



GREATER TZANEEN MUNICIPALITY

REVIEWED LOCAL ECONOMIC DEVELOPMENT STRATEGY

PERIOD: 2025-2030



OFFICIAL SIGN OFF

It is hereby certified that this 2025-2029 LED strategy for Greater Tzaneen Municipality:

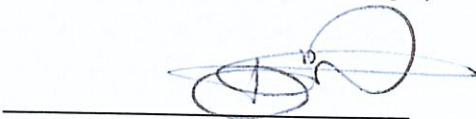
1. Was developed by Management under the guidance of the Council as led by His Worship, Mayor Gerson Molapisane
2. Took into considerations all the relevant policies, legislation and other mandates for which GTM is responsible;
3. Accurately reflects the Impact and Outcomes which GTM will endeavor to achieve over the 2025-29 Financial Years.



D. Mhangwana (Municipal Manager)

05/08/2025

Date



GP. Molapisane (Mayor)

05/08/2025

Date

FOREWORD BY THE MAYOR



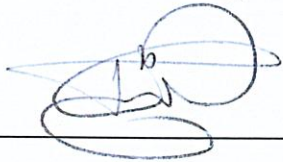
I have no shred of doubt in my mind that with the right mix of political will, technical support from our sister agencies and goodwill from our allies in the private sector, we are on course of achieving our cherished dream of making Tzaneen, Limpopo's most thriving industrial powerhouse and agro-processing giant,

Through this strategy, we reaffirm our enduring commitment to deliver our "*developmental state obligation*" of pulling millions of our people out of poverty, unemployment and inequality.

Further, this strategy is a call for action to leverage on our matchless resource endowments to make our municipality a real and true sanctuary for shared prosperity and job creation.

To this end, our daunting task is to rally all our partners behind a commonly understood economic vision in which "*no one and no place*" is left behind.

Kind regards



GP. Molapisane (Mayor)

05/08/2025

Date

ACRONYMS

4 th IR	Fourth Industrial Revolution
AfCFTA	African Continental Free Trade Area
ARFP	Adopt a Restituted Farm Programme
BBEE	Broad-based Black Economic Empowerment
BRICS	Brazil, Russia, India, China and South Africa
COMESA	Common Market for East and Southern Africa
CSIR	Council for Scientific and Industrial Research
GDP	Gross Domestic Product
GGM	Greater Giyani Municipality
GTM	Greater Tzaneen Municipality
GVA	Gross Value Added
ICT	Information and Communication Technology
IDC	Industrial Development Corporation
IDP	Integrated Development Plan
LDP	Limpopo Economic Development Plan
LED	Local Economic Development
LEDA	Limpopo Economic Development Agency
NDP	Nation Development Plan
NEET	Not in Employment Either in Training
NEF	National Empowerment Fund
PESTEL	Political, Economic, Social, Technology, Environment and Legal
RAL	Road Agency Limpopo
SADC	Southern African Development Community
SANRAL	South Africa National Road Agency Limited
SDF	Spatial Development Framework
SDGs	Sustainable Development Goals
SEDFA	Small Enterprise Development Finance Agency
SME	Small to Medium Enterprises
StatsSA	Statistics South Africa
SWOT	Strengths, Weaknesses, Opportunity and Threats
UPL	Upper-bound Poverty Line
WWTW	Waste Water Treatment Works

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SECTION A: OUR MANDATE

This blueprint sets Greater Tzaneen Municipality's (GTM) economy on a high growth trajectory by protecting historic gains, navigating new frontiers of opportunity, digitizing business licensing and permitting ecosystems whilst eradicating needless red tapes to improve its ease of doing business ranking. The ultimate idea is to turn GTM into a safe haven of new opportunities as well as a sought-out destination of both domestic and offshore capital.

1.1. Our Unique Value Proposition

Our exceptional commitment to clean, accountable and smart economic governance plus our matchless resource balance sheet places us in a valuable position to scale up the job creation effect of existing and new investments.

1.2. Our Overriding Goal

The overarching aim of the revised strategy is to steer the local opportunity economy on a strong path of diversification, job creation and inclusive growth.

1.3. Our Constitutional Mandate

This strategy gives meaningful effect to Section 152, sub-section (c) of the Constitution of the Republic of South Africa which mandates GTM "*to promote social and economic development*" by leveraging local resources to expedite transformation for the benefit of all.

1.4. Our legislative Mandate

The mandate of GTM especially within the LED context is primarily guided by the following legislation:

- a. **Municipal Finance Management Act** underlines important benchmarks for driving clean audits and accountable economic governance whilst ensuring the budget is meticulously deployed to reignite local demand and drive greater opportunity localisation.
- b. **Municipal Systems Act** reasserts the power of council as the supreme authority empowered to oversee the speed actualisation of LED strategies.
- c. **Broad-based Black Economic Empowerment Act** apart from redressing past economic injustices, it also places historically disadvantaged companies at the heart of local economic opportunity.
- d. **Skill Development Act** besides underscoring the criticality of investing in sought-out skills, it also seeks to alleviate the disequilibrium in the local skills market, thus making GTM relatively attractive to global capital.

1.5. Guiding Policies and Catalytic Programmes

Moreover, the review also seeks to give the following policies and strategies a momentous effect:

1.5.1. Global and Continental Policies and Strategies

- a. **Sustainable Development Goals (SDGs):** The strategy gives a new impetus to Goals No 5, 8 and 9 of the SDGs blueprint. As a matter of fact, Goal No. 8 puts a high premium on job absorbing projects, Goal No 9 underlines the propelling effect of a resilient network and industrial infrastructure whilst Goal No 5 is a call for action to genderise the opportunity economy.
- b. **African Continental Free Trade Area (AfCFTA):** dubbed the "*next China*" and hailed as the world's largest free trade area comprising 55 African countries, this historic agreement of which SA is an integral part guarantees local farmers and agro-processors access to an expansive market of 1.2 billion people and an economy valued at US\$3 trillion (World Bank, 2024).
- c. **Southern African Development Community (SADC):** This new economic path resonates with Pillar I of SADC's Regional Indicative Strategic Plan which makes a clarion call for local agro-processors and farmers to eye lucrative SADC markets as part of efforts to deepen regional trade and market integration.

1.5.2. National Policies and Strategies

In addition, the strategy was also shaped by the following national policies and strategies:

- a. **National Development Plan (NDP)** the stimulus plan was hatched with **Target 1** (reduce unemployment to 6% by 2030); **Target 2** (create 11 million jobs by 2030); **Target 3** (increase proportion of adults working from 41% to 61%); **Target 4** (achieve an annual GDP growth of 5.4%), **Target 5** reducing Gini from 0.69 to 0.60 and **Target 6** (reduce poverty from 39% to 0%) in mind.
- b. **Agricultural and Agro-processing Master Plan:** the blueprint does not only seek to foster an enabling agro-business climate but also to among other things; eliminate food imports, drive market linkages, localize agro-processing ecosystems and to avail comprehensive farmer support to build sustainable grower capacity and food self-sufficiency.
- c. **Tourism Master Plan:** the compact does not only underscores the multiplier effect of the local tourism value chain but also unveils an ambitious incentive scheme to set the pandemic hit sector on a speedy rebound.
- d. **Comprehensive Rural Development Programme:** the programme is a critical pivot that underpins the government's efforts not only to drive the modernization of key rural infrastructure but also to translate rural areas into engines of transformation through driving an infrastructural and agricultural-led growth.
- e. **Industrial Policy Action Plan:** the blueprint spells out bold and actionable initiatives to drive localized industrial conglomeration by unleashing a cocktail of fiscal incentives to emerging industrialists, manufacturers, beneficiaries and agro-processors, as part of an elaborate plan to build their global competitiveness and productive capacities.

- f. **National Framework for LED** underlines the need to forge collective action aimed at leveraging on GTM's rich resource endowments to stimulate competitive and inclusive local economies.

1.5.3. Provincial Policies and Strategies

The following provincial policies and strategies also influenced the strategy review process:

Limpopo Development Plan (LDP) -2020-2025: the revised economic trajectory for GTM amplifies **Priority 2** (youth employability programmes); **Priority 3** (industrial and sectoral development strategies, **Priority 4** (export and localisation); **Priority 5** (distressed sector support programmes), **Priority 6** (integrated support to SMMEs and Cooperatives); **Priority 7** (elevation of the green economy); **Priority 9** (innovation, technology diffusion and research and development and **Priority 10** (transformation through the network infrastructure, better services, education and health) of the LDP.

1.5.4. Regional Policies and Strategies

- a. **District Development Model** is a call for action for GTM to amplify and institutionalise the "One District, One Plan" initiative to drive the effective coordination and co-funding of game changing cross-border infrastructure to boost inter-municipal economic integration and trade.
- b. **Mopani District LED Strategy:** This strategy does not only underscores the need to drive a regional approach to LED but it also acknowledges and reasserts the rising industrial and economic influence of the Tzaneen and NkomaNkoma nodes, especially given their rare geographical centrality and interconnectedness, exponential population growth and proximity to key agricultural and mining belts in the region.

1.5.5. Internal Policies and Strategies

Over and above the national and provincial contexts that shape the LED reset process, the following are some of the internal policy dynamics that influenced the review process:

- a. **Integrated Development Plan (IDP)** besides acting as a marshal plan to revolutionize GTM's service delivery experiences, the IDP also seeks to revitalize key social and economic infrastructure, thus putting it in a formidable position to turn GTM into a sought-out investment destination.
- b. **Incentive Policy:** The policy marks a turning point for GTM's FDI journey in that it unpacks a cocktail of uniquely blended fiscal incentives to charm domestic and global capital whilst simultaneously redefining and refining its unique value proposition.
- c. **Spatial Development Framework:** Besides acting as a vital investment atlas guiding prospective investors, the framework also maps out game-changing spatial projects especially in the heart of GTM's key development nodes like Tzaneen, Nkoma Nkoma, Lenyenye, Letsitele etc.
- d. **Electricity Masterplan:** The recently approved Electricity Masterplan rally key stakeholders behind an integrated energy mix in which investment in renewable energy is vigorously pursued to make Tzaneen an energy secure municipality.

- e. **Road Masterplan:** The Road Masterplan is a call for action for Tzaneen to modernize its road assets as part of a systemic plan to make its network economy both attractive, reliable and resilient.
- f. **Revenue Enhancement Strategy:** The blueprint outlines actionable strategies and tools to optimize the municipality's revenue collection base and efficiencies in pursuance of financial self-sufficiency and sustainability.

1.6. Relevant Court Rulings

Although at the time of drafting this report, there was no court ruling in which GTM is an implicated part, this LED review took note of the recent constitutional court judgement in Minister of Finance v Aribusiness NPC [2022] that declared some parts of the BEE Act null and void and therefore unconstitutional. The judgement which came into full force on 16 January 2023 provides a sufficient basis for the municipality to trigger a realignment of its preferential procurement policies.

1.7. Our Strategic Focus

Inspired by the desire to expand GTM's opportunity economy and noting the propelling effect of LED in efforts to usher its economy on a high growth trajectory and taking to heart the legislative and policy imperatives informing its mandate, the Council hereby take a conscious decision to predicate its LED strategy on the following strategic focus:

- **Vision:** A Green, Healthy, Prosperous and United Municipality that Provides Quality Services to All".
- **Mission:** GTM is fully committed to facilitating equitable social and economic development, providing affordable, quality and sustainable services; ensuring efficient and effective utilization of all available resources; guaranteeing the promotion of safe, healthy communities & environmental sustainability; driving effective stakeholder and community participation and providing affordable quality services, alleviating poverty.
- **Values:** GTM espouse values of accountability, professionalism, commitment, ethical conduct, innovation, consultation, fairness, transparency and integrity.

1.8. Outline of the Report

Apart from Section A which articulates GTM's constitutional, legislative and policy mandates as well as its founding charter as reflected in its strategic vision, mission and values, the report also contains,

- Section B: which highlights the state of its spatial outlook,
- Section C which analyses its investment climate,
- Section D which outlines the socio-economic status of GTM,
- Section E which examines the municipality's opportunity economy,
- Section F which assesses GTM's capacity to implement priority projects and,
- Section G which outlines strategies and programs to steer the local economy on a high growth trajectory

SECTION B: ANALYSIS OF SPATIAL ECONOMY

This section explore strategies to reinvent the current spatial climate to leverage GTM's ease-of-doing-business ranking, thus effectively repositioning it for global capital and high tourist traffic. What the local economy needs is a world class spatial ecosystem that does not only ranks the best in the province but that underwrites the success of GTM's trade-dependent economy.

