 44.06) is at a point approximately 400m north of the current access road (ENGEN) and Option 2 (km 43.61) at a point approximately 900m north of the existing access road at the junction with DR08098. Preliminary assessment of sight distances from these locations indicates that a sight distance of at least 400m can be achieved both to the north and south.
- Option 1 is preferred as it is closer to the existing EmaXesibeni entrance and would provide a more direct entrance into the new development precinct. However, its location may be too close to the existing access road and may thus result in undue influence from the existing access junction.
- Option 2 is further away – 900m – but would require the construction of a bridge over a watercourse.
- As stated above, the sight distance at both locations is more than 400m in both directions.

- To reduce the influence of activity at the existing access road on access Option 1, consideration was also given to the reconfiguration of the existing access junction to accommodate left-in/left-out movements only, or to close the junction entirely such that only the filling station is accessed at this location. However, this would result in all traffic from the south having to make use of the new junction placing an unnecessary additional traffic load onto the proposed new access road.

- The preferred approach would be to spread traffic across the two junctions (existing entrance and proposed) thus minimising unnecessary volumes along the N2 and spreading the traffic load in EmaXesibeni itself.

- It is thus recommended that the Umzimvubu Municipality or the development team conduct further investigations into the proposed access junctions to determine the most suitable location before entering into discussions with SANRAL to obtain their approval.

Figure 86 Proposed access arrangements to the northern side of the town.

Transport requirements regarding the existing CBD include:

- The DR08102 / Church Street / Ntsizwa Street and Ntsizwa Street / Hlanekela Street junctions are currently operating chaotically.
- The DR08102 / Church Street / Ntsizwa Street junction is four-legged. On the north eastern approach to the junction (Hospital Access Road), there is a staggered junction located extremely close to the main junction. Also, the junction is quite large given the angle of the approaching roads. This situation creates an unsafe operating condition as operations at each junction influence the other. In particular, some motorists approaching from the east along DR08102 destined for the residential area via Ntsizwa Street make use of the verge instead of following the formal road.
- The is currently operating as a four-way stop-controlled junction with three lanes on the southbound Hlanekela Road approach. In terms of the South African Road, Traffic Signs Manual junctions should not be configured for all-way stop control if there is more than one lane per approach. The high volumes of pedestrians are also not catered for across each leg of the junction.
- It is recommended that the Ntsizwa Street / Hlanekela junction be reconfigured as a traffic circle with suitable pedestrian accommodation on each approach.
- The DR08102 / Church Street / Ntsizwa Street junction needs to be further assessed to confirm the legs that carry the highest traffic volumes, as this will inform the configuration that is most suitable as this will reduce the number of lanes.

Transportation requirements regarding any N2 Bypass options include:

- At present, traffic passing EmaXesibeni is not unduly affected by congestion.
- SANRAL is currently constructing portions of the Wild Coast Highway from Mthatha though to Port Edward. This highway is expected to reduce traffic volumes along the N2 between Kwazulu Natal and Mthatha, further improving safety and operations along the N2.

Conclusions to the above transport requirements are as follows:

- The Traffic Study prepared by Emonti Consulting Engineers has identified various congestion and operational problems in the CBD and identified projects that can improve traffic operations in the CBD.
- A new access road link can be provided from the N2 (at two possible locations north of the town) to provide direct access to the proposed development precinct from the N2.
- Both access road options meet the required sight distance standards.
- Option 1 is located 400m from the existing access road.
- Option 2 is the preferred option given its location 900m from the existing access but will require crossing a watercourse which will trigger a Water Use License Application and a Basic Assessment process.
- The configuration of the DR08102 / Church Street / Ntsizwa Street junction is impractical and unsafe due to the number of movements nearby and should be reconfigured such that the legs carrying the highest traffic volumes are prioritised; and
- The operations at the Ntsizwa Street / Hlanekela Street junction are unsafe with the junction configured as all-way stop control and no provision for pedestrians and should be reconfigured as a traffic circle.

Recommendations regarding the above transport requirements are as follows:

- The traffic improvement measures identified in the Traffic Study prepared by Emonti Consulting Engineers cc be implemented.
- The DR08102 / Church Street / Ntsizwa Street junction be reconfigured as a traffic circle; and
- The Hlanekela Street / Ntsizwa Street junction be reconfigured as a traffic circle; with provision for pedestrians; and

- a detailed investigation is conducted into the most suitable position for a new access road north of the existing access road and an application in support of the proposed access be submitted to SANRAL for their consideration and approval.

See attached Traffic and Transportation report for further detail.

4.6.2.3 Sewerage

Based on the information received, the following will be required for future development projects:

- Repair/replacement of dilapidated infrastructure.
- Installation of water-borne sanitation systems for surrounding residential and peri-urban areas.
- Installation of infrastructure with "anti-theft" criteria (air valve chambers, security fencing around pump stations and WTW's)

4.6.2.4 Stormwater

The Precinct Plans Situational Analysis of December 2015 by Tshani Consulting CC notes the following:

' Stormwater which runs along the main roads is piped however, the network is in an extremely poor condition. All other stormwater in the area is catered for in surface drains.'

4.6.2.5 Water

The following gaps in the existing water infrastructure have been identified:

- Shortage of water pipes in the residential area South-West of CBD.

- Generally, small water pipe diameters might have to be increased to larger diameters to provide pressures of 2.4 bar to 6 bar, at adequate velocities of 0.6 m/s to 1.2 m/s.
- Water pipes to be sized to accommodate fire flow conditions (Low risk – group 2 in "Red book")
- Bulk water supply to be extended for possible development North and North-East of CBD
- Lack of reticulation systems with dead-end mains can cause stagnant water quality if not scoured regularly.
- Lack of domestic house connections for houses in the Western and Southern parts of the residential area.
- Non-functional and/ non-existent fire hydrants in town and surrounding residential areas.

The following will be required for future development projects:

- Repair/replacement of dilapidated infrastructure
- Installation of water pipes with house connections/standpipes for new villages emerging around town.
- Installation of isolating valves and fire hydrants
- Installation of infrastructure with "anti-theft" criteria (valve and hydrant chambers, air valve and scour valve chambers, security fencing around pump stations, boreholes and WTW's)

4.7   PROJECT RELATED IMPLEMENTATION

4.7.1   Project Prioritisation

Following the project identification process, each of the previously identified projects, in addition to new potential projects identified during this study, are brought forward for prioritisation. Prioritisation is necessary to ensure that projects that have the most likely probable success are embarked on first, to maximise scarce resources. To do so, each project was assessed against a standard set of multi-disciplinary criteria (MCDA).

A project prioritisation multicriteria tool was developed based on specific criteria deemed suitable to assess the suitability, sustainability and potential impact of each project against one another. The multicriteria tool applies scores between zero and three in each criterion to determine each project's suitability for development as part of the ULM Revitalisation Implementation Plan.

A project prioritisation matrix is a simple tool that provides a method by which to sort a diverse set of projects into an order of importance. The list of projects presented below consist of projects that have emerged from the status quo analysis as well as from the 'gap analysis.'

The criteria used to prioritise projects include:

- Land Ownership
- Alignment with Existing Planning
- Project Sustainability/Business Viability
- Contribution to Local Economic Development
- Contribution to Social Development

The MCDA further made provision for '**Not Applicable'** indicators and '**Critical Flaws'**.

Critical flaws were defined as "certain circumstances regarding the status quo of the proposed site that might not be able to be changed/altered to allow for the proposed development to occur"; alternatively, aspects related to site ownership, permissions, release or authorisation that may not be attainable within a realistic period.' In situations where an indicator was 'Not Applicable', the final site values were restated to take cognisance of this.

The table below shows all the various criteria defined and explained with their rating scale from 0 to 3.

Criterion	Description	Rating Scales
Land ownership	Is the earmarked development site owned by a private entity, a public entity (e.g., Department of Public works or any government entity) or a local Municipality? Ownership of the land noted as being an important factor that influences the local government's ability to facilitate and encourage development.	0= Unknown, 1=Private entity, 2=Any government entity such as Public Works, 3=Local Municipality
Alignment with Existing Planning	How closely is the project aligned with previous municipal planning documents such as IDP, SDF, Conceptual Framework Precinct Plan and the likes?	0= No,1=Little, 2=To some extent, 3=Aligned
Project sustainability/Business Viability	Can the project operate as a viable and sustainable business venture from an economic and financial point of view?	0=No,1=No, 2=To some extent, 3=Yes
Contribution to Local Economic Development	Will the project have a positive impact on the economy in terms of job creation, local procurement, poverty alleviation, skills development etc.?	0=No,1=Little, 2=To some extent, 3=Yes
Contribution to Social Development	To what extent will the project contribute to improving the social and developmental well-being of the community within the area in terms of social development, skill	No=0,1=Little, 2=To some extent, 3= To a great extent

	development, community cohesion etc.	
Traffic Impact	Considered the surrounding transportation network issues and what impact they could have on the proposed development. An optimally situated site would ensure the development was sustainable within the broader transportation system and not impacting on existing users. Consideration was also given to traffic speeds and volumes in and around the proposed site.	0=No,1=Little , 2=To some extent, 3=Yes
Public Transport Connectivity	This indicator evaluated the accessibility of the site for public transport, providing an affordable and efficient mode of transport for locals and transient users (if applicable). A potential site should be in an accessible environment, integrated with the transportation network and one that promotes public transportation. Thus, proximity to existing public transportation networks would make a site more ideal.	0=No,1=Little , 2=To some extent, 3=Yes
Walkability and streetscape	Considered how easy a site is to access by foot. Factors influencing walkability include the presence or absence and the quality of connected footpaths, sidewalks or other pedestrian rights-of-way, traffic and road conditions, land-use patterns, building accessibility, and safety, among others.	0=No,1=Little , 2=To some extent, 3=Yes
Bulk Infrastructure	A potential site that is located favourably/unfavourably close to existing, reliable, electrical, bulk water and sewage systems with adequate capacity to accommodate the new development would be more preferred.	0=No,1=Little , 2=To some extent, 3=Yes

Table 41: Socio-economic criterion.

4.7.2   Multi-Criteria Results

The multicriteria tool utilises scores between zero and three in each criterion to determine the suitability of the criteria for each of the proposed projects. When applying the criteria, a potential development project that positively contributes to the achievement of the specific criterion scores highly, while a proposed project that is seen to contribute negatively to a certain indicator achieves a low score.

The tables outline the scores of each project based on the criteria listed above for the towns of KwaBhaca and EmaXesibeni. The tables illustrate the results of the application of the multicriteria to potential projects. The projects have been ranked from highest scoring (most preferred) to lowest scoring (least preferred).

Figure 87: EMAXESIBENI 2020.

5   FINAL DELIVERABLES

One of the final deliverables for this work is the selection of priority development projects and their implementation strategies.

Visualisations of these priority projects are also provided.

5.1   PACKAGING OF PRIORITY PROJECTS

This section seeks to package the various strategic and enabling projects that emerged as having the highest scoring based on the multi-criteria prioritisation matrix results.

These are identified as catalytic projects to be prioritised for KwaBhaca and EmaXesibeni, which will set out to achieve the future development vision for each town.

