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FREE STATE PROVINCE



Research Report: Identification of major economic drivers in Kasi economy of Mangaung

MARCH 2019/20

Economic Research Directorate

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This report was compiled by:

Mr S.T Belot

Assistant Director: Economic Research Management

Economic Research Management sub-directorate

Date: ____ / ____ / 2020

Checked by:

Ms B.M Kruger-van Rooyen

Deputy Director: Economic Research Management

Economic Research Management sub-directorate

Date: ____ / ____ / 2020

Approved by:

Adv. J Mosia

Economic Research Director

Economic Research Directorate

Date: ____ / ____ / 2020

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1. Introduction

The Department of Economic, Small business development, Tourism and Environmental Affairs (DESTEA) is tasked to be at the fore front in creating an enabling environment to produce a transformed economy. During the 2019/20, DESTEA assisted small medium and micro enterprises with financial and non-financial support. The financial support for the 2019/20 financial year amounted to R3, 479,175 while the non-financial support included pre-financial training and access to international markets such as Brazil, China and Bulgaria.¹ During the 2019/20 financial year, DESTEA further provided extensive pre-financial training to beneficiaries before disbursing equipment throughout the Free State province to the value of R3, 095,099.40². DESTEA is also in the processes of drafting its Township Revitalisation Strategy and as such need this research to assist in mining information from the ground. Therefore, specific objectives in support of the above-mentioned are:

- To determine the sectors in which Kasi businesses currently participate, within the Free State Province using Mangaung as a case study;
- To determine which sectors are thriving and to determine their ownership characteristics;
- To determine the youth participation within Kasi businesses;
- To identify the available opportunities for growth and development within the townships economy; and
- To identify gaps in the market in terms of supply and demand of Kasi products.

It is important for DESTEA to have a better understanding of the current township economic drivers. This research seeks to assist DESTEA to determine which sectors are dominating in Mangaung's Townships and how they can be aligned with the priority sectors as identified by the Free State Growth and Development Strategy.

2. Background and significance of the study

South Africa's historical developments and spatial planning were dictated by the Group Areas Act No.41 of the Apartheid administration. From the 19th century to the end of

¹ DESTEA. SBD Disbursement of Equipment for 2018 Report. Free State: Bloemfontein

² DESTEA. 2019. Final MEC Report on Enterprise Support. Free State: Bloemfontein.

Apartheid regime, the development of segregated and often under-developed urban areas took place. The Group Areas Act No.41 was passed by the apartheid government on the 27th April 1950 with a primary purpose to enhance white supremacy in the country. The population census of 1960 indicated that Africans represented 68.3% of the population, followed by White 9.4%, Coloured 9.4% and Indian 3.0%.³ During the apartheid era, the majority (African) citizens were deprived of land, skills as well as the opportunities to establish businesses. The history of South African townships is therefore rooted in South Africa's apartheid regime. The economic infrastructure was left in an unfavourable state by the oppressive rules and regulations of the apartheid government. The decision-makers at the time, navigated balancing the tension between two needs: to keep black people close enough to provide cheap labour and keep them away to ensure a clear social distance.⁴

Townships are situated quite the distance from the *traditionally* white population within a geographic location and are surrounded by open buffer areas. Townships or *Kasi* as they are more affectionately referred to; usually have land that is available for expansion that is far away from the city centre. It normally consists of one road that connects the Township to the central business district, however they are always within reach of public transportation. Access to vital services such as sanitation and electricity struggle to meet the demands of the growing population. The residents rely on capital from outside the township because they are not positioned to take full advantage of the broader economy.⁵ As a result, businesses in Townships were never supported by the apartheid government. In an attempt to address the inequalities of the past, the South African government has undertaken a number of economic policies. At the heart of the economic transformation has been the adoption of a local economic development framework, which underpins planning and employment creation at the local level.⁶ The spatial planning legacy is still very evident in post-apartheid South Africa. The first decade of South African Democracy saw the development of the Reconstruction Development Programme (RDP) in an attempt to

³ Group Areas Act No.41 of 1950. South Africa's Apartheid Segregation Act. (<https://www.thoughtco.com/group-areas-act-43476>).

⁴ Economics of South African townships, special focus on Diepsloot

⁵ Township Economic Development and Integration, Mahmood Sunday, 2015

⁶ Department of Provincial and local Government 2003: 6

settle the needs of the nation by providing decent houses for Africans. Municipalities were immediately under immense pressure to provide basic services, these pressures are still persistent, with demands far exceeding the budget and capabilities. According to a Strategic Insights expert GG Alock, during the Apartheid era, townships were referred to as *apartheid ghetto* but since the dawn of democracy they have developed into amazing transformed places. Additionally, many South African brands are losing out on an opportunity to take advantage of the *Kasi* market which consists of exciting businesses, enthusiastic people, and a tight network social community which provides a snapshot of what the future could look like. Accordingly, this study focuses on the township economy with special focus on Mangaung Metropolitan Municipality.

3. The Free State perspective

The Free State Growth and Development Strategy (FSGDS) outlines the key priority sectors that should be supported by government. These key priorities include, agriculture, mining, manufacturing, transport, tourism and transport that need to be supported in order to achieve the objective of an inclusive economic environment and job creation (PEDS, 2018). When analysing the data, it is evident that the Free State province has the lowest number of SMMEs in all its priority sectors. In terms of mining 0 SMMEs were recorded in 2018: Q1, manufacturing recorded 11,324 SMMEs, trade and accommodation recorded 56,850 SMMEs and transport and community service 8,536 SMMEs). The *SMME 2018:Q1 Update Report* indicates that during the first quarter SMMEs operating in the informal sector stood at 70%. Table 1 below provides a comparison between 2018:Q1 statistics and 2019:Q1 of the Free State SMMEs per sector.

Table 1: 2018: Q1 vs 2019: Q1 Free State SMMEs per industry

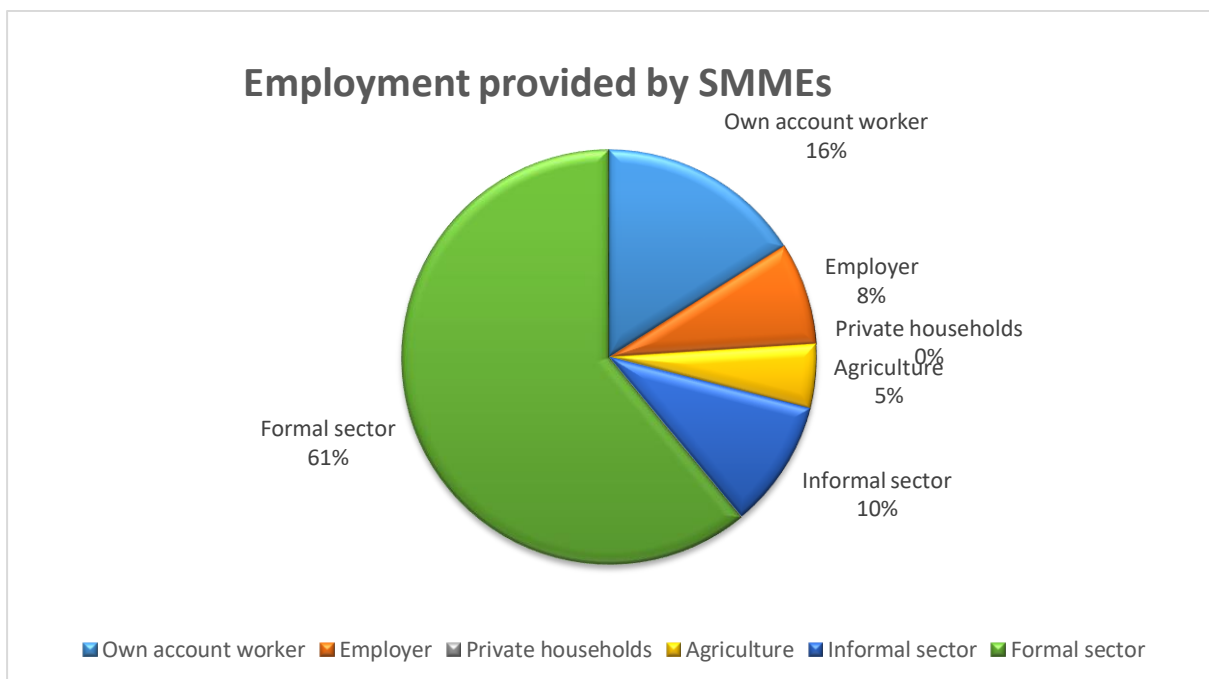
Industry	2018: Q1	2019: Q1	Change	% change
Agriculture	4 077	6 413	>2 336	57%
Mining	0	0	0	0
Manufacturing	11 324	12 716	>1 392	12%
Elec, gas & water	0	0	0	0%

Construction	8 172	18 947	>10 775	132%
Trade & accommodation	56 850	55 487	<1 363	-2%
Transport & commu.	8 536	5 652	<5 884	-34%
Financial & business services	8 661	9 384	>723	8%
Community	16 965	11 823	<5 142	-30%
Other	0	1 319	>1 319	0%
Total	114 584	121 740	>7156	6%

Source: (Small Enterprise Development Agency, 2018 & 2019).

