

MUSINA LOCAL MUNICIPALITY



LOCAL ECONOMIC DEVELOPMENT STRATEGY

PREPARED BY:



CONTACT PERSON:

Mrs N. Churr

TEL:

012-430 2888

FAX:

012 430 2979

EMAIL:

nanja@kayamandi.com

**MARCH
2007**

PREPARED FOR:



**KAYAMANDI DEVELOPMENT SERVICES (PTY) LTD,
P.O. Box 13359, HATFIELD, 0028**

TABLE OF CONTENTS

LIST OF ABBREVIATIONS

EXECUTIVE SUMMARY

i

1. INTRODUCTION

Section 1

1.1	Background	2
1.2	Concept of LED	2
1.3	Purpose of report	7
1.4	Methodology	8
1.5	Study area	13
1.6	Structure of remainder of report	20

2. POLICY FRAMEWORK

Section 2

2.1	National policies and strategies	1
2.2	Provincial policies and strategies	17
2.3	District and Local Municipal policies and strategies	32
2.4	Conclusion	42

3. MACRO ECONOMIC PROFILE

Section 3

3.1	Provincial and regional socio-economic profile	1
3.2	Provincial and regional economic profile	22
3.3	Development constraints and opportunities	35

4. LOCAL SECTORAL ANALYSIS

Section 4

4.1	Analysis of Agricultural sector	1
4.2	Analysis of Mining sector	27
4.3	Analysis of Manufacturing sector	39
4.4	Analysis of Tourism sector	46

4.5	Analysis of Wholesale, Retail and Trade sector	74
4.6	Analysis of Construction sector	88
4.7	Analysis of Transport sector	92
4.8	Analysis of Community Services sector	96
4.9	Analysis of Business and Finance Services sector	103

5. LOCAL ECONOMIC FRAMEWORK

Section 5

5.1	Introduction	1
5.2	Strategic thrusts	2
5.3	Thrust 1: Business expansion and support	5
5.4	Thrust 2: Rural integration	14
5.5	Thrust 3: Agricultural production, value chain development and integration	18
5.6	Thrust 4: Tourism development and promotion	26
5.7	Thrust 5: Mining sector expansion, value chain development and integration	36
5.8	Summary of Thrusts, Programmes and Projects	41

6. IMPLEMENTATION FRAMEWORK

Section 6

6.1	Introduction	1
6.2	Institutional framework	1
6.3	Implementation guidelines for priority focus areas	17
6.4	Monitoring and evaluation plan	68

BIBLIOGRAPHY

ANNEXURE A – STAKEHOLDERS CONSULTED

ANNEXURE B – MONITORING AND EVALUATION MATRIX

LIST OF ABBREVIATIONS:

▪	ASGISA	:	Accelerated Shared Growth Initiative for South Africa
▪	BBBEE	:	Broad-based Black Economic Empowerment
▪	DEAT	:	Department of Environmental Affairs and Tourism
▪	DEDET	:	Provincial Department of Economic Development, Environment & Tourism
▪	DOA	:	Department of Agriculture
▪	DOE	:	Department of Education
▪	DOL	:	Department of Labour
▪	DTI	:	Department of Trade and Industry
▪	DWAF	:	Department of Water Affairs & Forestry
▪	GDP	:	Gross Domestic Product
▪	ICT	:	Information Communication Technology
▪	IDP	:	Integrated Development Plan
▪	ISRDP	:	Integrated Sustainable Rural Development Programme
▪	LED	:	Local Economic Development
▪	LIBSA	:	Limpopo Business Support Agency
▪	LIMAC	:	Limpopo Manufacturing Advisory Centre
▪	LIMDEV	:	Limpopo Economic Development Enterprise
▪	LTPB	:	Limpopo Tourism & Parks Board
▪	MTSF	:	Medium Term Strategic Framework
▪	NAFCOC	:	National African Federated Chamber of Commerce and Industries
▪	NEPAD	:	New Partnership for Africa's Development
▪	NSDP	:	National Spatial Development Perspective
▪	SANPARKS	:	South African National Parks
▪	PGDS	:	Provincial Growth and Development Strategy
▪	SEDA	:	Small Enterprise Development Agency
▪	SETA	:	Sector Education and Training Authority
▪	SDI	:	Spatial Development Initiative
▪	TIL	:	Trade and Investment Limpopo

Formatted: Indent: Left: 0.05", Hanging: 0.38", Bulleted + Level: 1 + Aligned at: 0.5" + Tab after: 0.75" + Indent at: 0.75", Tab stops: Not at 0.75"

Formatted: Indent: Left: 0.05", Hanging: 0.38", Bulleted + Level: 1 + Aligned at: 0.5" + Tab after: 0.75" + Indent at: 0.75", Tab stops: Not at 0.75"

Formatted: Indent: Left: 0.05", Hanging: 0.38", Bulleted + Level: 1 + Aligned at: 0.5" + Tab after: 0.75" + Indent at: 0.75", Tab stops: Not at 0.75"

Formatted: Indent: Left: 0.05", Hanging: 0.38", Bulleted + Level: 1 + Aligned at: 0.5" + Tab after: 0.75" + Indent at: 0.75", Tab stops: Not at 0.75"

Formatted: Indent: Left: 0.05", Hanging: 0.38", Bulleted + Level: 1 + Aligned at: 0.5" + Tab after: 0.75" + Indent at: 0.75", Tab stops: Not at 0.75"

Formatted: Indent: Left: 0.05", Hanging: 0.38", Bulleted + Level: 1 + Aligned at: 0.5" + Tab after: 0.75" + Indent at: 0.75", Tab stops: Not at 0.75"

Formatted: Indent: Left: 0.05", Hanging: 0.38", Bulleted + Level: 1 + Aligned at: 0.5" + Tab after: 0.75" + Indent at: 0.75", Tab stops: Not at 0.75"

Formatted: Indent: Left: 0.05", Hanging: 0.38", Bulleted + Level: 1 + Aligned at: 0.5" + Tab after: 0.75" + Indent at: 0.75", Tab stops: Not at 0.75"

Formatted ..

Formatted ..

Formatted ..

Formatted ..

Formatted ..

Formatted ..

Formatted ..

Formatted ..

Formatted ..

Formatted ..

Formatted ..

Formatted ..

Formatted ..

Formatted ..

Formatted ..

Formatted ..

Formatted ..

Formatted ..

Formatted ..

Formatted ..

EXECUTIVE SUMMARY:

Kayamandi Development Services (Pty) Ltd was appointed by Musina Local Municipality to formulate an Economic Development (LED) Strategy for their area of governance. The LED Strategy forms part of the Municipality's overall strategic plan, as outlined in the Integrated Development Planning Process, in seeking to promote viable local economic activities that benefit the local population, through the creation of direct and indirect employment.

This Strategy is to be used by the Musina Local Municipality to assist in ensuring the dedicated and effective utilisation of local available resources and to promote local economic development in a proactive and dynamic manner.

Musina Municipality is located to the north west of Vhembe District Municipality and is bordered by Zimbabwe to the north, Makhado and Mutale Local Municipalities to the south and east and Capricorn District to the west. Musina Municipality consists of 6 Wards, of which four fall within the urban centre of Musina (Wards 3, 4, 5 and 6), comprising the peri-urban and urban settlements of Musina Municipality. Ward 6 stretches eastwards from Musina and also comprises areas which are rural in nature. Wards 1 and 2 are the largest wards in the Municipality, with Ward 1 stretching from the western border of the Municipality up to Tshipise, with Ward 2 covering the area from Tshipise and Doreen Farm up to the eastern boundary of the Municipality. These two wards are mainly rural in nature, with the majority of the rural population in these areas residing on private farms.

Socio-Economic Analysis

Musina Municipality had a population total of over 42 000 people in 2004, contributing approximately 3% to the 1.2 million people living in Vhembe District. A population growth of approximately 1.3% was experienced in Musina between 2003 and 2004, with the population of the Municipality predicted to grow to some 44 308 in 2008. Population growth is, however, affected by the HIV/AIDS prevalence in a region. In Musina Municipality, 12% of the total population is HIV positive or has AIDS, with the highest HIV/AIDS prevalence being found in the ages between 15 and 64. This makes up the potentially economically active group of the population, which could negatively affect the Municipality's economic performance in the future.

While Vhembe District has high proportions of people residing in rural or non-urban areas, Musina Municipality has a relatively equal urban (49%) and non-urban (51%) split, with nearly half of the population of Musina Municipality residing in the urban areas surrounding Musina town/Nancefield. The fact that people are concentrated in fewer areas within the Municipality implies that it is easier to distribute services, although equal focus and attention should also be given to providing rural areas with the necessary infrastructure to ensure the increased contribution and integration of rural areas into the economy of Musina Municipality.

Musina Municipality has an employment rate of 75% of its economically active population, which is much higher than that on District, Provincial and even National level. However, despite the comparatively high employment rates in the Municipality, the majority of the employed earn very low incomes, with 34% of income earners in the Municipality earning

only between R1 and R4 800 per annum (less than R400 per month). This is to a large degree as a result of the low skills levels of the local population, with up to 20% of the population having received no schooling and a further 34% of the population only having been educated up to primary level. Furthermore, Musina Municipality does not have any tertiary education facilities. It is, therefore, essential that the focus of the LED Strategy should be less on the creation of jobs, but more on the quality of jobs created, by improving the skills levels of its population and encouraging local value-adding activities.

Economic Profile

The economy of Musina Municipality has grown some 4.5% between 2001 and 2005, which is significantly higher than the growth experienced in Vhembe District and Limpopo Province. The economy of the Municipality has also grown faster than that of the country as a whole, which experienced 4% growth in the same time period. Despite this, Musina Municipality makes the second smallest contribution of all the local municipalities to the GDP of Vhembe District, with an 11% contribution.

The economy of Musina Municipality is concentrated, with the Mining sector making the biggest contribution to the economy of Musina Municipality with 31%. In terms of employment, the local economy is also very concentrated, with an employment stress index of 72. In this respect, the Agricultural sector contributes to more than half (54%) of local employment. This concentration of Musina Municipality's economy in one or two economic sectors makes it vulnerable to fluctuations and changes in these individual sectors. It is therefore necessary for the economy to be diversified into other sectors of the economy.

Other sectors of the local economy that are important GDP contributors include the Transport and Communication sector (19%) and the Finance and Business services sector, which contributes 15% to the local economy. This is mainly related to the higher, on average, urbanisation rate in Musina Municipality. The Transport and Communications sector also showed the highest GDP growth rate with 13.2% growth between 2001 and 2005. In terms of employment, the Government Services sector is also an important employer in Musina Municipality, which together with the Agricultural sector, takes up almost 70% of local labour. The Government Services sector also showed the highest employment growth rate between 2000 and 2004.

Development Opportunities

Musina Municipality is characterised by a relatively equal urban-rural population split with nearly half of the population in Musina Municipality residing in the urban areas centred around Musina town. Commercial activities are also almost exclusively concentrated in these areas. Opportunities therefore exist to build on the current strength of this economic node to further support the growth and expansion of businesses in this centre, thereby increasing the range of goods and services provided in Musina Municipality and ensuring that local communities do not have to travel to towns outside of the Municipality to do their shopping.

Musina Municipality and Musina town in particular also benefits from an advantageous strategic location in relation to the N1 and the Beitbridge and Pontdrift border posts. This creates opportunities for this locational benefit to be exploited and marketed to potential

investors, in order to attract larger enterprises. Furthermore, by capitalising on its location and improving its transport and logistics services to ensure the reliable movement of goods and services, the Municipality can reduce transaction costs for investors.

The Agricultural sector of Musina Municipality is fairly well established, focused mainly on game farming and horticultural production. Horticultural and particularly the vegetable production seasons are significantly longer in the Municipality than in other parts in the country, as a result of its favourable climatic conditions. This provides considerable development potential for the expansion of production, as well as the diversification of agricultural production into other commodities. Significant development potential also exists in the expansion of the game farming industry.

