

DEPARTMENT OF ECONOMIC DEVELOPMENT AND TOURISM



Oceans Economy report 2024

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1. Introduction

The unique ocean currents around South African are highly productive and contain extensive biodiversity due to habitats which range from cool-water kelp forests to subtropical coral reefs. This diversity means that the marine and coastal zones in South Africa have enormous economic and developmental opportunities – through fishing, shipping, tourism as well as new and emergent technologically advanced sectors relating to medicine, energy, mining and food production (WWF-SA, 2016; DEFF, No date) (Jarre, et al., 2018).

Aware of this vast potential, the government launched Operation Phakisa in 2014 as a ‘fast results delivery programme’ designed to boost economic growth and create jobs within the context of the government’s National Development Plan (Department of Planning, Monitoring and Evaluation (DPME), 2014). It has seven cross-cutting focal areas, one of which is the Oceans Economy which has, in turn, six workstreams. Naidoo (2020) notes South Africa’s oceans hold extensive economic growth potential which Phakisa hopes to tap into by creating new industrial opportunities (Naidoo, 2020; Chadema & Joseph, 2017). In 2014, it was estimated that the Oceans Economy could contribute up to R177 billion to South Africa’s GDP, as well as create approximately one million jobs by 2033 (Department of Environment, Forestry and Fisheries (DEFF), 2019).

The marine economy represents a largely untapped development opportunity for the province. Unlocking such development potential however requires a coordinated approach to ensure that benefits accruing is sustainable and localised. The oceans have vast untapped resources but to extract these will require meaningful investment and good policy implementation. If undertaken well, this could result in job creation, new sources of government revenue and limitless opportunities for entrepreneurship.

2. Objective

The Northern cape coastal area have untapped opportunities confirmed through several studies done previously as well as recent field work that has been done. It is against this background that the objective of this report is to:

- Identify low hanging fruits in terms of opportunities that can be realised in the short term by removing challenges that may be hampering development of such opportunities to be realised.

- Have an understanding of the economic landscape in the coastal marine areas
- To have a primary understanding of economic activities in the coastal towns
- To identify economic development initiatives to enhance/unblock economic potentials

3. Problem statement

South Africa has nine ports, however, only eight ports are commercial. Port Nolloth is the only exception, it is neither a commercial port nor does it have a forecasted cargo demand, due to limitations of waterside infrastructure. It's narrow and shallow, making entrance to the harbour difficult and it has become significantly silted-up over the years (Oceans Economy: Investigating opportunities for the Northern Cape, 2015).

Furthermore, the subject of marine economy in the Northern Cape is brought up at most of the forums as neglected while there are opportunities which can benefit the community in the coastal areas as well as boosting the provincial economy at large.

4. Methodology

APPROACH (OCEANS ECONOMY)

The study will be decided on four (4) phases and for each will utilise different methodology approaches:

1. Scoping of the Coastal Study Areas
2. Sectorial Approach: Key engagements with Stakeholders

For the purposes of scoping, the research team will utilise mix methods technique in attaining the core objective of the study. This is necessary because the both weaknesses in the sets of techniques (qualitative and quantitative) will be addressed and thus providing in-depth knowledge on the subject matter. To gain a complete picture of the ocean economy, the research study will focus on gaining primary data through field work and secondary data through desktop analysis.

- Sampling technique
Purposive sampling will be employed so as to gain pertinent/specific data from the participants. For the determination of this study the main identified participants in Ocean Economy are:
 - Local Government Officials

- Operational Businesses
- Local residents

- Data collection

Qualitative: a semi structural questionnaire will be utilised for informal interviews during the scoping phase so as to encourage a two-way communication and participants are not restricted in expressing their views on the subject matter. According to Typset (2024), a semi-structured questionnaires are important tools in research as they allow for in-depth data collection and analysis. They provide a structured framework for asking questions while also allowing for flexibility and open-ended responses

Observation: techniques will also be applied in gathering data. Observations are often used to gather data without relying on survey respondents' honesty or accuracy.

Quantitative: An open-ended questionnaire will be administered to participants so as to have to gain insight on what is happening in the localities.

- Data Analysis

Qualitative: transcription method will be utilized to analyse the data from the informal semi structured interviews.

Observation- the data will also be transcribed and reading of the field notes

Quantitative: data will be analysed using the Microsoft Excel spreadsheet from the open-ended questionnaire used during scoping.