The year-on-year comparison between 2018:Q1 and 2019:Q2 indicate that there was an overall increase (6%) in the number of SMMEs in the following industries; agriculture, manufacturing, construction, Finance and business services and other. Table three further indicates that no growth in the mining sector was recorded in the Free State. A further decrease in the number of SMMEs were recorded in the following sectors; Financial and business services (- 5 884), community services decreased by (-5 142) and in trade and accommodation recorded a decrease of (- 1 363) SMMEs. Figure 1 below indicates the employment provided by SMMEs in the formal and informal sectors in South Africa.

Figure 1: South African SMMEs in the formal and informal sector



Source: (Small Enterprise Development Agency, 2018, 2019: 13).

The data from first quarter 2019 indicates that the small medium and macro enterprises (SMMEs) sector employed 10.8 million people which is equivalent to 66% of all employment in South Africa. Of the 10.8 million jobs, only 2.55 million jobs were from the SMMEs owners themselves, while the remaining balance of 8.3 million jobs were from their employees. Furthermore, the data indicated that the number of SMME employees (non-owners) increased by 29% between 2018: Q1 and 2019: Q1. The formal sector represented the majority of employment at (61%) and 10% in the informal sector, while approximately 38% is occupied by female workers. Therefore, the need to develop SMMEs is crucial due to its potential to increase job opportunities. SMMEs are viewed as potential drivers for economic development. Hence advisors have proposed that SMME development is the solution to joblessness in South Africa. This is even more evident when considering the emphasis in all the “major policy engagements of President Cyril Ramaphosa’s 2018 to 2019 state of the nation address and that of the employment summit under the current administration”.⁷

Characteristic of Youth in the informal sector

The South African Department of Trade and Industry and the Department of Small Business Development launched a Youth Enterprise Development Strategy to enhance mass youth enterprise development for youth-owned enterprises. However, youth people in the rural areas still find it difficult to fully participate in South Africa’s economy. According to the Youth Development Policy 2015 – 2020, in order to ensure that youth have access to land, business skills, information and opportunities to influence decisions the following should occur;

- *Young people should become more involved in decision-making institutions of traditional authorities.*
- *The National Youth Development Agency in collaboration with the Department of Small and Medium Enterprises should promote the establishment of ecotourism facilities in rural areas owned by youth.*

⁷ Business Day. 2019. Creating jobs through SMMEs means creating a new market. (<https://www.businesslive.co.za/bd/opinion/2019-03-30-creating-jobs-through-smmes-means-creating-a-new-market/>).

- *Young people in South Africa should be assisted by the Department of Land Reform to access land (The Presidency, 2015).*

The South African Government has prioritised enhancing sustainable entrepreneurial development for Small, Medium and Micro Enterprises (SMMEs) in South Africa. The importance of SMMEs are not only limited to its ability to create employment in a country but also because it's an opportunity to ensure that young people participate in the economy and distribute that wealth which contributes towards the welfare of a state (Madzivhandila & Dlamini, 2015). At provincial level, a study conducted in 2005 by the African Institute for Community-Driven Development, concluded that 50% of the population at the time in Mangaung was employed in the informal sector (African Institute for Community-Driven Development, 2015). Although the data is relatively old, it does provide an idea of the participation of Mangaung in the informal sector.

The working definition for this research report will focus so-called “burden of unemployed” youth aged (15-34 years) in South Africa.⁸ The youth unemployment statistics have been worrisome in South Africa and particularly in the Free State. When reviewing the youth unemployment in the Free State from 2008 to 2018, it is evident that unemployment rate has been on a steady increase over the past decade. The overall youth unemployment in the Free State increased from 53.8% in 2008 to 68.8% in 2018. Youth unemployment in Mangaung region increased from 49.8% in 2008 to 63.4% in 2018. ⁹This calls for drastic intervention on the part of the Free State Government and the private sector.

Table 2: Youth Unemployment rate (Aged 15-24) (Official Definition) 2008 to 2018

Items	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Free State	53.8%	54.3%	56.1%	57.5%	61.5%	64.4%	65.2%	65.1%	66.4%	67.6%	68.8%
Mangaung	49.8%	50.0%	51.4%	52.6%	55.8%	58.4%	58.8%	58.6%	60.4%	62.2%	63.4%

Source: IHS Markit Regional eXplorer 1854 (2.6i)

⁸ The Department of Statistics South Africa. (<http://www.statssa.gov.za/?p=12362>).

⁹ The Department of Statistics South Africa. (<http://www.statssa.gov.za/?p=12362>).

4. Mangaung Metropolitan Municipality

Mangaung Metropolitan Municipality (hereafter referred to as the municipality) has the largest population in the Free State province, made up of approximately 853 000 people or 29.9% of the total population in the Free State. Mangaung contributed R97.6 billion to the total Gross Domestic Product (GDP) of the Free State. ¹⁰The Municipality's economy is made up of various industries. In 2018 the community services sector was the largest contributing sector within the Mangaung Metropolitan Municipality accounting for R29.2 billion or 33.2% of the total Gross Value Added (GVA) in the metro's economy. ¹¹The community sector is followed by the finance sector at 21.5%, followed by trade at 17.0%. During that same period, the sector that contributed the least to the economy of the municipality is the mining sector with a mere 0.97% or R857 million of the total GVA. ¹²

Table 3: Gross Value Added GVA by Broad Economic Sectors

	Mangaung	Free State	National Total	Mangaung as % of province	Mangaung as % of national
Agriculture	1.6	11.1	106.1	14.0%	1.47%
Mining	0.9	23.3	350.9	3.7%	0.24%
Manufacturing	5.2	23.4	572.9	22.2%	0.90%
Electricity	3.0	9.4	166.0	31.4%	1.78%
Construction	2.5	5.6	170.3	44.4%	1.47%
Trade	15.0	31.7	652.7	47.2%	2.29%
Transport	11.8	22.3	426.7	53.1%	2.77%
Finance	18.9	36.4	854.4	52.0%	2.22%
Community services	29.2	55.6	1,041.3	52.5%	2.81%
Total Industries	88.0	218.7	4,341.3	40.2%	2.03%

Source: IHS Markit Regional eXplorer version 1854

¹⁰ IHS Markit Regional eXplorer version 1854

¹¹ IHS Markit Regional eXplorer version 1854

¹² IHS Markit Regional eXplorer version 1854

Mangaung is made up of Bloemfontein, Thaba Nchu, Botshabelo, Wepener, Soutpan, Van Stadensrus and Dewetsdorp. The Mangaung townships display similar characteristics to those of the rest of South African townships. There were a wide range of occupations including hawkers, spaza shops, fast foods, traditional healers, and hairdressers, illustrating the diversity of the sector. The informal sector should be taken more seriously as they contribute 7% to the national gross product (GDP) in South Africa and a further 22% of total employment in the country. Furthermore, according to the Nevin (2004), the South Africa's informal traders general approximately R32 billion on an annual basis and provide employment for many people¹³.

Youth unemployment is an important aspect to consider with regards to their limited involvement in the Free State economy. The increase in youth unemployment over the ten year period between 2008 and 2018 (as indicated in table 2) should be viewed in conjunction with the self-employed youth in the informal sector. Table 4 below indicates the number of self-employed youth in the Free State informal sector.