The strong Agricultural sector in Musina Municipality, based on the production of a range of vegetables and other horticultural products, as well as the strong game farming industry, allows opportunities for the establishment of a variety of processing facilities, the further beneficiation and the extension of value-adding activities of locally produced products. This not only creates opportunities for the development in the Agricultural sector, but will also have a direct impact on the local Manufacturing sector.

Musina Municipality also boasts a number of unique tourism attractions, based mainly on natural beauty, wildlife conservation and hunting and the cultural heritage of the region related to the people of Mapungubwe. The Mapungubwe Landscape, which has been declared a world heritage site, forms the anchor attraction to the Municipality, with a number of rock art sites and private game farms and lodges complementing this attraction. These attractions, if marketed effectively, create opportunities for increased tourism flows to the Municipality. The strong Tourism sector in the Municipality also creates opportunities for the development of locally produced arts and crafts.

A number of mineral deposits also occur in Musina Municipality, which include diamonds, coal, copper and magnesite and the possibility of exploiting these minerals for economic benefit should be investigated. Coal deposits appear to be quite viable for mining, with the exploitation of coal fields in the north western parts of the Municipality being imminent. This creates opportunities for the development of SMMEs related to the services required by mining enterprises, such as catering SMMEs for canteens, cleaning service, transport, vehicle repairs etc. The future coal mining enterprises also create opportunities for the establishment of coal beneficiation industries locally. These opportunities should be marketed and promoted in advance, ensuring that the Municipality capitalises on the full coal value chain, rather than seeing the coal being transported to areas outside of the Municipality for beneficiation.

While land claims are associated with some level of uncertainty, the transfer of land to local communities also creates opportunities for the development of such land for farming or tourism-related enterprises, as well as for mining activities where appropriate.

The Municipality, therefore, has inherent potential in its natural resource base, creating opportunities for the further development in the Agricultural, Manufacturing (agro-processing and beneficiation), Tourism and Mining sectors, from which the economic base can be diversified, backward and forward linkages can be created and job creation maximised.

Key constraints and challenges

A number of constraints are hindering the effective expansion and development of the key economic sectors in Musina Municipality. These challenges need to be successfully addressed in order for the Municipality to initiate and sustain economic growth and job creation.

One of the challenges faced by entrepreneurs in Musina Municipality is the lack of business and financial management skills, as well as the lack of access to the support provided by existing National and Provincial business support agencies. This inhibits the development and growth of local businesses.

The development of businesses in the villages along the eastern boundary of the Municipality are also to a large extent constrained due to the remote location of these villages from the economic node of Musina town, as well as the lacking communications and transport infrastructure in these areas. This lack of infrastructure precludes the development of businesses in these rural areas, constraining the ability of rural areas to serve their own product and service needs.

Land claims are also a currently reality in Musina Municipality, with large portions of private and state land being the subject of land claims. Land claims constrain economic development, as great uncertainty is created amongst investors, who are hesitant to invest in land until such time that claims have been settled. Insufficient support is also provided for the sustainable development of successfully claimed land, resulting in land not being utilised to its fullest potential and not reaping the expected and optimal benefits for local communities.

A further constraint experienced in Musina Municipality is the dualistic economy, comprising a formal and an informal, marginal or non-commercial component, particularly in the Agricultural sector. Emerging and small-scale farmers experience constraints in respect of access to larger markets, forcing farmers to sell their products to local communities, thereby preventing the expansion of their enterprises. In addition, local levels of beneficiation or agro-processing are low. This prevents local farmers from gaining access to the larger profits that could be gained from these value adding activities.

A particular shortcoming in the effective promotion of the Municipality as tourist and investment destination is the lack of appropriate signage. It is essential that road signage to local villages and major attractions and facilities such as tourism products and activities, Municipal and police offices, hospitals etc. are improved and increased in order to maximise the benefit gained from the location of these facilities within Musina Municipality.

A challenge faced by the Tourism sector in Musina Municipality is the absence of comprehensive and appropriate marketing of the existing attractions and activities provided in the Municipality. Furthermore, the lack of effective communication, cooperation and commitment of all the different interested parties could prevent the Municipality from becoming a prime tourism destination. In addition, local communities are not always aware of how they can become involved in the Tourism industry or the economic benefits it can bring.

While the Mining sector in Musina Municipality is responsible for nearly a third of the output of the local economy, it only takes up approximately 4% of local employment. Constraints in this respect relate mainly to the lack of appropriate mining skills, particularly in high earning posts such as mining engineers. Furthermore, little community ownership of mining activities occurs in the Municipality, restricting the benefit this sector brings to local communities. This is further exacerbated by the lack of linkages between the Mining sector and other sectors of the local economy. In addition, the relative dependence of the local economy on the Mining sector makes it particularly vulnerable to changes in this Sector.

Local Economic Framework

The LED Strategy does not only analyse the local economy in terms of its strengths and weaknesses, but also identifies specific opportunities within the Municipality which, if developed effectively, have the potential to improve the quality of life of its people. The LED Strategy allows local communities, business & private sector partners, local government and non-governmental organisations the opportunity to work together towards a shared vision and strategy for development, allowing economic growth and job creation.

The Local Economic Framework sets out this shared vision and the strategic direction for Musina Municipality, enabling the Municipality to facilitate development in a coordinated and structured manner. The framework is built on the unique comparative and competitive advantages of the location and the specific opportunities it presents and is aimed at capitalising on these advantages, in order to increase the local community benefit, improve the local economy and enhance the competitiveness of the Municipality.

The opportunities identified in the Strategy are grouped into Strategic Thrusts, which allow for more focussed and coordinated development and facilitation of similar opportunities. Within these Thrusts, numerous Programmes are identified which concentrate the attention on specific areas of development that support the overall goals set by the Strategic Thrusts. Each Programme further comprises specific development Projects and Facilitation issues that need to be addresses. These Projects and Facilitation actions enable the Municipality to achieve the targets set by the development Programmes and Thrusts.

The Projects and Development Facilitation issues were derived from the analysis undertaken as part of this Strategy, taking into consideration the opportunities for development, the gaps identified and the development needs expressed. Furthermore, to ensure that the most relevant and effective Thrusts and Programmes take precedence, the development focus areas were presented and discussed at a workshop of relevant local roleplayers and stakeholders representative of all the economic sectors in Musina Municipality held on the 19th March 2007. At this workshop changes and additions were made to the key focus areas the Framework should encompass and the most relevant focus areas were prioritised. The Table below summarises the Strategic Thrusts, Programmes and Projects, as well as the Development Facilitation actions that form the Framework for this LED Strategy.

Table 1 Summary of Strategic Thrusts, Programmes and Projects

THRUST 1: BUSINESS EXPANSION AND SUPPORT	
PROGRAMMES	PROJECTS & DEVELOPMENT FACILITATION
Urban-based business expansion and new business development	PROJECTS
	<ul style="list-style-type: none"> Establish Manufacturing incubator in Musina town to provide support, facilities and training for development of local manufacturers to supply local needs Undertake poster campaign to entice business start-ups in projects identified by LED Strategy Develop a database of informal businesses & develop informal trade strategy to identify trade zones, trade structures etc. Undertake industrial demand study for development of small-scale industrial estates north of Musina town Develop passenger shuttle SMME for transfers between international airports and local facilities Develop a grocery purchase and delivery SMME to serve local facilities and households
	DEVELOPMENT FACILITATION
	<ul style="list-style-type: none"> Develop local product & service provider database and distribute information to facilitate supplier-client linkages Develop SMME grouping system/clustering along commodity supply chains to facilitate networking & information sharing Provide support & facilitate development and effective operation of dedicated business chamber and industrial development forums
Market penetration, investment attraction and maximising strategic location benefit	PROJECTS
	<ul style="list-style-type: none"> Undertake retail demand study to identify demand and specific needs & requirements in respect of retail and wholesale Improve and increase road signage to villages, major attractions and facilities
	DEVELOPMENT FACILITATION
	<ul style="list-style-type: none"> Investigate potential and promote opportunities for development of storage & distribution and transport hub to facilitate movement Market economic nodes to attract retail, industrial, storage & distribution and wholesale enterprises Facilitate competitive investment incentive packages and negotiate differential rates for industrial services/utilities in Musina town Negotiate and facilitate expansion of fuel and servicing outlets with existing outlets Investigate potential and promote opportunities for expansion of export service facilities
Entrepreneurial business support, mentorship and skills development	PROJECTS
	<ul style="list-style-type: none"> Establish local Business Support Centre in Nancefield for central access to different support agencies, support services, government support services, etc and facilitate mobile support services to Municipal satellite offices in Malale, Madimbo and Domboni Chief's Kraal Establish recycling cooperative (compost, bottles, paper etc.) in Nancefield

Formatted: Indent: Left: 0.02", Bulleted + Level: 1 + Aligned at: 0.25" + Tab after: 0.5" + Indent at: 0.5", Tab stops: Not at 0.5"

Formatted: Indent: Left: 0.02", Bulleted + Level: 1 + Aligned at: 0.25" + Tab after: 0.5" + Indent at: 0.5", Tab stops: Not at 0.5"

Formatted: Indent: Left: 0.02", Bulleted + Level: 1 + Aligned at: 0.25" + Tab after: 0.5" + Indent at: 0.5", Tab stops: Not at 0.5"

Formatted: Indent: Left: 0.02", Bulleted + Level: 1 + Aligned at: 0.25" + Tab after: 0.5" + Indent at: 0.5", Tab stops: Not at 0.5"

Formatted: Indent: Left: 0.02", Bulleted + Level: 1 + Aligned at: 0.25" + Tab after: 0.5" + Indent at: 0.5", Tab stops: Not at 0.5"

	DEVELOPMENT FACILITATION <ul style="list-style-type: none"> ○ Support and promote business visitation programme to support local emerging businesses in association with Business Support Centre ○ Promote training in business ownership and financial management skills through Business Support Centre ○ Support and promote the establishment of SETA learnership programmes in collaboration with Business Support Centre ○ Promote and support development of database of experienced mentors to support emerging entrepreneurs in association with Business Support Centre ○ Facilitate the expansion of flexible further learning centres and develop mobile learning facilities offering practical courses eg. home based sewing industries etc. ○ Facilitate access to improved practical & technical subjects at local schools in tourism, agriculture, SMME development and mining fields ○ Develop, expand, diversify and support NGO sector ○ Facilitate expansion of financial institution network into Nancefield and rural areas ○ Continually evaluate and update procurement policies of the Municipality to assist in the creation of local employment opportunities ○ Launch annual entrepreneur of the year competition and annually identify start-ups in tourism, SMME, agriculture and mining sectors as nominees
Improved mutual cooperation and development with Zimbabwe	DEVELOPMENT FACILITATION <ul style="list-style-type: none"> ○ Facilitate improved tourism friendliness and safety at Beitbridge border post ○ Support establishment of peripheral customs and immigration facilities at entrance gates of Transfrontier Park ○ Support twinning committees and ensure dedicated dual representation on development forums ○ Identify and develop shared twinning projects ○ Improve and promote neighbourliness and information sharing

Formatted: Indent: Left: 0.02", Bulleted + Level: 1 + Aligned at: 0.25" + Tab after: 0.5" + Indent at: 0.5", Tab stops: Not at 0.5"

Formatted: Indent: Left: 0.02", Bulleted + Level: 1 + Aligned at: 0.25" + Tab after: 0.5" + Indent at: 0.5", Tab stops: Not at 0.5"