Each project is packaged according to the following information categories described below:

- Project Description: Provides an overview of what the project entails, describes the extent of the project, size, location, target market etc.
- Project Rationale: Justification for the project and why it was selected from an economic, spatial planning, transportation, urban design point of view.
- Timing and Phasing: Indicates the timeframe of the project and the project's start and end dates.
- Cost and Budget Estimates: Sets out the estimated economic impact based on the project CAPEX and OPEX figures for the project, CAPEX being initial capital to be invested in the project (project costs) and OPEX being the costs of operating the project to ensure it is financially sustainable in the long term.

- Enabling Interventions: Interventions that should be in place to enable the success of the development; these range from the provision of bulk infrastructure (water, sanitation, refuse removal, electricity), road network, rezoning, land surveying etc.
- Institutional Recommendations (ULM Roles and Responsibilities).
- Private sector roles and responsibilities

In summary, the review of various projects for both towns is as follows:
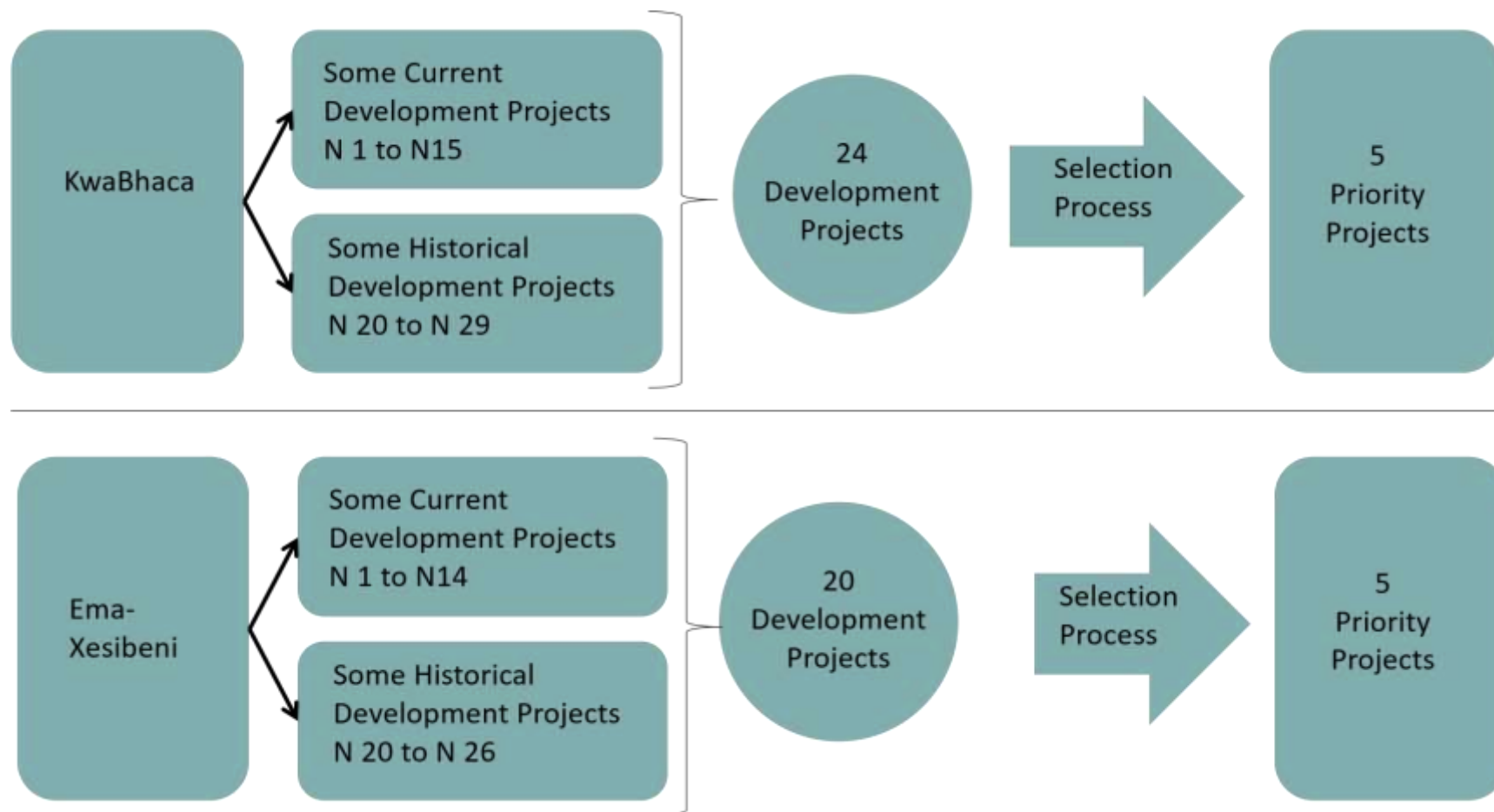
Figure 88: Summary flow chart of review and selection of Priority Projects.

A summary of these projects is as follows:

Emaxesibeni List Of Prioritised Projects	
Project Number	**Project Name**
N14	Retail, Industrial, Larger Spaces (Erven 2913-2940, 2944-2953, 1395, 1396)
N10	Development Site: Retail and Commercial Development (Erven 3077-3085)
N6	New Development Site: Development of Retail Line Shops (Erven, 595, 596, 597, 598, as well as part of the remainder of Erf 188)
N8	Development Site: Hawker Trading Stalls (Erf 3221, part of the remainder of Portion 188) New Government Precinct Including New Municipal Offices

Figure 89: List of priority projects for EmaXesibeni.

KwaBhaca List of Prioritised Projects	
Project Number	**Project Name**
N13	New Hawker Stalls (a part of Erf 1488)
N9	Portion 2 Site 1: Light Industrial Development (part of the remainder of Erf 351)
N4	Proposed Shopping Mall (part of the remainder of Erf 351)
N7	Portion 3 – (Site Mu2) Mixed-Use Development (part of the remainder of Erf 351)
N15	New Government Precinct Including New Municipal Offices (part of the remainder of Erf 351, Erf 969)

Figure 91 Summary of Priority Projects for KwaBhaca.:

Figure 90: Location plan of EmaXesibeni indicating all priority project sites.

Figure 92: Location plan of KwaBhaca indicating all priority project sites

5.2   EMAXESIBENI LIST OF PRIORITISED PROJECTS

5.2.1   N14: Light Industrial and Retail

5.2.1.1   Project Location Diagram

Figure 93: N14: Retail and Industrial opportunities of Erven 2913-2940, 2944-2953, 1395,1396.

5.2.1.2 Project Inception Summary

N14: LIGHT INDUSTRIAL AND RETAIL (Erven 2913-2940, 2944-2953, 1395,1396)	
Project Description	The proposed development is to be located on the west of the periphery of the CBD (-30.79907358,29.36422936) and is to be rezoned for industrial retail and light industrial property developments for small businesses. These properties might ideally be occupied by light industrial manufacturing tenants, and/or construction trade retailers, i.e., hardware/build ware stores. Also, smaller lock-up-and-go units could be designed for tenants who require smaller premises. Supporting infrastructure would include fencing, pedestrian and vehicular access gates, as well as high mast lights, 24-hour CCTV, an internal road network, dedicated receiving areas, and public ablutions.
Project Rational	The analysis of industrial development activity revealed that industrial development in EmaXesibeni is currently characterised by auto services and repairs with little evidence of formal value-adding manufacturing bases in the town. An opportunity exists for the establishment of a dedicated industrial park to enable the potential for value-adding activity and the trade of industrial and automotive products and services. The development of industrial spaces will assist in enticing businesses to take up premises within EmaXesibeni and allow for diversification in the economy away from the current dependency on government, trade, and community and personal services sectors. Furthermore, the presence of hardware stores in the main streets within the CBD has been found to cause congestion during the delivery and collection of materials. The establishment of an industrial park will provide an opportunity for the Municipality to address the traffic caused by hardware stores through the relocation of some of these stores to the industrial park.

Implementation Guidelines		
Timing and Phasing	**Cost and Budget Estimates**	**Enabling Interventions**
Short-term opportunity. Construction estimated at ±12-months	• CAPEX = For the private developer's account: to be determined, based on developer/tenant fixture and fitting requirements • OPEX= For the private developer's account	• Appoint a land surveyor to determine the suitability of the site for the proposed development. • Rezoning of the land to Business Zone II, or Industrial • Ensure that there is adequate bulk infrastructure for the development. • Because of the scale of this priority project, it is recommended that a detailed master plan be developed that provides location-specific development regulations and guidelines.

Institutional Recommendations	
ULM Roles and Responsibilities	• Pass Council resolution to earmark the land for release on a long-term lease. • Rezone the land for commercial development. • Determine the appropriate form of release for the land (long-term lease). • Issue Request for Proposal (RFP) for an investor to take a long-term lease. • Bidders respond to RFP to state desired contractual period, terms and conditions (lease contract max 30 years). • Select preferred bidder based on RFP evaluation criteria. • Enter into a formal legal lease agreement with the developer.
Private Sector/ (or other) Roles and Responsibilities	• Conduct their own market feasibility testing and business plan to respond to RFP. • Formalise long-term lease commitment with the Municipality. • Source funding and/or commercial finance for the development • Acquire applicable developmental approvals and authority consent from the local Municipality. • Submit necessary applications for bulk infrastructure connectivity to ULM and/or ANDM. • Enter into respective tenant contractual agreements aligned to commitments made within the RFP process. • Service long-term lease agreement with the Municipality

5.2.1.3   Project Summary Diagram

High visibility sites along the N2.

Available sites are part of a proposed light industrial and retail precinct.