Table 4: Self-employed youth in Free State informal sector

Jan-Mar	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Thousand	'000	'000	'000	'000	'000	'000	'000	'000	'000	'000	'000
Male	16	15	11	8	17	11	11	20	18	11	9
Female	13	14	11	10	6	9	6	7	6	7	13
Free State	29	30	22	18	23	19	17	27	24	18	22

Source: Stats SA, Quarterly Labour Force Survey: Quarter 1 Free State

¹³ Gamielidien, F & van Niekerk L. 2017. Street vending in South Africa: An entrepreneurial occupation. South African Journal of Occupational Therapy.

Table 3 indicates that the self-employed youth in the Free State's informal sector decreased from 29 000 in 2008 to 22 000 in 2018. Therefore, the numbers indicate that a total of 7 000 businesses owned by youth in the informal sector of the Free State has ceased to exist. The reason for this large number of why SMMEs failing in the Free State could be linked to the numerous factors as indicated in SMME literature. In an effort to respond to the growing concern of SMMEs failure, DESTEA has supported a number of SMMEs in the Mangaung area of the Free State. These include individuals which government considers vulnerable groups namely; youth and women. The beneficiaries of DESTEA are operating in the following sectors; retail, services, manufacturing, textile and automotive. The information of the beneficiaries unfortunately does indicate whether these businesses operate within Mangaung's Kasis'.

Table 5: Summary of DESTEA's beneficiaries in Mangaung 2008-2019

Town	No. of beneficiaries	Sectors	Youth Enterprise	No indication	Non-youth enterprise
Bloemfontein	179	Services, agro-processing, manufacturing, transport	58	57	64
Botshabelo	5	Tourism, manufacturing, services	No indication	No indication	No indication
Thaba 'Nchu	46	Services, transport, manufacturing, tourism, ICT	25	11	10
Wepener	0	Not applicable	0	0	0
Soutpan	0	Not applicable	0	0	0
Van Stadensrus	0	Not applicable	0	0	0
Dewetsdorp	1	Health care (Pharmacy)	1	0	0

*Source: DESTEA SBD, Long list updated¹⁴

¹⁴ The information provided in the table was provided by SBD Directorate at DESTEA.

5. Research methodology

This study is descriptive in nature and utilised a mixed method approach to enhance the systematic integration of qualitative and quantitative data. This is done to ensure that the research findings presents synergistic usage of data than to heavily rely on either quantitative or qualitative data. The quantitative data was collected through the literature review and qualitative was collected through distributing questionnaires in Bloemfontein, Soutpan, Dewestdorp, Wepener, Thaba Nchu and Botshabelo. This empirical research adhered to all ethical prescripts

6. Research findings

This section will discuss the research findings based on interviews and observations by the Researchers. This section will further determine whether there is a correlation between the empirical data collected and previous research conducted.

6.1 Sector Classification of Participants

South Africa reportedly has 50 000 informal take-away outlets selling a range of products from a quarter-loaf of bread with filling, snoek, *shisa nyama* etc. with an approximately R50 000 income a day, seven days a week. ¹⁵Statistics further indicate that 50 000 table-top vendors (commonly known as hawkers) earn between R1500 to R3000 profit per month. Regarding accommodation, backroom rental economy in the township is worth approximately R30 billion per annum. ¹⁶The outlets and traders are paying Value Added Tax (VAT) on their substantial purchases and they are employing people which provides household incomes in South Africa. Statistics indicate that the informal sector of South Africa is growing at a rapid pace in retail, fast food and other segments compared to the formal sector (Financial mail, 2019). In terms of the transport sector, minibuses, bus services and taxi industry are widely utilised by the community, especially those commuting from Thaba 'Nchu, Botshabelo and

¹⁵ Big Box. 2019. Repurposed shipping containers: at the heart of South Africa's informal economy. (<https://www.bigboxcontainers.co.za/blog/repurposed-shipping-containers-at-the-heart-of-south-africas-informal-economy>)

¹⁶ Financial mail. 2019. (<https://www.businesslive.co.za/redzone/news-insights/2019-01-17-the-informal-market-its-the-townships-turn/>).

Bloemfontein. The dominant players in the Free State in terms of the busses is Itumeleng Bus Lines (Pty) Ltd t/a Interstate Bus Lines which owns 237 busses with 70 employees. Another big player in the transport sector is Scopefull 21 (Pty) Ltd t/a Maluti Bus Service has 36 busses and employs 120 people (Who Owns Whom, 2020).

The empirical data affirms that retail is one of the fastest growing segments in the informal sector. According to the data obtained retail is the largest segment representing (91%) of segment in Mangaung's Kasis' economy. The second largest segment is manufacturing at (4.1%), followed by finance representing (1.4%). Figure 2 below addresses the main purpose of this study which is to "identify major economic drivers in Kasi economy". Figure two on the proceeding page demonstrate the major economic drivers in Mangaung's Kasis'.

Figure 2: Major economic drivers in Mangaung's Kasis'

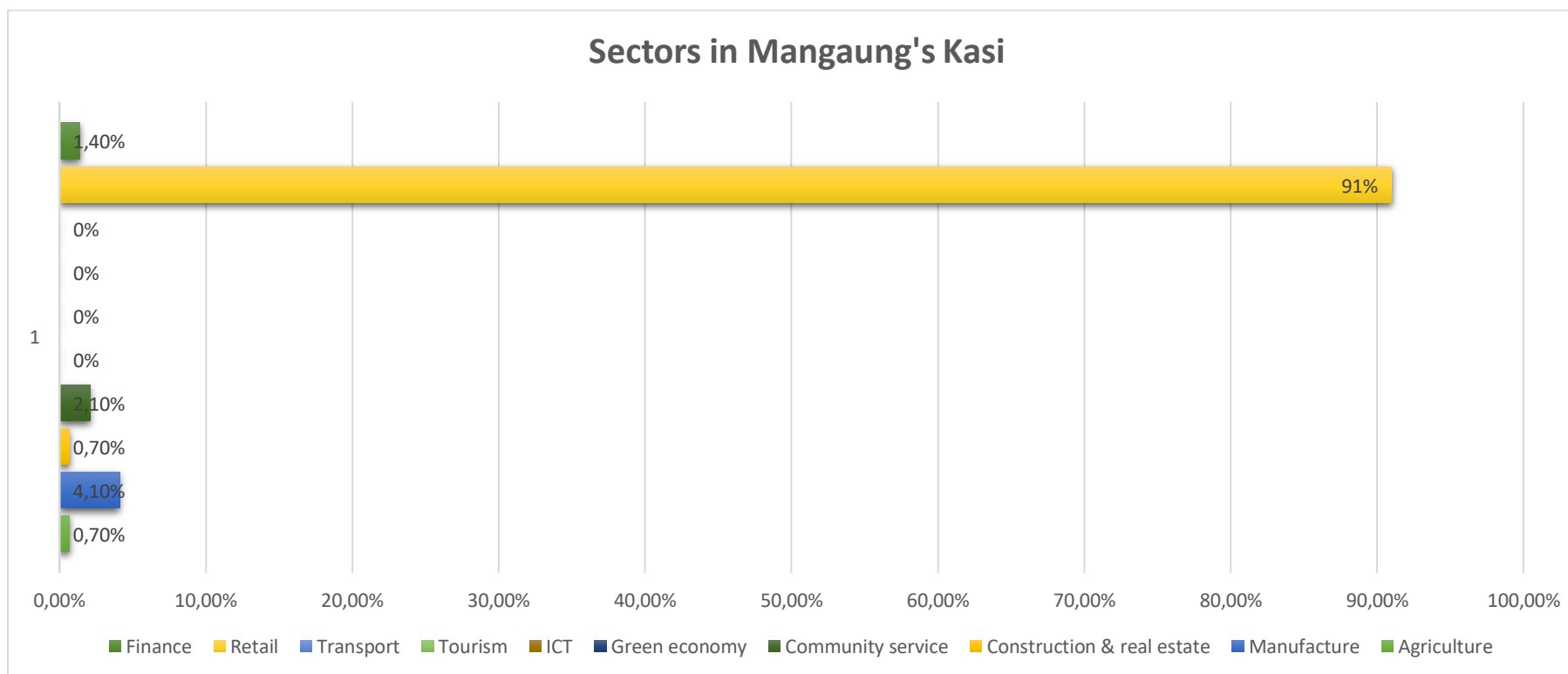


Table 6: Informal Sectors of Mangaung’s Kasi economy

Sectors	Cluster				
Retail	Butchery	Spaza	Fruit & veg stall	Take away	General dealer
Service industry		Car wash	Hair Salons	Burial Society	
Construction & real estate	Property	Construction	Renting		
Tourism	Bed and Breakfast	Backroom rentals ¹⁷	*Backpackers	*Self-catering units ¹⁸	
Manufacturing	Auto body repairs	Carpentry			
Transport	Logistics				
Agriculture					
Finance	Stokvel	Cash loans			
Creative Industries	Arts and craft	entertainment	fashion		
Community services	Childcare				
ICT	Internet solutions	Electronics repairs			
Green economy	Waste management	Coal and wood			