THRUST 2: RURAL INTEGRATION	
PROGRAMMES	PROJECTS & DEVELOPMENT FACILITATION
	PROJECTS <ul style="list-style-type: none"> ○ Develop a one-stop business shop that provides courier & postal services and phone, fax and internet facilities in Madimbo ○ Create community support cooperatives in Madimbo, Malale and Domboni eg. car-pooling cooperative, local savings & credit cooperatives, rural finance schemes etc.
Rural development and advancement	DEVELOPMENT FACILITATION <ul style="list-style-type: none"> ○ Facilitate improved access to communications infrastructure in Domboni, Malale & Madimbo ○ Facilitate supply contracts between local producers and local institutions & establishments ○ Support and promote mobile services provided by Business Support Centre and government service sectors

Formatted: Indent: Left: 0.02", Bulleted + Level: 1 + Aligned at: 0.25" + Tab after: 0.5" + Indent at: 0.5", Tab stops: Not at 0.5"

Formatted: Indent: Left: 0.02", Bulleted + Level: 1 + Aligned at: 0.25" + Tab after: 0.5" + Indent at: 0.5", Tab stops: Not at 0.5"

	DEVELOPMENT FACILITATION
Support for land claims beneficiaries	<ul style="list-style-type: none"> o Liase with DLA, DOA & other land claim stakeholders for successful implementation of farming activities on land with agricultural potential under settled land claims and ensure continued monitoring, evaluation and support to ensure sustainability o Liase with DLA, DEAT, DEDET & other land claim stakeholders for successful implementation of tourism activities, game farming and hunting on land with tourism potential under settled land claims and ensure continued monitoring, evaluation and support to ensure sustainable practices (eg. MAFISA game loan scheme, etc.) o Liase with DLA, DME & other land claim stakeholders for successful implementation of mining activities on land with mineral deposits and mining potential under settled land claims and ensure continued monitoring, evaluation and support to ensure sustainable practices

Formatted: Indent: Left: 0.02", Bulleted + Level: 1 + Aligned at: 0.25" + Tab after: 0.5" + Indent at: 0.5", Tab stops: Not at 0.5"

THRUST 3: AGRICULTURAL PRODUCTION, VALUE CHAIN DEVELOPMENT AND INTEGRATION	
PROGRAMMES	PROJECTS & DEVELOPMENT FACILITATION
Agricultural production diversification and expansion	PROJECTS <ul style="list-style-type: none"> o Establish organic and/or hydroponic system for production of variety of perishable vegetables for tourism industry and local demand o Undertake feasibility for expanding production of melons & watermelons in Mopane and Nwanedi areas o Develop agri-villages in Nwanedi area o Expand game breeding and rearing through game loans and increase community benefit o Expand production of cattle and goats along eastern border of Municipality o Expand production of fodder (eg. Lucerne) in line with market demand o Undertake feasibility for expansion of cotton production around Weipe and other areas o Undertake feasibility for expansion of aquaculture (eg. fish, crocodiles; fresh water crayfish) production by emerging farmers and extension of aquaculture value chain linkages o Investigate potential for expansion of production of chillies, garlic, okra, peri-peri, herbs & spices etc. o Undertake feasibility for essential oil crop production o Establish agricultural demonstration and support centre providing skills, facilities, product improvement and development services for emerging farmers
	DEVELOPMENT FACILITATION <ul style="list-style-type: none"> o Promote conversion of livestock to productive and marketable breeds o Support revitalisation of irrigation scheme for production of dates and mangoes in Nwanedi o Support continued marketing and expansion of Spirulina production & investigation into diversification of end-products

Formatted: Indent: Left: 0.02", Bulleted + Level: 1 + Aligned at: 0.25" + Tab after: 0.5" + Indent at: 0.5", Tab stops: Not at 0.5"

Formatted: Indent: Left: 0.02", Bulleted + Level: 1 + Aligned at: 0.25" + Tab after: 0.5" + Indent at: 0.5", Tab stops: Not at 0.5"

Agricultural value adding and agro-processing industrial development	PROJECTS
	<ul style="list-style-type: none"> Establish vegetable processing plant in Musina town Establish abattoir, de-boning facility & meat processing plant for processing of local game, goats, cattle etc. in Musina town Establish pet food processing from livestock within the red line Revitalise date production and date liqueur project at Nwanedi Establish chutney processing plant (mango, tomato etc.) Establish jam processing plant (watermelon, tomato, pumpkin, orange marmalade etc.) Establish orange & citrus processing plant (eg. orange juice, dried oranges for decorative purposes etc.) Establish mango processing plant (eg. mango archar, mango juice, mango wine, dried mangoes etc.) Establish local off-cut leather tannery & product manufacturing (bags, belts from cattle, game, crocodiles etc.) Establish Mopani worm production facility and processing & packaging cooperative Establish Marula fruit production, trade and processing (beer brewing, pulp, preserves, juice etc.) Undertake feasibility for development of fermentation plant for processing of tomatoes & other biomass to produce bio-fuels
	DEVELOPMENT FACILITATION
	<ul style="list-style-type: none"> Provide support and assistance for development along red meat value chain Support and promote livestock and game health initiatives related to foot-and-mouth disease in collaboration with neighbouring municipalities and countries Facilitate public-private partnerships for development & expansion of agro-processing facilities
Emerging farmer support and agricultural service and product development	PROJECTS
	<ul style="list-style-type: none"> Establish multi-faceted open trade market in Musina town for trade of fresh produce, livestock, meat etc. Establish cooperative for hiring of agricultural implements, small-scale machines and other equipment linked to agricultural support centre Develop refrigerated truck pooling SMME/cooperative for collection and distribution of local produce, linked to Thohoyandou fresh produce market and other markets in South Africa and neighbouring countries Undertake feasibility for establishment of seedling nurseries Establish local manufacturers of agricultural fertilisers & pesticides
	DEVELOPMENT FACILITATION
	<ul style="list-style-type: none"> Undertake joint ventures with commercial farming enterprises to host agricultural open days/demonstrations Liaise with DoA in development of local succession plans to entice youth involvement in farming activities and along agricultural value chain Support cooperation amongst small-scale farmers to form and register cooperatives, in collaboration with LibSA & SEDA Facilitate membership of local farmers with District & Provincial commodity associations Facilitate access to seasonal and graduate level training (eg. agricultural research, management, etc.) Facilitate the development of Women in Agriculture and Rural Development (WARD) committees to mobilise and capacitate women in agriculture Support and promote CASP, LADEP, Landcare and Mafisa programmes of Limpopo DoA Identify and nominate local people for DoA women/youth farmer of the year competitions Facilitate development of mentorship programmes by commercial farmers

Formatted: Indent: Left: 0.02", Bulleted + Level: 1 + Aligned at: 0.25" + Tab after: 0.5" + Indent at: 0.5", Tab stops: Not at 0.5"

Formatted: Indent: Left: 0.02", Bulleted + Level: 1 + Aligned at: 0.25" + Tab after: 0.5" + Indent at: 0.5", Tab stops: Not at 0.5"

Formatted: Indent: Left: 0.02", Bulleted + Level: 1 + Aligned at: 0.25" + Tab after: 0.5" + Indent at: 0.5", Tab stops: Not at 0.5"

Formatted: Indent: Left: 0.02", Bulleted + Level: 1 + Aligned at: 0.25" + Tab after: 0.5" + Indent at: 0.5", Tab stops: Not at 0.5"

THRUST 4: TOURISM DEVELOPMENT AND PROMOTION	
PROGRAMMES	PROJECTS & DEVELOPMENT FACILITATION
Promotion of Mapungubwe & environs as tourism 'icon'	DEVELOPMENT FACILITATION <ul style="list-style-type: none"> ○ Improve promotion & marketing of Mapungubwe Landscape as World Heritage Site and major tourism attraction ○ Support and facilitate relocation and local display of gold artefacts at Mapungubwe National Park ○ Support & encourage private sector efforts for packaging of products & activities and destination building around Mapungubwe Route ○ Support and facilitate completion of Transfrontier Park development ○ Support & market investment opportunities for development of facilities and activities not provided at Mapungubwe in Limpopo Valley conservancy and facilitate & negotiate increased community benefit
Development of tourism assets, activities and themed routes	PROJECTS <ul style="list-style-type: none"> ○ Undertake feasibility for establishment of farm stay/farm vacation developments for community benefit on private farms through PPPs ○ Undertake feasibility for development of adventure tourism activities and adventure route (eg. hot air ballooning, 4x4, hiking & horse trails, quad bike adventures etc.) on private land through PPPs ○ Undertake feasibility for special interest tourism development around dinosaur footprint near Pontdrift ○ Encourage and negotiate the development of mining museum and mining tours to Messina Copper Mine & Venetia Diamond Mine and develop related infrastructure ○ Establish information cairns along main routes to provide relevant information (eg. R572 next to Hill at Klein Bolayi)
	DEVELOPMENT FACILITATION <ul style="list-style-type: none"> ○ Promote investor opportunities for establishment of tourism facilities and services at Musina Nature Reserve ○ Encourage development of tourism facilities at Tollo Azime waterfall through joint ventures/PPPs ○ Facilitate & negotiate development of conservancy linking Honnet Nature Reserve to Greater Kudu Land and Nwanedi Game Reserve, in collaboration with Mutale Municipality ○ Support packaging of local attractions to develop special interest routes and integrate into existing regional route initiatives eg. Limpopo Rock Art route & Footsteps of the Ancestors route
Destination building, marketing and branding	PROJECTS <ul style="list-style-type: none"> ○ Develop comprehensive tourism marketing plan in association with tourism role-players/management bodies ○ Develop map & brochures of local tourism facilities and attractions ○ Upgrade & expand tourism information centre to include attractive and up-to date displays and relevant information

Formatted: Indent: Left: 0.02", Bulleted + Level: 1 + Aligned at: 0.25" + Tab after: 0.5" + Indent at: 0.5", Tab stops: Not at 0.5"

Formatted: Indent: Left: 0.02", Bulleted + Level: 1 + Aligned at: 0.25" + Tab after: 0.5" + Indent at: 0.5", Tab stops: Not at 0.5"

Formatted: Indent: Left: 0.02", Bulleted + Level: 1 + Aligned at: 0.25" + Tab after: 0.5" + Indent at: 0.5", Tab stops: Not at 0.5"

Formatted: Indent: Left: 0.02", Bulleted + Level: 1 + Aligned at: 0.25" + Tab after: 0.5" + Indent at: 0.5", Tab stops: Not at 0.5"

	DEVELOPMENT FACILITATION <ul style="list-style-type: none"> o Launch special tourism and heritage events programme eg. game/baobab festival, rock art site events, cultural festivals etc. o Facilitate upgrade of golf course and develop golf and game experiences linked to Provincial golf events o Promote and improve annual Two Countries Marathon and other sporting events o Facilitate grading of accommodation facilities & inclusion of facilities on accommodation databases o Promote developments at Maeremani Conservation area & include as attraction as part of destination building programme o Promote private sector hunting, wild dog viewing & game drives as package of activities o Ensure representation of local products & activities as part of marketing campaigns & advertising undertaken by Vhembe District o Organise familiarisation tours/press tours (travel writers, TV & radio) o Promote package of local attractions and activities as special heritage tour package to tour operators and agencies o Establish links between local tourism database and Limpopo E-platform o Facilitate clean-up drives along major routes, improved road accessibility and roll-out of tourism safety plans to ensure tourism-friendliness of Municipality o Facilitate, support and promote establishment of scheduled flight service to Musina
Arts & crafts manufacturing, retail and skills development	PROJECTS <ul style="list-style-type: none"> o Undertake audit of natural art & craft manufacturing skills o Establish art & crafts, jewellery and ornament incubator, exhibition and workshop stalls and curio shop linked to tourism information centre in Musina town
	DEVELOPMENT FACILITATION <ul style="list-style-type: none"> o Promote manufacturing of arts & crafts by local people, eg. gemstone ornaments & replica gold rhinos etc. o Facilitate linkages between arts and crafts manufacturers and curio shops at Mapungubwe National Park, Tshipise resort & other private sector tourism facilities o Facilitate access to arts & crafts skills training
Tourism support, training & skills development	DEVELOPMENT FACILITATION <ul style="list-style-type: none"> o Support revitalisation of Musina Limpopo Valley Tourism Association and ensure focussed purpose, effective operation and increased cooperation to strengthen the Association o Undertake local tourism awareness campaigns and encourage community involvement in Tourism sector o Ensure appropriate conservation of heritage sites eg. dinosaur footprint, rock art sites, Verdun Venda Ruins etc. o Facilitate access to appropriate training, conservation programmes and accreditation for site guides, professional hunters, skimmers & trackers, emerging product owners & activity operators o Facilitate mentorship programmes & skills transfer from commercial tourism sector to small entrepreneurs or operators