Main Street

Nolangeni Street

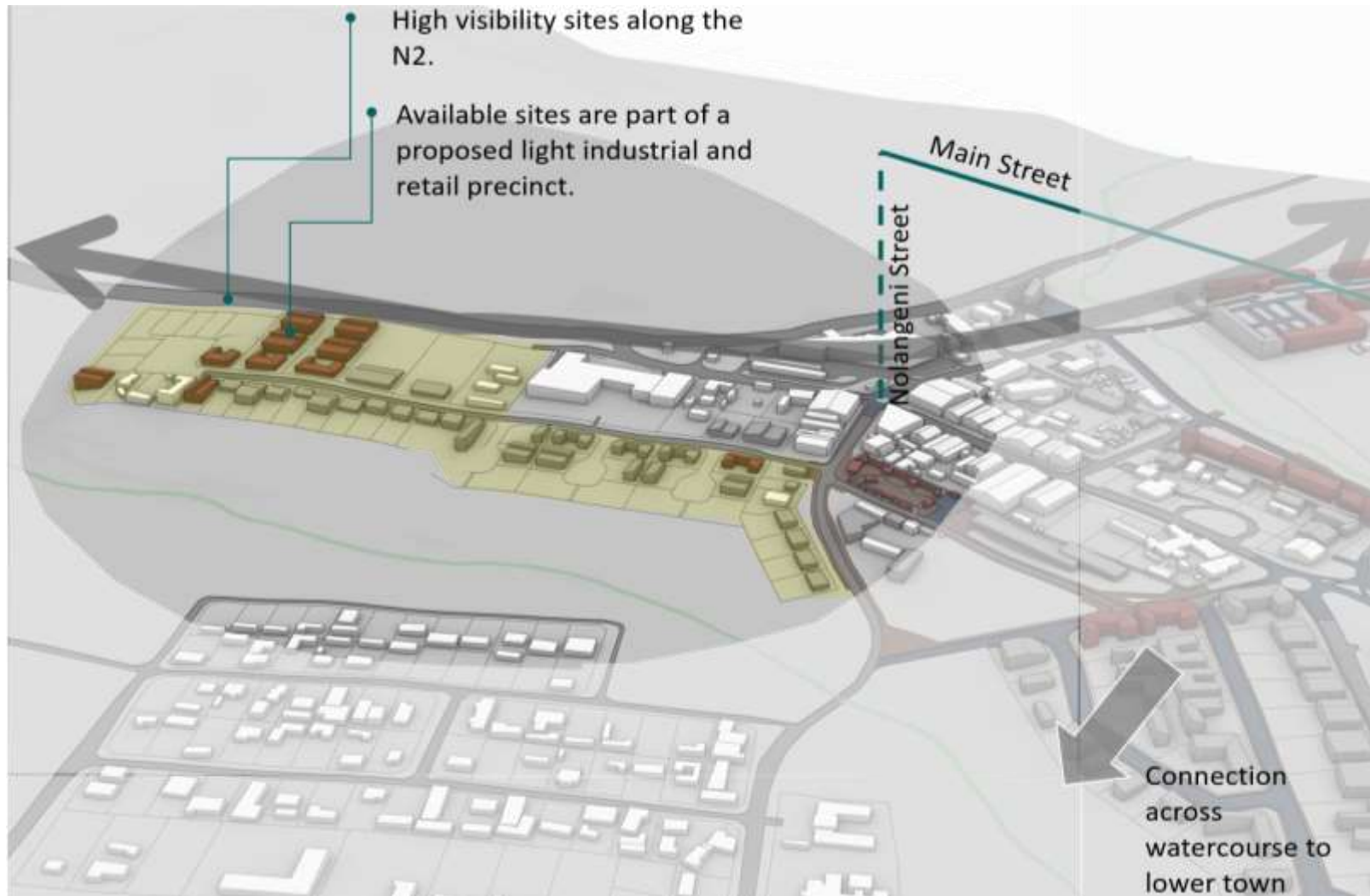Connection across watercourse to lower town

Figure 94: Summary Diagram for EmaXesibeni Priority Project N14 0 Light Industrial.

5.2.2   N10: Development Site for Retail and Commercial Development

5.2.2.1   Project Location Diagram

Figure 95:N10 – Development Site – Retail and commercial development on erf 3077 and 3085.

5.2.2.2   Project Inception Summary

N10: DEVELOPMENT SITE: RETAIL AND COMMERCIAL DEVELOPMENT (Erven 3077-3085)	
Project Description	The project comprises the development of a convenience retail facility located in the corner of Church Street, adjacent to the Alfred Nzo District Municipality offices. The site is also earmarked for the development of a small filling station that would primarily cater to the local market, given its position within the CBD. The shopping complex should ideally comprise an anchor tenant in the form of a recognised national convenience grocery store. Also, various smaller line stores, such as restaurants, coffee shops, takeaway outlets, beauty and hair salons, pharmacies, etc. can be justified on-site. The first floor of the development is also proposed for the development of office space; potential tenants include private consultancy firms and finance and business service SMMEs, in addition to government agencies and parastatals requiring regional office space. The retail facility should further provide for a safe and secure parking bay to provide a convenient shopping experience. Based on the available developable land size, the total coverage for this greenfield development could 3500 m2.
Project Rationale	The Church Street commercial development is aimed at providing convenience-related goods and services to residents, Alfred Nzo District Local Municipality employees, civic centre staff and the employees of local schools and hospitals. Currently, the town only has one notable filling station (Engen) that is targeted at the transient market. The development is well-placed to complement the civic hub.

Implementation Guidelines		
Timing and Phasing	**Cost and Budget Estimates**	**Enabling Interventions**
Short-term opportunity. Construction estimated at ±18-months	• CAPEX = For the private developer's account: to be determined, based on developer/tenant fixture and fitting requirements. • OPEX= For the private developer's account.	• Appoint a land surveyor to determine the suitability of the site for the proposed development. • Rezone of the land to Business Zone II. • Ensure private investor provides meet investment requirements. • Ensure there is adequate bulk infrastructure for the development.

Institutional Recommendations	
ULM Roles and Responsibilities	• Pass Council resolution to earmark the land for release on a long-term lease. • Rezone of the land for commercial development • Determine the appropriate form of release for the land (long-term lease) • Issue Request for Proposal (RFP) for an investor to take a long-term lease. • Bidders respond to RFP to state desired contractual period, terms and conditions (lease contract maximum 30 years) • Select preferred bidder based on RFP evaluation criteria.

	• Enter into a formal legal lease agreement with the developer.
Private Sector/ (or other) Roles and Responsibilities	• Conduct their own market feasibility testing and business plan to respond to RFP. • Formalise long-term lease commitment with the Municipality. • Source funding and/or commercial finance for the development • Acquire applicable developmental approvals and authority consent from the Local Municipality. • Submit necessary applications for bulk infrastructure connectivity to ULM and/or ANDM. • Enter into respective tenant contractual agreements aligned to commitments made within the RFP process. • Service long-term lease agreement with the Municipality •

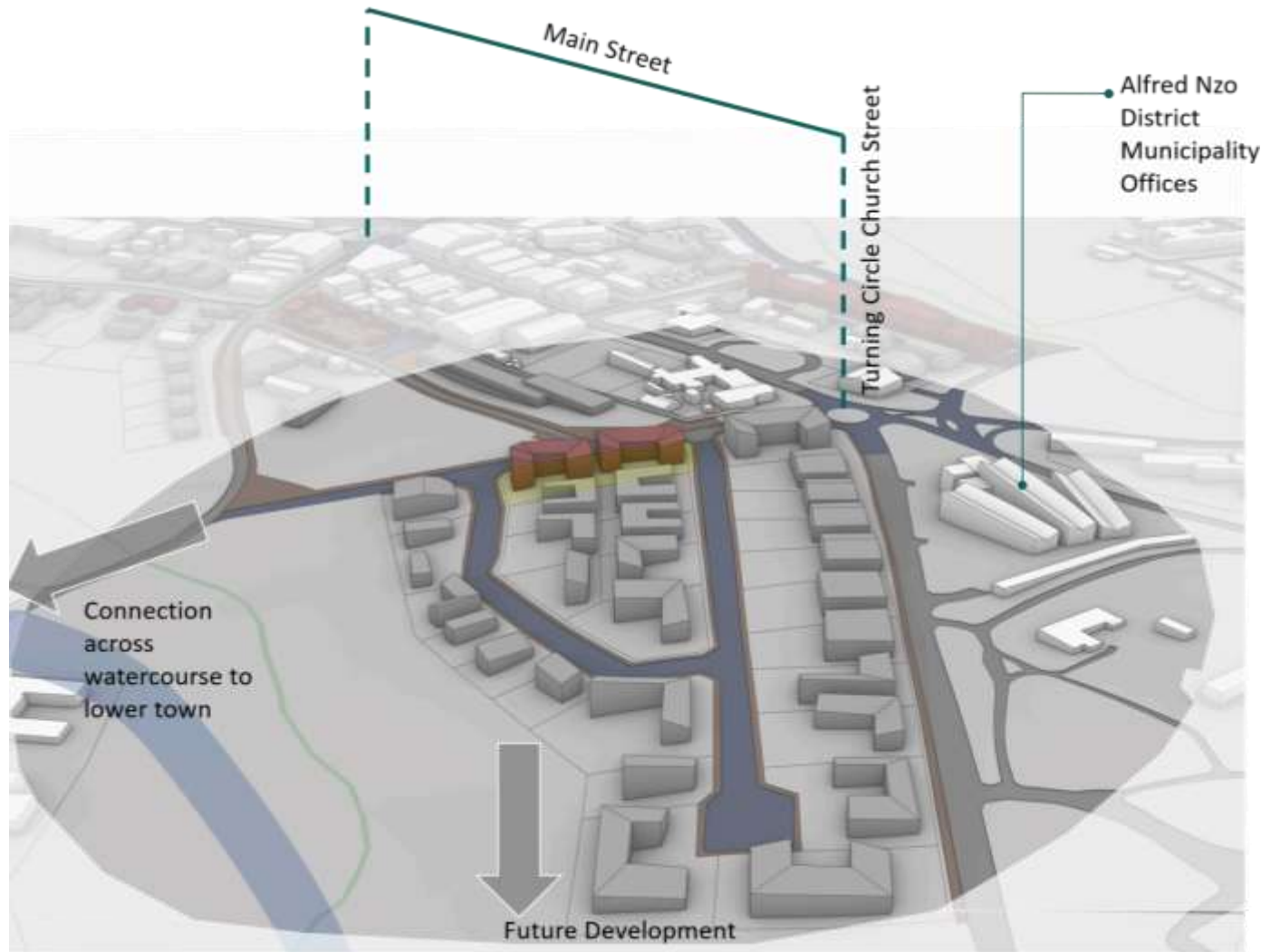### 5.2.2.3   Project Summary Diagram

Figure 96: Summary Diagram for EmaXesibeni Priority Project N10 – Retail and Commerce.

5.2.3   N6: New Development Site – Development of Retail Line Shops

5.2.3.1   Project Location Diagram

Figure 97: N6 - New Development Site - Retail Line Shops on erven, 595,596,597,598, as well as part of the Remainder of Erf 188.

5.2.3.2   Project Inception Summary

N6: NEW DEVELOPMENT SITE: DEVELOPMENT OF RETAIL LINE SHOPS (Erven, 595,596,597,598, as well as part of the Remainder of Erf 188)	
Project Description	The site is proposed for the development of line shops adjacent to the proposed upgraded link road. The individual line stores will comprise small retail units, ranging from 20m² to 100m². It is proposed that tenants will likely comprise local SMMEs looking at establishing small retail stores such as a pharmacy, butchery, internet cafe, hairdresser, dry cleaner and liquor store. Other tenants might include specialised gadget stores, small clothing stores, restaurants and takeaways. Based on the available developable land size, the total coverage for this greenfield development could comprise about 6900 m2.
Project Rational	The upgraded link road will result in higher volumes of passing vehicular and pedestrian traffic, predominantly moving between the N2 and the Civic node. The development of line stores, with convenient parking along the link road, will allow for civic employees, students and healthcare workers to obtain convenience goods while passing to and from their place of work.

Implementation guidelines		
Timing and Phasing	**Cost and Budget Estimates**	**Enabling Interventions**
Short-term opportunity Construction estimated at ±12-months	• CAPEX = For the private developer's account: to be determined, based on developer/tenant fixture and fitting requirements. • OPEX= For the private developer's account.	• Appoint a land surveyor to determine the suitability of the site for the proposed development. • Rezone of the land to Business Zone II. • Ensure private investor provides meet investment requirements. • Ensure there is adequate bulk infrastructure for the development.