Clustering adapted from: Gauteng Kasi Revitalisation Strategy

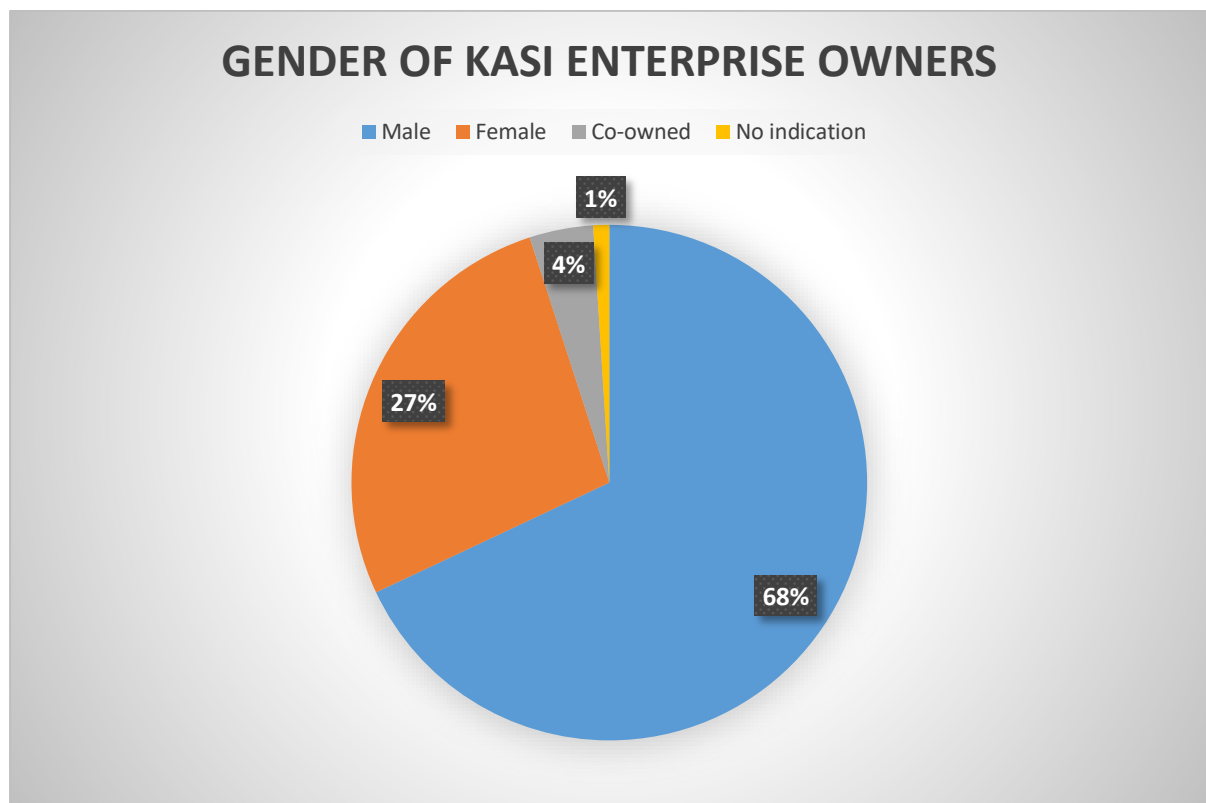
¹⁷ The informal market: it’s the township’s turn. (<https://www.businesslive.co.za/redzone/news-insights/2019-01-17-the-informal-market-its-the-townships-turn/>).

¹⁸ *DESTE. 2018. Study on the State and Ownership Patterns of the Hospitality Industry (Tourism Sector) in the Free State and the Linkages with Other Economic Sectors in the Province (<http://www.edtea.fs.gov.za/wp-content/uploads/2012/09/Study-on-the-state-and-ownership-patterns-of-the-hospitality-industry-tourism-sector-in-the-Free-State-and-the-linkages-with-other-economic-sectors-final.pdf>)

6.2 Gender and nationality of participants

A total of n=200 questionnaires were distributed throughout the townships of Mangaung. A total of n=143 questionnaires were received back from the participants. Figure 1 below indicates that 68% of the participants are male, while only 27% are female-owned and a mere 4% are co-owned (husbands and wives). The remaining 6% of the participants did not want to indicate their gender.

Figure 3: Gender of Kasi enterprise owners



Despite the considerable efforts made by South African government to promote gender equality in small, medium and micro-sized enterprises (SMMEs), 20% of female-owned businesses fail annually. The Department of Trade and Industry (the dti) have invested millions of Rands to support female-owned SMMEs with funding, training, grants and consultation services. However, according to Bridget (2017), in an article titled *Women entrepreneurship in South Africa: Understanding the role of competencies in business success*; female-owned SMMEs fail due to over-dependence on government's initiatives (Bridget, 2017). It is crucial for the Free State Provincial Government to provide development assistance to SMMEs, especially focusing on women and youth because the first 2-3 years are a critical threshold for

an SMME in terms of longer term survival (Seda, 2018). The empirical data indicate that there is a correlation between the empirical data and findings from previous research conducted that demonstrates that SMMEs are predominately owned by males. According to the 2016/17 GEM Global Report, 34% of South African small and medium (SMEs) businesses are female-owned, while only 28% of SMEs that are co-owned by male and females, and male led by 38%. ¹⁹Although these figures are a cause for concern, the national figure is still better than the global average of 31% for female-owned SMEs.

The report further found that female entrepreneurs' barriers to entry are slightly different to their male counterparts. Below are some of the common barriers highlighted in various studies;

- Greater levels of domestic responsibilities;
- Lower levels of education especially amongst developing countries;
- Insufficient female role models in the business sector;
- Less business-orientated networks in their communities;
- Lack of capital and assets;
- Lower status in society; and
- Women generally lack assertiveness and confidence in their ability to succeed (SME South Africa, 2017).

6.2.1 Nationality of Mangaung's Kasi SMMEs

Previous research conducted on SMMEs identified two types of entrepreneurs; (1) opportunity entrepreneurs and (2) necessity entrepreneurs. The former refers to entrepreneurs that discover or identify an opportunity in the marketplace and take advantage of that opportunity. The latter refers to those entrepreneurs that start a business out of a dire need to survive due to lack of employment opportunities (Botha, Nieman & Van Vuuren, 2007). It is important to determine the number of SMMEs and

¹⁹ GEM 2016/2017 Global Report. 2017. Global Entrepreneurship Monitor. (<https://www.gemconsortium.org/report/gem-2016-2017-global-report>).