Formatted: Indent: Left: 0.02", Bulleted + Level: 1 + Aligned at: 0.25" + Tab after: 0.5" + Indent at: 0.5", Tab stops: Not at 0.5"

Formatted: Indent: Left: 0.02", Bulleted + Level: 1 + Aligned at: 0.25" + Tab after: 0.5" + Indent at: 0.5", Tab stops: Not at 0.5"

Formatted: Indent: Left: 0.02", Bulleted + Level: 1 + Aligned at: 0.25" + Tab after: 0.5" + Indent at: 0.5", Tab stops: Not at 0.5"

Formatted: Indent: Left: 0.02", Bulleted + Level: 1 + Aligned at: 0.25" + Tab after: 0.5" + Indent at: 0.5", Tab stops: Not at 0.5"

THRUST 5: MINING SECTOR EXPANSION, VALUE CHAIN DEVELOPMENT AND INTEGRATION	
PROGRAMMES	PROJECTS & DEVELOPMENT FACILITATION
Expansion and diversification of mining activities	PROJECTS
	<ul style="list-style-type: none"> Undertake feasibility of developing small-scale salt production
	DEVELOPMENT FACILITATION
	<ul style="list-style-type: none"> Market coal mining opportunities in the north western portions of the Municipality Entice & support investigation into mining potential of diamonds in the north western portions of the Municipality Entice & support investigation into mining potential of magnesite along the south eastern border of the Municipality Liase with DME to establish database of available land for mining development and encourage commencement of mining activities with existing mineral rights owners Encourage and support re-opening of Messina Copper Mine Ensure local representation in Vhembe District delegations attending annual mining summits at Provincial and National levels Provide support to expand gemstone & colour stone mining and beneficiation
Mining beneficiation and value chain linkages	PROJECTS
	<ul style="list-style-type: none"> Undertake feasibility for establishing local brick-making from clay deposits in Madimbo and other areas Identify and develop SMMEs that will be supported by anticipated coal mining operations and other local mines (eg. catering, transport, cleaning services etc.)
	DEVELOPMENT FACILITATION
Mining development support, training and skills development	<ul style="list-style-type: none"> Negotiate inputs into Social & Labour Plans of mines and facilitate its completion and implementation to ensure local benefit Continually evaluate and negotiate local contracts/procurement procedures to favour local SMMEs in forward and backward linkages along the mining value chain Market and promote investment opportunities for establishment of coal beneficiation facilities eg. washeries, sizing, crushing & screening, etc. in anticipation of coal mining activities
	DEVELOPMENT FACILITATION
	<ul style="list-style-type: none"> Facilitate & negotiate appropriate training programmes & study bursaries with existing and proposed mines for students interested in mining sector Facilitate training programmes with FET and appropriate training providers for mining engineers and mine workers in anticipation of future expansion of Venetia Mine and future coal mining in Weipe area Facilitate support & mentorship programmes between large mines and mining entrepreneurs

Formatted: Indent: Left: 0.02", Bulleted + Level: 1 + Aligned at: 0.25" + Tab after: 0.5" + Indent at: 0.5", Tab stops: Not at 0.5"

Formatted: Indent: Left: 0.02", Bulleted + Level: 1 + Aligned at: 0.25" + Tab after: 0.5" + Indent at: 0.5", Tab stops: Not at 0.5"

Formatted: Indent: Left: 0.02", Bulleted + Level: 1 + Aligned at: 0.25" + Tab after: 0.5" + Indent at: 0.5", Tab stops: Not at 0.5"

Formatted: Indent: Left: 0.02", Bulleted + Level: 1 + Aligned at: 0.25" + Tab after: 0.5" + Indent at: 0.5", Tab stops: Not at 0.5"

Formatted: Indent: Left: 0.02", Bulleted + Level: 1 + Aligned at: 0.25" + Tab after: 0.5" + Indent at: 0.5", Tab stops: Not at 0.5"

It is not possible for the Municipality to implement all of the above-indicated Programmes and Projects simultaneously. It is, therefore, important to indicate which of the above listed projects or development facilitation actions take priority. Through the effective implementation of these key projects and development facilitation issues, the streamlined and fast-tracked delivery of the LED Strategy, its Thrusts and Programmes can be facilitated.

The priority focus areas provided in the list below should be implemented as a priority, requiring the facilitation of actions to commence in the immediate future.

- Establish Manufacturing Incubator in Musina town;
- Undertake poster campaign to entice business start-ups in projects identified by LED Strategy;
- Investigate potential and promote opportunities for development of retail, industrial, storage & distribution and wholesale enterprises and transport hub;
- Establish local Business Support Centre in Nancefield ;
- Create rural community support cooperatives in Madimbo, Malale and Domboni;
- Provide land claims support;
- Undertake expansion of aquaculture production and extension of aquaculture value chain linkages;
- Establish vegetable processing plant in Musina town;
- Develop map and brochures of local tourism facilities and attractions and improve and increase road signage to villages, major attractions and facilities;
- Establish arts and crafts, jewellery and ornament incubator, exhibition and workshop stalls and curio shop linked to tourism information centre in Musina town; and
- Establish database of available land for mining development and encourage commencement of mining activities with existing mineral rights owners.

Formatted: Indent: Left: -0.38", Hanging: 0.38", Bulleted + Level: 1 + Aligned at: -0.04" + Tab after: 0.21" + Indent at: 0.21", Tab stops: 0", List tab + Not at 0.21" + 0.25"

A monitoring and evaluation plan was also developed to enable the Municipality to monitor the success achieved in the local economy and to be responsive to the changing conditions within the economy.

MUSINA LOCAL MUNICIPALITY

LOCAL ECONOMIC DEVELOPMENT STRATEGY

PREPARED BY:



CONTACT PERSON:

Mrs N. Churr

TEL:

012-430 2888

FAX:

012 430 2979

EMAIL:

nanja@kayamandi.com

SECTION ONE INTRODUCTION

MAY
2007

This Section sets out the purpose of the report, describes the study area and provides the general background and the methodology followed in compiling the LED Strategy.

PREPARED FOR:



**KAYAMANDI DEVELOPMENT SERVICES (PTY) LTD,
P.O. Box 13359, HATFIELD, 0028**

TABLE OF CONTENTS

1.1 BACKGROUND	2
1.2 CONCEPT OF LED	2
1.2.1 DEFINING LED	2
1.2.2 LED ROLES AND RESPONSIBILITIES	4
1.3 PURPOSE OF REPORT	7
1.4 METHODOLOGY	8
STEP 1: ORIENTATION	8
STEP 2: STATUS QUO	10
STEP 3: LED WORKSHOPS AND TRAINING	11
STEP 4: LOCAL ECONOMIC STRATEGIC AGENDA	12
STEP 5: IMPLEMENTATION AND MONITORING FRAMEWORK	12
STEP 6: FEASIBILITY PROJECT PACKAGING	13
1.5 STUDY AREA	13
1.6 STRUCTURE OF REMAINDER OF REPORT	20

SECTION 1: INTRODUCTION

This Section sets out the background and purpose of the Strategy and provides a general background to the concept of Local Economic Development in South Africa. This Section also provides the methodology followed in undertaking the study, describes the study area and sets out the structure of the remainder of the report. Section 1 includes the following sub-sections:

- Background to study;
- Concept of LED;
- Purpose of report;
- Methodology; and
- Structure of remainder of report.

Formatted: Indent: Left: -0.38", Hanging: 0.38", Bulleted + Level: 1 + Aligned at: 0.5" + Tab after: 0.75" + Indent at: 0.75", Tab stops: 0", List tab + Not at 0.25" + 0.75"

1.1 BACKGROUND

Kayamandi Development Services (Pty) Ltd was appointed by Musina Local Municipality to formulate an Economic Development (LED) Strategy for their area of governance. The LED Strategy forms part of the Municipality's overall strategic plan, as outlined in the Integrated Development Planning Process, in seeking to promote viable local economic activities that benefit the local population, through the creation of direct and indirect employment.

The Strategy is based on the underlying needs, opportunities and comparative and competitive advantages of Musina Municipality and provides the Municipality with guidelines to create and facilitate economic development in order to realise the underlying development potential and in order to encourage both private and public sector investment and local job creation.

This Strategy is to be used by the Musina Local Municipality to assist in ensuring the dedicated and effective utilisation of local available resources and to promote local economic development in a proactive and dynamic manner.

1.2 CONCEPT OF LED

1.2.1 Defining LED

Local Economic Development (LED) is about local people working together to achieve sustainable economic growth that brings economic benefits and quality of life improvements for all in the community. **Local** is about keeping the benefits of economic development within the local community. **Economic** is focussed on ensuring that the benefits exceed costs and that actions build long term sustainability and local competitiveness. **Developmental** is about maximising or optimising the improvement in the quality of life of people in terms of the Human Development Index.

However, LED is NOT about municipalities financing small local projects from the public purse. Nor is it about Mayors, Councillors or municipal officials trying to run or manage these or even larger projects. All too frequently these projects have been initiated without real business plans or any serious notion of sustainability and they only last and provide temporary employment for as long as the public grant, which created them, lasts. Once the projects are potentially viable and sustainable, they should be run by the direct stakeholders as real businesses. LED is thus about developing robust and inclusive municipal economies, not small unsustainable projects.

While LED is a relatively recent phenomenon in South Africa, it has been applied, as a programme, to improve the economic performance of municipal areas. It focuses attention on the local level as the most appropriate place for economic intervention, as this level should be the most readily accountable to the public, while having the legitimacy of being democratically elected.

Local Economic Development is an ongoing process, rather than a single project or a series of steps to follow. It involves identifying and using local resources, ideas and skills to stimulate economic growth and development. The aim of LED is to create employment opportunities for local residents, alleviate poverty, and redistribute resources and opportunities to the benefit of all local residents.

It is important to realise that LED is about building up the economic competitiveness and as such, economic development actions need to be conceived in a proactive manner which creates and directs change as opposed to waiting for changes to become inevitable and only adapting to them or waiting for some action at the national level to spur the overall economic development.

Some key measures to enhance the competitiveness of a municipality are:

- | Research opportunities for investment (location, finance, human resources, ecology);
- | Promoting a development vision;
- | Educating and training people (developing new skills and professions);
- | Development financing through public and private financial sources;
- | Develop transport routes to support just-in-time organisation of operations;
- | Technology planning;
- | Determining community objectives in attracting entrepreneurs, capital and know-how from other communities;
- | Defining success criteria as the instrument to measure performance;
- | Creating partnership relations at home and abroad;
- | Involving the regional community in networks and institutions providing for information, technical expertise and capital;
- | Acquiring all possible assistance for partnerships and development;
- | Encouraging organisations in education and training, research and consulting to focus on joint research and development and its commercialisation;
- | Providing land, communal infrastructure and utilities to investors;
- | Creating social awareness on the importance of knowledge and technology for well-being; and

Formatted: Indent: Left: -0.38", Hanging: 0.38", Bulleted + Level: 1 + Aligned at: 0.5" + Tab after: 0.75" + Indent at: 0.75", Tab stops: 0", List tab + Not at 0.25" + 0.75"

- | Integrating economic advantages with cultural policy, urban development policy and other components of quality of life.