Map 1: GTM Map Extract

Map 1 illustrate GTM's geographical outlook as framed in the 2024-29 Spatial Development Framework



Source: GTM's SDF: 2024-2029

Table 1: Summary of Spatial Status

Location:	GTM is situated on the south-western part of Mopani District. It shares the border with seven municipalities, i.e. Maruleng to the south, Lepelle-Nkumpi to the south-west, Molemole to the west, Greater Letaba to the north, Greater Giyani to the north-east, Ba-Phalaborwa to the east and Polokwane to the West (SDF, 2024).
Area:	Comprises of a land area of 3242.6 km ²), the municipality extends from Haenertsburg in the west, to Rubbervale in the east (85km), and the south of Modjadjiskloof in the north, to Trichardtsdal in the south (47km) (SDF, 2024).
Rural-Urban Ratio	80 per cent of GTM residents live in rural areas whilst 20 per cent resides in designated towns such as Tzaneen, Nkowankowa, Lenyenye, Letsitele, Haeretzburg (StatsSA, 2022).
Households	The local economy supports 125 rural villages and 124 163 households the majority of which are concentrated in the southeast, and north-west of the municipality (StatsSA, 2022).
Key Economic Drivers:	Besides agriculture which is the mainstay of its economy, the municipality's relative proximity to the world-acclaimed Kruger 2 Canyon Biosphere, its

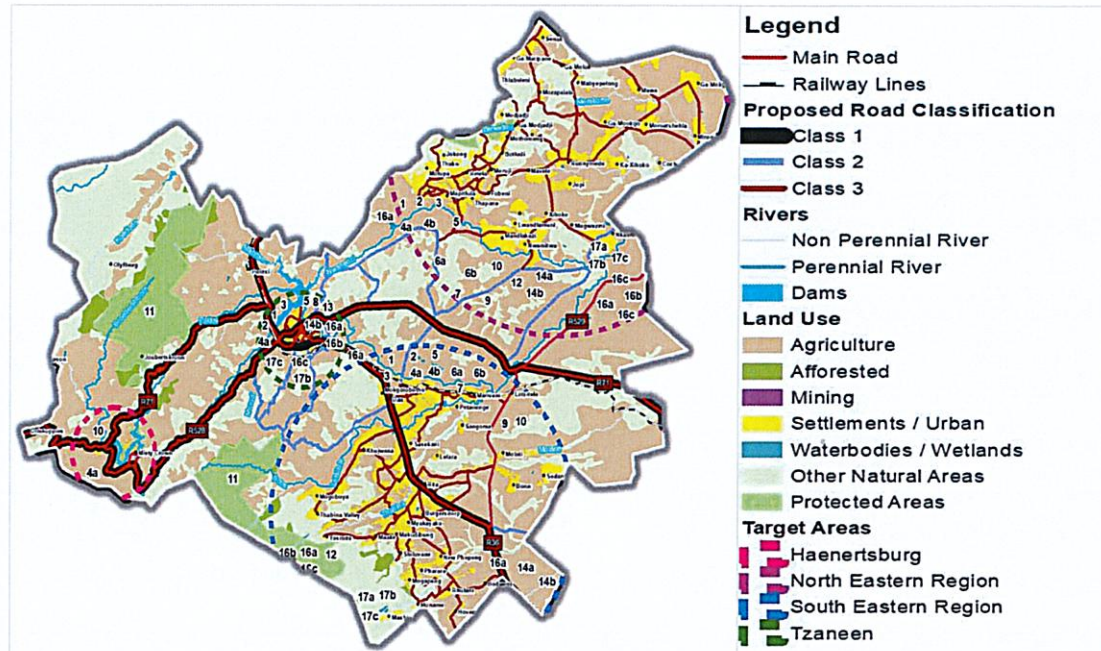
	unparalleled mountainous picturesque and its rich cultural heritage further cement itself as the region's leading tourism hub.
Topography	GTM's rugged volcanic mountains, its spectacular geographical scenery and steep terrains in the west and south as well as its gentle slopes in the north and east reinforces its position as the home to one of the breathtaking landmarks and rich biodiversity in SA.
Soil Analysis:	The red and yellow soils found mainly in the mountainous regions of the west and the central south regions has a low-to-medium crop farming potential whilst the red, yellow and greyish loam soils found mainly in the north south has a high farming potential (Department of Agriculture, 2012). In addition, the light purple soils concentrated in the north-south has high agricultural potential.
Climate Analysis:	The south western region is famous for regular orographic rains whilst its south eastern parts depends on erratic conventional rains which normally fall between October and March. Most importantly, the average annual rainfall in mountainous regions is between 900mm and 1960mm whilst the rest of its regions record between 400 – 700mm annual average rainfalls (Department of Agriculture, 2012). Sadly, GTM is prone to the ripple effects of droughts especially in the north eastern regions due to climate change, thus, rendering rainfed agriculture in these regions a risky and costly enterprise.
Vegetation Analysis:	GTM's evergreen exotic forests comprising mainly of pine and gum trees found predominantly in the south west regions of Haenertsburg and Agatha Nature Reserve have not only turned the region into a mini tropical paradise but also into Limpopo's timber growing powerhouse. Meanwhile, the Lowveld and Central regions encompassing Mavele and Mirangomaare areas are renowned for their rich Savannah grasslands and shrubs which makes them attractive to cattle ranching and goat farming.
Hydro-logical Analysis:	The six perennial rivers (Nwamedzi, Thabina, Letaba, Koedoesiriivier, Poliitisrivier, Broederstroom and Brandboontjies) which criss-cross the length and breadth of the municipality do not only presents a profound opportunity to turn GTM into a water supply superpower in the region, but also put it in an impressive space to unlock the economic power of its productive land especially along the banks of Tzaneen dams, Ebenezer dam, Tous dam, Magoebaskloof dam, Nwamitwa dam, Thabinadam and Altenzur dam).
Regional competitiveness	(a) Intertwined Regional Economy: GTM's economy is seamlessly intertwined with that of its neighboring municipalities, thus, presenting a compelling case for the establishment of a powerful regional trade bloc comprising mainly of municipalities with economic links to the Kruger Canyon Biosphere Corridor. (b) Case for collaboration: As a core member of the Kruger Canyon Biosphere club, the vibrancy and growth of GTM's economy is clearly dependent on its ability to collaborate with its neighbors especially on the upgrade and modernization of cross border network infrastructure. (c) Case for market integration: Ba-Phalaborwa to the north east is endowed with abundant platinum and gold resources, whilst Maruleng to the far east is home to untapped tourism, horticulture and citrus potential, Giyani to the north provides a safe and quicker passage to the soon to be opened Kruger National Park's Shangone Gate whilst Lepelle Nkumpi to the south possesses abundant mineral deposits which can feed future mineral beneficiation ventures. (d) Reasserting its economic influence: Accounting for 36 per cent of Mopani's total GDP, GTM remains the region's undisputable economic powerhouse with Greater Giyani on second spot at 26 per cent, followed by Ba-Phalaborwa at 20 per cent, Greater Letaba at 12 per cent and lastly by Maruleng at 7 per cent (S&P Global, 2022).

	(e) Matchless water balance sheet: Further, given its unrivalled water assets, a cogent business case exists for the Council to craft a Dam Construction and Rehabilitation Masterplan as part of an elaborate plan to become a net exporter of water to municipalities with a history of water scarcity like Giyani, Maruleng, Phalaborwa, Polokwane etc.
Development Corridors (DCs)	According to the SDF (2024-2029) the following Development Corridors are the heartbeat of GTM's economic development ecosystem: 1. Eastern Escarpment Transformation Corridor which is backed by a key National Development Corridor via the R71- R40- R36 routes links the National Urban Node of Tzaneen with: • Polokwane National Urban Node • Bushbuckridge Regional Development Node • Hazyview and Nelspruit National Urban Nodes • The railway line linking Nelspruit with Musina a future Export/Import Node • Eskom's Limpopo East Corridor Network. Most importantly, each year, the corridor intercepts a huge traffic of millions of ZCC pilgrims especially during Easter holidays. 2. Phalaborwa Development Corridor which connects Tzaneen with Polokwane's N1 to the West and Phalaborwa to the North East to form the busiest Regional Development Anchor have all the features of a thriving logistics hub.
Opportunity Concentration	The historic question facing GTM is not only to root out racialized economic participation parity ecosystems inherited from the apartheid era but also to adopt bold action plans to decentralise economic opportunity by turning designated municipal growth points into sustainable generators of economic opportunity.
Land Availability	Unlike most neighboring municipalities facing scarcity of well-located land, GTM commands sufficient land assets although most of its pipeline projects have been stalled by a mismatch between water supply and demand. However, the fact that a significant portion of its productive land is administered by Traditional Authorities perpetually weaken its bargaining leverage in land allocation decisions.
Land Tenure Security	Unlike commercial farmers that possess commercially tradeable title deeds, smallholders only hold unbankable Permission to Occupy (PTOs) certificates which they cannot lodge as collateral assets to boost their loan pitching successes. A PTO is a legal instrument that grants smallholder farmers the right to occupy and use a piece of land, typically in communal areas (Kingswill, 2017). PTOs do not confer full ownership of the land but provides temporary and conditional rights to reside on and use the land for specific purposes, such as housing, farming, or small-scale business activities.
Land Claims	The daunting task facing GTM is not only to lobby for the fast clearance of land claim backlogs but also to craft cogent plans to regain the productive and economic value of the 10 restituted farms currently facing chronic viability challenges (IDP, 2025).
Land invasions	The current spate of chaotic land grabs (10 identified hotspots) especially of wetlands and flood-lines is not only putting lives at risk and eroding the productive and economic value of these properties but also undermining the Council's relentless efforts to curb the mushrooming of unplanned informal settlements (IDP, 2025).

2.1. Functional Spatial Development Areas

Map 2: Functional Spatial Development Areas

GTM is subdivided into the five functional spatial development focal points briefly discussed below:



Source: SDF, 2024

- a. **Tzaneen Urban Development Node** – Besides doubling as GTM's administrative capital and bustling commercial hub, the node also bears all the hallmarks and features of an emerging industrial hub especially due to its unrivalled geographical centrality, exponential population growth and matchless logistical capabilities.
- b. **South-Western Settlement Area** which comprises Nkowakowa and Leyenye along the R36 route is not only home to a sprawling industrial ecosystem but also houses the likes of Peppadew International, a spice manufacturing giant exporting to 26 countries. However, the node's industrial potential is constantly undermined by incessant water cuts and power outages. This underscores the need to deploy concomitant action to mitigate the water supply crisis.
- c. **North-Eastern Settlement Area** west of the R529 route consisting of mainly low-density dispersed settlements and villages is popular for its rich agricultural endowments. The area is ripe for a proliferation of new township establishments that are predicated on the mixed-land-use system.
- d. **Haenertsburg** is rural development node which is not only renowned for its rugged mountainous terrains but also for its high concentration of exotic forestry like gum and pine trees. This makes it a key incubator of new timber beneficiation industries.

- e. **Rural areas:** Are famed for their endowments in indigenous forestry and untapped agricultural wealth although lack of farm mechanization, requisite skills, sufficient funding and modern network infrastructure is hampering efforts to translate these areas into sanctuaries of commercial agriculture.

2.2. Urban Development Nodes

GTM has a fair share of designated urban nodes and these form the bedrock on which its urbanisation agenda is laid. These nodes do not only serve as important cornerstones for concentrated infrastructural and industrial development but also as outposts for rapid population growth, thus cementing their economic influence and market significance:

- a. **First Order Node:** Tzaneen town is the only designated first order node and by extension the single busiest Regional Urban Node. The node has a marked concentration of Industrial and Commercial activity to the west of its CBD, to the north along the R36 route and to its southern parts.
- b. **Second Order Nodes:** Municipal Urban Nodes consists of Nkowankowa and Moleketla and with a bold Node Development Masterplan, the two nodes' transitioning into fully-fledged first-order nodes can be expedited. Thus, unlocking an influx of high net investors with interest in food manufacturing, steel fabrication and timber beneficiation
- c. **Third Order Nodes** acting as informal economy hubs, designated service centres such as Lenyenye, Burgersdorp, Maake/ Ritaskop, Senakwe, Mandlakazi, Runnymede/Mavele and Haenertsburg can be turned into thriving commodity broking centres and home to mini-malls.

SECTION C: ANALYSIS OF INVESTMENT CLIMATE

The sad reality facing local companies and businesses is that owing to rising global uncertainties, dwindling FDI flows, skyrocketing borrowing costs, incessant power outages and a sharp spike in energy and wage costs, their ability to compete on the global stage is clearly weakened, thus the GTM will regularly monitor these trends to share vital business intelligence with local companies and businesses.

3.1. PESTEL Analysis

PESTEL which is an acronym for Political, Economic, Social, Technology, Environment and Legal was used to analyse the impact of the prevailing macro-economic outlook on the reviewed LED strategy.

Table 2: Results of the PESTEL Analysis

Table 2 outlines the results of the PESTEL analysis.

Factor	Critical triggers		Threat/ opportunity
Political	a.	Protests at known service delivery hotspots expose key economic infrastructure to arson and vandalism.	Threat
	b.	Ripple effect of burdensome taxes on buying power (Value added tax, fuel levy, and corporate tax).	Threat
	c.	Effect of corruption on cost of doing business and on investor confidence.	Threat

Factor	Critical triggers		Threat/ opportunity
	d.	The fragility and toxic nature of coalition politics and its ability to undermine the delivery of LED services.	Threat
	e.	Disruptive effect of Russia/Ukraine and Israel/Gaza conflicts on global supply chains	Threat
	f.	Availability of fiscus incentives and support for local companies	Opportunity
Economic	a.	Erosion of buying power due to rising inflation	Threat
	b.	Exorbitant import costs	Threat
	c.	Weak rand against the US dollar) and its contagion effect on import bill	Threat
	d.	Sharp fall in GDP growth	Opportunity
	e.	Effect of rising repo rates on cost of capital.	Threat
	f.	Lowly ranked on the ease of doing business index.	Threat
	g.	Investor confidence at record low	Threat
	h.	Ripple effect of energy prices on cost of doing business.	Threat
	i.	Ratification of Africa Continental Free Trade Area (ACFTA)	Opportunity
Social	a.	High unemployment rate and its adverse effect on disposal incomes and buying power.	Threat
	b.	Sharp increase in the number of households across South Africa	Opportunity
	c.	Workforce vulnerable to HIV infections.	Threat
	d.	Increase in the population of new RDP houses in rural areas	Opportunity
	e.	Rising levels of commercial crimes and their effect on asset security and insurance costs	Threat
	f.	Demographic dividends linked to a largely youthful population.	Opportunity
Technology	a.	Disruptive effects of 4 th IR.	Opportunity
	b.	High digital illiterate rates	Opportunity
	c.	Exorbitant data tariffs, poor network coverage, and excessive cost of smartphones.	Threat
	d.	The exorbitant cost of importing and installing digitized technologies.	Threat
	e.	High digital reskilling and upskilling costs	Threat
	f.	Negative effect of online shopping on brick and mortar malls	Opportunity
Environment	a.	Burdensome environmental laws and policies	Threat
	b.	High cost of transitioning to low carbon footprint business models.	Threat

Factor	Critical triggers		Threat/ opportunity
	c.	High cost of setting up a fully-fledged paperless offices.	Opportunity
	d.	Weather variability due to climate change.	Threat
Legal	a.	High debt collection costs	Threat
	b.	High costs of litigation	Threat
	c.	Vulnerability to costly labour disputes.	Threat
	d.	Over-regulation	Threat

3.2. SWOT Analysis

SWOT a tool to gauge the strengths, weaknesses, opportunities, and threats of GTM's LED environment is used to bolster its readiness to capitalize emerging opportunities for growth and investment creation.