Study areas

The Namakwa District is home to the coastline of the Northern Cape extending over three municipalities, namely Kamiesberg; Nama Khoi; and Richtersveld and stretches over 313 kilometres of coastline (Department of Tourism, Environment & Conservation and CSIR Environmentek, 2005). For the purpose of scoping the study

a decision was made to visit the following towns; Port Nolloth, Kleinsee, Alexander Bay and Hondeklip Bay.

5. Legislative framework

5.1 National Development Plan

The relevance of oceans economy is found in Chapter 6 of the National Development Plan which refers to: An integrated and inclusive rural economy: marine fishing is important for subsistence and employment. Subsistence fishers rely on marine resources as a basic source of food.

5.2 Provincial Growth and Development Plan

The Provincial Growth and Development Plan has four drivers, namely: Driver 1: Economic Growth, Development and Prosperity, Driver 2: Social Equity and Human Welfare, Driver 3: Environmental Sustainability and Resilience and Driver 4: The Northern Cape Governance Model, of which the department of Economic Development and Tourism is responsible for driver 1. In order to ensure economic growth that will lead to increased development and prosperity for the people of the Northern Cape Province, the following developmental outcomes are identified:

- Agriculture and Agro-Processing
- Mining and Mineral Beneficiation
- Tourism Market Development
- Development of the Energy Sector
- Manufacturing and Trade
- Competitive Infrastructure Development
- Employment and Skills Development
- Innovation and the Knowledge Economy
- The Maritime Economy

These outcomes are also central to building a growing and successful economy is strategic partnerships to drive the industrialisation of the Northern Cape.

5.3 Northern Cape Marine and Coastal Tourism Strategy- 2017

The province developed the Provincial Marine and Coastal Tourism Strategy in 2016 with specific focus on the present and potential future catalytic development opportunities that would unlock the tourism economic potential of the Province's coastal towns and regions. The Provincial Marine and Coastal Tourism Strategy highlighted 17 High priority projects identified to unlock tourism potential within the Northern Cape Diamond coast, these were later reduced to 12 through merging projects as illustrated below:

Project 1: Diamond Coast Route

Project 2: Diamond Coast Marketing Strategy

Project 3: Diamond Coast Welcoming Centre and Tourist One Stop

Project 4: Establishment of an Educational Centre

Project 5: ORM Conservation Centre and Boardwalk

Project 6: Port Nolloth Beach Precinct

Project 7: Luxurious tent camps situated along the coastline

Project 8: Nama Culture and Heritage Living Museum

Project 9: Diamond Coast Database Mobile Application

Project 10: Diamond Coast Tourist Guide

Project 11: Improved Access to the Diamond Coast

Project 12: Port Nolloth and Boegoe Bay Harbour for cruise tourism

There has been significant progress on the projects below in terms of tourism growth in the province:

Orange River Mouth- collaboration with the United Nation as a precinct of international jurisdiction. However, there is a challenge of demarcated area by the Alexkor mine as they have mining rights to the area. In terms of Improved access to the diamond coast, a feasibility study was done on air travel while the basic airport infrastructure will be located in Springbok. This project requires a total amount of R 100 million. The Small

Cruise Tourism which is part of the national strategy, has seen some progress with the cruise ship docking on the 24 April 2024 in Port Nolloth. The relevant arrangements are being taken to ensure safety as well as sight-seeing by the visitors in that moment.

6. Literature review

6.1 Oceans Economy: Investigating opportunities for the Northern Cape 2015 (Research and Development)

The main objective of the study (Oceans Economy: Investigating opportunities for the Northern Cape 2015) was to investigate opportunities for oceans economy in the Northern Cape Province.

6.2 The Potential of the Ocean Economy in the Northern Cape

The potential of the Ocean Economy in the Northern Cape was done by the Northern Cape Provincial Treasury in 2017 and highlight the benefits of the ocean economy and identify areas to be explored in the Northern Cape Province. This paper identified three main economic areas which the Northern Cape can capitalise on in order to yield maximum economic growth and employment in the ocean economy space. These areas are aquaculture, the Port Nolloth small harbour as identified in Operation Phakisa, and coastal and marine tourism. The paper recommended developing an ocean economy strategy and its implementation plan that will help the province to realise the potential of its maritime resources.