Yesterday's ways of doing things are no longer appropriate for current problems anymore and new and more creative and innovative ways need to be introduced. This calls for joint, collective goals and actions and a common vision for all stakeholders. This collective effort needs to be continuously monitored and improved since circumstances vary and there is not enough experience to plan for all possible actions and contingencies. Lastly, it is important to note that everything we do tomorrow needs to be done better than today (continuous improvement).

Until about 2003, the conceptual discussion around LED in South Africa primarily focused on the issues of poverty alleviation, the upliftment of previously disadvantaged and infrastructure development. It, however, became obvious that there needs to be a stronger effort to enhance the job creation capacity of the established formal economy. Thus, the creation of location-based competitive advantage as a theme has been introduced in LED plans. It has also been noted that promoting the competitiveness of existing companies is often much more relevant than attracting new companies. The synergies between the three target groups (attracting new firms, strengthening new firms and promoting start-ups and entrepreneurship) need to be realised through:

- | Not attracting external investors in a random manner. Rather attract companies that strengthen the profile and competitive advantage of the local economy. Try to build clusters or sub-sectors that can benefit from shared suppliers or infrastructure;
- | When trying to achieve start-up promotion, look at the opportunities which are created through outsourcing, subcontracting and spin-offs. For a longer term perspective, introduce entrepreneurship as a topic in primary and secondary education; and
- | Assess the opportunities which franchising creates for potential entrepreneurs in your location.

Formatted: Indent: Left: -0.38", Hanging: 0.38", Bulleted + Level: 1 + Aligned at: 0.5" + Tab after: 0.75" + Indent at: 0.75", Tab stops: 0", List tab + Not at 0.25" + 0.75"

In order for Local Economic Development (LED) to be effective, a community needs to identify and consider its own economic strengths, weaknesses, opportunities and threats and agree a shared strategy. Without this clear strategic vision, there will be a constant uncertainty about the actions to be taken and their prioritisation and some confusion would become inevitable with some misplaced efforts undermining the fragile consensus.

LED is characterised by the following objectives:

- | Establishing a job-creating economic growth path;
- | Embarking upon sustainable rural development and urban renewal; and
- | Bringing the poor and disadvantaged to the centre of development.

Formatted: Indent: Left: -0.38", Hanging: 0.38", Bulleted + Level: 1 + Aligned at: 0.5" + Tab after: 0.75" + Indent at: 0.75", Tab stops: 0", List tab + Not at 0.25" + 0.75"

1.2.2 LED roles and responsibilities

LED involves government, the private sector and civil society, local business, companies and people. It is not a specific action or programme, but occurs when a spectrum of stakeholders harness their individual resources and ideas to strive for a better economic

status within a locality. Thus, all the stakeholders have responsibilities and roles to play in the process. The roles and responsibilities of the various tiers of government, as well as civil society, in local economic development are outlined by the Resource Book for Municipal Councillors and Officials (2001) and include the following:

National Government:

- Co-ordinate and align support to municipalities for LED through their IDP process;
- Provide support to municipalities to implement their developmental mandate;
- Provide the overall legislative and regulatory framework for LED;
- Maintain strong inter-governmental relationships and institutions;
- Provide the necessary resources to municipalities for the implementation of LED;
- Disseminate information to provincial and local government about LED;
- Increase administrative efficiency (such as access to land and finances); and
- Monitor the outcomes and impact of municipal-led LED activities.

Formatted: Indent: Left: -0.38", Hanging: 0.38", Bulleted + Level: 1 + Aligned at: 0.5" + Tab after: 0.75" + Indent at: 0.75", Tab stops: 0", List tab + Not at 0.25" + 0.75"

Provincial Government:

- Align LED initiatives with national and local priorities;
- Strengthen and support the capacity of local government;
- Make available financial and technical resources to implement and sustain LED;
- Share information regularly (provincial economic trends, land use, investment, new developments) with municipalities; and
- Monitor and evaluate the impact of LED initiatives provincially.

Formatted: Indent: Left: -0.38", Hanging: 0.38", Bulleted + Level: 1 + Aligned at: 0.5" + Tab after: 0.75" + Indent at: 0.75", Tab stops: 0", List tab + Not at 0.25" + 0.75"

District Municipalities: District municipalities are better positioned to provide a co-ordinatory and supporting role to the local municipalities within their broad geographic areas. They have the following direct responsibilities:

- Plan and co-ordinate LED strategies within the frameworks of IDP;
- Establish the LED structure comprising of the district and local municipalities, to foster co-operation and co-ordinate LED policies, strategies and projects within the district;
- Identify lead LED sectors that can kick-start development within districts by undertaking economic research and analysis;
- Promote joint marketing, purchasing and production activities;
- Promote networking of firms within the district (e.g. tourism routes);
- Collect and disseminate information to assist local municipalities with LED policies;
- Identify resource availability (e.g. grants, land, infrastructure, etc.);
- Maintain a strong relationship with the province; and
- Provide the necessary training to municipalities.

Formatted: Indent: Left: -0.38", Hanging: 0.38", Bulleted + Level: 1 + Aligned at: 0.5" + Tab after: 0.75" + Indent at: 0.75", Tab stops: 0", List tab + Not at 0.25" + 0.75"

Local Municipalities: Local municipalities are the key LED implementation agencies of government. They have a more direct impact on LED in terms of their potential influence on issues and factors such as by-laws, tender and procurement procedures and other regulations. They also have a more direct influence on access to land and the necessary infrastructure and services, promoting a positive image of their area, making their environment more appealing and welcoming investors and visitors, facilitating skills development and being responsive to the needs of the local and potential business

concerns. Local authorities, therefore, need to be proactive in promoting economic development. In view of the above, local municipalities have the following responsibilities:

- | Ensure that social and economic development is prioritised within the municipal Integrated Development Plans (IDPs);
- | Conduct local economic regeneration studies as part of the IDPs;
- | Establish capacity within the municipality to promote interdepartmental collaboration;
- | Establish an LED forum within the community to mobilise the efforts and resources of local stakeholders around a common vision;
- | Build and maintain an economic database to inform decisions and act as an early warning system for the municipality;
- | Identify and market new economic opportunities;
- | Create an enabling environment for local businesses through efficient and effective service and infrastructure delivery;
- | Improve the quality of life of, and facilitate economic opportunities for the local population by addressing infrastructure and service delivery backlogs;
- | Develop an understanding and communicate the complex local economic relations, limitations and advantages to role players;
- | Network with key sectors and role players to create partnerships and projects;
- | Motivate and support individuals, community groups and local authorities to initiate and sustain economic initiatives;
- | Mobilise civil society to participate in LED and encourage public participation; and
- | Establish sector linkages and clustering of economic activity.

Formatted: Indent: Left: -0.38", Hanging: 0.38", Bulleted + Level: 1 + Aligned at: 0.5" + Tab after: 0.75" + Indent at: 0.75", Tab stops: 0", List tab + Not at 0.25" + 0.75"

The municipality is thus the 'connector' that links local, provincial, national and international spheres; facilitates growth of social capital; incorporates local role players in partnerships; and accesses funds.

Civil Society: The new developmental form of local government puts emphasis on civil society involvement in local government activities. For civil society involvement to have the desired effect, however, representatives should have the legibility and respect of the people or organisations they represent. Civil society should also share a common LED vision with the local municipality within which they reside. Civil society has the following responsibilities:

- | A community must have a core of local, capable and respected leaders who are prepared to commit time and energy to LED. The active engagement of women and young people in the leadership is essential;
- | Community leaders need to have or acquire the necessary skills, knowledge and attitudes necessary to manage economic change;
- | Leaders must operate in a transparent manner and be accountable;
- | Leaders must be willing to report, listen and ensure the support of the community;
- | Leaders should provide inspiration and participate in developing new layers of leadership;
- | The community must adopt a practical development agenda which focuses on realistic and sustainable goals, long-term plans and achieving small visible improvements by getting people involved; and
- | The goals must be realistic and address the community's needs. To achieve this, there needs to be constant evaluation and adjustment of the action plan.

Formatted: Indent: Left: -0.38", Hanging: 0.38", Bulleted + Level: 1 + Aligned at: 0.5" + Tab after: 0.75" + Indent at: 0.75", Tab stops: 0", List tab + Not at 0.25" + 0.75"

As such, civil society should participate in decision taking and implementation of public programmes that create local employment, they should encourage successful entrepreneurship, get organised to deal with collective issues, and play watchdog roles to ensure that public resources are used to advance social priorities.

The **private sector** needs to get effectively organised in business chambers and sectoral associations, it needs to organise effective collective action to undertake LED initiatives, and it should interact with local government to identify win-win opportunities.

1.3 PURPOSE OF REPORT

The purpose of the report is to evaluate the Municipality on an economic basis and to identify trends and gaps in the local economic base. From this, opportunities and strategies are identified to provide Musina Municipality with guidelines for the creation and facilitation of economic development. These strategies will also assist the Municipality to realise the underlying economic development potential and to encourage private sector investment and job creation.

The LED Strategy, therefore, provides the Municipality with the following:

- A strategically focused local economic development profile;
- Methods to enhance co-ordination, integration and participation in local economic development;
- Learning tool/s for the sharing of lessons learnt from the project;
- A local economic development plan; and
- Sustainable and commercially viable business opportunities appropriately packaged for investment.

Formatted: Indent: Left: -0.38", Hanging: 0.38", Bulleted + Level: 1 + Aligned at: 0.5" + Tab after: 0.75" + Indent at: 0.75", Tab stops: 0", List tab + Not at 0.25" + 0.75"

The Strategy is built on the underlying principle that a gap exists between the existing levels of development in Musina Municipality and the potential level of development. In order to bridge this gap, this LED Strategy addresses the following aspects:

- A profile of the sectoral composition of the local economy;
- Identification of the development potential of Musina Municipality;
- Identification of opportunities for SMME development in Musina Municipality; and
- An institutional analysis.

Formatted: Indent: Left: -0.38", Hanging: 0.38", Bulleted + Level: 1 + Aligned at: 0.5" + Tab after: 0.75" + Indent at: 0.75", Tab stops: 0", List tab + Not at 0.25" + 0.75"

In-depth interviews were held with a range of role-players, which included:

- Municipal officials of Musina Municipality;
- Ward Councillors of Musina Municipality;
- Agricultural sector role-players;
- Tourism sector role-players;
- Mining sector role-players; and
- Nafcoc.

Formatted: Indent: Left: -0.38", Hanging: 0.38", Bulleted + Level: 1 + Aligned at: 0.5" + Tab after: 0.75" + Indent at: 0.75", Tab stops: 0", List tab + Not at 0.25" + 0.75"

For a comprehensive list of consultations, refer to **Annexure A**.

Various secondary data sources were also consulted, which included:

- Musina Municipality IDP, 2006/2007;
- Musina Municipality SDF, 2006;
- Vhembe District LED, 2006;
- Vhembe District IDP, 2005/2006; and
- Limpopo Growth and Development Strategy, 2004.

Formatted: Indent: Left: -0.38", Hanging: 0.38", Bulleted + Level: 1 + Aligned at: 0.5" + Tab after: 0.75" + Indent at: 0.75", Tab stops: 0", List tab + Not at 0.25" + 0.75"

For a comprehensive list of secondary sources, refer to the **Bibliography**.

1.4 METHODOLOGY

The following Diagram, illustrates the approach followed in developing the Local Economic Development Strategy for Musina Local Municipality.