Institutional Recommendations	
ULM Roles and Responsibilities	• Pass Council resolution to earmark the land for release on a long-term lease. • Rezoning of the land for commercial development. • Determine the appropriate form of release for the land (long-term lease). • Issue Request for Proposal (RFP) for an investor to take a long-term lease. • Bidders respond to RFP to state desired contractual period, terms and conditions (lease contract maximum 30 years). • Select preferred bidder based on RFP evaluation criteria. • Enter into a formal legal lease agreement with the developer.

Private Sector/ (or other) Roles and Responsibilities	• Conduct own market feasibility testing and business plan to respond to RFP. • Formalise long-term lease commitment with the Municipality. • Source funding and/or commercial finance for the development • Acquire applicable developmental approvals and authority consent from the Local Municipality. • Submit necessary applications for bulk infrastructure connectivity to ULM and/or ANDM. • Enter into respective tenant contractual agreements aligned with commitments made within the RFP process. • Service long-term lease agreement with the Municipality.

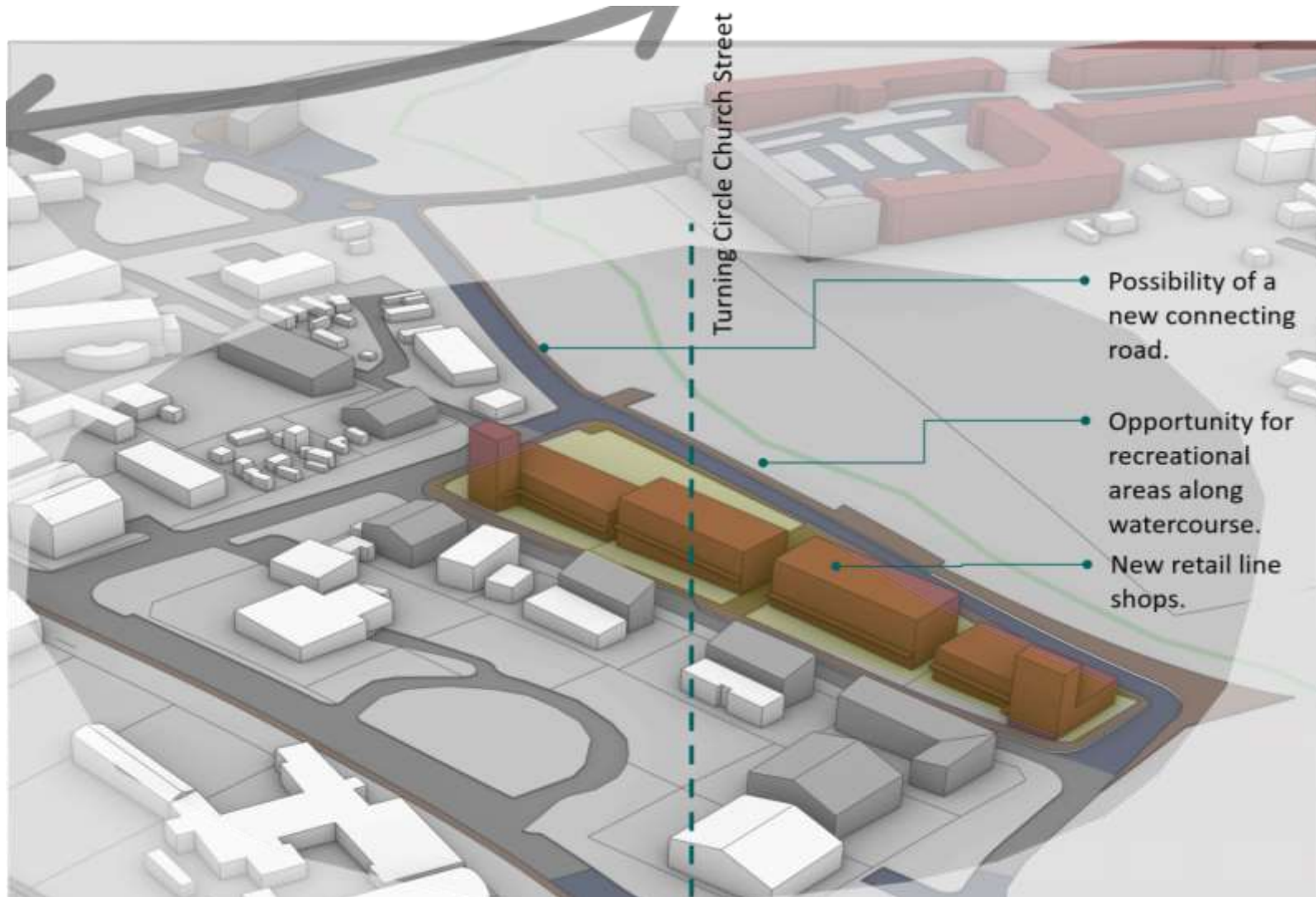### 5.2.3.3   Project Summary Diagram

Figure 98: Summary diagram of EmaXesibeni Priority Project N 6 – Retail Line Shops.

5.2.4   N8: Development Site – Hawker Trading Stalls

5.2.4.1   Project Location Diagram

Figure 99: N8 - New Hawker Stalls on erf 3221.

5.2.4.2 Project Inception Summary

N8: DEVELOPMENT SITE: HAWKER TRADING STALLS (Erf 3221, Part of the Remainder of Portion 188)	
Project Description	The ULM has been selected to benefit from the improvement of informal trading infrastructure projects as funded by the Department of Economic Development, Environmental Affairs and Tourism (DEDEAT) and implemented by the Eastern Cape Development Corporation (ECD). EmaXesibeni is one of the towns that stand to benefit in Phase 1 of the project, with AmaBhaca to benefit in Phase 2. The project is proposed to be undertaken on a greenfield site that is currently used by informal motor mechanics. The area is currently unsurveyed and forms part of Erf 188 (EmaXesibeni Commonage). The stalls are to comprise about 21 enclosed stalls built in brick and mortar with floor areas measuring approximately 9m² - 11m². The development will have a taxi drop-off and pick-up area with a public ablution facility. The development will comprise a proposed total of 28 roof-sheltered stalls for fruit and vegetable hawkers. Also, there will be a dedicated size allocated for vehicle repairs with an associated car wash facility and approximately 38 parking bays. Drawings and designs of the facility have been submitted to the ULM for approval and were approved in March 2020. The ECDC is in the process of commencing with the procurement process.
Project Rational	The findings of the trend analysis for the informal retail property market reveals the presence of scope and opportunity for the formalisation of informal trading stations. The results of a snapshot survey with informal hawkers showed that informal trading facilities in the towns are dilapidated, with the majority of hawkers having no formal stalls to operate in, resulting in the office of temporary, unstable and unsafe facilities. More than a third of hawkers indicated the need for the formalisation of hawker stalls as a priority intervention.

Implementation Guidelines		
Timing and Phasing	**Cost and Budget Estimates**	**Enabling Interventions**
Short-term opportunity Construction estimated at 12-months	• CAPEX: To be provided by the client. • OPEX: annual maintenance budget to be allocated by the Municipality for repairs, such as painting etc.	Although the project is to be initiated by DEDEAT in partnership with ECDC, the Municipality has a long-term role to play in the management and maintenance of the facilities to ensure their longevity.

Institutional Recommendations		

ULM Roles and Responsibilities	• ULM to form part of the Project Steering Committee (PSC) • ULM to attend PSC meetings and play a facilitative role between the PSC and local interested and affected parties. • Liaise with interested and affected stakeholders such as taxi associations and hawker stall associations and encourage active participation.
Private Sector/ (or other) Roles and Responsibilities	• Respond to the call for bids for construction companies. • Respond to the call for bids for annual maintenance and repairs (if applicable)

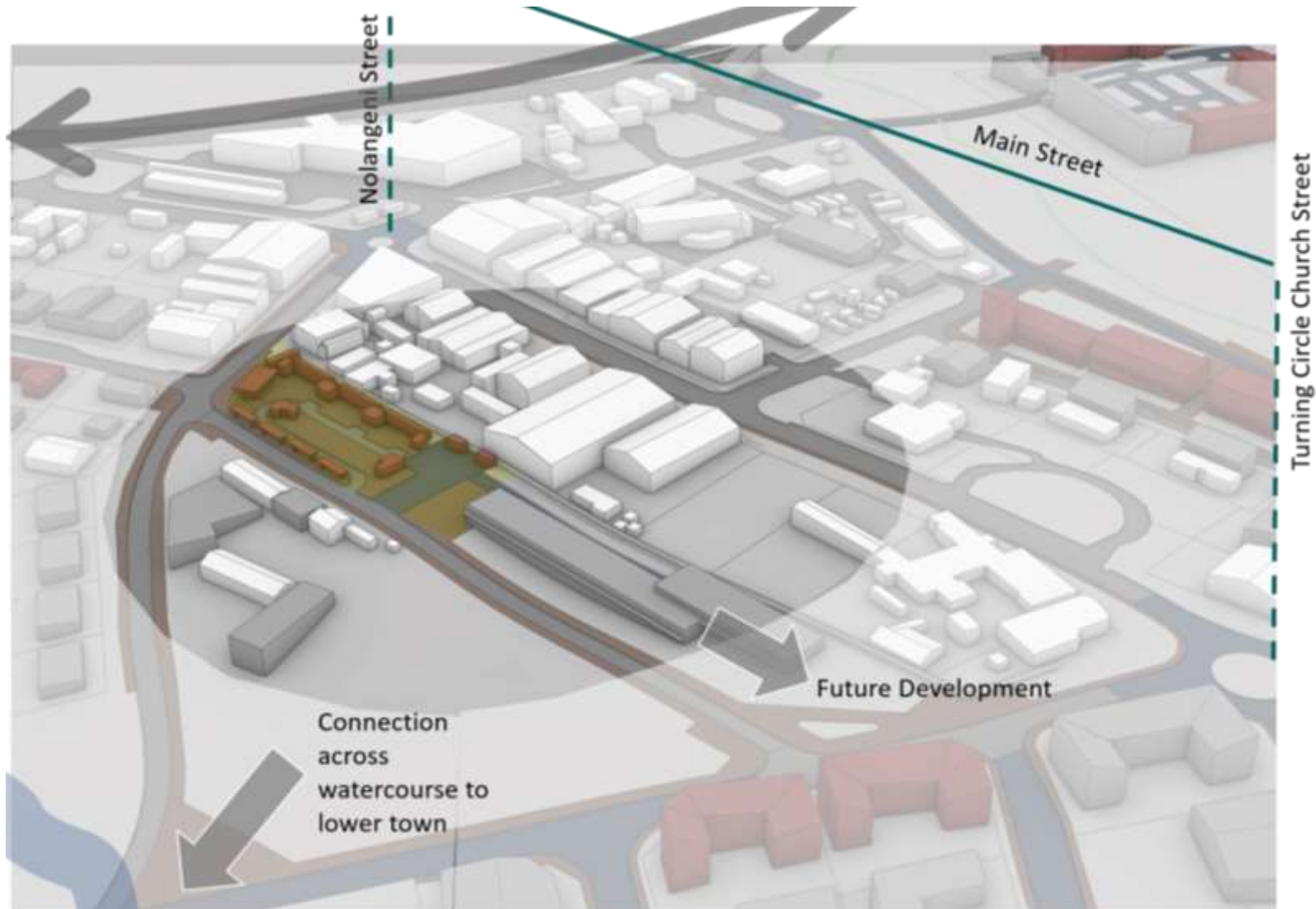### 5.2.4.3 Project Summary Diagram

Figure 100: Summary Diagram of EmaXesibeni Priority Project N8 - Hawker Trading Facilities.