Figure 1: SWOT Analysis

Figure 1 below illustrates the results of the SWOT analysis.

STRENGTHS	WEAKNESSES
• Strong resource and trade balance sheet • Political will to drive transformation • Investment promotion blueprint • Private sector support • Proximity to Kruger Canyon Biosphere • Leveraged tourism assets • Untapped water resources • Geographical centrality and interconnectedness • Intermediate City Status	• Ageing and dilapidated infrastructure • Insufficient budget to drive LED projects • Inept economic research acumen • Understaffing • Silo mentality among key departments • Land scarcity and invasions • Land claim backlogs • Underutilized restituted farms • No university
OPPORTUNITIES	THREATS
• Dam construction • Full-fledged City Status • Agricultural Technology University • Adventure Tourism • Agro-processing industries • Drive economic diversification • Solar farms	• Violent community protests • Rising crime levels • High HIV burden • Global uncertainty • HPV outbreak • Construction mafia • Vandalism of key infrastructure • Disruptive effect of 4IR • Ripple effect of climate change

3.3. Ease-of Doing-Business-Scorecard

The attractiveness of GTM's economy is measured by metrics such as the agility of its business licensing ecosystem, the friendliness of its by-laws, its ability to enforce property rights and its ability to drive seamless processing of new investments. Thus, investors eyeing the GTM market should never be subjected to needless red-tapes, unreasonable licensing delays and inept services delivery. Against this backdrop, the following is the state of its ease-of-doing-business outlook:

Table 3: Ease of doing business analysis

Table 3 below is a summary of GTM's Ease-of-Doing-Business Scorecard.

Delivery time and speed of new development applications.	Maximum of 90 days if all documents are lodged and all due processes are followed.
Delivery time and speed of building plans approvals	Maximum of 14 days if all documents are lodged and all due processes are followed.
Delivery time and speed of vehicle disc renewals	Maximum of 3 hours if all required papers are furnished.
Delivery time and speed of issuance of new driver's license.	8 hours if all requirements and due processes are met.
Accuracy and coverage of its Global Positioning System (GPS)	Serve for new settlements, all streets and addresses are in the local GPS system although the accuracy of the system requires further improvements.
Delivery time and speed of new company registration	As an accredited business registration centre, the process takes less than 5 days if all necessary documents are lodged. However, there is a compelling case to digitise the registration ecosystem to drive real-time processing.
Delivery time and speed of water permit processing.	GTM is not an accredited water service authority and therefore the issuance of water permit is not under its jurisdiction although its long term ambition is to be a designated water services authority.
Rate billing system.	As one of the pivots of the revenue enhancement strategy, concerted efforts are underway to digitise the billing system to eliminate inefficiencies, improve client interfaces and enhance processing speed and time.
Refuse collection.	Collection of refuse in urban nodes is done once in a week by specialised refuse trucks whilst community-based waste collectors collect in rural clusters as part of the Expanded Public Works Programme.
Price of land.	The price of zoned and serviced land in the town of Tzaneen is exorbitantly high and beyond the reach of new entrants.

3.4. Incentives Accruing to Qualifying Investors

GTM pride itself as one of the few municipalities in Limpopo with a clear-cut incentive program to charm new investors and retain existing ones. These incentives are either fiscal or non-fiscal rewards extended to qualifying investors as part of an elaborate plan to reposition the municipality as an enviable and most sought-out destination of domestic and global capital. For example, investors with interest in sectors such as agriculture, tourism, green economy, manufacturing, wholesale and retail, broadband and critical infrastructure stand to enjoy the following incentives, funding of feasibility study, business plan development, rebate on municipal building plan, approval costs for approved

investments, discounts on rates and services for new investments and discount on municipal land and buildings.

3.4.1. Financial Incentives

Table 4: List of financial incentives

The following table is a summary of the financial incentives accruing to qualifying investors.

Key Constraint	Potential Incentive	Target Investors	Purpose
Water and sewage connections	25% rebate after 12 months of doing business in the area.	Business of all sizes	Increase the number of new businesses attracted.
Electricity-availability & tariffs	5% discount on electricity rates	Business of all sizes in electricity intensive sectors, e.g. Manufacturing	Attract new businesses & increase inward investment
			Retain and support expansion of existing businesses.
			Increase competitiveness of investment location through reduced operating costs
Land sales	Must be in context of the municipal SCM policy, but allow 10% discount on fair market value.	All investors	Attract new businesses & increase inward investment
Refuse removal	Up to 25% discount for first six months, after which full fee to be paid.	All investors	To compliment water and electricity tariffs as these two utilities are far more costly to business
Access to capital for SMMEs and potential start-ups	Loans and or grants for business plan development	SMMEs across all sectors	Increase the number of start-ups

Source: GTM: Approved Incentive Policy.

3.4.2. Qualifying Criteria

Table 5: Qualifying Criteria

Table 5 is a summary of the criteria used to assess qualifying investors.

Factor	Criteria Range	Maximum Points	Points Awarded
Firm employs local labour in permanent positions	All permanent local labour (including senior management)	20	20
	>60% staff permanent and local		15
	60-30% permanent and local		10
	<30% permanent and local		0
Firm has procurement policy that demonstrate how local suppliers will be favoured	>60% of products/services will be purchased locally.	20	20
	60-30% of products/services will be purchased locally		15
	<30% of products/services will be purchased locally		0
Firm commits to a skills development plan	Skills development facilitator appointed and skills development plan implemented	10	10
	No skills development facilitator appointed		0

Firm has appointed auditors	Auditor appointed and contracted	5	5
	Nothing demonstrated		0
Firm is able to prove it can raise sufficient bridging finance to cover operational costs as shown in a business plan	Full bridging finance approves in respect to business plan	10	10
	Conditions apply but full finance available as long as business plan targets met		5
	Finance not yet confirmed		0
Contribution to BBBEE(as per code of practices guidelines)	>80%	15	15
	>65-79.9%		12
	>40-64.9%		8
	<40%		0
Value of investment	>R1,5m	20	20
	<R250 000		5
Maximum Points Awarded		100	

Source: GTM: Approved Incentive Policy.

3.5. Supporting Infrastructure Ecosystems

A resilient network infrastructure is not only a powerful broker and backbone of its global trade and business-to-business connectivity but also act as a potent tool to safeguard the viability of its local transport and logistics sector. For GTM to forge economic ties with the outside world, an excellently maintained and functional network ecosystem remains a key underwriter. Against this backdrop, the following is a plausible analysis of the state of GTM's network ecosystem.

- a. **Rail Ecosystem:** GTM remains optimistic that bulky-cargo-dependent-firms situated along its rich agricultural and mining belts will immensely benefit from ongoing efforts by Transnet to renovate and modernise its Musina - Richards Bay (Maputo) freight line. The revitalisation of the line which links fresh produce brokers, timber traders and mining firms with the Musina-Makhado Special Economic Zone to the north will reassure them access to one of the most cost-efficient and quick pathways to lucrative SADC and COMESA route-to-markets.
- b. **Road Ecosystem:** Of the 4 085.67 km of road assets servicing local farmers, tourists and traders, 3091.36 km of which 2788.4km (90.2%) is gravel and 301.6(9.2%) is paved directly fall under GTM's management, 821.31 km falls under Road Agency Limpopo (RAL) whilst 173 km is owned by South African National Road Agency Limited (SANRAL) (IDP, 2025). The fact that 90.2 % of its road assets are gravel and that R71 a key trade route is plugged by potholes underlines the need for GTM to rethink its Road Asset Management System. The mammoth task facing GTM is to ramp up its preventative maintenance initiative as part of a systemic plan to enhance the accessibility of its key industrial sites, farming belts and tourist corridors.
- c. **Airport Ecosystem:** Tzaneen is one of the few sought-out tourist magnets in the region serviced by a sound air travel ecosystem, although tourists have to either charter planes or access it via Polokwane due to absence of direct flights from OR Tambo International Airport. This underlines the need to forge mutually reinforcing partnerships with local flight firms to boost its global connectivity.

- d. **Digital Network Ecosystem:** Although local companies are slowly embracing digital business models, the sad reality is that the municipality's investment licensing and processing ecosystems are not fully digital-compliant mainly due to the scourge of "*digital hesitancy*". Worse still, the pace of digital diffusion in local SME and smallholder farming sectors is hampered mainly by the non-existent of a concise masterplan to reposition GTM' for the 4th IR.
- e. **Energy Security Ecosystems** – GTM is upbeat that the resolute steps adopted by Eskom to reverse the disturbing trend of load shedding" brought the much-needed relief and grid stability. On the other hand, Eskom's documented history of structural incapacities has also triggered the rapid proliferation of solar energy industries most of which specialises in importing, installing and maintenance of solar infrastructure.
- f. **Water Supply Ecosystems:** Despite being a host to some of the best fresh water basins in the country, the sad fact is that GTM still experience chronic water supply disruptions. Most importantly, the fact that heavy water users like Peppadew Industries perpetually experience water shedding remains a policy headache. To this end, the following table represent a summary of Water Treatment Plants that supply bulk water services to Tzaneen.

Table 6: Water supply status

The following table provide a summary of GTM's water supply status

Item	Tzaneen Dam	George's Valley	Letsitele
Owned by:	GTM	GTM	GTM
Present capacity MI/d	6	8.6	1.8
Proposed capacity	12	15	5
Water Allocation per Annum	1230000	2370000	418269
Raw water abstracted	8.028	7.799	1.063
Monthly purified water MI/d	7.776	7.643	0.985
Water loss (%)	3.1	2.1	7.3

Source: Tzaneen Municipality: Engineering Services, 2025

Table 7: Wastewater Treatment Works

Table 7 below provides a summary of GTM's wastewater treatment assets

Item	Present capacity	Proposed capacity
Tzaneen WWTW	8ML	13ML

Source: Tzaneen Municipality: Engineering Services, 2025

However, there is hope that the speed completion of the Tzaneen WWTW upgrade scheme may not only add an extra 5 ML into the grid but also place the municipality in a formidable position to enhance its water security.

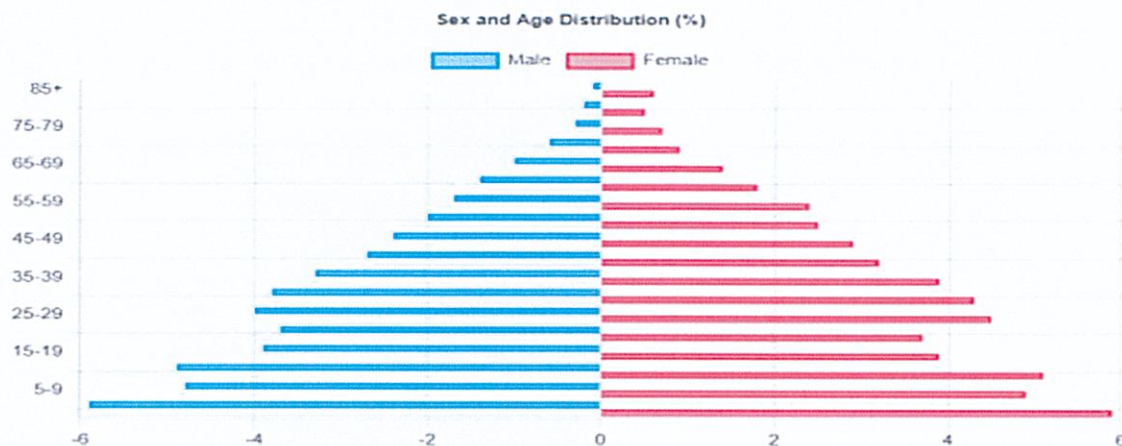
SECTION D: SOCIOECONOMIC INDICATORS

Besides examining the socioeconomic realities confronting local communities, this section also analyses the impact of these realities on local livelihoods ecosystems as part of an elaborate plan to improve GTM's quality of life index.

4.1. Population size

Graph 1: Population size

Graph 1 below illustrates GTM's population size.



Source: StatsSA, 2022

With 478 254 people residing in GTM, the municipality ranks as the most densely populated municipality in the region and the second most populous in Limpopo after Polokwane (628 999) (StatsSA: 2022). However, compared to the 2011 Census (390 095), it gained 88159 (22.6 per cent) extra residents over the past decade, making it one of the fastest growing municipalities in Limpopo. The fact that females (53.4 per cent) and youth (40 per cent) constitutes the municipality's dominant genders underscores the need to drive a genderised enterprise support initiative.

4.2. Gini-Coefficient

The Gini-coefficient reflect the strides made by GTM in reducing income inequality over the past five years. Whereas a zero Gini coefficient depicts a state of income equality that of 1 signifies a state of income inequality.

Graph 2: Gini-Coefficient

Graph 2 below illustrates GTM's Gini-coefficient outlook.



Source: South Africa Regional eXplorer v2375. Data compiled on 10 May 2023. © 2023 S&P Global.

The Gini data reflected above is encouraging in that over the past 5 years (2019-2023) GTM's Gini coefficient fell by 4 percentage points from 0.61 to 0.57, perhaps indicating that the youth basic income grant of R350 per month is clearly making a positive dent on household incomes. Interestingly, this Gini figure is slightly lower than that of the district and the province which stands at 0.586 and 0.587 respectively.

4.3. Level of Education

The local education system is an integral part of GTM's LED ecosystem in that it supplies sought-out skills to bolster the municipality's competitiveness in the race for global capital.

Table 8: Level of Education

Table 8 below summarises GTM's education outlook.

	2012	2022
No schooling (20 + Years)	2,5%	16,4%
Some Primary (20 + Years)	42,4%	7,9%
Completed Primary (20+ Years)	6,4%	3,5%
Some Secondary (20 + Years)	37,3%	32,1%
Grade 12/std 10	9,9%	30,5%
Grade 12/std 10	1,2%	8,7%
Higher Education	0,2%	0,9%
Other	2,5%	16,4%

Source: South Africa Regional eXplorer v2375. Data compiled on 10 May 2023. © 2023 S&P Global.

A downward spiral was recorded in low value grade categories, i.e., (No schooling - 2.5% to 16.4%), (Some primary education - 42.4% to 7.9%), full primary education - (6.4%-3.5%) and (Some secondary education -37.3% to 32.1%) whilst a marked improvement was witnessed in two high value grades (Grade 12- 9.9% to 30.5%) and Higher Education (1.2% to 8.7%) implying that more people within GTM are discovering the propelling effect of matric and post-matric education. This serves as an empirical proof that GTM is clearly ready to pioneer the establishment of a University of Technology in Agriculture and Tourism.