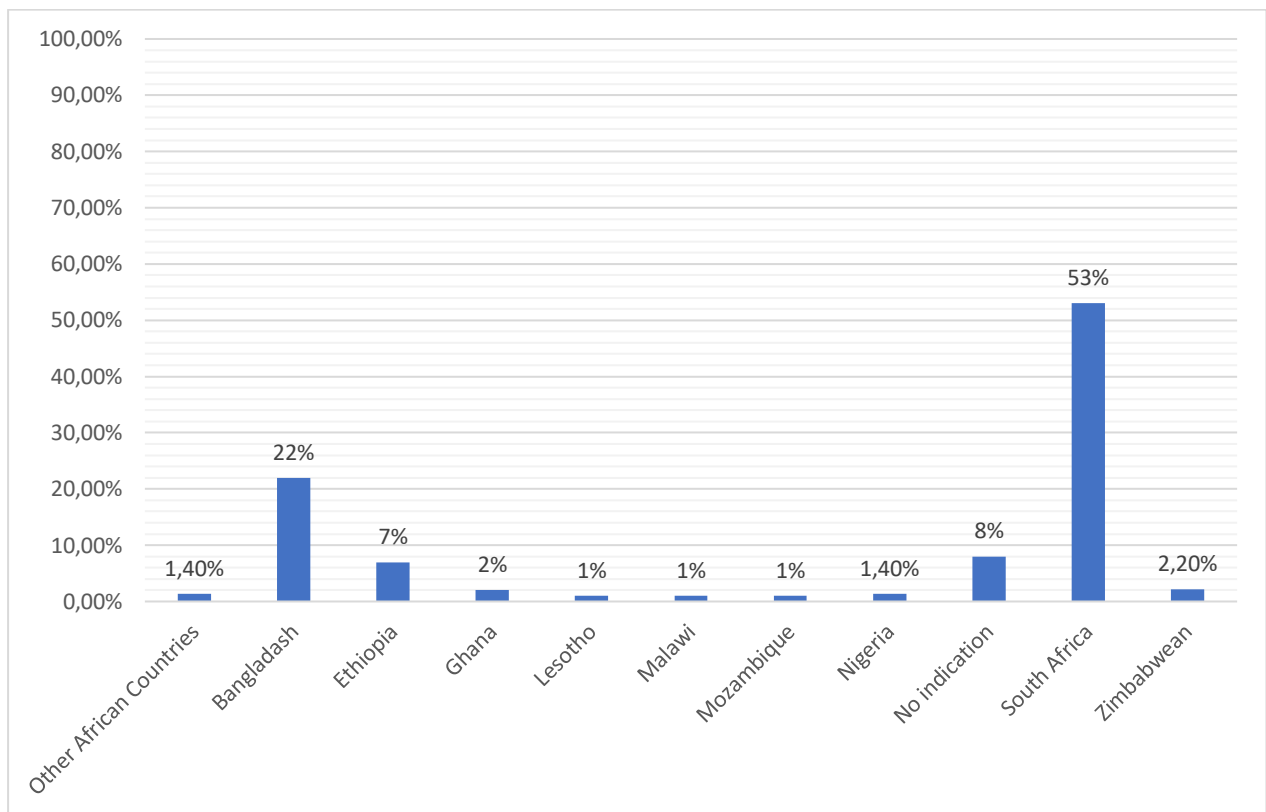
whether they are in the formal or informal sector. The picture of the informal sector has changed in South Africa, Free State and Mangaung in particular. The number of foreign owned businesses are dominating the informal sector. In 2018, the Department of Economic, Small business development, Tourism and Environmental Affairs (DESTEA) commissioned a study on the *Hair Salon Industry as a Contribution to Growth of the Economy of the Free State*, which found that 60% of the hair salons in the Free State are owned by non-South Africans. Furthermore, a majority of these small businesses were not registered, meaning they do not contribute to the GVA of Mangaung (DESTEA, 2018).

This study found that foreign-owned SMMEs in Mangaung's Kasi make up 47% of the n=200 participants from the various city/ towns. A majority of 53% of SMMEs in Mangaung region are owned by South Africans. The questionnaire asked the participants to indicate their nationality and the feedback received is as follow;

- Bangladesh makes up 22% a (dominating in Wepener, Thaba Nchu and Bloemfontein);
- The second largest group of foreigners are Ethiopians (7%), Zimbabweans (2.2%), Ghanaians (2%) and Nigerians (1.4%);
- People from Lesotho represents 1% of SMMEs;
- Feedback received indicate that 1.4% of the participants responded that they are from the African continent but did not specify from which country; and
- Unfortunately, 8% of the participants chose not to indicate their nationality due to mistrust towards provincial government.

However, through observations by the researchers while conducting field work, it was obvious that those participants who failed to respond were Africans but not necessarily South African citizens. The figure below illustrates the country of origin based on the data collected in Mangaung's Kasis'.

Figure 4: Mangaung SMMEs Owners: Country of origin



The concern that has been raised and greatly publicised by media is the presence of foreigners in South Africa. According to Liedeman, Charman, Piper and Petersen (2013: 1), since 2015 a fierce competition had emerged between foreign-owned businesses and South African owned spaza shops. This study further found that foreign owned shops deliberately position themselves to compete with South African shops, they are generally cheaper, utilise price discounting as a strategy, improved stock and are generally favoured by local consumers (Liedeman, et.al. 2013). This study conducted in Mangaung's Kasi indicated that foreign-owned shops have taken the poverty levels into account and have adjusted their products to be even more affordable to the ordinary man on the street. The images below illustrate some of the initiatives taken by foreign-owned shops.

Photo 1: Mangaung Foreign-owned tuckshops sell 5 teabags for R0.50 and sugar packets R2.00.



Photo supplied by: DESTEA researchers.

Photo 2: Sign display in foreign owned shops: meat & vegetables for sale



Photo supplied by: Destea researchers

Photo 3: Variety of Spices, Soya mince and seshabo



Photo supplied by: Deste researchers

The photos illustrate some initiatives taken by foreign-owned shops. They cater for local people in the community, taking into account the high unemployment in the Free State. Instead of selling *Supreme Chicken* at 5kg at R150.00, they repackage the chicken into smaller bags, name them and sell them accordingly. For example, *Supreme 20* at R62.00, *Supreme 4* at R38.00 and other options such as *Bones* for R50.00, *WMC* R30.00 and *Jackpot* which includes meat and bones for R40.00. South African shops in Mangaung's Kasis are reluctant to sell their products in smaller quantities, which in turn leads to them being out-competed by the non-South African shop owners.

An ethnographic study that was conducted by Liedeman, Charman, Piper and Petersen (2013), found that foreign-owned shops are usually micro- or small-scale *survivalist* entrepreneurs with social networks. A case study conducted in a particular area with Somalian shopkeepers found that they operate within a network that provide the following:

- Recruit cheap labour from Somalia;
- Enforcement of contractual agreements through the network with clan elders who are managing business deals;
- Access to strategic investment in geographical areas to establish Somali strongholds;
- Group purchasing / Bulk purchasing deals to ensure discounts and operational economies of scale; and
- Facilitate micro-finance by organising investments and business partnerships (Liedeman, et.al, 2013).

The Somalia business model is stronger in comparison to South African shopkeepers who usually operate on poor social network with limited members who are relatives that only provide labour. Although the case study of the Somalians demonstrates strong networks, the empirical data from the Mangaung Kasi study goes a step further and identify that there is also strong competition between foreigners. The questionnaire asked the participants to indicate the challenges they experience and below are some of the comments by the participants;

“Don’t know how the Somali guy do business. We buy e.g. something for R2.00 and sell it for R3.00 he buys for R2.00 and sells for R2.00” – KEQ38 Wepener foreign participant

“More shops have opened in the past 5 years...things are more expensive” –KEQ53 Thaba Nchu, Bangladesh participant.

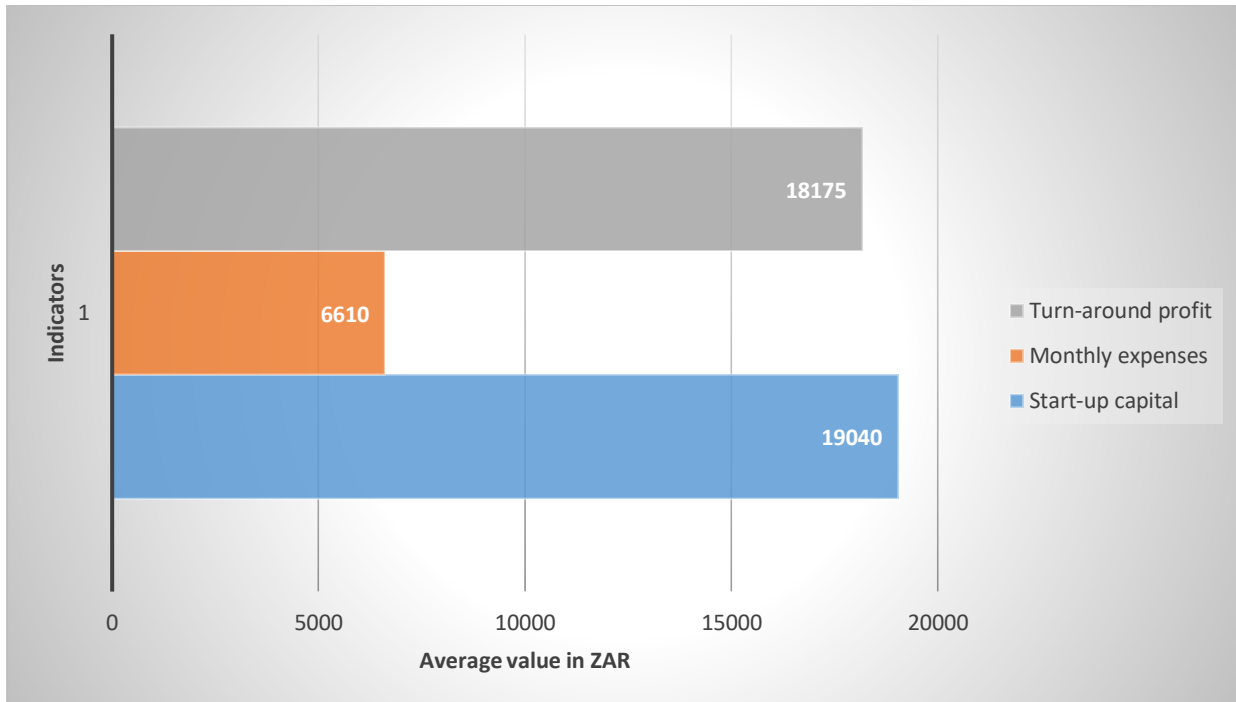
The common challenges that were identified by the participants relate to greater volume of competition, customer base, location and site, regulations and crime in the areas. There appears to be consensus amongst the participants that too many shops (spaza shops) exist in the townships of Mangaung. This has a huge impact on the competition and providing clients with credit who in turn are slow to pay the shops. Additional challenges that were identified relate to the following;