5.2.5   N1: New Government Precinct Including Municipal Offices

5.2.5.1   Project Location Diagram

Figure 101: N1 - New Government Precinct.

5.2.5.2   Project Inception Summary

N1: NEW GOVERNMENT PRECINCT INCLUDING NEW MUNICIPAL OFFICES		
Project Description	The Eastern Cape Department of Public Works (ECDPW) has plans to build a dedicated government office precinct in EmaXesibeni that will house regional offices and some units of ANDM. The departments will include the Department of Human Settlements, the Department of Education and the Department of Public Works, among others. The proposed location for the government precinct is north of the CBD in EmaXesibeni along the N2.	
Project Rational	The development of the government precinct will see the relocation of the regional provincial offices which are outside the province. This is expected to unlock major development potential for the town as it will bring economically active individuals to the area.	
Implementation Guidelines		
Timing and Phasing	**Cost and Budget Estimates**	**Enabling Interventions**
Short-term opportunity. Construction estimated at 12-months	• CAPEX = For the private developer's account: to be determined, based on developer/tenant fixture and fitting requirements. • OPEX= For the private developer's account.	• Appoint a land surveyor to determine the suitability of the site for the proposed development. • Rezoning of the land to Business Zone II. • Ensure private investor provides meet investment requirements. • Ensure that there is adequate bulk infrastructure for the development.
Institutional Recommendations		
ULM Roles and Responsibilities ULM Roles and Responsibilities	• ULM to form part of the Project Steering Committee (PSC) • ULM to attend PSC meetings and play a facilitative role between the PSC and local interested and affected parties	
Private Sector/ (or other) Roles and Responsibilities	• Respond to the call for bids for construction companies. • Respond to the call for bids for annual maintenance and repairs (if applicable)	

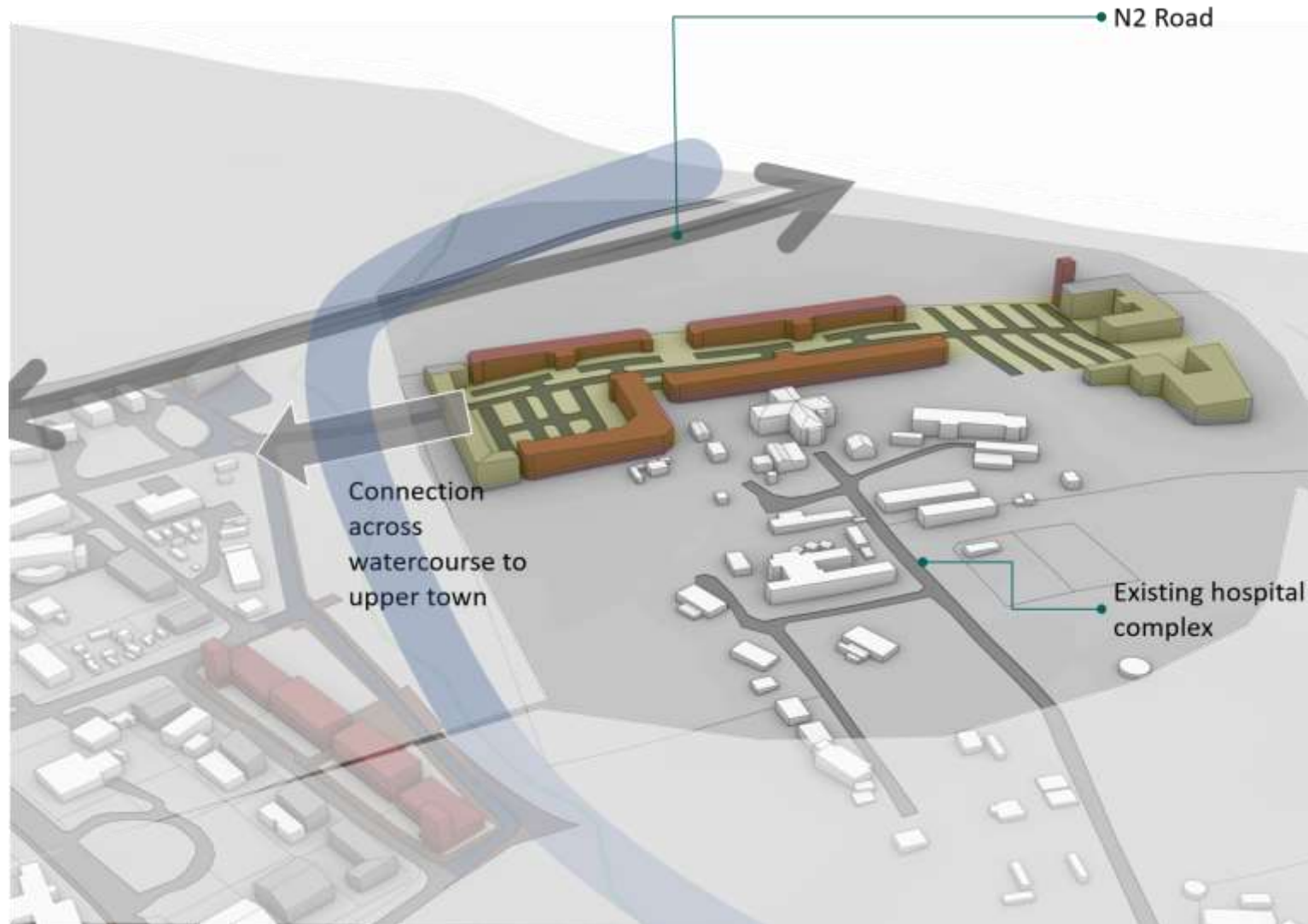5.2.5.3   Project Summary Diagram

Figure 102: Summary diagram for EmaXesibeni N1 – New Government Precinct

Figure 103: Summary diagram of all priority projects for EmaXesibeni.

5.3   KWABHACA LIST OF PRIORITISED PROJECTS

5.3.1   N13: New Hawker Stalls

5.3.1.1   Project Location Diagram

Figure 104: N13 - New Hawker Stalls.

5.3.1.2   Project Inception Summary

N13: NEW HAWKER STALLS (A Part of Erf 1488)	
Project Description	The ULM has been selected to benefit from the improvement of the informal trading infrastructure project as funded by the Department of Economic Development, Environmental Affairs and Tourism (DEDEAT) and implemented by the Eastern Cape Development Corporation (ECDC). KwaBhaca is one of the towns that stand to benefit during the second phase of the project; note that EmaXesibeni is targeted in Phase 1. Currently, there are existing stalls in KwaBhaca built of brick and mortar, all of which are fully utilised by hawkers located adjacent to the N2 main street. However, with little maintenance over the years, the stalls are presently in a dilapidated state and in dire need of revamping. The project envisions the revamp of certain existing stalls, while others will be relocated to more appropriate locations, such as adjacent to the taxi rank.
Project Rational	The findings of the trend analysis for the informal retail property market reveals the scope and opportunity for the formalisation of the informal trading stations. The results of a snapshot survey with informal hawkers showed that informal trading facilities in the towns are dilapidated, with the majority of hawkers having no formal stalls to operate in, resulting in the office of temporary, unstable and unsafe facilities. More than a third of hawkers indicated the need for the formalisation of hawker stalls as a priority intervention.

Implementation Guidelines		
Timing and Phasing	**Cost and Budget Estimates**	**Enabling Interventions**
Short-term opportunity Construction estimated at 12 months	• CAPEX: This is to be confirmed with the client and consultant project leader. • OPEX: annual maintenance budget to be allocated by the Municipality for repairs, such as painting etc.	Although the project is to be initiated by DEDEAT in partnership with ECDC, the Municipality has a long-term role to play in the management and maintenance of the facilities to ensure their longevity.

Institutional Recommendations	
ULM Roles and Responsibilities	• ULM to form part of the Project Steering Committee (PSC). • ULM to attend PSC meetings and play a facilitative role between the PSC and local interested and affected parties. • Liaise with interested and affected stakeholders such as Taxi associations and Hawker Stall Associations and encourage active participation.
Private Sector/ (or other) Roles and Responsibilities	• Respond to the call for bids for construction companies. • Respond to the call for bids for annual maintenance and repairs (if applicable).

5.3.1.3   Project Summary Diagram

Figure 105: Summary diagram for KwaBhaca N13 - New Hawker Trading Facilities.

5.3.2   N9: Portion 2 Site 1- Light Industrial Development

5.3.2.1   Project Location Diagram

Figure 106: N9 – PORTION 2 SITE 1 – Industrial Development.

5.3.2.2 Project Inception Summary

N9: PORTION 2 SITE 1: LIGHT INDUSTRIAL DEVELOPMENT (Part of the Remainder of Erf 351)	
Project Description	The proposed development is to be located along the R 405 en route to Matatiele (-30.89486183,28.98569317) and is to be rezoned for industrial retail and light industrial property development for small businesses. These properties may ideally be occupied by light industrial manufacturing tenants and/or construction trade retailers, i.e., hardware/build ware stores. Also, smaller lock-up-and-go units could be designed for tenants who require smaller premises. Supporting infrastructure would include fencing, pedestrian and vehicular access gates, as well as high mast lights, 24-hour CCTV, an internal road network, dedicated receiving areas, and public ablutions. Based on the available developable land size, the total coverage for this greenfield development could comprise 18 Hectares.
Project Rational	The analysis of industrial development activity revealed that industrial development in KwaBhaca is currently characterised by auto services and repairs with little evidence of formal value-adding manufacturing bases in the town. An opportunity exists for the establishment of a dedicated industrial park to enable the potential for value-adding activity and the trade of industrial and automotive products and services. The development of industrial spaces will assist in enticing businesses to take up premises within EmaXesibeni and allow for diversification in the economy away from the current dependency on the Government, Trade, and Community and Personal Services sectors. Furthermore, the presence of hardware stores in the main streets within the CBD has been found to cause congestion during the delivery and collection of materials. The establishment of an industrial park will provide an opportunity for the Municipality to address the traffic caused by hardware stores through the relocation of some of these stores to the industrial park.

Implementation Guidelines		
Timing and Phasing	**Cost and Budget Estimates**	**Enabling Interventions**
Short-term opportunity Construction estimated at 12-18 months. This could be for the phase 1 initiation construction including infrastructure, security and access.	• CAPEX = For the private developer's account: to be determined, based on developer/tenant fixture and fitting requirements. • OPEX= For the private developer's account.	• Appoint a land surveyor to determine the suitability of the site for the proposed development. • Rezoning of the land to Business Zone II, or Industrial. • Ensure that there is adequate bulk infrastructure for the development. • Because of the scale of this priority project, it is recommended that a detailed masterplan be developed that provides location-specific development regulations and guidelines.