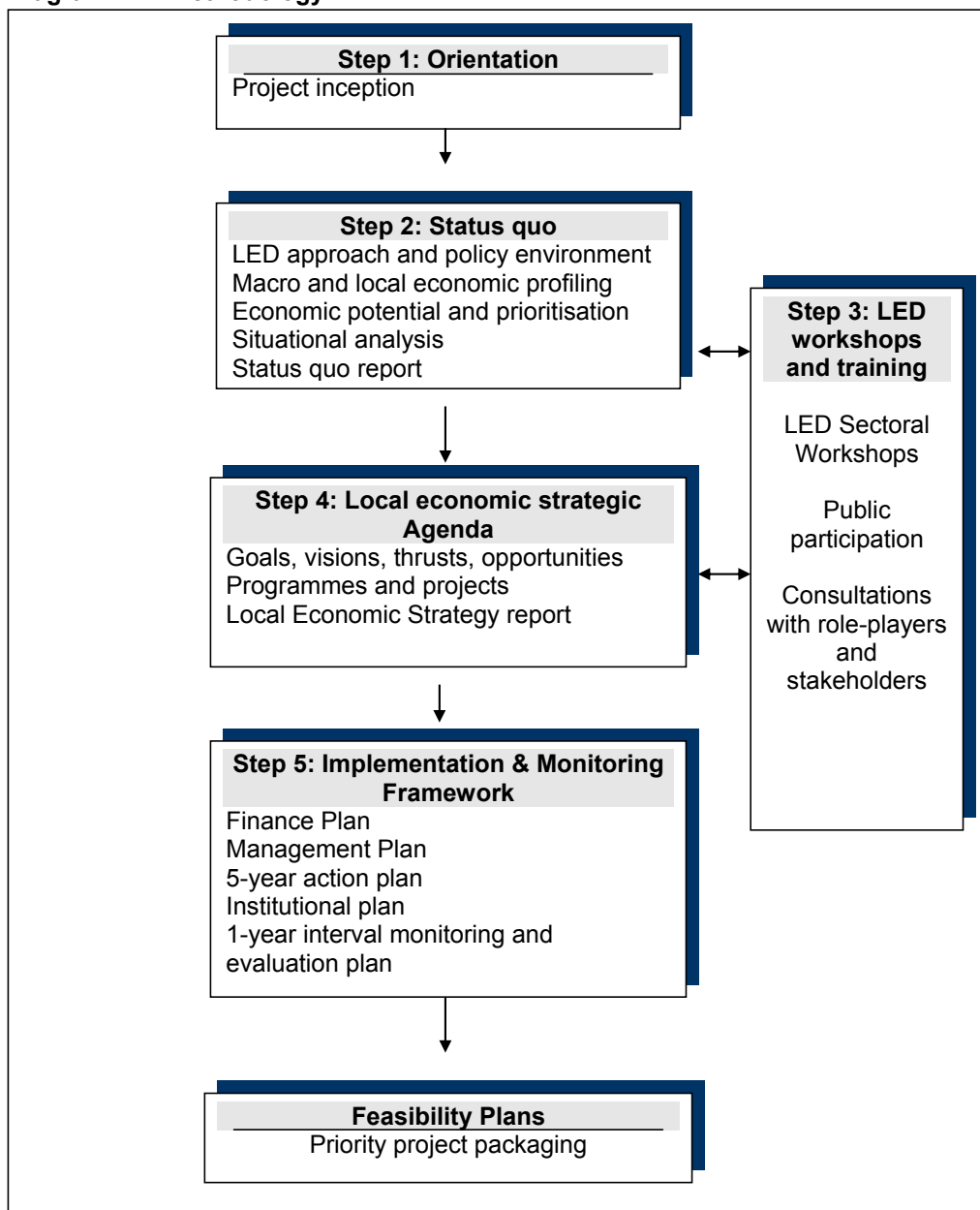
Step 1: Orientation

The first step was used for orientation purposes and included:

- Inaugural meeting with client and steering committee to finalise goals, objectives, process deliverables, actions and programme;
- Identification and sourcing of all the required background information;
- Establishing contact with knowledgeable individuals and institutions; and
- Analysis of resources.

Formatted: Indent: Left: -0.38", Hanging: 0.38", Bulleted + Level: 1 + Aligned at: 0.5" + Tab after: 0.75" + Indent at: 0.75", Tab stops: 0", List tab + Not at 0.25" + 0.75"

Diagram 1.1: Methodology



Step 2: Status quo

This step entailed aspects such as sectoral production, economic base, employment, growth, specialisation, linkages, comparative advantages, market trends, etc. The focus of this profile was to determine the economic status quo of the study area and in a broader geographical context, to understand the economic functioning and sectoral specialisation of the area (sub region) with emphasis on growth potential, sectoral composition, historic growth and comparative advantages. Furthermore, the regional perspective was addressed with socio-economic indicators such as population size, distribution and growth patterns, income and expenditure levels (disposable income and affordability levels), human development index (HDI) and poverty gap.

The status quo was compiled by making use of:

- | Economic interviews to obtain data on economic activities such as businesses, industries, mining, agricultural practices as well as concerns in the Musina Municipality. The underlying rationale for obtaining this information was to determine the level of economic development as well as the extent of linkages between sectors within the economy;
- | Business surveys were also undertaken with the aid of a business questionnaire to collect data and information from local businesses; and
- | A natural resources review was also initiated in order to establish mineral rights and agricultural initiatives in the study area.

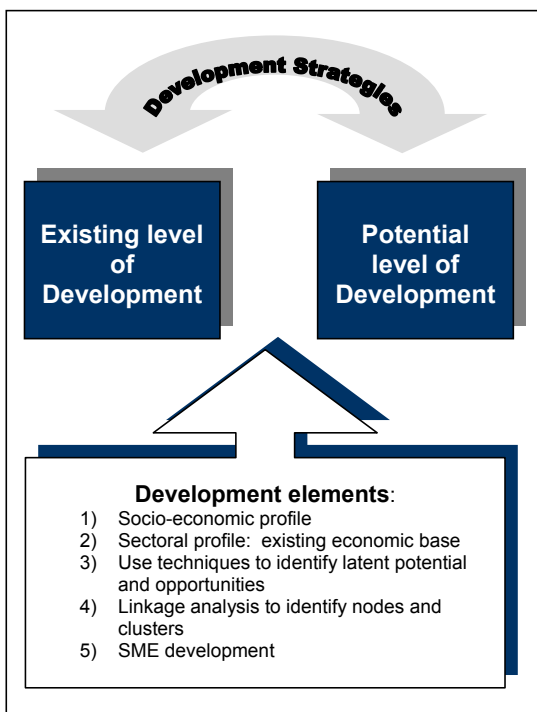
Formatted: Indent: Left: -0.38", Hanging: 0.38", Bulleted + Level: 1 + Aligned at: 0.5" + Tab after: 0.75" + Indent at: 0.75", Tab stops: 0", List tab + Not at 0.25" + 0.75"

The above-mentioned information was obtained by means of secondary data sources, as well as through primary research (such as surveys, interviews, sector workshops and public sessions). This information was then analysed to compile complete and updated development profiles for Musina Municipality.

Cognisance was also taken of existing studies and policies at national, district and local level (such as the Constitution, White Paper on Local Government, Municipal Structure and Systems Act, GEAR, ASGI-SA, BBBEE, NSDP, PGDS, Co-operative Development Plan, SETA, SDIs, IDPs, SDFs, Tourism Growth Strategy and other government development programmes).

Once an overview of the existing environment was established, the gap that exists between the existing levels of development and the potential level of development was identified. This situation is illustrated by the Diagram below.

Diagram 1.2: Development Gap



The purpose of this step was to analyse the data obtained in order to determine development opportunities. Once development potential was ascertained, an inventory of development projects was undertaken. Focus was placed on not only creating a general higher level of output, but also on broadening the economic base to ensure the introduction of new activities that are not currently operational in the area. This means an extension of the production capacity in terms of new products and services and the application of new technologies that are not being applied in production processes. The aim of this is to make Musina Municipality more competitive.

Interrelationships between economic activities and other development dimensions such as the social, demographic, financial, institutional, infrastructural and environmental aspects were carefully considered in

identifying key development projects.

Step 3: LED workshops and training

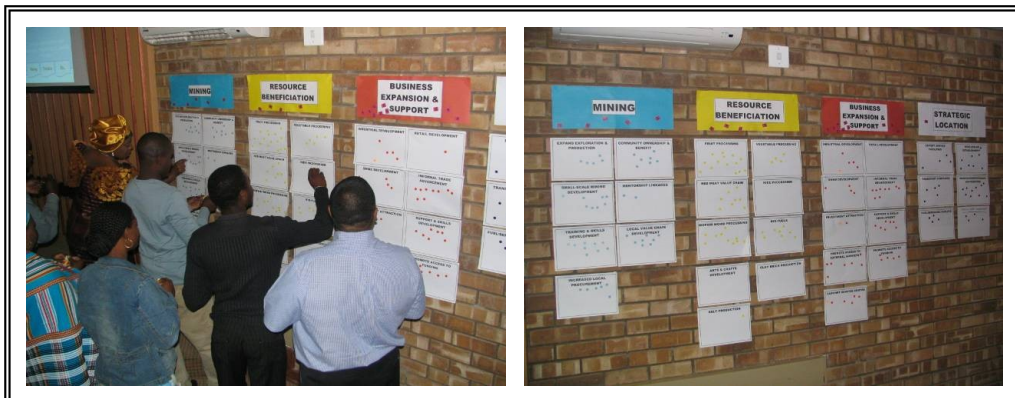
In this step workshops were held with key stakeholders and role-players within the study area and economic development opportunities were prioritised, based on existing knowledge of the local economic development situation. The workshops were held at critical stages throughout the undertaking of the study and focussed on:

- The identification and verification of economic opportunities;
- The interpretation and collation of opportunities in terms of economic thrusts;
- The undertaking of resolutions to be addressed in the economic development plan;
- The incorporation, involvement and commitment of key stakeholders and communities to the economic development of the area;
- The education of the community, business and Municipality, i.e. counterpart training; and
- Public participation to ensure transparency in the process.

The following pictures illustrate the prioritisation of economic development opportunities at the Steering Committee and Forum meetings held on 19th March 2007.

Formatted: Indent: Left: -0.38", Hanging: 0.38", Bulleted + Level: 1 + Aligned at: 0.5" + Tab after: 0.75" + Indent at: 0.75", Tab stops: 0", List tab + Not at 0.25" + 0.75"

Photograph 1.1: Prioritisation of opportunities



Step 4: Local Economic Strategic Agenda

The purpose of this step was to develop a strategic framework in terms of key Projects and Programmes, based on Thrusts and the opportunities identified in the preceding steps. The sectoral programmes were interpreted in terms of strategic targets, focused on unlocking the inherent development potential, exploiting comparative and competitive advantages in specific sectors of the economy, as well as intensifying sub-regional specialisation.

Step 5: Implementation and Monitoring Framework

This step integrated and interpreted the different components of the study into an Integrated Economic Strategy that consists of Integrated Programming to ensure the optimal rate of implementation and economic development for the Musina Municipality, a Financial Plan to focus project phasing in terms of financial requirements, a purpose-directed Management and Monitoring Plan and a Locational Plan, which allows the spatial representation of the proposed development vision and programmes in terms of economic activities and supporting infrastructure. The Economic Strategy also includes an Institutional Framework, which provides guidelines for capacitating the Municipality to implement the Economic Strategy.

This step, furthermore, presented each development opportunity or intervention in a manner that clearly indicates what actions need to be taken, by whom, when and at what estimated cost, with recommendations being made on appropriate economic development, management and marketing structures within the Municipality and what the functions and responsibilities of each component of those structures should be.

Recommendations were also made regarding appropriate partnerships and linkages that could be formed between the public sector, private operators and communities in order to ensure that the Strategy creates the benefits expected by all role-players and stakeholders. This step also proposed a realistic and achievable timetable for the implementation of the Strategy, as well as an appropriate performance monitoring system to ensure that all the objectives and expectations of the Municipality are met over a period of time.