The study concluded by stating that increasing aquaculture production, developing small harbours and promoting coastal and marine tourism in the province can help speed up economic growth of the province and create jobs.

7. Oceans economy Overview

7.1 GDP Contribution

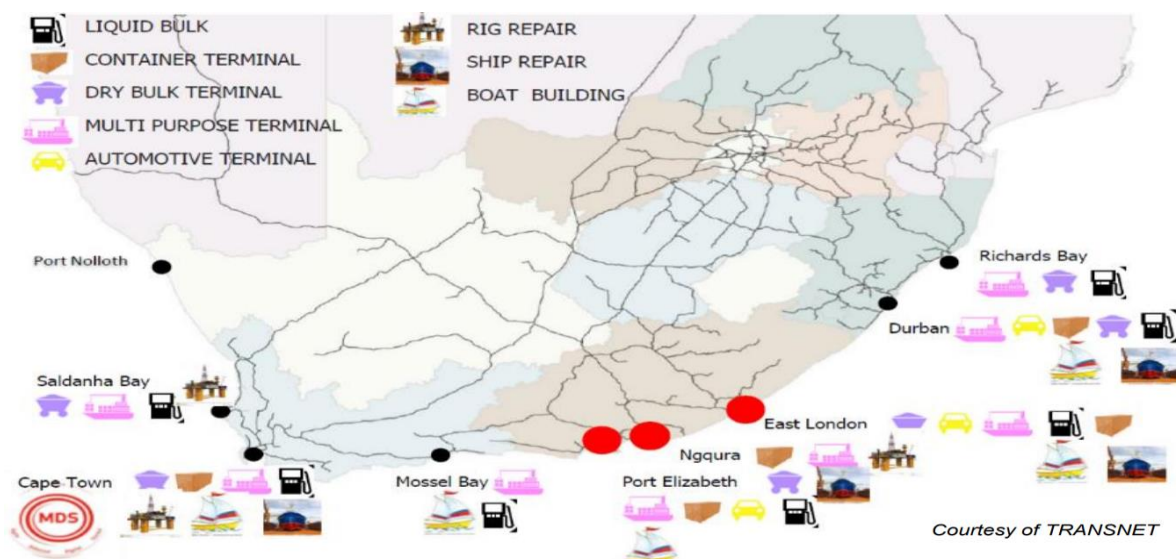
It is estimated that the oceans economy has the potential to contribute up to R177 billion to Gross Domestic Product (GDP) by 2033 (compared to R54 billion in 2010) and create approximately 1 million jobs (compared to 316 000 in 2010).

7.2 Oceans Economy Impact

Operation Phakisa: Oceans Economy commenced with operational work after the October 2014 launch. Overall progress to date for directly funded Oceans Economy projects impacts includes:

- Government has unlocked investments amounting to approximately R 29.4 billion for direct project funding in the Oceans Economy.
- Over 7 351 jobs have been created in the various sectors.

7.3 Economic viability



Port of Port Nolloth is one of the nine ports in South Africa (Richards Bay, Durban, East London, Ngqura, Port Elizabeth, Mossel Bay, Cape Town, Saldanah Bay and Port Nolloth) which have been determined as a port according to the National Ports Act 12 of 2005, section 10 (2). While Boegoebaai is still at the planning phase. The other eight (8) ports are operational and recognised as point of international entry into the country. However, Port of Port Nolloth has been neglected and it is the only one that is not operating as a point of entry into the country and does not comply with international standards and requirements.

Transnet has identified Boegoebaai as a potential site for harbour development particularly in maritime transporting. This is firstly because of the feature of the site and secondly that it is placed relatively close to rich mining and agricultural sectors as compared to the other two ports in the province.

8. Strategic thrust

South African government was introduced to the Big Fast Results Methodology in August 2013 through which the Malaysian government achieved significant government and economic transformation within a very short time. The Big Fast Results approach was renamed Operations Phakisa and adapted to the South African context. In order to unlock the oceans potential teams from government, labour, business, academia and other sectors to work together in experimental laboratories, to explore all possibilities and the following were the results:

Marine Transport and Manufacturing

This focus area emanated from the premise that we have not exploited South Africa's strategic location, infrastructure and skills base to accelerate growth of this sector. In spite of the fact that each year, three hundred million (300 million) tons of cargo moves through our ports in imports and exports, there is a concern that South Africa currently has no registered ships. South Africa is ideally positioned to serve the East-West cargo traffic and the booming African offshore oil and gas industry, through marine manufacturing, which includes ship and rig repair, refurbishment and boatbuilding. Despite this competitive advantage, we currently capture only one % of the global market of ship repair and refurbishment. Of the eighty oil rigs estimated to be in the range of the Western Cape, only four rigs are serviced per year, showing significant potential for growth.