4.4. HIV+ and AIDS estimates

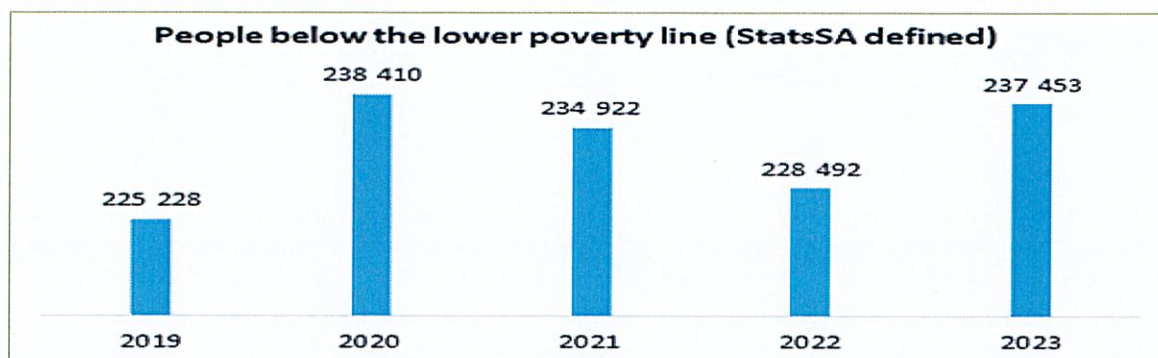
With approximately 3 per cent (14,300) of its population living with HIV and by extension on ARV treatment, HIV and AIDS continues to pose an existential threat to the local workforce. Sadly, due to a combination of socio-economic factors and unequal gender dynamics, the burden of the disease is disproportionately felt by women and youth, hence GTM is under pressure to join forces with stakeholders in the health sector to drive focused workplace-based safe sex campaigns especially at hotspots like farming communities.

4.5. Upper-bound poverty line

The upper-bound poverty line (UPL) is defined by StatsSA as a measure of the minimum income an individual needs to afford both food and non-food items. It is calculated by adding the food poverty line and the average amount spent on non-food items by households whose food expenditure is equal to the food poverty line. Currently, SA's UPL is R1 227 per person per month.

Graph 3: Upper-bound poverty line

Graph 3 above illustrates GTM's poverty exposure outlook.



Source: South Africa Regional eXplorer v2375. Data compiled on 10 May 2023. © 2023 S&P Global.

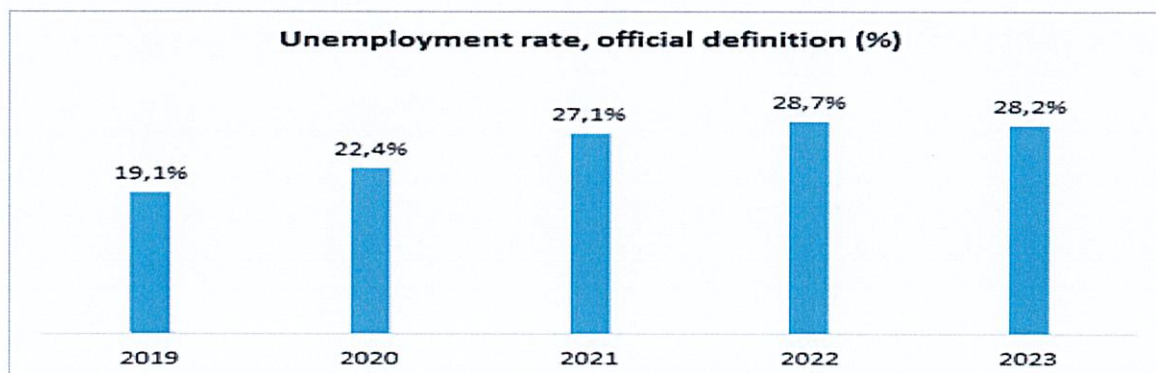
With nearly half of its population (49.6%) living below the poverty datum line (PDL) and by implication facing the harsh realities of chronic unemployment, starvation and hunger, the onerous task facing GTM is not only to give top priority to investment projects with high job absorption capacities but also to place the most vulnerable at the centre of economic opportunity.

4.6. Unemployment rate

Like any other municipality, GTM is hard hit with the grim reality of chronic unemployment and its ripple effect affect mostly young people most of which are neither in employment nor in training (NEET). StatsSA (2022) defines the unemployed as all persons between 15 and 65 years who are currently not working, but who are actively looking for work implying that it excludes discouraged work seekers.

Graph 4: Unemployment rate

Graph 4 below illustrates the municipality's unemployment outlook.



Source: South Africa Regional eXplorer v2375. Data compiled on 10 May 2023. © 2023 S&P Global.

Data extracts from S&P Global (2023) shows that in 2023 alone an excess of 28 percent of GTM's prospective job seekers faced zero prospects of receiving a job offer, signifying the clear failure of its opportunity economy to generate employment opportunities that matches the demand of the population. These figures demonstrate that the war against the scourge of unemployment is far from over, thus piling pressure on GTM to enhance the job creation effect of the local economy.

4.7. Total employment per broad economic sector

Total employment consists of two parts: employment in the formal sector, and employment in the informal sector.

Table 9: Total employment per broader economic sector

Table 9 below outline GTM's sector based employment outlook

	Greater Tzaneen	Total Mopani
Agriculture	10,200	30,383
Mining	13,100	26,252
Manufacturing	4,770	12,095
Electricity	413	1,174
Construction	8,310	21,364
Trade	19,700	53,451
Transport	3,010	7,835
Finance	6,230	20,612
Community services	15,800	53,224
Households	6,420	16,524
Total	87,900	242,913

Source: South Africa Regional eXplorer v2375. Data was compiled on 10 September 2024. © 2024 S&P Global.

Data from S&P Global (2023) show that by 2023 the local economy supported a total of 87,700 breadwinners the majority of which 22.4%(19,700) were linked to the Trade sector, 18%(15,800) to community services, making it the second largest employer followed by the mining sector 15% (13,100) and agriculture 10,200 (12%). Meanwhile, the electricity sector at 413 (0.5%) employed the least number of people. This expose serves as empirical proof that like any other municipality in the region, GTM perpetually suffers from the ripple effect of unemployment) implying that job seekers in the municipality struggles with no success to land gainful and decent work offers. This grim discovery further give credence to clarion calls for the GTM to craft a novel Job Creation Masterplan with the view to expand the municipality's opportunity economy for the benefit of all.

4.8. Average Annual Growth Rate

An average annual growth rate depicts the pace at which GTM's economy is growing to match the shifting demands and unique needs of its growing population.

Graph 5: Average Annual Growth Rate

Graph 5 below illustrates GTM's average annual growth rate



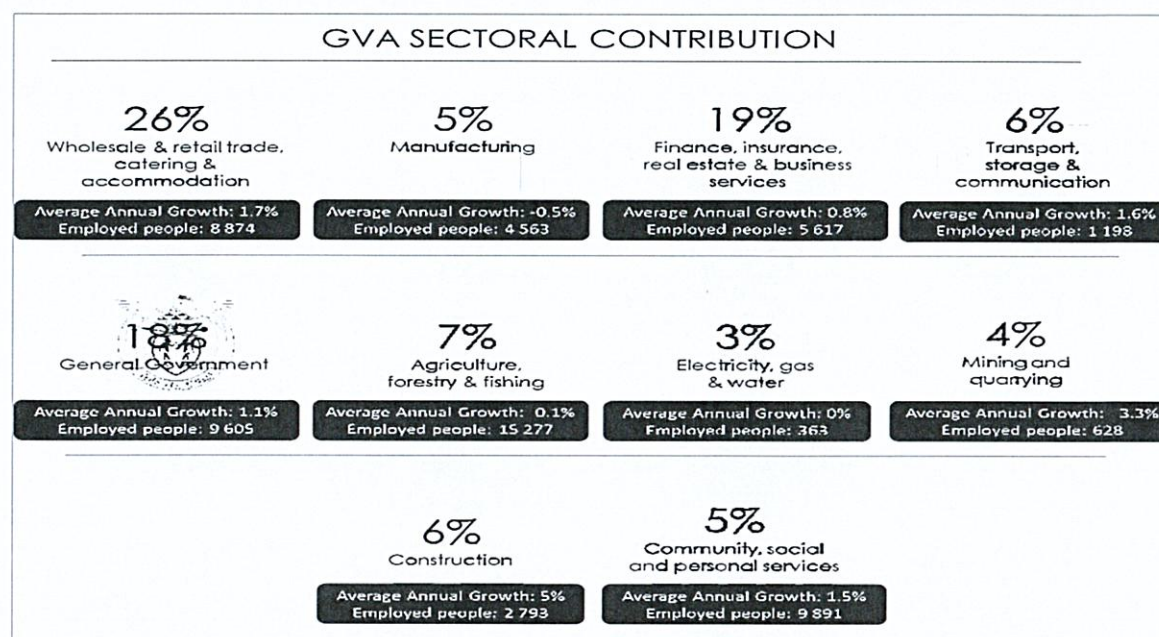
Source: South Africa Regional eXplorer v2375. Data compiled on 10 May 2023. © 2023 S&P Global.

S&P Global data shows that 2019 (-0.9%) and 2020 (-5.6%) GTM's growth rate plunged into a negative territory, mainly due to pandemic induced hard lockdowns which restricted economic and trading activity especially on its flagship sectors (Tourism and agriculture). However, its growth rate clawed back into positive territory in 2021(4.0%) probably as a response to either the lifting of trading and traveling ban or due to the propelling effect of sector-specific stimulus incentives.

4.9. Sectoral Contribution to GVA

Figure 2: Sectoral contribution to GVA

Figure 2 below illustrates each sector's contribution to GTM's Gross Value Added (GVA).



Source: StatsSA, 2011

Contrary to the widely portrayed notion that agriculture is the backbone of GTM's economy, the reality reflected by StatsSA's GVA data tell a different narrative. For example, the top three GVA contributors in ascending order are the trade sector (26 per cent), followed by finance (19 per cent) and the community services (18 per cent). Meanwhile, agriculture (7 per cent) is a distance fourth whilst the transport sector (6 per cent) stood at the fifth position. The fact that the manufacturing sector (5 per cent) is number seven on the GVA league is the strongest indication that a pragmatic approach is required to catalyse GTM's industrial conglomeration journey. An industrialised economic ecosystem that is predicated mainly on agro-processing is what GTM currently need to maximise the job creation effect of its sluggish economy. Crating an industrial Masterplan to guide its industrial conglomeration agenda remains the first critical step in this regard.

4.10. GDP– Regional context

Table 10: GDP-Regional Context

Table 10 below provides a summary of the regional GDP outlook.

	2022 (Current prices)	Share of district municipality	2012 (Constant prices)	2022 (Constant prices)	Average Annual growth
Greater Giyani	28.03	25.56%	10.46	18.47	5.85%
Greater Letaba	13.06	11.91%	8.01	8.80	0.94%
Greater Tzaneen	38.51	35.11%	25.14	25.64	0.20%
Ba-Phalaborwa	22.08	20.14%	13.34	10.57	-2.30%
Maruleng	7.99	7.28%	4.97	3.73	-2.82%

Source: South Africa Regional eXplorer v2375. Data compiled on 10 May 2023. © 2023 S&P Global.

A noteworthy discovery in this dataset is that despite ranked as the region's largest economy in GDP terms, the sad fact is that at an average growth rate of 0.20 per cent, GTM's R38 billion economy is not growing as faster as that of GGM whose average growth rate during the same period stood at 5.85 %. Worse still, GTM's growth rate is surpassed by that of Greater Letaba whose economy grew by 0.94%. However at (-2.82 per cent) Maruleng recorded the lowest average annual growth rate of -2.82% during the same period. This discovery does not only project GTM's failure to accelerate the growth of its economy but also underscores the need for it to usher its sluggish economy on a high growth trajectory.

4.11. Growth forecast

Table 11: Growth Forecast

Table 11 below compares GTM's growth forecast with that of fellow regional municipalities:

The growth outlook of GTM is worth analysing in that it provide a plausible insight into the municipality's future trajectory and this can be used as a foundation on which novel plans to steer its economy on a high growth pedestal.

	2027 (Current prices)	Regional Share	2012 (Constant prices)	2027 (Constant prices)	Average Annual growth
Greater Giyani	44.59	30.63%	10.46	23.20	5.45%
Greater Letaba	17.47	12.00%	8.01	9.59	1.20%
Greater Tzaneen	50.54	34.72%	25.14	27.42	0.58%
Ba-Phalaborwa	23.03	15.82%	13.34	9.20	-2.44%
Maruleng	9.93	6.82%	4.97	3.74	-1.87%

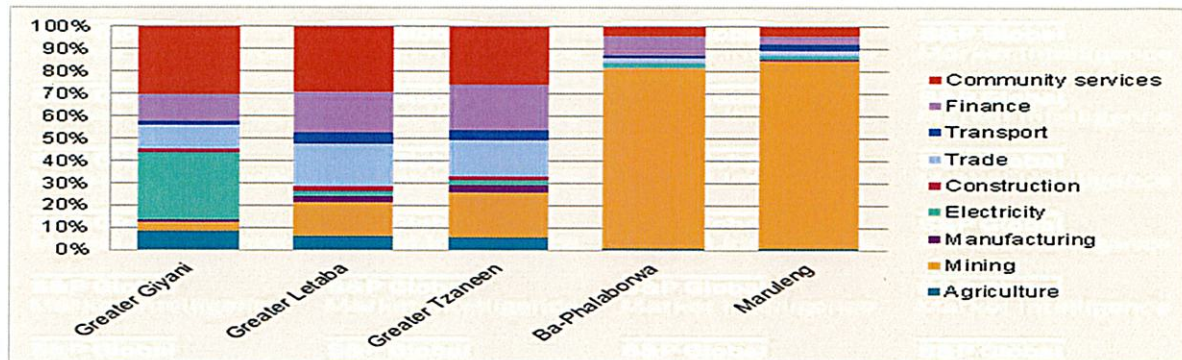
Source: South Africa Regional eXplorer v2375. Data compiled on 10 May 2023. © 2023 S&P Global.