Institutional Recommendations		

ULM Roles and Responsibilities	• Pass Council resolution to earmark the land for release on a long-term lease. • Rezoning of the land for commercial development • Determine the appropriate form of release for the land (long-term lease) • Issue Request for Proposal (RFP) for an investor to take a long-term lease. • Bidders respond to RFP to state desired contractual period, terms and conditions (lease contract maximum 30 years) • Select preferred bidder based on RFP evaluation criteria. • Enter into a formal legal lease agreement with the developer.
Private Sector/ (or other) Roles and Responsibilities	• Conduct own market feasibility testing and business plan to respond to RFP. • Formalise long-term lease commitment with the Municipality. • Source funding and/or commercial finance for the development • Acquire applicable developmental approvals and authority consent from the Local Municipality. • Submit necessary applications for bulk infrastructure connectivity to ULM and/or ANDM. • Enter into respective tenant contractual agreements aligned with commitments made within the RFP process. • Service long-term lease agreement with the Municipality

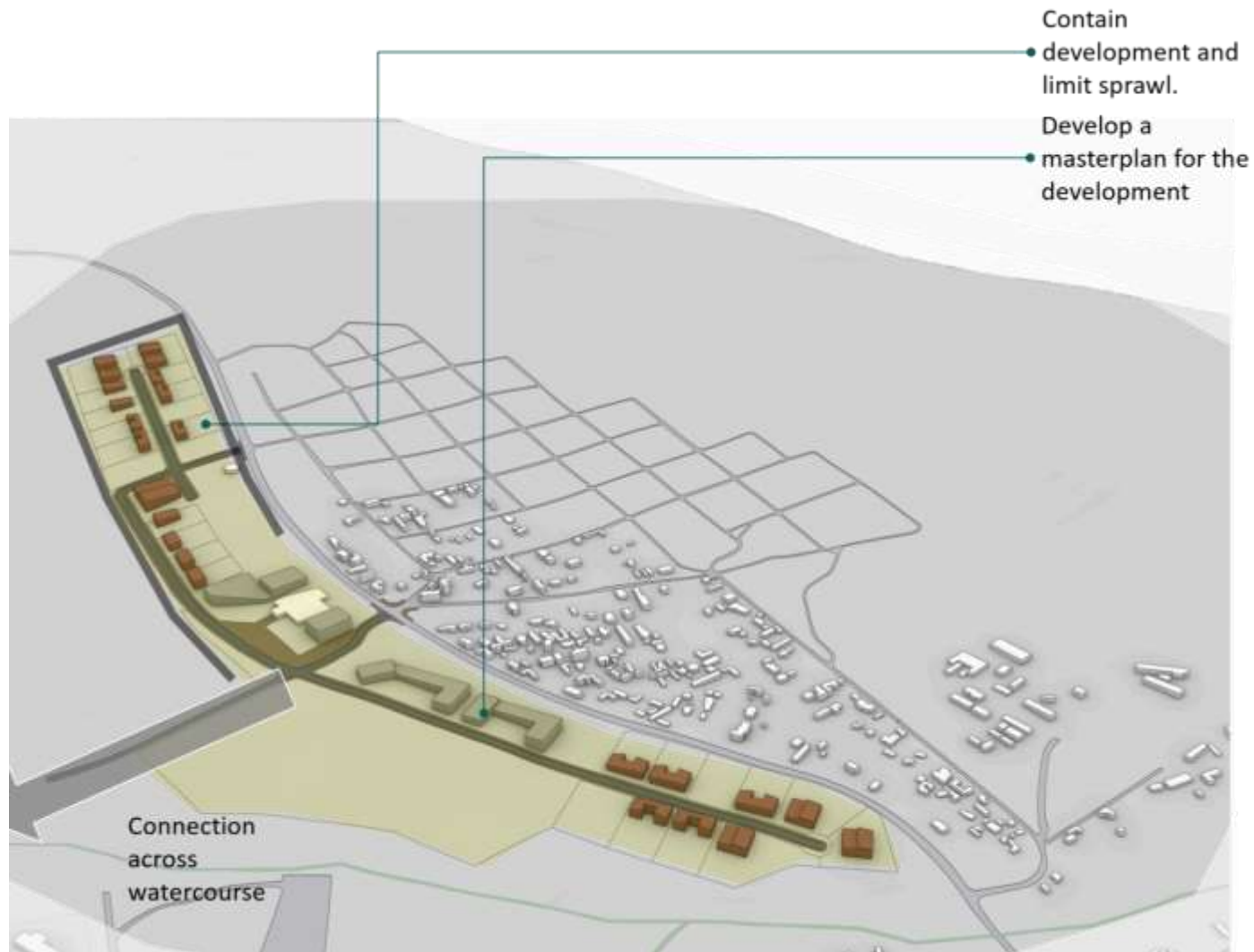### 5.3.2.3   Project Summary Diagram

Figure 107: Summary diagram for KwaBhaca Priority Project N9 – Light Industrial Development.

5.3.3   N4: New Mixed Use Development (Including Shopping Mall Site)

5.3.3.1   Project Location Diagram

Figure 108: N4 - PORTION 1 SITE C - Proposed mixed-use.

5.3.3.2   Project Inception Summary

N4: NEW MIXED-USE DEVELOPMENT (INCLUDING PROPOSED SHOPPING MALL SITE) (Part of the Remainder of Erf 351)	
Project Description	This retail facility proposed comprises a neighbourhood shopping centre with a GLA of between 5 000 to 8 000 m². The shopping centre is proposed to fulfil a convenience and express convenience role for current and future local KwaBhaca residents, in addition to households residing in the rural villages in the periphery of KwaBhaca. The centre would comprise an anchor tenant in the form of a reputable national food/anchor store such as Spar, Pick n Pay, or Checkers occupying approximately 1500 m² GLA. Other potential tenants might include convenience retailers such as a national pharmacy/health beauty store (e.g., Dis-Chem or Clicks). Service retailers such as hairdressers, beauty and nail clinics as well as a dry cleaner. Indoor/outdoor restaurant and entertainment zones are also proposed, thereby introducing after hour facilities to local KwaBhaca residents. Based on the available developable land size, the total coverage for this greenfield development could comprise about 94 Hectares.
Project Rational	The demand modelling exercise undertaken in this study indicates that there is, currently and in future, a justification for the development of a shopping centre that specifically targets middle- to higher-income (aspirational) consumers. Scenario growth forecasting shows that even at the most optimistic levels, the development should not exceed the size of a small neighbourhood shopping centre. See retail model results in the Property Market chapter.

Implementation Guidelines		
Timing and Phasing	**Cost and Budget Estimates**	**Enabling Interventions**
Short-term opportunity Construction estimated at 12-18 months	• CAPEX = For the private developer's account: to be determined, based on developer/tenant fixture and fitting requirements. • OPEX= For the private developer's account.	• Appoint a land surveyor to determine the suitability of the site for the proposed development. • Rezone of the land to Business Zone II, or Industrial. • Ensure that there is adequate bulk infrastructure for the development. • Because of the scale of this priority project, it is recommended that a detailed masterplan be developed that provides location-specific development regulations and guidelines. • It is encouraged that strict controls be put in place to manage sprawl.
Institutional Recommendations		

ULM Roles and Responsibilities	- Pass Council resolution to earmark the land for release on a long-term lease. - Rezone of the land for commercial development - Determine the appropriate form of release for the land (long-term lease) - Issue Request for Proposal (RFP) for an investor to take a long-term lease. - Bidders respond to RFP to state desired contractual period, terms and conditions (lease contract maximum 30 years) - Select preferred bidder based on RFP evaluation criteria. - Enter into a formal legal lease agreement with the developer.
Private Sector/ (or other) Roles and Responsibilities	- Conduct own market feasibility testing and business plan to respond to RFP. - Formalise long-term lease commitment with the Municipality. - Source funding and/or commercial finance for the development - Acquire applicable developmental approvals and authority consent from the Local Municipality. - Submit necessary applications for bulk infrastructure connectivity to ULM and/or ANDM. - Enter into respective tenant contractual agreements aligned with commitments made within the RFP process. - Service long-term lease agreement with the Municipality

5.3.3.3   Project Summary Diagram

Contain development and limit sprawl.

Develop a masterplan for the development

Allow for road connection to new development.

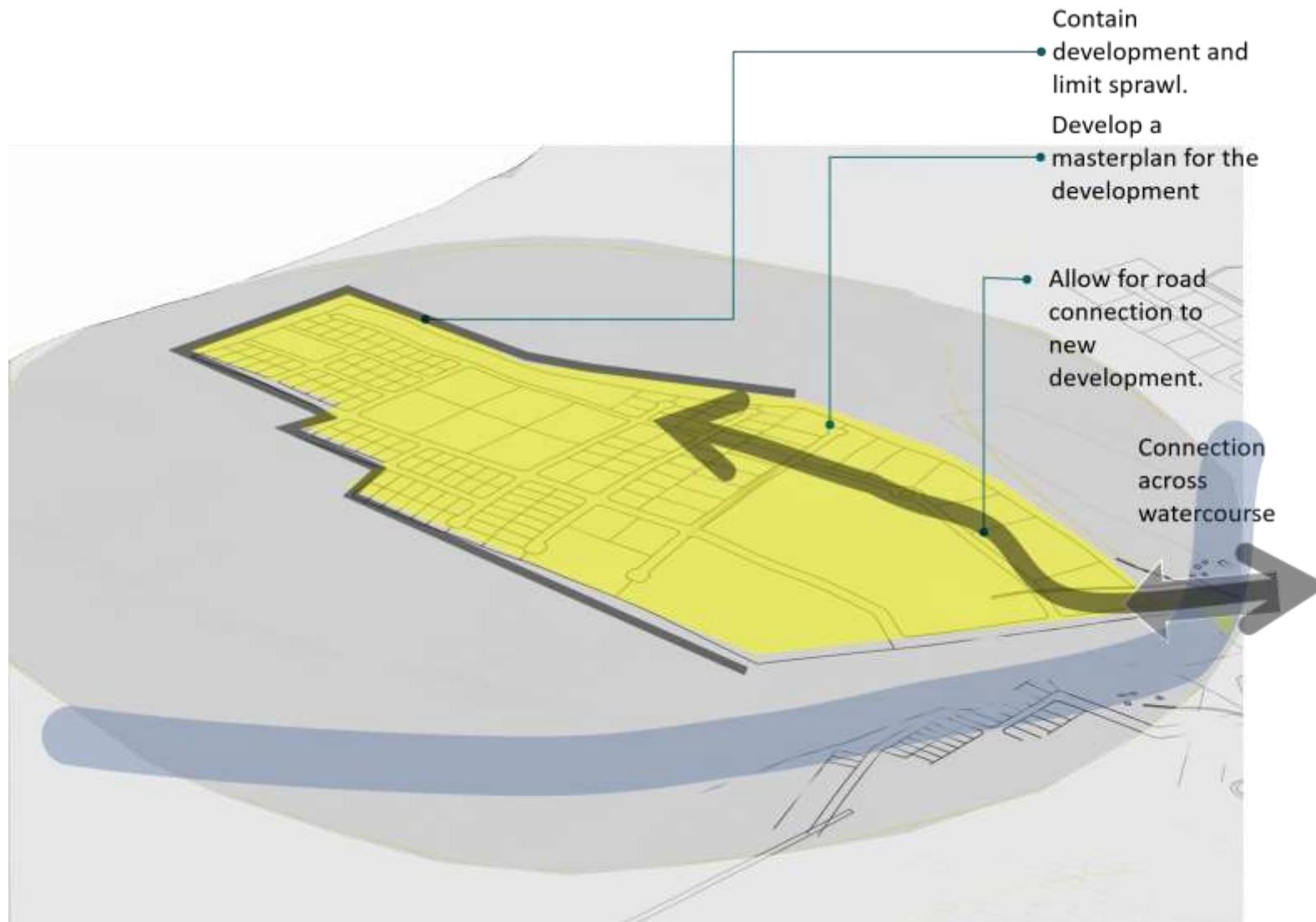Connection across watercourse

Figure 109: Summary Diagram of KwaBhaca Priority Project N4 - Mixed Use.