Therefore, the marine transport work stream developed eighteen initiatives across three categories, infrastructure and operations, skills and capacity building as well as market growth to accelerate sector growth.

The Lab recommends the following 18 initiatives for marine transport and manufacturing

A Infrastructure and operations	B Skills and capacity building	C Market growth
<ol style="list-style-type: none"> 1 Create supportive funding and revenue model 2 Establish purpose-built oil and gas port infrastructure by appointing Facility Operators – Saldanha Bay 3 Align on Implementation of government policy 4 Prioritise Transnet and TNPA funding allocation towards marine manufacturing 5 Maintain and refurbish existing facilities 6 Unlock investment in new and existing port facilities 7 Implement Strategic Prioritised Project – Richards Bay 8 Implement Strategic Prioritised Projects – East London 	<ol style="list-style-type: none"> 9 Train 2,550 TVET College graduates on an 18-month Workplace-based Experiential Learner Programme in scarce and critical trades over the 5 year period 10 Create dedicated Occupational Teams for MTM Sector (professional, trades, operators and seafarers) 11 Establish trade RPL, CBMT or Centres of Specialisation in Saldanha Bay and Richards Bay 12 Train 18,172 learners as artisans, semi-skilled workers and professionals over the next 5 years 13 Increase usage of ESSA system and targeted career awareness services as a high value recruitment tool for MTM 14 Increase capacity to develop skills for ~1,200 ratings and ~720 officers per year 	<ol style="list-style-type: none"> 15 Create and implement a public procurement and localisation programme 16 Develop a strategic marketing campaign and value proposition for target markets 17 Propose inclusion of preferential procurement clause in the African Maritime Charter 18 Support local registry of vessels through incentives and legislation of using SA-flagged ships for cargo and coastal operations (based on United Nations Conference on Trade and Development and African Maritime Charter guidelines)

i. TNPA – Transnet National Ports Authority
 ii. ESSA – Employment Services of South Africa
 iii. TVET – Technical and Vocational Education and Training

iv. RPL – Recognition of Prior Learning
 v. CBMT – Competency-based Modular Training

Offshore Oil and Gas Exploration

South Africa's coast and adjoining waters have possible resources of approximately nine billion barrels of oil which is equivalent to 40 years of South African oil consumption. Furthermore, there is eleven billion barrels oil equivalent of natural gas, which is equal to three hundred and seventy-five years of South African gas consumption. However, there is significant uncertainty about the extent of these resources which resulted in the work stream developing eleven initiatives and setting an ambitious target of drilling 30 exploration wells in 10 years.

Aquaculture

While aquaculture contributes to almost half of the global fish supply, it contributes less than 1% of South Africa's fish supply. However, there is significant potential for rural development, especially for marginalised coastal communities. eight initiatives to spur the growth of the sector were identified including but not limited to funding support, increasing the skills pool and awareness and improving access to markets.

Marine Protection Services and Ocean Governance

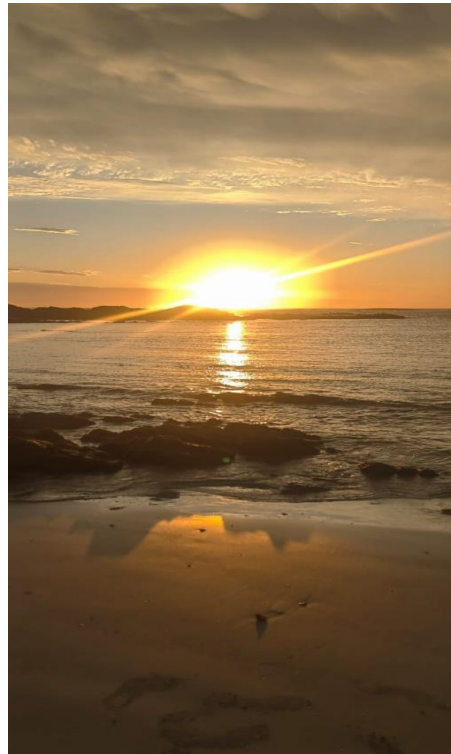
The Marine Protection Services and Ocean Governance focus area looked at South Africa's jurisdiction over a very large exclusive economic zone, with an extent of one and a half million square kilometres. This work stream undertook the task of developing an overarching, integrated ocean governance framework for the sustainable growth of the ocean economy.