Step 5 also involved the compilation of a Strategy Plan that would direct implementation of the Framework and Strategy and included actions that need to be taken and the identification of responsible role players.

Step 6: *Feasibility project packaging*

In order to ensure that the LED Strategies can be taken further, two priority projects (identified during the previous step) were packaged, aimed at attaining economic development in Musina Local Municipality. The packaging included the undertaking of feasibility studies. The objective of the feasibility study is to enable financial assistance by Government or financial institutions or to attract private investors in order to develop projects within the study area.

1.5 STUDY AREA

Musina Municipality is located to the north west of Vhembe District Municipality, which is one of the five Districts that make up the Limpopo Province. Vhembe District is bordered by Capricorn District to the south west and Mopani District to the south east.

The sharing of borders extends to Zimbabwe and Botswana in the north and west and the Kruger National Park in the east respectively.

Diagram 1.3 below illustrates the five Districts of the Limpopo Province.

Musina Local Municipality, together with Thulamela, Mutale, and Makhado Local Municipalities make up the Vhembe District. As is evident from Diagram 1.4 below, Musina Local Municipality is one of the larger local municipalities within the Vhembe District. Musina Municipality is also the least densely populated with just 5 people per square km. Despite this low population density, it is one of the most urbanised of the four Local Municipalities, with almost half of the Municipality's population living in the town of Musina.

Land claims are also major constraints to development as nearly a third (27%) of the Local Municipality is currently under claim and therefore cannot be developed.

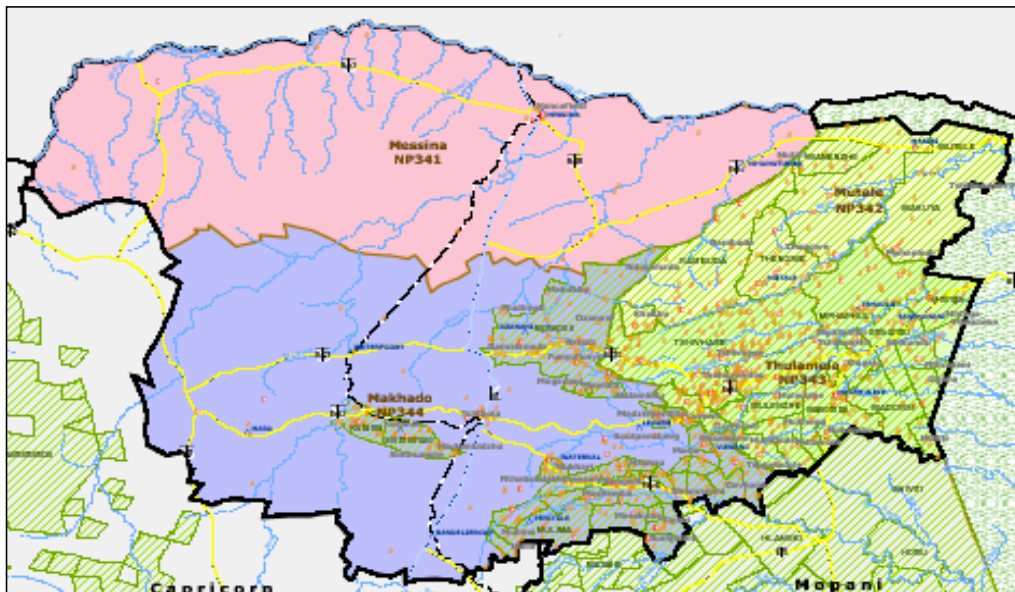
Diagram 1.3 Limpopo Province and its Districts



Source: Demarcation Board of South Africa (www.demarcation.org.za)

The Diagram below shows the four local municipalities that make up the Vhembe District.

Diagram 1.4 Vhembe District and Local Municipalities



Source: Demarcation Board of South Africa (www.demarcation.org.za)

Musina Municipality is located a significant distance from other locations within South Africa. These geographical attributes present unique challenges and opportunities for the development of all of the Sectors in Musina Municipality's economy.

Diagram 1.5 below provides a spatial orientation of the Municipality, indicating the sub-places as demarcated by the 2001 Census. As is evident from the Diagram below, the population within Musina Municipality is fairly concentrated around Messina and is comprised of the following main places and sub-places, as set out in the Table below.

Table 1.1 Main and sub-places of Musina Local Municipality

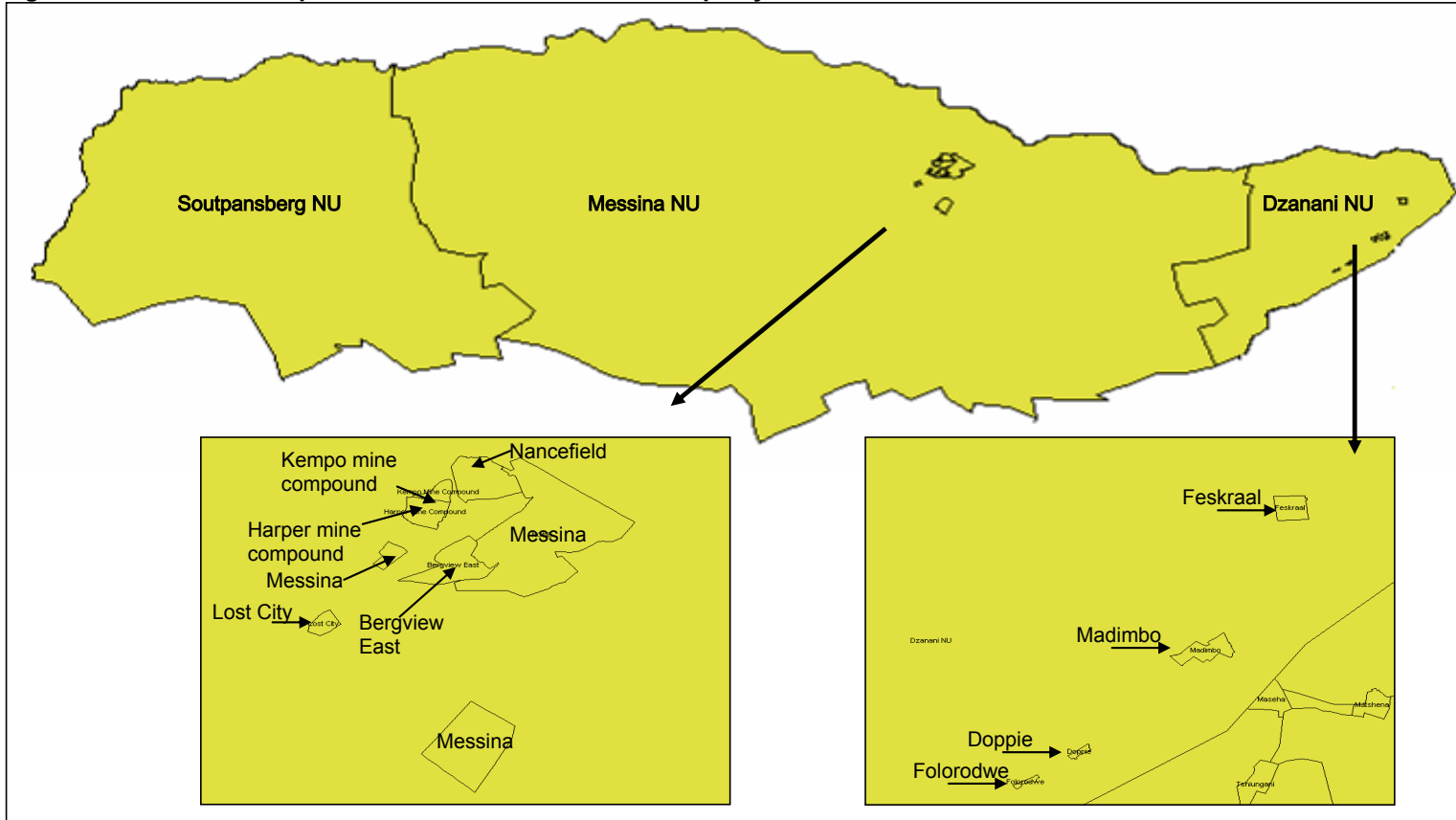
CENSUS MAIN PLACES	SUB-PLACES
Messina	Messina SP Bergview East Harper Mine Compound Kempo Mine Compound Lost City
Musina	Dzanani NU Messina NU Soutpansberg NU
Mutali	Doppie Feskraal Folovhodwe Madimbo
Nancefield	Nancefield

Source: Stats SA, Census demarcations

It is evident from the 2001 Census demarcations that Musina Municipality has the smallest number of settlements of all the local municipalities in Vhembe District. It also has a small population, viz. approximately 40 000 people. Although the average number of people in the 7 settlements in the Musina Local Municipal area was 5834 people in 2001, it is misleading, as the majority of the people residing in settlements are living in Musina/Musina-Nancefield.

Furthermore, according to the Vhembe District Spatial Development Framework (2006), the only nodal point within the Municipality is the town of Musina. This node is a growth point within the Municipality, which is continuing to grow despite indications of out-migration.

Diagram 1.5 Main and sub-places within Musina Local Municipality



Source: Stats SA and Kayamandi Development Services

According to the Musina IDP, Musina is the only urban area north of the Soutpansberg and the most northerly located town in South Africa. Musina is located approximately 500km north of Pretoria, 224km north of Polokwane and approximately 108km north of Makhadu, which is the nearest neighbouring town. Musina is situated 13km south of the Beit Bridge border post to Zimbabwe on the N1-national road and railway line, linking South Africa to the rest of Africa. Musina is very accessible and a number of provincial roads converge at Musina, i.e:

- District Road D746 (R525) to Tshipise holiday resort (37km);
- District Road D1483 (R572) to Alldays in the west (Pontdrift road);
- District Road D2692 to Venetia Mine in the west; and
- District Road D1942 to Artonvilla and Pafuri.

Formatted: Indent: Left: -0.38", Hanging: 0.38", Bulleted + Level: 1 + Aligned at: 0.5" + Tab after: 0.75" + Indent at: 0.75", Tab stops: 0", List tab + Not at 0.25" + 0.75"

The District Spatial Framework (2006) also reveals that Musina and Nancefield are located directly adjacent to each other and forms an urban unit that is different from the most "apartheids" towns where the former "black" residential areas were located a few kilometres away from the "white" residential areas and business centra (e.g. Pietersburg/Seshego). Musina developed on both sides of the main road (extension of the N1 - national road) and railway line. The Messina residential areas developed on the eastern and western side of the main road, while the Nancefield residential areas developed to the north west of Messina. The central business area (CBD) developed on the eastern side of the main road and the industrial areas to the north-northeast (Blikkiesdorp) and to the southwest.