- Poor financial management;
- Transporting goods (public transport is limiting);
- Poor infrastructure and low supply of electricity; and
- Unable to repair broken equipment or purchase new equipment.

The questionnaire further asked the participants whether they were aware of any funding opportunities available to them.

6.3 Mangaung’s Kasi SMMEs: Financial data

Figure 5: Average financial data of Mangaung’s Kasis’



According to empirical data collected in this study, the average enterprise in Mangaung’s Kasi economy needed approximately R19 040.00 as start-up capital for their business. The monthly expenses of these participants on average amounts to R6 610.00, while the average turn-around profit is R18 175.00. The information provided by the participants further indicated that the average business have been in operation for approximately 6 years and employs an average of 3 people.²⁰ Previous research conducted in 2008 by *the dti* suggests that the average business survives for an average of less than 3.5 years. The recent research conducted indicates that more than 70% of small to micro and medium enterprises (SMMEs) in South Africa fail within the first 5-7 years of inception (Bushe, 2017). However, it is important to note that no consensus has been reached amongst, scholars, experts and observers regarding the reasons for these failures. Although the empirical data collected in Mangaung’s Kasi economy indicate that those businesses have been operating on average of 6 years,

²⁰ Participants did not indicate whether employees are South African or foreign. *The questionnaire also did not request the nationality of the employees only that of the employers.

the latest literature cautions that they could still fold or fail in the next year. This is a concern raised by South African shop owners in Mangaung:

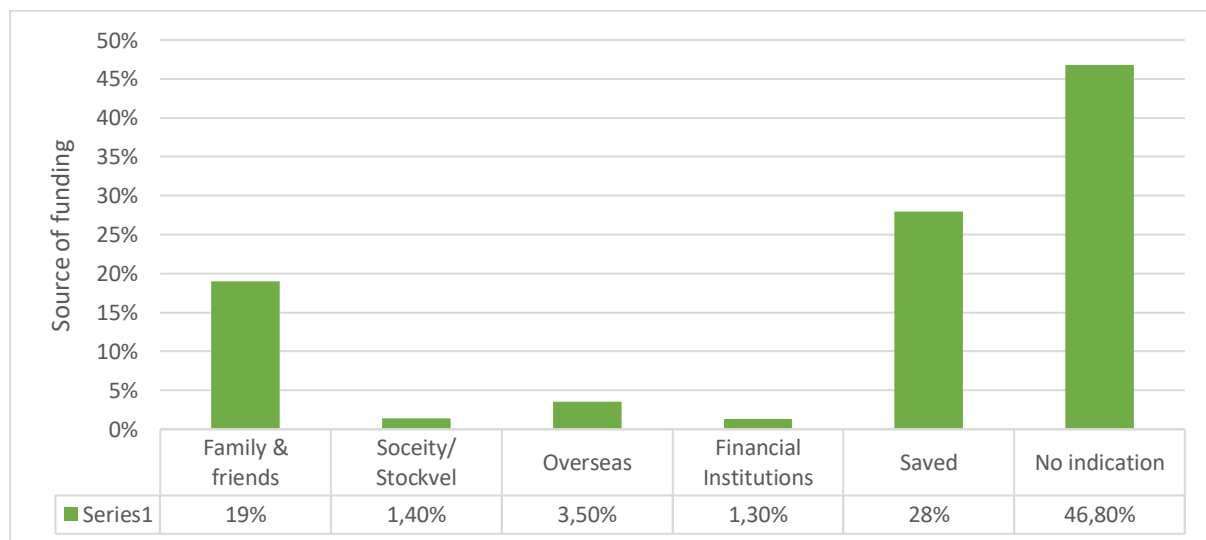
*“Competition has bigger volumes of stock, I pack 7 potatoes and he packs 14” –KEQ13
(55yr, South African male, Soutpan)*

*“Competition has risen, help support business” –KEQ125 (28yr, South African female,
Botshabelo)*

*“Competition from outside players e.g. Bangladesh and Somalia, turn our residence away” –
KEQ44 (55yr, South African male, Wepener)*

The feedback from the enterprise owners that operate within Mangaung’s Kasi have acknowledged the fact that there has been an increase in the number of foreign-owned shops. As a result, competition has increased within these towns and South African shop owners have been struggling to fairly compete with their foreign counterparts. The questionnaire enquired where enterprise owners obtained their source of funding. It should be noted that a majority of (46.8%) of the participants did not want to indicate their source of funding. Of these participants who did not indicate their respective source of funding; (25%) are South African, (17%) are Bangladeshi, (8%) Ethiopians, (7%) indicated Africans, and (1%) of the participants are Zimbabweans. Figure six below show the responses from the participants with regards to their source of funding.

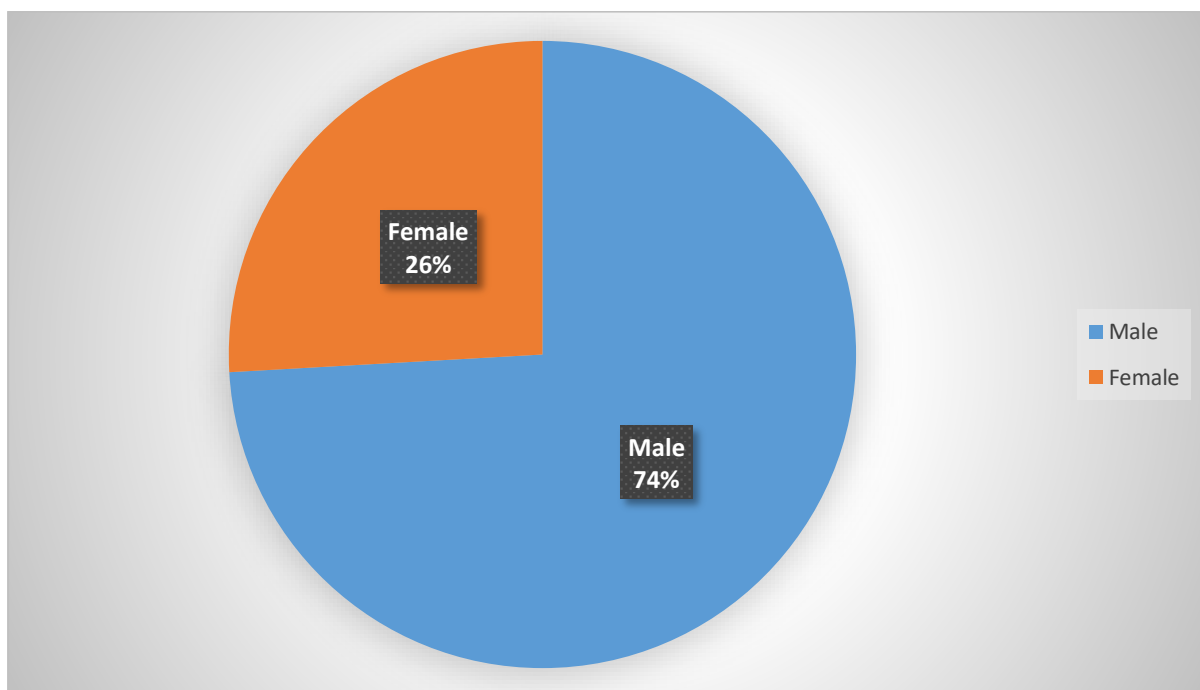
Figure 6: Source of funding of SMMEs in Mangaung’s Kasis’