S&P Global expects GTM's total GDP to breach the R50 billion mark by 2027 and its economy to grow at an annual average rate of 0.58 per cent although at that rate S&P predicts the GDP of its closest competitor GGM (5.5 per cent) to outperform it. Further, S&P expects GTM's GDP to contribute 35 per cent to Mopani's GDP, a figure slightly higher than GGM's 31 per cent contribution.

4.11.1. Gross Value Added: Regional Context

Graph 6: GVA: Regional Context

Graph 6 illustrates the GVA outlook of the Mopani Region



Source: South Africa Regional eXplorer v2375. Data compiled on 10 May 2023 © 2023 S&P Global.

The community services sector (42.58%), which government services is an integral part is arguably the largest contributor to GTM's GVA. It is also the single biggest GVA contributor and by extension the municipality's largest employer and sure source of livelihood to many of its breadwinners. From a policy perspective, the fact that GTM's economy is anchored by the community services pillar instead of the agriculture and tourism.

4.12. Tourism

Tourism is not only the jewel of GTM's trade-dependent economy but also a chief cornerstone of its R38 billion GDP (Regional Market Explorer, 2022). In practice, six drivers make GTM every holidaymaker's natural choice, i.e. (a) *its* proximity to the iconic Kruger National Park, (b) its fabulous picturesque sightings, (C) its spectacular geographical scenery which ranks it among the best adventure tourism spots in SA (d) its ease accessibility to the sacred land of Moria, a top ZCC pilgrim centre (e) its matchless centrality and interconnectedness and lastly (f) its top-tier tourism infrastructure and assets.

4.12.1. Brand Positioning

Tzaneen is the land of some of the world's most sought-out tourist delights. Buoyed by its forested volcanic terrains and sacred mountain slopes which make it a perfect spot for global and local adventurers, its warm and balmy climate gives visitors a real tropical paradise experience whilst its stunning picturesque settings and captivating hospitality and rich cultural heritage do not only offer visitors lasting impressions but also profound value for money experiences.

4.12.2. Most sought-out tourist delights

Most frequented destinations include among others, Sunland Baobab, Modjadji Ctcad Reserve, Tzaneen Country Club, Debengeni Waterfalls, Ebenezer dam, Tarentaalrand, Mogoabaskloof Adventures, Agatha Crocodile Ranch, and the renowned Tsonga Kraal Museum. Over and above these, visitors may opt to take guided tours to the mighty Kruger National Park where there will experience spectacular big five sightings and some of the world's rare bird species and flora.

4.12.3. Tourism spend per resident capita

An insightful metric used to measure the strength of the sector is the tourism spending per resident capita. To calculate this, the total amount of tourism spending in the region is divided by the number of residents living within that region. This gives a relative indication of how important tourism is for a particular area.

Table 12: Tourism spend per resident capita

Table 12 provides a summary of tourism spend per resident capita.

	2012	2017	2022
Greater Giyani	R 1,795	R 2,017	R 3,041
Greater Letaba	R 1,400	R 1,445	R 1,917
Greater Tzaneen	R 2,937	R 3,299	R 3,319
Ba-Phalaborwa	R 5,416	R 5,385	R 5,852
Maruleng	R 8,029	R 9,162	R 8,587

Source: South Africa Regional eXplorer v2375. Data compiled on 10 May 2023. © 2023 S&P Global.

In 2022, GTM's tourism spend per capita of R3, 319 was far lesser than that of Maruleng's R8, 587 and Ba-Phalaborwa (R5, 852) implying that its per capita spent plays a second fiddle to that of Maruleng and even Ba-Phalaborwa (R5, 852) although it is slightly higher than that of GGM (R3, 040)., thus the immediate task facing GTM is to double efforts to reengineer the spending habits of its holidaymakers.

4.12.4. Brand Perception

Out of a total of 5,390 reviews linked to Tzaneen's 22 hotels in 2024, an average hotel rating of **7.78** was recorded, implying that most of the visitors gave their stay a thump up. The following represents further statistics that underpin these experiences:

Table 13: Analysis of brand Perception

The following table is a summary of the results of the perceptions of sampled tourists about their lived experience in Tzaneen's 22 hotels.

Ranking Factor	Rating	Rand value
Average hotel fees per night in US\$	US\$79	R1,511
Most expensive month to visit	August (US\$102)	R1,951
Best month to visit Tzaneen by rating	August (8.27)	-
Cheapest month to visit Tzaneen	January (US\$69)	R1,319
Least popular month to visit Tzaneen	February (6.7% of visitors)	-
Most popular month to visit Tzaneen	December (10.9% of visitors)	-
Most satisfied travellers	Friends (rating their stays at 8.45 on average).	-
Least satisfied category of travellers	Group travellers rating their stays at 7.18 on average.	-

Source: Tzaneen Tourism Association, 2024

NB: The prevailing exchange rate of US\$1: R19.13 was employed as the basis for the conversion formula.

4.13. Heartland of Commercial Agriculture

GTM's vast arable territory is a treasure chest of untapped agricultural resources. In fact, agriculture is not only a key pivot and engine of GTM's economy but also its third largest employer after community services and Trade sectors. Home to some of the world's export-quality mangoes, bananas, citrus and Litchi, Tzaneen bears all the hallmarks of a fruit production and agro-processing powerhouse.

Table 14: Analysis of Hectarage under production

The following Hectarage under fruit plantations cultivation is testament to this fact.

	Tzaneen	Maruleng	Giyani	Letaba	Phalaborwa
Mango	4884 Ha	4409 Ha	-	218 Ha	425 Ha
Banana	1443 Ha	46 Ha	176 Ha		
Litchi	319	6 Ha	-		
Citrus	8109 Ha	4308 Ha	-		4105 Ha
Total	14,755 Ha	8,769 Ha	176 Ha	218 Ha	4,530 Ha

Source: Dept of Agriculture, 2012.

GTM's status as Limpopo's leading tropical garden is affirmed by data from the Dept. of Agriculture (2012) which links about **40%** of South Africa's total avocados, **40%** of its mangoes and **20%** of its bananas to farms based in GTM. Moreover, it also produces 90% of South Africa's tomatoes. Tzaneen is also the biggest producer of pine plantations in Limpopo, accounting for more than **85%** of province's pine and blue gum production (Dept. of Agriculture, 2012).

- a. **ZZZ Farm:** GTM is a host to the iconic ZZZ farm, a top signature label in tomato production and distribution whose exploits and tentacles in the sector are globally recognised. Every year it harvests 60 000 tons of high grade tomatoes for sell to either local traders or European markets. However, as part of a grand plan to catalyse GTM's agro-processing journey, there is a compelling case to persuade ZZZ to localise its tomato beneficiation value chain to further unlock the local economy's job absorption capacity.
- b. **Westfallia Plantations:** Tzaneen pride itself as home to Westfallia, a flagship brand with profound interest in the global avocado production and supply chain. Westfallia's balance sheet is credited with a whopping 100 000 avocado trees which generates 3 million cases of avocados per year. This accounts for 40 per cent of all avocados consumed in SA, making it an elite member of the global avocado supply ecosystem. The company also produces avocado purée and avocado oil, one of the world's most sought-out skin therapy oils. Further, its nurseries produces over 100 000 avocado seedlings.
- c. Based at Nkowankowa Industrial Complex, **Peppadew International** which sustains the livelihood of more than 4000 people exports a wide –array of sweet tasting peppers to 26 countries, thus making it the world's leading pickler of unique red capsicum. However, there are real fears that the firm may relocate from its present site citing persistent water supply disruptions. Such an exit may not only spell doom for those depending on it for livelihood but also tarnish the image of GTM.

- d. **Agro-processing ecosystems:** GTM is yet to reap the full dividends from its 20 000 sq. km tracts of productive plantations largely due to the absence of a revolutionary Agro-processing masterplan. As long as more than 60 per cent of its raw farm produce is processed and canned outside its borders, the municipality's strong wish to fully leverage the economic and social value of its agricultural wealth through beneficiation will be hard to achieve.
- e. **Agro-processing infrastructure** is one of the key pivots of GTM's agricultural value chain hence the need to implement bold and actionable strategies to turn Tzaneen into an agro-processing stronghold. A physical count of agro-processing infrastructure done by the Department of Agriculture in 2025 shows that GTM has a total of 8 packhouses and 15 agro-processors signifying the need to make agro-processing the mainstay of its agricultural ecosystem. Moreover, Tzaneen has three red meat abattoirs (Harmony, Beefmar and Bridgeway), one white meat abattoir (Bushvalley Chickens) and two seedlings (WD seedlings and P & A Seedlings).
- f. **Macadamia:** South Africa's macadamia industry has grown into a major world force, thus, the country ranks the third- largest macadamia producer in the world. Luckily, Tzaneen is an integral part of the country's macadamia growing ecosystem.
- g. **Mangoes:** Mango production and processing is a central feature on Tzaneen's agricultural balance sheet. The municipality is also a top producer and net exporter of raw mangoes, dried mango products, and a wide array of juices and archer.
- h. **The vast tracts of banana plantations** mainly along the Letsitele and Letaba basins have not only turned GTM into a mini-tropical paradise but also Limpopo's leading bread basket. The industry does not only rakes approximately R1.2 billion per year but its Du Roi Laboratory in Letsitele produces over six million tissue-culture banana plants annually for sale to SADC, Middle East and South American markets.

SECTION E: ANALYSIS OF OPPORTUNITY ECONOMY

GTM is a tale of untapped economic opportunities, most of which are linked to its under-explored trade, tourism, manufacturing and agricultural sectors. The municipality is under pressure to diversify its opportunity economy to reinvent and expand it for the benefit of all. The following is a summary of these opportunities.

5.1. Opportunity Basket

- **Rural economy:** The rural economy is bounding with plenteous but under-explored agribusiness opportunities which can be fully harnessed by among other things; (a) speeding up the processing of unresolved land claims to unlock the land's intrinsic economic value, (b) building the growing capacity of smallholder farmers by improving existing farmer support efficiencies, (c) maximizing the productive value of restituted land, (d) accelerating the rollout of key economic infrastructure to enhance their business competitiveness and (e) making agri-townships the mainstay of the rural economy.

- **Spaza economy:** The R178 billion Spaza shop economy which is buoyed by a R500 million stimulus fund from the Dept. of Small Business Development is undergoing a major compliance-led evolution to improve the participation parity of indigenous South Africans in the sector. The next critical step is to expedite the regularisation of the sector, build its pitching capacities and enhance its networking acumen.
- **Digital economy:** The digital economy which is valued at R55 billion is riding on the crest of a thriving e-shopping culture, increased smartphone penetration, high social media usage, streaming services, and digital content creation, thus ushering in a new breed of content creators, podcasters, bloggers, tech entrepreneurs and crypto currency traders etc. GTM is thus under pressure to forge synergies with the Council for Scientific and Industrial Research (CSIR) and the Dept. of Science and Technology to drive the proliferation of hi-tech industries, smart agriculture, Science Parks and Innovation hubs.
- **Retail sector:** Tzaneen is a hive of retail activity and a thriving mall economy. Major Chain stores like Shoprite, Checkers, Edgars, Spa, Woolworth, Pep, etc. have footprints in the town. However, efforts to grow this sector are hampered by a lack of investors, erratic supply of bulky water and erosion of buying power due to rising inflation.
- **Financial Sector:** Although local firms are banked by SA's big five banks (Nedbank, Standard Bank, Absa, FNB and Capitec), their perpetual inability to record loan pitching successes due to inept pitching practices underscores the need for GTM to forge alliances with the financial sector to improve the pitching skills of local companies.
- **Manufacturing sector:** GTM's emerging industrial ecosystem is marked by light, metal fabrication, timber beneficiation and food industries most of which have footprints in Tzaneen and Nkowankowa. However, the absence of a novel Industrial Master Plan to guide its industrialisation roadmap continues to undermine ongoing efforts to turn Tzaneen into the region's industrial superpower.
- **Mining sector:** Mining is not one of GTM's key strengths save for some isolated gold and iron mining activity especially along the Greenstone belt although the sector's potential can be maximally unleashed by intensifying exploration activity especially along the mineral rich Greenstone belt.
- **SMEs and Cooperatives:** Due to a history of inept business practices, poor pitching skills and a culture of dependency, most SMEs and Cooperatives face existential viability challenges, thus underlining the need to build their entrepreneurial innovation. However, their resilience can be scaled up by rallying local SME development agencies like Seda, Leda, NDA, Sefa, IDC and NEF behind a shared SME capacity building strategy. Most importantly, there is a need to institute a diagnostic study to deconstruct factors impeding the sector's growth, thus helping to drive a research driven capacity building strategy.
- **Agriculture:** With the right mix of multi-stakeholder collaboration, enhanced farmer support coordination efficiencies and a robust agro-processing ecosystem, GTM's agricultural sector is set for a major rebound. Moreover, the rollout of earmarked projects such as the Tomato Processing Plant, the agri-park, the Auction Kraal Hub and the Fruit and Vegetable Market will certainly put the sector on a high growth trajectory.