5.3.4   N7: Portion 3 – (Site MU2) Mixed Use Development

5.3.4.1   Project Location Diagram

Figure 110: INFIL 3 - Proposed commercial, institutional and residential.

5.3.4.2 Project Inception Summary

N7 - PORTION 3 – (SITE MU2) MIXED-USE DEVELOPMENT (Part of the Remainder of Erf 351)		
Project Description	The proposed mixed-use development comprises the development of commercial, retail and residential properties within Portion 3 Site MU 2, located on the Mpila Drive bypass. The mixed-use development proposes the development of a two storey building with retail line stores on the ground floor and office space on the first floor. Potential tenants here include private consultancy firms and finance and business service SMMEs, in addition to government agencies and parastatals requiring regional office space. Also, another portion of the site proposes the development of three-storey, high-density flats/apartments to accommodate middle- to higher-income tenants and investors working within the town. A parking area and taxi rank will be built as part of the development. Based on the available developable land size, the total coverage for this greenfield development could comprise 2,4 Hectares.	
Project Rational	The property status quo analysis revealed a demand for housing, retail and office space developments in KwaBhaca. A mixed-use development provides an opportunity to provide affordable rental housing for workers as well as a convenient shopping experience for commuters and traffic traversing the bypass. The ULM 2018 Housing Sector Plan showed that commuters in KwaBhaca travel an average of 11km from their place of residence to work every day. High-density flats/apartments can provide weekday accommodation close to the CBD and within walking distance of most offices, retail stores and other places of work for professionals in the town. The development seeks to promote a 'live, work and play' environment.	
Implementation guidelines		
Timing and Phasing	**Cost and Budget Estimates**	**Enabling Interventions**
Short-term opportunity Construction estimated at 12-months	• CAPEX = For the private developer's account: to be determined, based on developer/tenant fixture and fitting requirements. • OPEX = For the private developer's account.	• Appoint a land surveyor to determine the suitability of the site for the proposed development. • Rezone of the land to Business Zone II, or Industrial. • Ensure there is adequate bulk infrastructure for the development. • The extent of the watercourse to be understood.
Institutional Recommendations		
ULM Roles and Responsibilities	• Pass Council resolution to earmark the land for release on a long-term lease. • Rezone of the land for commercial development. • Determine the appropriate form of release for the land (long-term lease). • Issue Request for Proposal (RFP) for an investor to take a long-term lease.	

	• Bidders respond to RFP to state desired contractual period, terms and conditions (lease contract max 30 years). • Select preferred bidder based on RFP evaluation criteria. • Enter into a formal legal lease agreement with the developer.
Private Sector/ (or other) Roles and Responsibilities	• Conduct own market feasibility testing and business plan to respond to RFP. • Formalise long-term lease commitment with the Municipality. • Source funding and/or commercial finance for the development • Acquire applicable developmental approvals and authority consent from the Local Municipality. • Submit necessary applications for bulk infrastructure connectivity to ULM and/or ANDM. • Enter into respective tenant contractual agreements aligned with commitments made within the RFP process. • Service long-term lease agreement with the Municipality

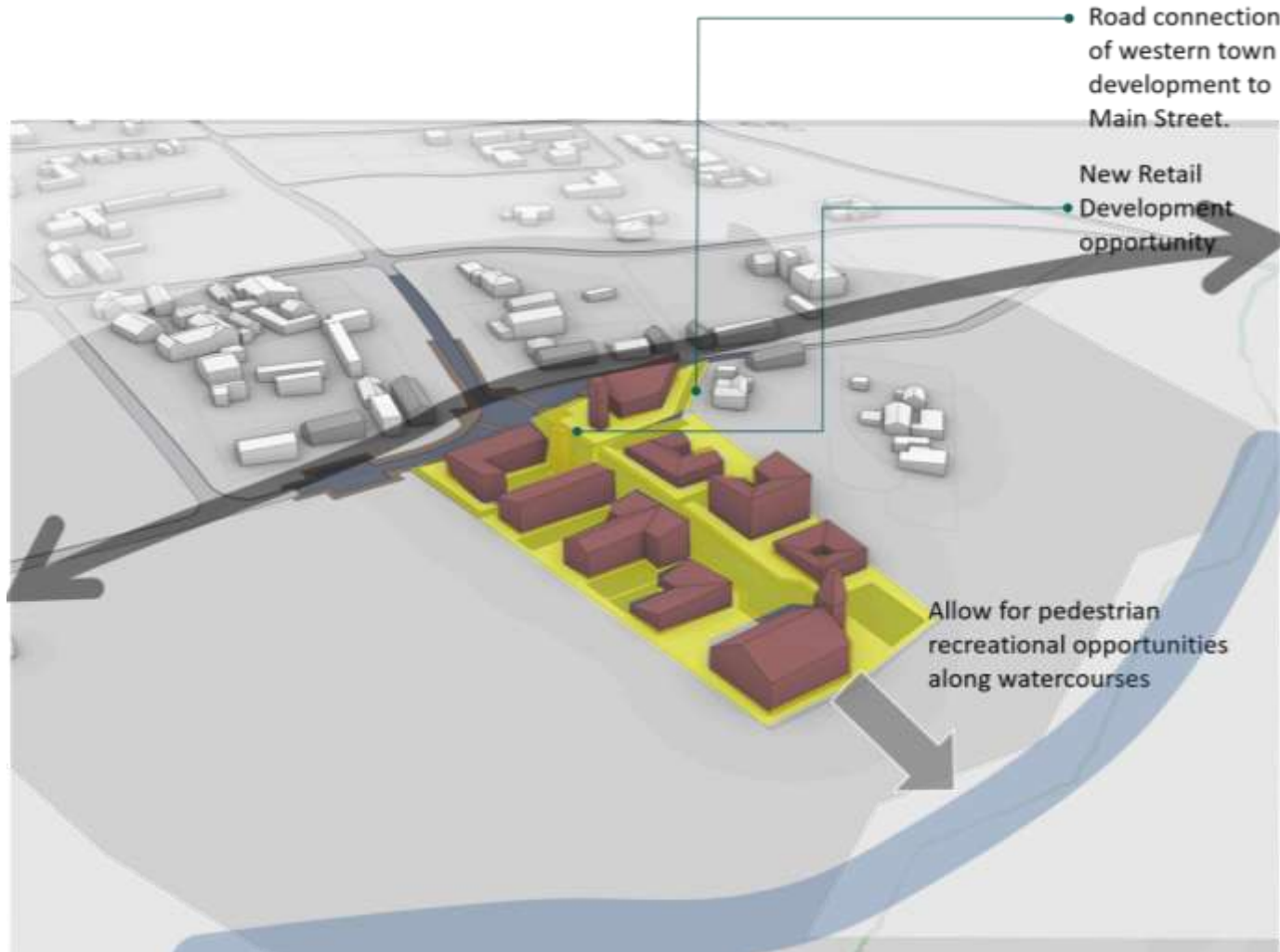5.3.4.3   Project Summary Diagram

Figure 111: Summary diagram of KwaBhaca Priority Project N7 - Mixed Use.

5.3.5   N15: New Government Precinct Including New Municipal Offices

5.3.5.1   Project Location Diagram

Figure 112: N15 – Proposed new government offices including municipal offices.

5.3.5.2   Project Inception Summary

N15: NEW GOVERNMENT PRECINCT INCLUDING NEW MUNICIPAL OFFICES (Part of the Remainder of Erf 351, Erf 969)		
Project Description	In KwaBhaca the Municipality is currently developing a four-story office building that will replace temporary office structures housing a number of the municipal staff. The new municipal offices are to be located in Ward 18. The project involves the construction of a four-storey building. The new offices will have space for all the Municipality's internal departments (i.e., Corporate Services, Budget and Treasury, Citizen and Community Services, Infrastructure and Planning, Local Economic Development, Special Programme and Communications, Office of the Municipal Manager). These offices will have more than 93 individual office spaces measuring 3710m² in total. Offices will boast associated conference venues, a cafeteria, male and female change rooms, a public-serving area, a classroom, a foyer, etc. The current existing occupied offices at KwaBhaca will be repurposed as the new Municipal Council Chambers.	
Project Rational	ULM is a fast-growing local Municipality with increasing pressure on the available municipal infrastructure caused by limited office space. The project will provide a sustainable working environment for municipal workers and stand to benefit local contractors through the procurement process to improve their CIDB grading.	
Implementation guidelines		
Timing and Phasing	**Cost and Budget Estimates**	**Enabling Interventions**
(March 2021 - March 2023)	• CAPEX = For the private developer's account: to be determined, based on developer/tenant fixture and fitting requirements. • OPEX = For the private developer's account.	• Appoint a land surveyor to determine the suitability of the site for the proposed development. • Rezoning of the land to Business Zone II, or Industrial. • Ensure that there is adequate bulk infrastructure for the development. • Careful and detailed master planning of this precinct is required. • The extent of the watercourse to be understood. •
Institutional Recommendations		
ULM Roles and Responsibilities **ULM Roles and Responsibilities**	• On-going maintenance and operations of the facility	
Private Sector/ (or other) Roles and Responsibilities	• Respond to the call for bids for construction companies.	

ULM URBAN REGENERATION PLANS AND URBAN DESIGN FRAMEWORK

F I N A L   R E P O R T

	• Respond to the call for bids for annual maintenance and repairs (understood to already have been appointed)

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5.3.5.3   Project Summary Diagram

Road connection of western town development to Main Street.