7. Youth participation in Mangaung's Kasi economy

One of the objectives of this study was to determine Mangaung's youth participation within the Kasi economy. According to the South African National Youth Policy and its National Youth Commission Act, youth in South Africa are defined as those persons aged between 14 to 35 years of age.²¹ However, the working definition for this research report will focus on the "burden of unemployed" youth aged 15-34 years.²² The empirical data collected indicated that 40.5% of n=143 participants are youth-owned enterprises. Of those youth enterprises 25.9% are female-owned enterprises with the highest qualification being a Diploma and lowest qualification being Grade 11. The male-owned youth enterprises represents 74.1% of the participants of which their highest qualification is a Bachelor degree and the lowest being Grade 8. The data further indicated that out of the 40.5% of youth-owned enterprises, a mere 34% are South African youth, in contrast to the 59% that are foreign-owned youth enterprises. A total of 7% of the participants did not indicate their country of origin.

Chart 1: Youth owned enterprises

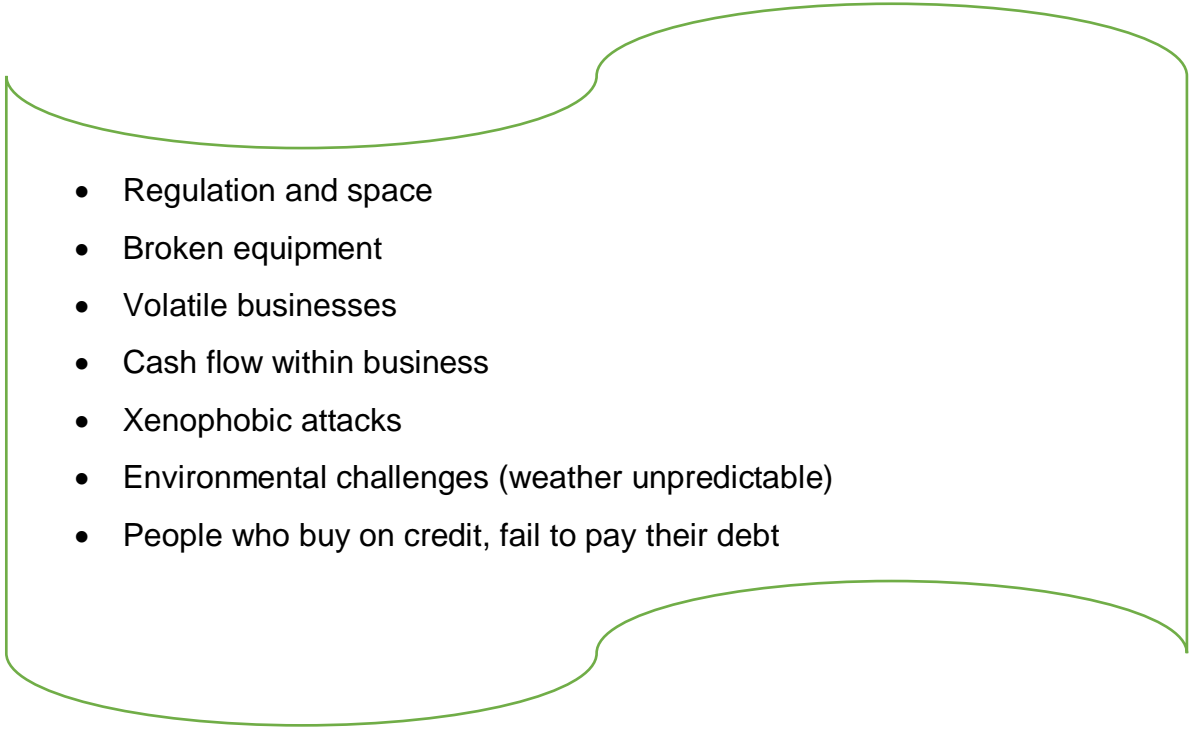


²¹ South African Youth. (<https://www.youthpolicy.org/factsheets/country/south-africa/>).

²² Department of Statistics South Africa. (<http://www.statssa.gov.za/?p=12121>).

8. Challenges and Intervention required

A number of challenges were raised by the participants and the common themes that derived from the participants' responses which include the following;

- 
- Regulation and space
 - Broken equipment
 - Volatile businesses
 - Cash flow within business
 - Xenophobic attacks
 - Environmental challenges (weather unpredictable)
 - People who buy on credit, fail to pay their debt

8.1 Interventions required

8.1.1 The anti-foreigner” narrative: It must be noted that immigration of non-South African informal traders into South African townships has been perceived by South African traders largely in three distinct ways: (1) the first, non-South Africans in general are viewed to be in South Africa illegally, (2) local business owners view the non-South African traders as participating in unfair business practices such as selling expired goods, fake goods, etc. (3) non-South Africans are viewed as having a deliberate strategy to oust the South African traders. These perceptions amongst South African traders have added to the strained relationships with their non-South African counterparts in the Mangaung Township.

8.1.2 Regulation/ By-laws: The South African traders put blame on the municipality for failing to regulate township trade, while other state departments such as the

Department of Home Affairs and the South African Police Service are being blamed for turning a blind eye to these immigrants of whom the local traders claim that a majority are both illegally staying in the country and being allowed to trade illegally.²³ South African traders are expected by the government to comply with the two key documents regulating township trade: the National Business Act 71 of 1991 and the National Health Act 61 of 2003, while the majority of non-South African traders do not comply. Consequently, South African traders feel they have been left unaided when dealing with the consequences of unfair competition resulting from the alleged failure by their own government to regulate the influx of non-South African traders.

8.1.3 Long and short term support needed: Supportive infrastructure, together with development of township value chains where entrepreneurship is key, playing a central part in the process. While conducting field work, the DESTEA's researchers reaffirms the findings by Phillip (2018) study that concluded that majority of goods sold in Kasi are mass-produced by large companies and associated brands that are usually found on the shopping list of all South Africans. These products and brands include; maize meal (Iwisa, Ace, and White Star), milk (Clover and Dairy Belle), bread (SASKO and Premier Milling) and tea (Joko, Glen and Five Roses) just to mention a few. The dilemma here is that those products are produced by macro enterprises and sold in local markets hence it is nearly impossible for small-scale production to compete with giants of the core economy. Lessons can be drawn from other developing countries where their products are produced by small enterprises and sold in local markets. Therefore, Kasi entrepreneurs need short term support to compete with their non-South African counterparts and long-term support to produce their own products and sell in the local market.

²³ Liedeman R, Charman A, Piper L & Petersen L. 2013. Why are foreign-run spaza shops more successful? The rapidly changing spaza sector in South Africa. (<http://www.econ3x3.org/article/why-are-foreign-run-spaza-shops-more-successful-rapidly-changing-spaza-sector-south-africa>)

8.1.4 Identify niche opportunities: In 7.1.3, this report identified the need for short and long term support needed by Kasi entrepreneurs. This section goes further and argue that there is a lack of innovation in Mangaung's Kasi. It is recommended that enterprises in Mangaung Kasi identify niche opportunities that are not already taken. These entrepreneurs need to be sensitive to the fact that there are different levels of disposable income which results in new opportunities. For example, craft beer Soweto Gold which was produced for the local market and has found itself in Johannesburg's upmarket northern suburbs or the case of Khayelitsha's Department of Coffee which supply cappuccinos to local commuters at the stations. ²⁴

8.1.4 Group/ Bulk purchasing:

The empirical data found that a majority (87%) of the participants indicated that they obtain their products from various wholesale shops in Bloemfontein. These shops include the following; Makro, Jambo, Cosmetics, Cambridge, Fruit and Vegetables, Econofoods, Shoprite and the Coca Cola Company. One of the challenges which was also highlighted was transportation because most of the South African shop owners utilise public transport and are therefore limited to smaller quantities.