- **Electricity sector:** Due to Eskom's history of incapacities, a plausible opportunity exists for GTM to build its solar energy ecosystem as part of a grand plan to achieve energy self-sufficiency and renewal energy leadership.
- **Tourism:** The face of the tourism sector is poised for a new momentum once the construction of the Tzaneen Conventional Centre and reopening of the Kruger National Park's Shangone gate gains traction from the private sector.
- **Trade sector:** The recent surge in on-line retail platforms like Temu, Sheen, Take a lot, the marked increase in tourist traffic, the mushrooming of brick and mortar malls and a spike in Spaza shop activity is expected to drive the sector's recovery although a report by National Treasury cites the recent erosion in consumer incomes as the sector's major setback.
- **Taxi Industry:** The advent of highly personalised e-hailing taxi platforms like Taxify, Drive-in, Uber, Bolt etc. is exerting relentless pressure on the traditional taxi sector, thus underlining the need to reset the sector to stay agile and competitive.
- **Security sector:** The use of digital security technologies like CCTV cameras, anti-hijacks, digital alarms and drones to protect economic assets and buildings is already changing the face of the local security sector and presenting a profound opportunity to penetrate this new market.
- **Educational Sector:** Although the speed adoption of a digitally-enabled curriculum and the proliferation of virtual learning programmes is pushing Tzaneen on the brink of a digital revolution, the implausible reality is that the absence of game changers or trigger points such as an Agricultural Technology university to underpin its knowledge economy ecosystem may undermine Tzaneen's overarching goal of sparking a skill revolution in the region.
- **Green Economy:** The Just-Transition paradigm which underlines the propelling effect of a low carbon footprint economy places GTM in a frontline position to drive a green-led industrial ecosystem. The first critical step toward the realisation of this goal remains to digitise its business to licensing ecosystem and to foster the concept of paperless administration by 2030.
- **Health Sector:** Tzaneen can cement its position as one of the medical tourism strongholds in the SADC region by courting global investors offering cutting-edge medical solutions to some of the world's unresolved epidemics like diabetes, cancer, heart and kidney transplants etc. The idea is not only to spark a new stream of tourism revenue but also to make medical tourism an integral part of its tourism ecosystem. The establishment of Tzaneen Heart and Kidney Transplant hub can lay a solid foundation for such a reality.
- **Research and Development:** A functional research and development ecosystem remains a precondition for turning Tzaneen into a top agro-processing hub and heartland for manufacturing innovation and advancement, thus GTM will mount a charm offensive to woo local and global R&D firms to drive a research-led economic growth.
- **Mega Infrastructural Rollout:** Private investors stand to reap enormous dividends by joining forces with GTM through "**built, operate and transfer**" arrangements to trigger a infrastructural revolution especially in areas such as dam construction, network infrastructure, water treatment and reticulation, industrial and energy complex etc. The overriding aim is to

turn the entire Tzaneen into a huge construction site to drive infrastructure-led growth and job creation.

- **Property and Real estate Sector:** Tzaneen pins its aspiration of realising its city status dream on the goodwill and financial muscle of its property and real estate sector. Whilst GTM will intensify efforts to rollout bulky water, electricity and road infrastructure to give the sector a strong head start, the real estate sector will be at the front and centre of its urban renewal and regeneration drive.

SECTION F: CAPACITY ANALYSIS

Although over the past five years, the GTM team made plausible strides in concretising some of its key commitments and undertakings, the unpleasant reality is that owing to a combination of insufficient budgets, understaffing, inept coordination and an “*us and them*” attitude some of these commitments were either not followed through at all or partially achieved. To this end, the following is a summary of the 2018 strategy review score card.

6.1. Review scorecard

A self-evaluation exercise of the 2018 strategy involving the LED team was conducted to measure progress made in translating it into concrete actions and results.

Table 15: Scorecard for 2018 LED Review

The results of the evaluation are summarised below:

Project/intervention	% of work achieved	Comment
Review Preferential Procurement Policy	0%	Budgetary constraints
Review LED Strategy	100%	Fully achieved
Formulate Incentive policy	100%	Fully achieved
Rethink the SDF blueprint	100%	Fully achieved
Formulate Rural Development Strategy	0%	Budgetary constraints
Formulate Tourism Development Strategy	75%	Partially achieved
Stakeholder engagements	100%	Fully achieved
Branding and Marketing	100%	Fully achieved
Cluster development	0%	Budget constraints
Improving electrical capacity in industrial area	100%	Fully achieved
Improving water service delivery	50%	Partially achieved
Identify and Support Smallholder Farmers	60%	Partially achieved
Fixing Roads in Industrial areas	40%	Fully achieved
Support Restitution Farms	20%	Budgetary constraints
Honey Production	0%	Zero sectoral expertise
Sapekoe Tea Estate	0%	Market failure
Roof Trusses Production	0%	Zero sectoral expertise
Expanding Tzaneen dam capacity	40%	Partially achieved
Average Score	45%	

Source: Interviews with LED team, 2025

On average, 45 per cent of turnkey projects were sufficiently achieved, implying that over half (55 per cent) were not achieved. Going forward, the immediate challenge is to redouble efforts in mobilizing corporate social capital to augment the LED budget, upskill key team members, forge catalytic synergies with sister agencies and romp in sector-specific think tanks to leverage the team’s operating leverage.

6.2. Skill Gap Analysis

To this end, the following is a summary of some of the mission-critical skills currently lacking in the strategy execution team. The team requires these skills to drive a plausible implementation journey.

Table 16: Skill-gap Analysis

Table 16 indicates the implementation team's unmet skill-needs and gaps.

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Source: Interviews with LED team

6.3. Institutional arrangements

GTM will forge mutually reinforcing alliances with the following sister agencies as part of a strategy to augment its operating leverage.

Table 17: Institutional Arrangements

The table below provides a list of stakeholders and the support they will render to the strategy implementation team.

Strategic Partner	Nature of Support
LEDA	Financial and market linkages, Enterprise development, export training and linkages, industrial parks infrastructure, and BEE compliance support etc.
IDC	Equity purchase funding, funding agro-processing, mineral beneficiation, tourism, and manufacturing projects, provisioning of post-financing support.
NEF	Financing share acquisition schemes, Funding Black Empowerment deals, provisioning of post-financing support.
SEDFA	Provide funding and post-funding support to manufacturing and agro-processing industries.
DtiC	Render grant support and other financial instruments to cooperatives and HDI companies.
DFIs	Unlock funding for critical network and industrial infrastructure
Department of Tourism	Create an enabling policy climate, render funding support to emerging operators and provide technical marketing and branding support.
Limpopo Tourism Agency	Provide branding, marketing and funding support to operators owned by HDIs.
Department of Agricultural and Land Reform	Provide funding, training and capacity-building support to emerging farmers.
Letaba Agriculture	Funding the Cattle Kraal Auction and the Fresh Produce market projects as well as rendering mentoring support smallholder farmers
NYDA	Render financial and non-financial support to local industries and companies.
Tzaneen Tourism Association	Act as a benchmark for best practices and quality standards in the tourism sector.
LED FORUM	Provide oversight and technical advisory support to the LED team.

SECTION G: A NEW ECONOMIC DAWN

Noting Tzaneen's unique environmental dynamics and shifting socio-economic realities, realising its unequalled resource endowments, and taking to heart its aspirations of becoming a full-fledged city by 2030 and taking on board its developmental state obligations enshrined in the

National Development Plan and recognising the centrality of a shared opportunity economy for the benefit of all, the following section articulates a five-point economic stimulus path to generate new opportunity streams for the people of Tzaneen:

7.1. Guiding Charter

- **Vision:** A shared and Vibrant Opportunity Economy for the Benefit of All.
- **Mission:** To maximise Tzaneen's economic opportunity by diversifying its agriculture and tourism dominated economy and to enhance its ease-of-doing business competitiveness.
- **Values:** The five point stimulus plan is built on the foundation of values of **strategic collaboration, mutually beneficial public-private partnerships, focus for impact and the principle of no-one and no place should be left behind.**

7.2. Five Point Growth Plan

The five point stimulus plan (PSP) is built on the bedrock of five growth pillars most of which are seamlessly linked to its matchless natural resource balance sheet.

Figure 3: Growth Pillars

Figure 3 below summarises the strategy's five growth pillars:

- Growth Pillar I: Opportunity Consolidation** to defend hard won gains made over the past five years and beyond.
- Growth Pillar II: Opportunity Diversification** to hedge the local economy from unmitigated exposure to single source risks,
- Growth Pillar III: Opportunity Competitiveness** to enhance GTM's ease of doing business ranking,
- Growth Pillar IV: Opportunity localization** to place locals at the heart of economic opportunity,
- Growth Pillar V: Opportunity Execution, Measurement, Evaluation and Risk Control** to monitor and measure progress and impact.

The following is a brief overview of the five PSPs:

Growth Pillar I: Opportunity Consolidation: The strategic intent is to protect gains made on traditional growth catalysts such as Agriculture, Tourism and Trade.

Agriculture: The target is not only to make Tzaneen South Africa's "top net exporter of agricultural products" but also to drive the proliferation of new agro-industries by 2030.

Table 18: Consolidating Gains in the Agricultural Sector

Table 18 summarises strategies to defend past gains made in the local agricultural sector

A. Substantive Challenge
The sector's growth is undermined by climate change risks, the influx of cheap imports, its systemic failure to penetrate alternative route-to-markets and inept mechanization infrastructure.
B. Game Changers
a. Ensure the farm mechanization and automation program is fully integrated into existing Farmer Support Programmes. b. Implement the "Adopt a Restituted Farm Programme (ARFP) to scale-up "look and learn" mentorship experiences of beneficiaries of land restitutions. c. Intensify the elimination of needless red tapes in the distribution of vital inputs, implements and equipment to local farmers, d. Establishment of a thriving Agri-park to offer local farmers a one-stop shop input supply experience, e. Establishing a Fresh Produce Market to guarantee systemic access to high-volume buyers, f. Constructing an Auction Kraal Hub to offer livestock farmers an alternative route-to-market,
C. Key Performance Measurement
a. Number of growers benefiting from the farm mechanization and automation programme, b. Number of restituted farms participating in the Adopt a Restituted Farm Mentorship initiative, c. Number of smallholder farmers accessing inputs from existing farmer support programmes, d. Number of agri-parks established across GTM, e. Fresh Produce Market facilities established, f. Number of functional Auction Kraal Hubs established across Tzaneen.

Tourism: The aim is to implement revolutionary actions to cement Tzaneen's position as the number one darling of holidaymakers.

Table 19: Consolidating gains in the Tourism Sector

Table 19 below outlines interventions to consolidate gains recorded in the tourism sector.

A. Substantive Challenge:
Rediscovering the sector's pre-Covid-19 momentum by maximizing tourist tariff volumes from existing routes whilst simultaneously penetrating new routes and less explored offerings like adventure, business and festival tourism.
B. Game Changers
a. Wooing private capital to expedite the construction of the Tzaneen Convention Centre to mark a turning point in business and festival tourism sub-sectors. b. Lobbying the International Golf Fraternity to make the Tzaneen Golf Retreat a key mainstay of the International Golf calendar, c. Making Tzaneen a sought-out brand for adventure tourism by aggressively marketing hiking, trekking and mountain climbing sports to unlock fresh tourism revenue streams, d. Conduct a Tourist Perception Survey bi-annually
C. Key Performance Measurement
a. Feasibility studies to demonstrate the bankability and social desirability of the proposed Tzaneen Convention Centre conducted, b. Number of Expression of Interests to invest in the Conference Centre Project signed by Strategic Partners and Private Investors, c. Number of international golfers gracing the Tzaneen Golf Retreat event every year, d. Number of adventure tourism events organized in conjunction with the private sector. e. Number of tourist perception surveys conducted

Retail ecosystems: The goal is to build the ecosystem's resilience in the face of daunting operational challenges.

Table 20: Consolidating gains in the Retail Sector

Table 20 outlines interventions to protect gains made in the retail sector.

A. Substantive Challenge:
Although the mushrooming of brick and mortar malls has a propelling effect on the sector, the sector's fragility is perpetuated by threats such as the surge in online shopping transactions, erosion of buying power, a surge in property rental costs and reputational risks posed by poor food hygiene standards.
B. Game Changers

- a. Drive the proliferation of new malls and shopping centres at municipal growth points to give the township economy a strong head start.
- b. Ensure locals are not only at the heart of the sector's ownership structure but also benefit from the government's R500 million Spaza Shop Fund.
- c. Rollout sustained campaigns to foster food hygiene standards in the sector.

C. Key Performance Measurement

- a. Number of new malls established,
- b. Number of local Spaza shops owned by indigenous South Africans licensed
- c. Number of local Spaza shops owned by indigenous South Africans benefiting from the R500 million fund.
- d. Number of food hygiene inspections conducted.

Growth Pillar III: Opportunity diversification: is a call for concomitant action to repurpose energies towards redefining and advancing Tzaneen's industrial conglomeration agenda to deliver a diversified opportunity base.

Drive industrial conglomeration: The idea is to leverage GTM's matchless agricultural wealth by joining forces with local fruit and vegetable growing giants to turn it into a net exporter of high-value agricultural products.

Table 21: Industrial Conglomeration

Table 21 below summarises strategies to drive the municipality's industrial conglomeration agenda

Substantive Challenge:
Agro-processing potential is under-optimized due to a combination of factors such as uncompetitive economies of scales, lack of meaningful investor appetite and absence of properly structured sector-specific incentives. As a result most of its raw materials are beneficiated outside its borders, thus undermining its agro-industrialization vision.
Game Changers
a. Prioritize the provisioning of bulky water supply, electricity and network infrastructure to the new Tomato Processing Plant b. Implement a lasting solution to water woes facing the Peppadew Plant in Nkowankowa.

- c. Eradication of bottlenecks impeding the speed rollout of the Coffee Processing Plant,
- d. Lobby large scale fruit and vegetable growers to allocate a quota of their produce to ensure local processors enjoy uninterrupted supply of raw materials.
- e. Ensuring artery roads accessing all industrial corridors are systemically rehabilitated and maintained to maximise corridor connectivity and mobility,
- f. Crafting an Industrial Ecosystem Masterplan to unlock the proliferation of new agro-industries in Tzaneen,
- g. Comprehensive mapping of the local solar industry ecosystem to maximally unlock its optimum industrial value.

C: Performance Measurement Metrics

- a. Number of new agro-processing industries operationalized,
- b. Number of water supply complaints lodged by Peppadew international,
- c. Percentage quota of fresh produces reserved to local processors and food manufacturers,
- d. Number of roads accessing key industrial corridors systematically maintained and rehabilitated.
- e. Number of Industrial Ecosystem Masterplans developed and operationalized.
- f. Number of solar industry ecosystem mappings conducted.

Growth Pillar IV: Opportunity Competitiveness: By driving a digitised business licensing and compliance enforcement ecosystem, GTM seeks to turn itself into the most enviable and sought-out destination of domestic and global capital by 2030.