The existing spatial structure of Musina is, however, distorted to a certain extent as the general direction of new low-income residential development (Nancefield) is away from the workplace, i.e. the Central Business District (CBD) and industrial areas. The main reasons for this problem are that there are some physical constraints that force new development to the west of Musina town. The existing constraints that impact on the development of Musina town includes:

- **To the north:**
 - The N1 - route and railway line divide the town;
 - The Messina-Nancefield sewerage treatment plants (northern and southern oxidation ponds) and the associated influence zones; and
 - The vacant land between the road to Beit Bridge and the road to Pontdrift and Messina-Nancefield is characterised by rocky outcrops.
- **To the east:**
 - A number of ridges and rocky outcrops;
 - Two sewerage treatment plants and their associated influence zones;
 - Areas to the east are located below the existing sewerage treatment plants.
- **To the south:**
 - An extensive portion of land in possession of the State being utilised as a nature reserve;
 - An extensive portion of land in possession of the State being utilised for military purposes;
 - A section of the proposed N1 - bypass;

Formatted: Indent: Left: -0.38", Hanging: 0.38", Bulleted + Level: 1 + Aligned at: 0.5" + Tab after: 0.75" + Indent at: 0.75", Tab stops: 0", List tab + Not at 0.25" + 0.75"

Formatted: Indent: Left: -0.38", Hanging: 0.38", Bulleted + Level: 1 + Aligned at: 0.5" + Tab after: 0.75" + Indent at: 0.75", Tab stops: 0", List tab + Not at 0.25" + 0.75"

Formatted: Indent: Left: -0.38", Hanging: 0.38", Bulleted + Level: 1 + Aligned at: 0.5" + Tab after: 0.75" + Indent at: 0.75", Tab stops: 0", List tab + Not at 0.25" + 0.75"

- Intensive agriculture and a horse riding school;
 - The cemetery located south of Messina Extension 3 (industrial area) restricts development in a southern direction to a certain extent; and
 - A gravitational low point restricting the use of existing bulk infrastructure in servicing future development.
- **To the west:**
- The area between Messina-Nancefield and Messina Extension 6 is transgressed by a number of ESKOM power lines, which will result in fragmented development in this area;
 - A refuse disposal site with its associated area of influence;
 - The proposed alignment of the N1-bypass located between Messina-Nancefield Extension 8 and Extensions 1, 2 and 3 forms a physical barrier as a large buffer is created by the road reserve and no direct access from the residential areas onto this road will be allowed;
 - Effectively the topography of Messina resulted in two drainage areas which have a cost implication with respect to the provision of sewerage disposal systems; and
 - A large ridge partially incorporated into the urban system as an informal open space.

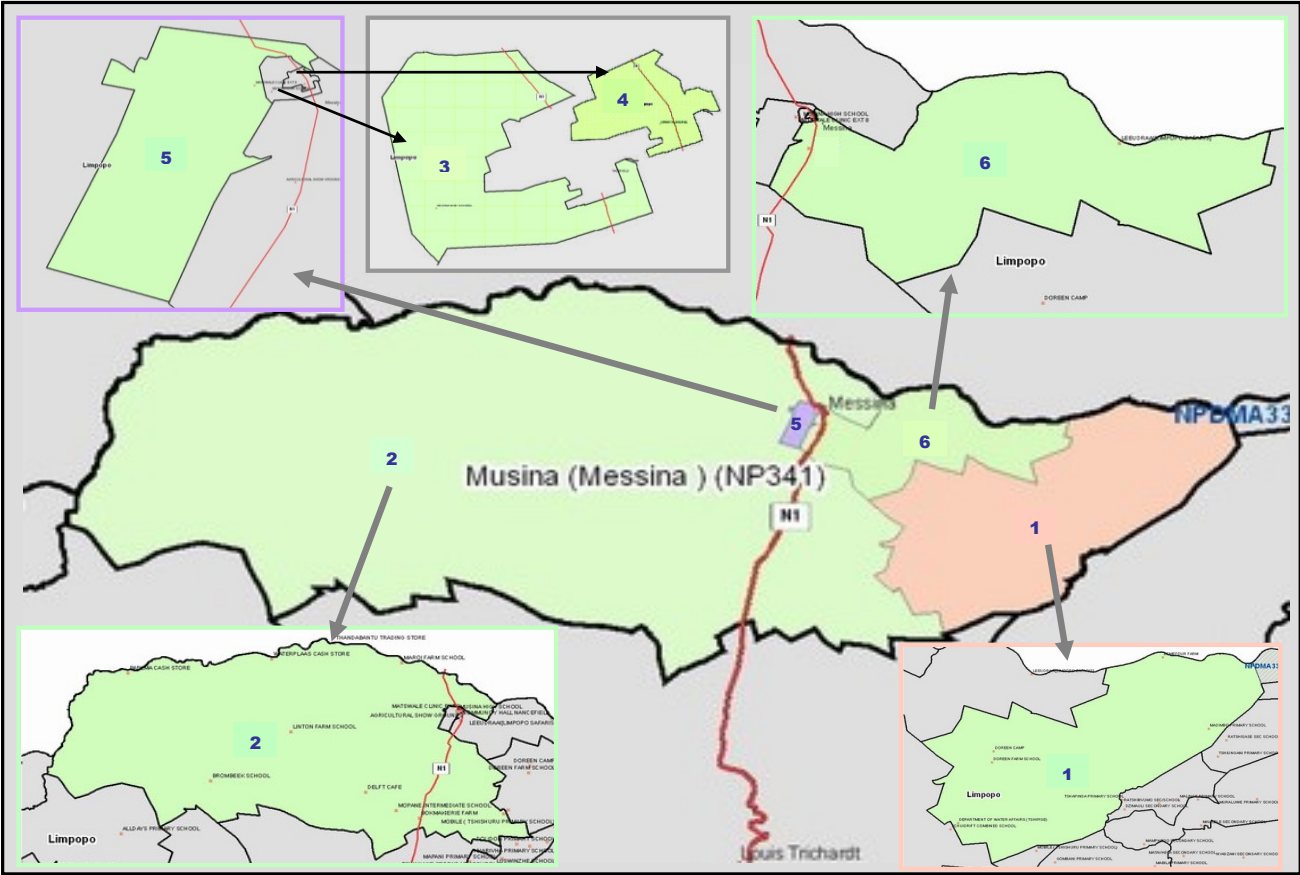
Formatted: Indent: Left: -0.38", Hanging: 0.38", Bulleted + Level: 1 + Aligned at: 0.5" + Tab after: 0.75" + Indent at: 0.75", Tab stops: 0", List tab + Not at 0.25" + 0.75"

Harper (Nancefield X6) and Campbell (Nancefield X7) were former mine compounds of the Messina Copper Mine and are not integrated into the urban area of Musina due to their location approximately 1km and 4km to the west of Musina (Vhembe District SDF as in Musina IDP, 2004/05 Review).

Madimbo, Malale & Domboni are small rural settlements that developed in the former Venda. These settlements have no economic base and serve a dormitory function as most people work elsewhere and commute on a daily basis to places of employment outside these settlements (farms, mines, etc.).

As is evident from the above Diagram, the settlements in Musina Municipality are fairly concentrated. For this reason, the Diagram below provides an indication of the various wards within the Municipality, to which reference will be made throughout the remainder of the study. As is evident from this Diagram, Musina Local Municipality consists of 6 Wards, of which four fall within the urban centre of Musina (Wards 3,4,5 and 6), comprising the peri-urban and urban settlements of Musina Municipality. Ward 6 stretches eastwards from Musina and also comprises areas which are rural in nature. Wards 1 and 2 are the largest wards in the Municipality, with Ward 1 stretching from the western border of the Municipality up to Tshipise, with Ward 2 covering the area from Tshipise and Doreen Farm up to the eastern boundary of the Municipality. These two wards are mainly rural in nature, with the majority of the rural population in these areas residing on private farms.

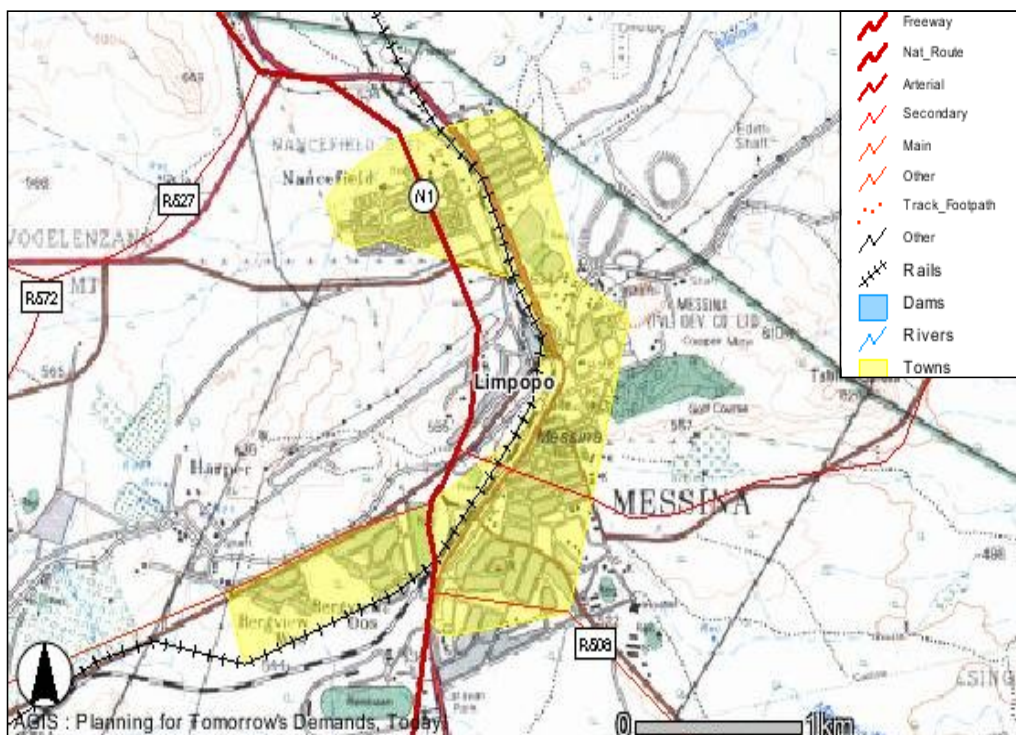
Diagram 1.6 Wards within Musina Local Municipality



Source: Source: Demarcation Board of South Africa (www.demarcation.org.za) and Kayamandi Development Services

Given the concentration of population in and around Musina town (Messina), Diagram 1.7 below provides a more detailed illustration of the town and its surrounds.

Diagram 1.7 Map of Messina



Source: Orientation Atlas, www.agis.agric.za, 2007

1.6 STRUCTURE OF REMAINDER OF REPORT

The remainder of the report is structured as follows:

- | **Section 2: Policy and legislative framework:** This Section sets out the National, Provincial and Local government policies, programmes and initiatives to which the LED strategy needs to conform and/or take into consideration.
- | **Section 3: Macro Economic Profile:** This Section sets out the economic and socio-economic context in relation to the District, Provincial and National context in order to create the background against which an appropriate development path can be determined.

Formatted: Indent: Left: -0.38", Hanging: 0.38", Bulleted + Level: 1 + Aligned at: 0.5" + Tab after: 0.75" + Indent at: 0.75", Tab stops: 0", List tab + Not at 0.25" + 0.75"

Formatted: Indent: Left: -0.38", Hanging: 0.38", Bulleted + Level: 1 + Aligned at: 0.5" + Tab after: 0.75" + Indent at: 0.75", Tab stops: 0", List tab + Not at 0.25" + 0.75"

- | **Section 4: Local Sectoral Analysis:** This Section sets out a detailed analysis of the contribution of the economic sectors to the economy of Musina Municipality at a local level and includes the identification of sectoral opportunities.
- | **Section 5: Local Economic Framework:** This Section sets out the framework that serves to guide economic development in order to provide the opportunity for local communities, business and private sector partners, local government and non-governmental organisations, to work together towards a shared vision and strategy.
- | **Section 6: Implementation framework:** This Sections sets out the means to ensure effective, successful and sustainable implementation of the LED Strategy in order for the Municipality to enable economic growth and job creation.

Formatted: Indent: Left: -0.38", Hanging: 0.38", Bulleted + Level: 1 + Aligned at: 0.5" + Tab after: 0.75" + Indent at: 0.75", Tab stops: 0", List tab + Not at 0.25" + 0.75"

Formatted: Indent: Left: -0.38", Hanging: 0.38", Bulleted + Level: 1 + Aligned at: 0.5" + Tab after: 0.75" + Indent at: 0.75", Tab stops: 0", List tab + Not at 0.25" + 0.75"

Formatted: Indent: Left: -0.38", Hanging: 0.38", Bulleted + Level: 1 + Aligned at: 0.5" + Tab after: 0.75" + Indent at: 0.75", Tab stops: 0", List tab + Not at 0.25" + 0.75"