Future Development

Future Development

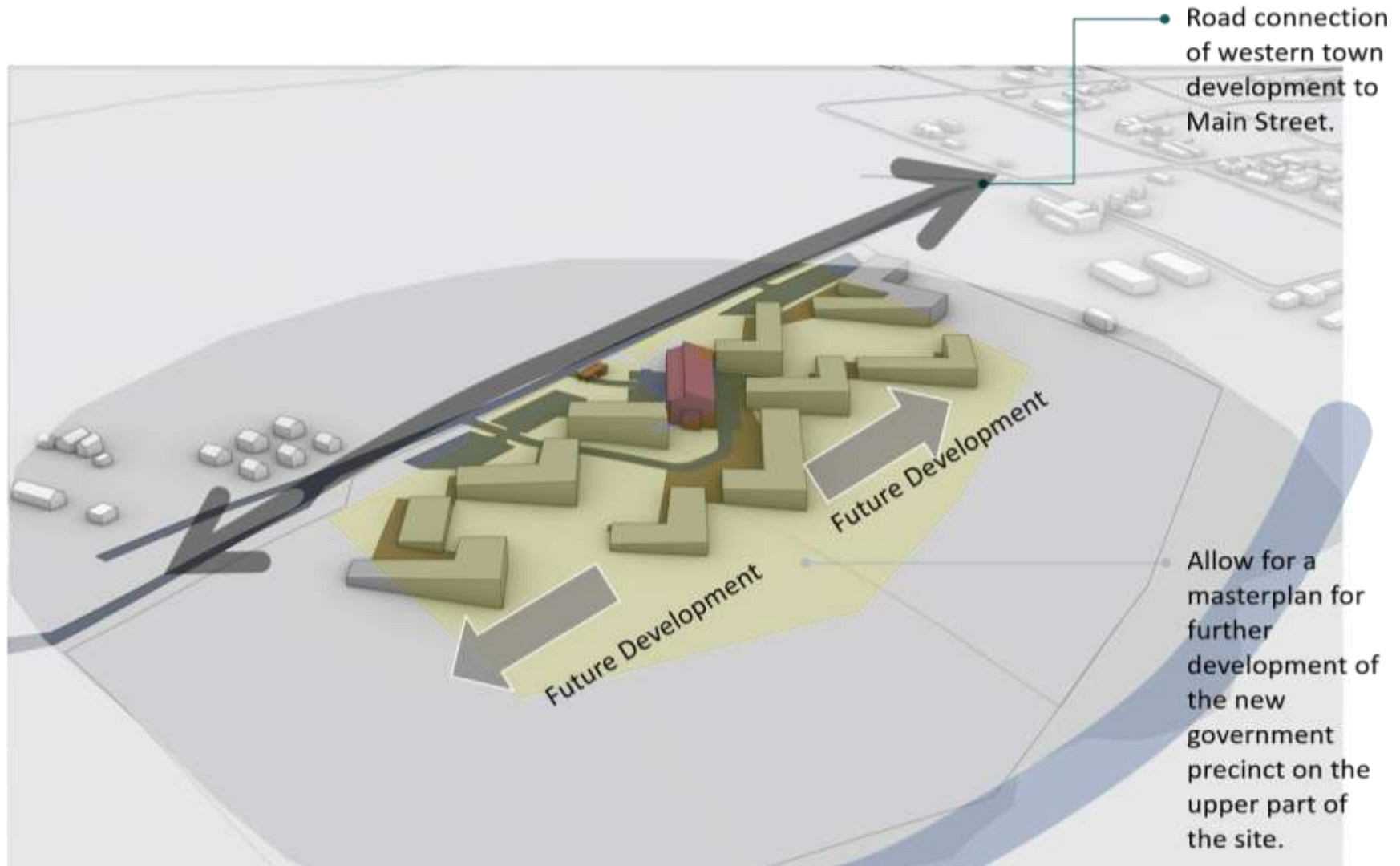Allow for a masterplan for further development of the new government precinct on the upper part of the site.

Figure 113: Summary diagram of KwaBhaca Priority Project N15 - New Government Precinct.
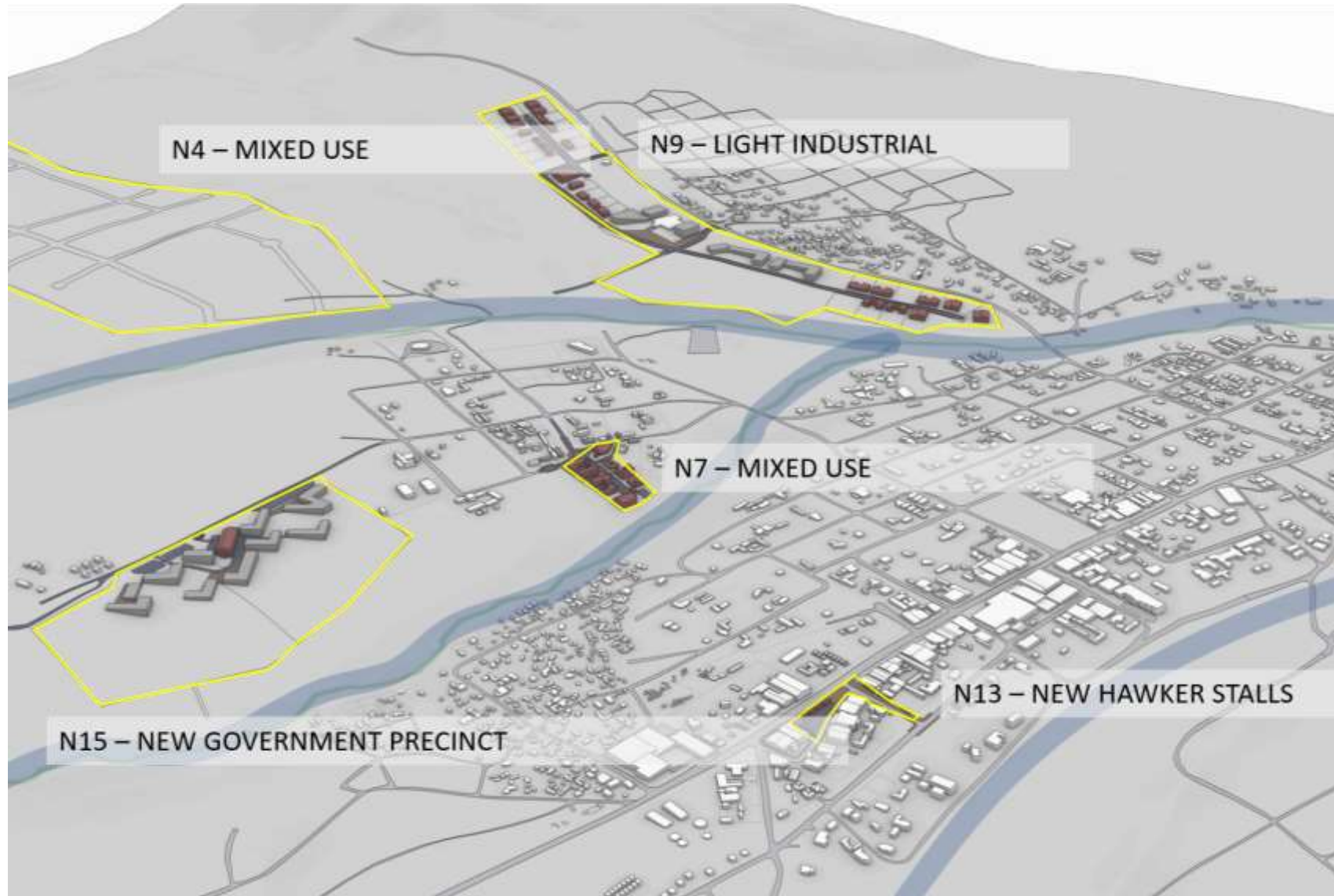
Figure 114: Summary diagram of all Priority Projects in KwaBhaca.

Figure 115 EMAXESIBENI 2020.

6   ANNEXURE

To respond to the brief fully and prepare this report, detailed investigations and reporting have been undertaken regarding Infrastructure, Town Planning, Roads and Transportation and Environmental.

These investigations and reporting along with other key documents and presentations that formed part of this work are recorded here and provided as annexures. Keymaps and drawings developed as part of this work are recorded here.

6.1   INFRASTRUCTURE REPORT

The following are attached:

- ULM Infrastructure Review Report, Ro, dated 04 September 2020.
- Drawing 509751-0000-DRG-ELE-0001-EmaXesibeni Electrical Layout
- Drawing 509751-0000-DRG-ELE-0002-KwaBhaca Electrical Layout
- Drawing 509751-0000-DRG-RDS-0001-EmaXesibeni Roads Layout
- Drawing 509751-0000-DRG-RDS-0002-KwaBhaca Roads Layout
- Drawing 509751-0000-DRG-WAT-0001-EmaXesibeni Water Layout
- Drawing 509751-0000-DRG-WAT-0002-KwaBhaca Water Layout

6.2   TOWN PLANNING SPATIAL PROPOSALS REPORT

The following are attached:

- Umzimvubu Local Municipality Urban Regeneration Strategy, **Town Planning Considerations**, for EmaXesibeni and KwaBhaca, Version 6, February 2021, by Maswana Group of Companies.

- Umzimvubu Local Municipality Urban Regeneration Strategy, **Town Planning Proposals**, for EmaXesibeni and KwaBhaca, Version 6, February 2021, by Maswana Group of Companies.

The first report, '**Town Planning Considerations'** responds to the 'Situational Analysis' portion of the main report and is structured as follows:

- Background and Purpose.
- Policy Context and Vision Directives.
- Context, Role and Issues.
- Broad Land Use Framework.
- Land Use Guidelines.
- Key Priorities and Issues.

The second report, **'Town Planning Proposals'** is directed to the 'Spatial Proposals' and 'Implementation Plan' in the main document. It is structured as follows:

- Introduction.
- Development Proposals.
- Land Use Management.
- Implementation Framework.
- References.

Please note that these two reports deal with both towns. The first report deals with the Status Quo aspects of both towns and the second report deals with the Proposal and Implementation aspects of both towns.

Each report also has annexures of relevant drawings.

6.3   ROADS AND TRANSPORTATION REPORT

This includes two reports entitled:

- Traffic and Transportation Input, For Mount Frere and Mount Ayliff Precinct Plans, Umzimvubu Local Municipality, **Mount Ayliff**, dated January 2021, by Engineering Advice and Services.
- Traffic and Transportation Input, For Mount Frere and Mount Ayliff Precinct Plans, Umzimvubu Local Municipality, **Mount Frere**, dated January 2021, by Engineering Advice and Services.

Both reports include annexures, including drawings.

These reports provide Traffic and Transportation Input for the two towns as follows:

- Introduction.
- Current Road Network.
- Current Operational Assessment.
- Road Network Condition.
- Precinct Plan Development Proposals.
- Transport Requirements in Support of Development Proposals.
- N2 Bypass Conditions.
- Conclusions.
- Recommendations.
- References.

6.4   ENVIRONMENTAL

6.5   MEETING MINUTES AND KEY INTERIM REPORTS

6.6   PRESENTATIONS

The following are attached:

- ULM Urban Regeneration Photograph Record of Site Visit of 05 to 08 October 2020.

- ULM Urban Regeneration Report of Site Visit of 05 to 08 October 2020.

6.7   PUBLIC PARTICIPATION INFORMATION

6.8   MAPS AND DRAWINGS

6.9   FURTHER SUPPORTING DOCUMENTATION