Table 22: Growth Pillar IV: Opportunity Competitiveness

Table 22 below is a summary of preferred strategies to enhance the municipality's opportunity competitiveness

A. Substantive Challenge:
Lack sufficient appetite, focused budgets and the right mix of tools and infrastructure to catalyse its digital transformation journey.
B. Game Changers
a. Expedite the digitization of the business licensing and compliance enforcement ecosystem to deliver real-time and extremely personalised investment processing experiences, b. Install CCTV cameras at known crime hotspots in Tzaneen whilst simultaneously utilizing drones to improve real time crime detection and surveillance,

- c. Digitization of billing services to reinvigorate revenue enhancement and elevate debt recovery,
- d. Streamlining current by-laws to increase policy certainty and foster investor confidence,
- e. Establish a one-stop investment processing hub to deepen intra-departmental coordination and congruency in the messaging chain.
- f. Lobby SANRAL to speed up the rehabilitation of the R71 corridor

- a. Percentage of business licensing and permitting system digitised,
- b. Number of crime hot-spots under CCTV and drone surveillance,
- c. Percentage of the rate billing system digitised,
- d. Number of by-law reviews instituted.
- e. One stop investment processing hub established,
- f. Number of collaborative engagements conducted with SANRAL

Growth Pillar IV: Opportunity Localisation Drive: to transfer the levers of the local economy into the firm control and ownership of local companies and historically disadvantaged groups.

Table 23: Growth Pillar IV: Opportunity Localisation Drive

Table 23 below outlines strategies to place local companies at the centre of the opportunity economy.

A. Substantive Challenge:
The absence of a dashboard to monitor the preferential procurement behaviour of state organs persistently undermines GTM's ability to measure the true economic impact of its affirmative action programmes.
B. Game Changers
a. Design a dashboard tool to enable the systemic monitoring of the public procurement practices, b. Collaborate with sister agencies (LEDA, Sedfa, NEF, IDC, NDA etc.) to deliver to promote co-funding of critical sectoral interventions. c. Install ablution toilets and dustbins at strategic hawking spots

- d. Institute a detailed diagnostic study of the informal sector ecosystem to understand its viability challenges and opportunities for growth and sustainability.

C: Key Performance Measurement

- a. Dashboard tool to monitor public procurement practices developed,
- b. Number of SMEs and Cooperatives benefiting from local procurement practices,
- c. Number of SMEs and Cooperatives participating in various capacity building initiatives driven by sister agencies,
- d. Number of vending sites installed with sanitary utilities like ablution facilities and dust bins,
- e. Number of diagnostic studies into the informal sector conducted.

Growth Pillar V: Opportunity Execution and Measurement: the goal is to build sufficient institutional capacity whilst simultaneously forging synergies with sister agencies and the private sector.

Table 24: Opportunity Execution and Measurement

Table 24 below reflects strategies to build GTM's strategy execution capability.

A. Substantive Challenge:
The daunting challenge is not only to assemble a multi-disciplinary LED team but also to rally key stakeholders behind the LED strategy.
B. Game Changers
a. Integrate LED priorities into the plans of all directorates of the municipality to improve internal synergies, b. Collaborate with sister agencies to share vital economic intelligence data, experiences and even co-fund projects of mutual interests, c. Tap into the competencies of seasoned commercial farmers through the "Adopt a Restituted Farm Programme (ARFP) to enhance the agribusiness management acumen of beneficiaries of restituted farms. d. Upscale upskilling or reskilling initiatives of the LED team. e. Contract independent consultants to drive complex turnkey projects or interventions.
C: Key Performance Measurement
a. Number of directorates embedding LED priorities into their annual plans and strategies, b. Number of co-project funding and skill transfer arrangements signed with sister agencies and the private sector. c. Number of seasoned commercial farmers participating into the ARFP programme, d. Number of employees participating in funded upskilling and reskilling initiatives and

- e. Number of independent Consultants contracted to augment strategy implementation capacity.

7.3. Abridged Business Plans for Three Anchor projects

By testing the bankability of three identified high-net projects, the overarching aim is to among other things; demonstrate preliminary project viability, risk proof these projects against emerging risks, and set the right tone for an accelerated execution process. Against this backdrop, the following is an abridged summary of the business plan of three high priority projects:

Table 25: Anchor Project 1: Tomato Processing Plant

Source of information	Department of Agriculture: Tzaneen Office
Business domain	Food processing
Overview of the industry	Tomatoes rank among the most widely consumed fruits in SA, and the sector is dominated by commercial farmers who account 95% of the industry's produce (South African Cities Network, 2015; DAFF, 2016). Between 2014 and 2017, tomato production increased from 513 404 tons to 672 180 tons, However, production declined to 537 258 tons in 2018 and later recovered by 20% in 2023.
Product mix	Tomato paste/ sauce
Overarching objective:	The tomato plant seeks to maximise the economic and earning value of locally grown tomatoes and to increase the job absorption rate of the sub-sector.
Problem	Most locally grown tomatoes are beneficiated and canned outside Tzaneen.
Chief Project Promoter	Private sector
Source of Funding	Private Investor
Initial Capital Outlay (ICO)	R30 million to cover Environment Impact Assessment (EIA) costs, Business plan development, superstructure construction costs, plant, machinery and equipment acquisition and installation costs, operationalization costs,
Estimated payback period	3 years
Revenue Streams	Sell different flavors of tomato paste to domestic and export markets
Project Status	Plant procurement and installation in progress
Time Frame	Short term (0-12 months)
Spinoffs	• Direct jobs – 100 jobs. • Downstream and Upstream jobs – 2000 especially on the grower side of things, • Export earnings • Surge in demand for locally produced tomatoes
Category of jobs	Food testing, plant operators, tomato graders, packers, sales, laborers etc.
Role of GTM	Steady supply of sufficient water, sanitation, access roads and electricity infrastructure, land rezoning support and speed processing of development application.

Role of Department of Agriculture	Build local grower capacity and risk-proof the project against raw tomato supply bottlenecks.
Role of SEDFA	Injection of expansion finance, as well as marketing and branding support
Project Status Reviews	Quarterly intervals at LED Forum meetings
Porter's Industry Analysis	• High barriers of entry, • Fierce rivalry especially first movers and importers • Exposed to high substitutionary risks • Bargaining leverage of suppliers and customers is very high • Threats of new entrants is almost non-existent
Risk Analysis and Mitigation	• High import bill of plant machinery and equipment due to surge in import tariffs – import from low-cost foreign suppliers • Shortage of critical skills within the locality- forge mutually beneficial partnerships with Mopani TVET, • Needless construction delays posed by construction mafia – Work closely with security cluster • Substandard products –Implement rigorous quality control • Stiff competition from first movers – Target segments where first movers have little or no geographical influence • Supply bottlenecks of raw materials – Build local grower capacity, • Water shedding –Secure water supply guarantees from GTM • Power outages – Secure alternative electricity supply
Critical Success Factors (CSFs)	• Secure off-take agreements, • Forge synergies with local growers and the Dept. of Agriculture, • Secure lucrative route-to-markets, • Implement total quality management (TQM) • Secure low cost loans or non-interest bearing grants
Growth Model	• Capitalize on current surge in demand for processed tomato products, • Exports to SADC bloc especially in import-dependent countries like Zimbabwe, Lesotho, Botswana and Mozambique. • Digitise and automate manufacturing value chain and business processes

NB: A fully-costed and detailed business plan to guide the implementation of the project can be sourced from the Private Investor via the local Department of Agriculture Office.

Table 26: Anchor Project 2: Tzaneen Fresh Produce Market

Source of information	Department of Agriculture: Tzaneen Office
Project type	Establishment of Fresh Produce Market
Industry Overview	A report by the Fruit Growers Association (2025), shows that the price trends on fresh produce markets between February and March 2025 shows monthly pressures across most vegetable commodities tracked while most fruits remained on the upside. In the vegetable complex, carrot prices posted the biggest monthly loss of 27.1% (-R2.36/kg) m/m and 12% (-R0.83/kg) y/y (figure B1). They were followed closely by tomatoes with a monthly decrease of 24.7% (-R4.49/kg) m/m on volume pressure although still 56% (+R4.93/kg) higher at R13.67/kg (figure A1). Tomatoes skyrocketed in the past few months as an unseasonable heat wave caused a flower drop and subsequently a reduced fruit set. However, volumes have since stabilised thus adding further downward pressure on the market. A further drill-down into the fruit inflation data shows a sharp increase of 68.9% y/y for paw paws March 2025, followed by oranges and avocados which rose by 19.8% y/y and 13.5% y/y respectively. In the vegetable category, the big-ticket items such as potatoes posted the biggest increase of 20.9% y/y in

	April declined by 2.5% m/m at R21.47/kg. Tomatoes accelerated by 9.9% m/m and 4.9% y/y to R32.39/kg. Onions and carrots posted strong monthly gains of 14.5% m/m and 10.7% m/m respectively at R23.79/kg and R16.47/kg. However, carrots were down by 5.9% y/y while onions were 2.5% ahead of the same month in 2023. This positive data serves as a strongest indication that a compelling case exist for Tzaneen to reconfigure its Fresh Produce Market to improve accessibility and market network efficiencies.
Business domain	Creating a common market for fresh produce products to guarantee access to high-volume buyers, thus reducing exposure to historic market risks.
Product mix	Citrus, mangoes, bananas, carrots, spinach, butternuts, ginger, beetroot, tomatoes, green mealies and many more
Problem statement	Local fresh produce farmers lack the right mix of tools, infrastructure and bargaining leverage to penetrate high volume markets.
Overarching objective	Modelled around the Tshwane and Johannesburg Fruit and Veg Market models, the Fresh Produce Market serves to reaffirm GTM's commitment to address existing market access inequalities especially among smallholder farmers.
Chief Project Promoter	Private Investor
Source of Funding	Private Capital
Initial Capital Outlay (ICO)	Approximately R100 million to cover preliminary expenses, EIA costs, land rezoning costs, feasibility studies, engineering designs, superstructure, construction costs, operationalization overheads, asset maintenance and repairs, security and insurance costs
Estimated payback period	5 years
Revenue streams	Space rental fees from traders, transport fees from farmers, quality control fees
Project Status	A feasibility study and a business plan to test its bankability are done and construction work will only commence once the municipality complete the land rezoning process.
Time Frame	Medium term (12-24 months).
Spinoffs	• Direct jobs – 100 • Downstream and upstream jobs - 2000. • Enhanced grower-buyer interfaces and networking
Role of GTM	Grant approval in line with applicable by-laws, guarantee water and electricity supply and expedite the land rezoning process
Role of Department of Agriculture	Organising and coordinating a community of local fresh produce growers and building efficiencies in the farmer support ecosystem
Role of SEDFA	Farm business management support and financial injections to improve the operating leverage of local smallholder farmers
Category of jobs	Cashiers, sales and marketing managers, drivers, graders and quality controllers
Project Status Reviews	Quarterly intervals at LED Forum meetings
Porter's Industry Analysis	• Low barriers of entry hence the mushrooming of pockets of fresh produce selling points across Tzaneen, • Threats of new entrants are very high, • Vulnerable to high substitutionary risks, • Bargaining leverage of growers and suppliers is relatively low, • Low buying power of buyers can also increase their bargaining leverage, • Competition is relatively low

Risk Analysis and Mitigation	- Supply bottlenecks due to high appetite for lucrative exports plus low grower capacity especially in the smallholder sector – Build local grower capacity and sign long term supply agreements with large scale commercial growers, - High cost of logistics due to Transnet’s history of incapacities – Lobby Transnet to expedite the recovery of Musina-Maputo-Richard Bay line - Vulnerability to price fluctuations – Monitor pricing trends frequently - Power cuts may trigger perishability-linked losses – deploy advanced refrigeration systems and alternative energy systems.
CSFs	- Expedite the land rezoning process to pave way for construction of key infrastructure, - Secure buy-in from local fresh produce growers, - Build local grower capacity in conjunction with the Dept of Agriculture, - Resilient logistic infrastructure
Growth Model	Develop a vibrant ecosystem or community of well-capacitated growers and back it with a resilient logistics system.

NB: A fully-costed and detailed business plan to guide the implementation of the project can be sourced from the Private Investor via the local Department of Agriculture Office.

Table 27: Anchor Project 3: Cattle Kraal Auction Project

Source of Information	Department of Agriculture: Tzaneen Office
Business domain	Construction of a cattle kraal auction infrastructure and driving its full-scale operationalization.
Product mix	A wide range of cattle breeds and sizes.
Industry Overview	DOA (2023) estimates that the gross value of beef production increased from R20.5 billion in 2012/13 to R37 billion in 2017/18 but reported a slight decline in 2018/19 of 7% due to outbreak of foot and mouth disease outbreak. The average gross value of beef produced during this period amounted to R32.9 billion per annum. Moreover, SA exported approximately 28 000 tons of beef in 2022 yielding an export value of R2.5 billion. This represents a decrease of 13% in the quantity and a slight increase of 1.2% in the value of beef exported during the period 2022 from the previous year. The local beef sector is poised for exponential growth if plans to establish a vibrant cattle auction system by a private investor gains desired traction and momentum.
Problem statement	The earning power of smallholder livestock breeders is disappointingly low due to lack of a competitive bidding platform.
Overarching objective	Facilitate access to high value cattle markets to optimise earnings of livestock growers
Chief Project Promoter	Private Investor
Source of Funding	Private capital
Initial Capital Outlay (ICO)	Approximately R30 000,000.00
Estimated payback period	3 years
Revenue streams	Commission fees
Project Status	Conceptualization and feasibility study currently underway.
Time Frame	Medium term

Economic Spinoff	Increased earnings from cattle sales
Role of GTM	• Expedite the rezoning of the land to pave way for construction phase, • Mobilizing local cattle breeders, • Guaranteeing supply of reliable water, electricity, modern roads and resilient storm water infrastructure
Role of Department of Agriculture	• Build breeding capacity of smallholder farmers • Coordinate the delivery of cattle to the auction kraal. • Mobilize local cattle breeders.
Category of jobs	Cattle breeders, sales etc.
Project Status Reviews	Quarterly LED Forum meetings
Porter's Industry Analysis	• High barriers of entry due to costly set up costs, • Threats of new entrants are also low, • Bargaining leverage of livestock breeders is very low • Substitutionary risks are relatively low • Bargaining leverage of buyers is low due to high demand for beef, • Competition from rivalry auctions outside the region is intense
Risk Analysis and Mitigation	• Cattle movement system over-regulated – Zero tolerance to non-compliance, • Ripple effect of stock theft – Forge synergies anti-stock unit of the SAPs • Outbreak of foot and mouth and anthrax – Regular dipping and vaccination of stock, • Low breed quality may affect prices – Enroll farmers into breed management program • Reduction in stock quantity – Implement herd rebuilding scheme in conjunction with DOA.
CSFs	• Vibrant cattle breeding program backed by strong buy-in from local cattle breeders, • Effective control of disease outbreak, • Sound cattle movement ecosystem.
Growth Model	• Leverage the quality and quantity aspects of the cattle breeding system, • Aggressive marketing campaign to win the hearts and minds of local cattle breeders. • Penetration of regional supply lines.