8.1.5 Assistance from the Free State Provincial Government: The questionnaire asked the participants what the Free State Provincial Government should do to stimulate Mangaung's Kasi economy. The responses from participants were very limited or poor at best. A small group of the responses mentioned service delivery challenges that are being faced such as access to police stations, recreational centres for youth development, 24 hour health care services, proper housing and access to water. The majority (55%) of the participants either did not respond to the question or they indicated "*not applicable*". While the minority (45%) indicated the following activities: develop local infrastructure,

²⁴ Department of Treasury.

(<https://csp.treasury.gov.za/Resource%20Centre/Conferences/Documents/CSP%20Tools/Economic%20Development/Township%20Economies%20Series%201%20Paper.pdf>).

build shopping malls/ centres, providing quality education and training, open Banks, internet café, employing more people.

8.1.6 Township economy strategy: DESTEA need to develop a township economy strategy that is responsive to the needs of Kasis around the province and should refrain from a blanket approach to revitalise Kasi economy. However, the objectives of township economy strategy should be universal and include the following objectives:

- Create jobs in the township;
- Increase the income returns from various economic activities which should include for workers employed in those enterprises;
- Enhance asset creation and better usage of existing assets to create value; and
- To improve on these approaches with the use of public employment such as EPWP and Community Work Programme (Department: National Treasury, n.d).

9. Recommendations

This section discusses the recommendations based on the empirical findings and previous research conducted pertaining to this topic.

9.1 Policy/ By-laws: towards creating a parallel approach

Policy makers in South Africa have a great task at hand; dealing with the spike in foreign-owned shops and supporting local businesses especially those in the townships who largely operate in the in the spaza shop. It is recommended that the national and provincial governments focus on supporting South African entrepreneurs from exiting the informal sector and grow towards participating in the formal sector. Regarding foreign-owned shops there is an urgent need for the Mangaung Metropolitan Municipality to ensure that those businesses comply with municipal by-laws and registering their employees. Therefore, there is a need to establish municipal

by-laws offices in the townships to regulate those businesses. Furthermore, foreign-owned shops should be providing employees with benefits, foreign-owners should submit Value Added Tax (VAT) and income tax returns (Liedeman, *et.al.*, 2013). Therefore, a parallel approach is required that would formalise larger shops whilst permitting and encouraging informal micro and survivalist businesses to become more successful.

9.2 Assistance with Business Model

The lessons learned from this study and previous studies conducted which has been incorporated into this report, suggest that townships entrepreneurs need to learn from their foreign counterparts. Lessons learned from previous studies indicate the following:

- Foreign entrepreneurs purchase their products in bulk in order to ensure that they obtain group discounts.
- In Bloemfontein, foreigners have mobilised funding in order to manufacture their own products. Therefore, foreigners now manufacturer their products and sell their products to other foreigners at a cheaper price.
- In addition, foreigners utilises their own people in order to determine and cap the salaries/ wages paid to employees.

The Free State Provincial Government should facilitate a dialogue between South African owned businesses to mobilise themselves and buy products in bulk. In turn, South African enterprises should prioritise employing South Africans, and youth in particular.

9.3 Training and Skills development

People who live in townships need lots of motivation because of the horrible conditions they live in. The motivational messages should stress the abilities and potentials that each person possesses. Many township dwellers have been crushed by poverty, and consequently, their self-esteem is very low.²⁵ The data collected is consistent with that of the national data. Majority of the participants do not fall under the 15-34 labour

²⁵ Manyaka 2010; 96

cohort of South Africa. According to SEDA, the majority (59%) of SMME owners are older than 40 years and this ratio remained consistent up to 2018:Q1. Statistics indicate that majority of new businesses ventures are formed by persons aged 25-34 years. This means that the higher failure rate of new ventures actually affect the youth of South Africa. Therefore it is imperative that the Free State Provincial Government focuses on equipping youth in the Free State especially those in the townships with the necessary soft and hard skills of running a successful SMMEs (SEDA, 2018).

9.4 Infrastructure development/ maintenance

The Free State Provincial Government should consider investing in infrastructure within the respective townships of Mangaung. These facilities should be equipped specifically according to the major economic drivers of Mangaung's Kasis. The major economic drivers in the township economy of Mangaung Kasi include the following sectors; retail, tourism and finance sector. However, this study encourages the Free State Provincial Government to campaign for innovation in products and services provided in Mangaung's Kasis. According to the township revitalisation strategy, the focus on cluster development, township nodes with specific value such as where national heritage, for example can be utilised as a foundation for entrepreneurship, are identified. It is imperative to assess what can be done by government to assist entrepreneurs to set up businesses in these spaces. Examples of such developments include safe parking areas, user-friendly meeting places, connectivity streetlights and other potential support services. Furthermore, close cooperation with municipalities across the province is required to ensure the connection between township hubs and CBDs. It was stated that municipalities have recognised that their own plans and that of the province need to be aligned, to ensure proper access to roads and other networks.

9.5 Innovation required for products & services

South African townships presented spaces for economic activity that does not fully serve their residents. Townships are energetic, vibrant entrepreneurship coexist

despite their poverty and deprived facilities. There is no shortage of economic activity in the Kasi streets; there are spaza shops on every corner, backyards and garages converted into work spaces, hair-braiding and snacks available on the sidewalks. Not to mention the volumes of end customers within these markets, needing a wide range of products and services, which should certainly warrant investment by the public and private sectors alike.²⁶

9.6 Township Revitalising Strategy and Fund

The Free State Provincial Government has tasked the Department of Economic, Small business development, Tourism and Environmental Affairs (DESTEA) to create an environment that is enabling for economic growth in the Free State. The DESTEA provides financial and non-financial support to businesses in the Free State. This research recommends that the department should make specific provision for funds towards supporting SMMEs in Mangaung's Kasi. This fund should be guided by the Kasi economy strategy.

10. Conclusion

This research answered the main objectives of the study. It was determined that the retail sector is a very big sector throughout South African townships, and that Mangaung is no exception. The retail sector is dominant in Mangaung with tuckshops at every corner, local fast food enterprises, hair salons etc. For Kasi traders and other entrepreneurs informality has presented certain advantages. People operating in the Kasi are afforded the opportunity to start small, often from their homes, taking advantage of local networks and local relationships, and with virtually no compliance costs. For many, this is the easiest entry-point into income generating activity, and it makes a vital contribution to their livelihoods. ***The second objective of the study was to determine which sectors are thriving and its ownership and its ownership characteristics.*** The research found that majority of the enterprises owners in Mangaung are owned by persons who are not characterised as youth. Pertaining to the South African owned shops, majority of these are persons aged 36 years and older

²⁶ Cities Support Programme, Why is there so little economic development in South Africa townships. 2018

and are Africans. ***The third objective of the study was to determine the youth participation within Mangaung's Kasis.*** The research was able to determine the Free State's youth participation in Kasi. The research found that a mere 40.5% of the businesses that participated in this study were youth. These figures are consistent with literature that suggest that youth are not fully participating in South Africa's economy. ***The final objective of this study was to identify the available opportunities for growth and development within the townships economy.*** Due to the lack of youth participation in Kasi economy and lack of innovation in Mangaung's Kasis', there is opportunity to support the priority sectors as outlined by the Free State Development Strategy. The research concluded that the retail sector is the only sector that is dominating in Mangaung's Kasis. However, this does not imply that it is "thriving", there is opportunity for the Free State Provincial Government to revitalise the township economy.

11. Limitations of the study

This study had one major limitation in terms of methodological approach. The report has noted that a total of n=200 questionnaires were distributed and only n=143 were received back from the participants. The major limitation was collecting of the data, participants were reluctant to provide information pertaining to the nature of their business. The lack of transparency from participants were not only from foreign-owned businesses but also from South African owned businesses in Mangaung Kasi. The data does not necessarily paint a holistic picture of Kasi's in the Free State but is only limited to Mangaung Metropolitan Municipality.

12. Direction for future research

This study has identified the need for future research to be conducted especially focusing on how non-South African business owners conduct their businesses in small towns of Mangaung. Furthermore, a large number of non-South African owners and South African owners indicated that their respective businesses are not registered. This indicates that the respective businesses do not contribute towards the GVA of Mangaung. This research therefore recommends that the Mangaung Metropolitan

Municipality need to conduct a campaign advocating that all small businesses should be registered.

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