NB: A fully-costed and detailed business plan to guide the implementation of the project can be sourced from the Private Investor via the local Department of Agriculture Office.

7.4. Project Summary of other Game Changing Projects

Over and above the three anchor projects cited above, a brief description of three additional projects likely to have a game-changing effect on the local economy is outlined below:

Table 28: Game Changer 1: Tzaneen Conference Centre and Theatre Park

Source of Information	Input from the LED Forum
Business domain	Providing modern conference facilities and theatre infrastructure to attract business tourists and festival goers into Tzaneen
Product mix	Conference facilities, restaurants and theatre rooms
Problem statement	Tzaneen lacks neither a theatre park nor a modern conference centre to host high profile and high traffic festival and business events.
Overarching objective	To turn Tzaneen into a sought-out festival and business events magnet.

Chief Project Promoter	Private-Public Partnership
Source of Funding	A mixture of Private and public capital
Initial Capital Outlay (ICO)	Approximately R300 million
Estimated payback period	5 years
Revenue streams	Reservation and booking fees
Project Status	The project is still at ideation phase and requires a comprehensive feasibility study to test its bankability and multiplier effect
Time Frame	Long term (3-5 years)
Economic Spinoff	Direct jobs: 200 jobs Downstream and upstream jobs: 1000.
Role of GTM	• Craft a concept document, • Conduct a technical feasibility study, • Avail land and rezone it. • Craft architectural designs • Drum up stakeholder support • Mobilization of private and public capital
Role of Department of Sports, Arts and Culture	• Drum up political support • Co-funding • Mobilize arts sector
Role of Department of Tourism	• Mobilize public capital • Coordinate private participation. • Marketing the concept
Category of jobs	Waiters, cooks, event managers sales, and promoters, cashiers etc.
Project Status Reviews	Quarterly LED Forum Meetings

Table 29: Game Changer 2: Agro-processing Master Plan

Business domain	Formulation of an evidence-based agro-processing master plan
Product mix	Approved Agro-processing Master plan
Problem statement	Lack of a comprehensive framework to guide the systemic rollout of game changing agro-processing projects and to turn Tzaneen into a global agro-processing powerhouse.
Overarching objective	Catalyse the agro-processing journey of the Tzaneen
Chief Project Promoter	Greater Tzaneen Municipality
Source of Funding	IDP budget
Initial Capital Outlay (ICO)	Approximately R800,000.00
Estimated payback period	5 years
Revenue streams	Not applicable
Project Status	The project is still at ideation phase and requires management endorsement and approval.

Time Frame	Medium term
Economic Spinoff	Unlock the economic scale of agro-processing industries
Role of GTM	Funding consulting fees
Role of Department of Agriculture	Mapping a pipeline of prospective agro-processing industries and build the capacity of smallholder growers
Role of DTIC.	Provide direct funding through its black industrialists programme or link bankable agro-processing projects to funding agencies under its umbrella.
Category of jobs	Machine operators, packers, quality controllers, transporters, sales etc.
Project Status review meetings	Quarterly LED Forum meetings

Table 30: Game Changer 3: Digitizing the business licensing ecosystem

Business domain	To develop a novel digital tool to streamline GTM's business licensing and permitting system
Problem statement	The current business licensing and permitting ecosystem is not digitised leading to pointless licensing delays and mounting backlogs.
Overarching objective	To deliver a seamlessly integrated digital licensing and permitting experience, thus placing GTM in a perfect position to reduce needless licensing delays.
Chief Project Promoter	Greater Tzaneen Municipality
Source of Funding	IDP budget
Initial Capital Outlay (ICO)	Between R800,000.00 –R1000,000.00
Estimated payback period	2 years
Revenue streams	Not applicable
Project Status	The project is still at ideation phase and requires sponsorship and widespread support from key stakeholders.
Time Frame	Medium term
Economic Spinoff	Improve GTM's standing on the province's ease-of-doing business index.
Role of GTM	Funding consulting fees for the professional services provider
Role of Science and Technology	Provide technical advice and digital infrastructure funding support.
Project Status review meetings	Quarterly LED Forum meetings

Table 31: IMPLEMENTATION FRAMEWORK

The following framework will guide the strategy execution process.

	Pivotal Interventions	Key Performance Indicator	Annual Targets				Accountable Agencies
			2025	2026	2027	2028	2029
Opportunity Consolidation	AGRICULTURE						
	a. Implement the farm automation and mechanization scheme	No of farmers benefiting from the scheme	20	30	50	60	100
	b. Spearhead the "Adopt a Restituted Farm Programme (ARFP).	No of restituted farms benefiting from the initiative	3	4	6	7	10
	c. Enhance efficiency of the farmer support ecosystem	No of smallholder farmers benefiting from the program	100	150	200	250	300
	d. Revive the establishment of the Agri-park.	No of Agri-parks established	-	1	-	-	1
	e. Establishing a vibrant Fresh Produce Market,	No of farmers selling products at the market	1000	2000	3000	5000	7000
	f. Constructing an Auction Kraal Hub	No of farmers participating in the Auction.	1000	2000	3000	5000	7000
	TOURISM						
	a. Wooing private capital into the Tzaneen Convention Centre and Theatre Park.	No of expression of interest signed.	1	3	-	-	-
	b. Put the Tzaneen Golf Retreat on the International Golf Calendar.	No of International Golfers in attendance	5	7	20	40	100
	c. Popularize adventure tourism	No of mountain hikers and trekkers participating in the tournament	1000	3000	7000	20000	30000
	d. Conduct a Tourist Perception Survey	No of perception survey conducted.	1	-	1	-	1
	TRADE						
	a. Mall Establishment	No of malls established	-	1	1	1	-
	b. Enhance local participation in the SPAZA shop sector.	No of locally owned Spaza shop registered	10	20	40	60	100
	c. Facilitate accessibility to the R500 million SPAZA Shop fund	No of locally owned Spaza shops benefiting from the fund	20	40	60	80	100

	Pivotal Interventions	Key Performance Indicator	Annual Targets					Accountable Agencies
			2025	2026	2027	2028	2029	
	d. Foster food hygiene standards in the sector	No of food hygiene inspections conducted	4	4	4	4	4	GTM, DoH, SAPS
Opportunity Diversification	INDUSTRIAL CONGLOMERATION							
	a. Establishment of a tomato processing plant.	No of tomato processing plants established	1	-	-	-	-	Private Investor, GTM, DOA
	b. Resolve the persistent water woes facing the Peppadew Plant	% reduction in the number of water supply complaints	0	0	0	0	0	GTM, Peppadew
	c. Revive the Coffee Processing Project	No of revitalization meetings conducted	4	4	4	4	4	GTM, Private Investors
	d. Lobby local commercial farmers to reserve a quota for their produce to local agro-processors	Percentage of quota reserved for local agro-processors.	10%	20%	30%	40%	50%	LEDET, LEDA, GTM, DOA, Letaba
	e. Rehabilitate roads accessing key industrial corridors	No of kilometers rehabilitated	20km	30km	40km	50km	60km	Agriculture GTM, RAL
	f. Diagnostic study of the local solar ecosystem.	No of studies conducted	1	-	-	-	-	GTM, Consultant
Opportunity Competitiveness	g.							
	EASE-OF-DOING BUSINESS RANKING							
	a. Digitization of the business licensing and compliance enforcement ecosystems,	% of licensing and permitting functions digitised	20%	40%	60^	80%	100%	GTM, Digital Consultant
	b. Deploy CCTVs and drones at crime hotspots	Number of hotspots with CCTVs	3	4	7	8	9	GTM, SAPS
		No of drones deployed at hotspots	5	7	9	10	15	GTM, SAPS
	c. Digitization of billing ecosystem	% of billing services digitised	50%	60%	70%	90%	100%	GTM
	d. Review and streamline current by-laws.	No of by-laws reviewed streamlined	1	1	1	1	1	GTM
	e. Establish a one-stop investment processing centre	One-stop investment processing centre established	-	-	-	1	-	GTM, LEDA
	f. Speed up the rehabilitation of the R71 corridor	% of road rehabilitated	20%	40%	60%	80%	100%	SANRAL, GTM, RAL
	g. Expedite completion of Tzaneen dam upgrade	% of dam construction completed	20%	40%	60%	80%	100%	Mopani District, GTM, DWS, Lepelle water
	h. Ramp up the upgrade of the Tzaneen Wastewater plant	% of the upgrade completed	20%	40%	60%	80%	100%	Mopani District, GTM, DWS, Lepelle water

	Pivotal Interventions	Key Performance Indicator	Annual Targets					Accountable Agencies	
			2025	2026	2027	2028	2029		
Opportunity Localisation	DRIVE TRANSFORMATION								
	a. Design a dashboard tool to monitor local public procurement system,	No of state organs sharing procurement data	5	10	15	20	30	GTM	
	b. Integrate SMEs into supplier development programs	No of SMEs participating in existing supplier development program.	100	200	300	400	500	GTM, All sister agencies and govt depts.	
	c. Deliver a coordinated SME capacity building campaign.	No of SMEs benefiting from various capacity building programs.	100	200	300	400	500	GTM, LEDA, SEDA, NDA,	
	d. Provisioning of ablution toilets and dustbins at hawking sites.	No of vending sites supplied.	3	6	8	10	12	GTM	
	e. Institute a diagnostic study on the economic impact of the informal economy	Diagnostic study report approved by Council	1	-	-	-	-	GTM/ Consultant	
Opportunity Rollout and Measurement	LEVERAGE MUNICIPAL CAPACITY								
	a. Integration of LED priorities into the plans of other directorates,	No of directorates mainstreaming LED priorities into their plans.	2	2	3	4	5	GTM	
	b. Sign project co-funding agreements with sister agencies	No of projects co-funded	2	3	5	7	8	GTM, LEDA, SEDA, SEFA,	
	c. Upskilling or reskilling of implementing team	No of team members reskilled or upskilled	3	5	6	7	10	GTM	
	d. Contract independent think tanks to champion complex projects.	No of sector-specific think tanks contracted.	2	2	2	2	2	GTM	
	e. Utilize the services of interns	No of interns integrated into the LED team						Mopani TVET, GTM	

Table 32: RISK CONTROL AND MITIGATION

GTM will constantly monitor the behaviour of the risks outlined below with the aim to risk proof its execution effort for maximum impact.

Growth Pillar	Risk	Cause	Consequence	Mitigation	Risk Owner
1. Growth Pillar I: Opportunity Consolidation	Adverse weather variability	Climate change-induced droughts and floods	Decrease in agricultural output	Build irrigation capabilities	DoA
	Fierce rivalry from other municipalities	Uncompetitive value proposition	Drop in tourist volumes	Brand repositioning	
	Poor food hygiene	Lack of systemic inspections	Trust-deficit	Build compliance enforcement capability	SAPs, DoH, GTM
	Erosion of buying power	Spike in cost of living	Decline in consumer demand	Monitor inflationary behaviour	GTM
2. Growth Pillar II: Opportunity Diversification	Persistent water supply bottlenecks	Mismatch between supply and demand and ageing infrastructure	Capital flight	Provide water supply guarantees to key industrial corridors	GTM, MDM, Lepelle Water
	Market access bottlenecks	Inept deal making and networking skills	Drop in revenues	Create alternative route to markets	GTM, DoA
3. Growth Pillar II: Opportunity Competitiveness	Digital hesitancy	Under-appreciate the intrinsic value of digitization	Red tapes and investor apathy	Craft Digital Policy and Strategy	GTM
	Rising crime	Collapse of social fabric	Investor apathy	Deploy CCTVs and drones in crime hotspots	GTM, SAPS
4. Growth Pillar IV: Opportunity Localization	Construction mafia	Poor monitoring and enforcement of SME quota policy.	Community protests	Design a public procurement dashboard	GTM
5. Growth Pillar V: Opportunity Rollout and Measurement	Insufficient capacity	Understaffing	Failure to rollout LED strategy	Contract independent think tanks to augment capacity	GTM
	Poor Decision Information Systems (DIS)	Weak economic intelligence collection system	Inability to drive data-driven decisions	Design an economic intelligence collection tool	GTM

8. CONCLUSION

This strategy was crafted against the backdrop of an increasingly fragile investment climate. Commonly cited factors perpetuating this fragility include inter-alia; global supply chain disruptions; runaway fuel and food prices, a weak Rand against major currencies, the exorbitant cost of capital; shrinking GDP growth, rampant power cuts, record low investor confidence and the negative effects of climate change on food security and livelihoods. All these and other factors continue to pile pressure on an economy that was already sinking low due to pandemic-induced pressures. There is sufficient evidence to demonstrate that the next five years will be the toughest in the history of GTM. We expect the ailing economy to have a material impact on GTM's ability to effectively roll out this strategy.

However, if all the measures contained in this blueprint are meticulously implemented, there is hope that the local economy will be effectively restored to its pre-pandemic position. Thus, this strategy presents a perfect opportunity to accelerate the transformation of the local economy. Top rate priority will be channeled at interventions with the greatest potential to yield better returns on investment. In this case, these returns are measured using benchmarks such as the new jobs created and retained, new contracts and sub-contracting opportunities created for SMEs, the Rand value of new investments pledged; the percentage of these pledges effectively actualized.

Finally, GTM remain optimistic that through the support from allies in the private, public and NGO sectors, its quest to steer the local economy on a high growth trajectory will be fully actualized.

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