Small Harbours Development

The work stream aimed to develop un-proclaimed small harbours that have potential for both harbour infrastructure, marine and offshore aquaculture, small towns precinct development, tourism and EPWP job creation in Boegoebaai, Cape St Francis, Hibberdene, Port Alfred, Port Edward, Port Grosvenor, Port Nolloth, Port Shepstone and Port St Johns. The small Harbour Tune-up has indicated that it could create 12 000 new jobs and contribute to the Gross Geographic Product by R6 billion by 2019. To date there still no functioning harbour in Port Nolloth though there some developments in terms of planning.

Coastal and Marine Tourism

<p>Conservation and sustainability: Implementing policies and practices to safeguard marine ecosystems, protect biodiversity, and ensure the long-term viability of ocean resources.</p>	<p>A strategic thrust for the ocean economy involves prioritizing initiatives and actions aimed at maximizing the sustainable utilization and development of marine resources. This includes:</p>	<p>Economic diversification: Promoting the expansion of industries such as fishing, aquaculture, marine tourism, renewable energy, biotechnology, and maritime transport to diversify economic opportunities within the ocean economy.</p>
<p>Innovation and technology: Investing in research,</p>		<p>Infrastructure development:</p>



9. Analysis

OCEANS ECONOMY: INVESTIGATING OPPORTUNITIES IN NC

The two regional fishing nodes in the Northern Cape are at the towns of Port Nolloth and Hondeklipbaai.

The province also has an abundance of diamond deposits both onshore and in marine deposits. This has led to the development of a large diamond mining sector, which has become the dominant activity of the Northern Cape's coastal zone. Diamond deposits are so extensive along the coast that mining companies hold the mineral rights and diamond concession areas covering most of the coast.

In the Northern Cape, Port Nolloth, Boegoebaai and Hondeklipbaai were identified as having huge potential for both harbour infrastructure, marine/aquaculture, small town precinct development, tourism and job creation through projects of Expanded Public Works Programme (EPWP) (Department of Public Works, 2015).

Opportunities for Oceans Economy

Aquaculture – beneficiation, boats and licenses

Aquaculture is defined as the rearing of aquatic animals or the cultivation of aquatic plants. In the 1990s and early 2000s globally, aquaculture has grown as a sector, such that nearly half of the fish products consumed around the world are produced in fish farms. Africa has however failed to take advantage of this growing sector as it only has a 1 per cent share of the global market, and South Africa only accounts for 1 per cent of African production (Feike, 2008).

Climatically, the Northern Cape coastline is suitable for farming a variety of marine fish species. It provides the coolest water along the South African coast, an important prerequisite for fish farming. Successful aquaculture experiments at Kleinsee (in abalone and Oysters), at Port Nolloth (in abalone) and Hondeklipbaai (also in abalone), justify expansion of these species and experimentation with fin-fish farming (Feike, TIPS, 2008).

The Northern Cape coast is also suitable for cultivation of high-value marine food such as salmon, trout, kabeljou, turbot and other indigenous line fish species (Engineering News, 2000). There is a potential for farming seaweed on the Northern Cape coast, especially if agar (a gelatinous substance made from seaweed, widely used in the East in food and bacterial cultures) is extracted locally. In addition, opportunity exist of introducing high-value species of brine shrimp in the Northern Cape. There is also a gap in the market for frozen brine shrimp biomass, which is used as feed for aquarium fish (Engineering News, 2000).

Operational Phakisa (coastal tourism lab) has prioritised the following subsectors:

- Boat and river cruises
- Adventures
- Products for beach tourism
- Development of tourism coastal nodes

- Ports and harbour tourism
- Beachfront infrastructure
- Water based activities
- Community based tourism
- Youth Programmes- paddling, diving etc.
- Filming industry

10. Fieldwork (Investigation, analysis and Recommendations)

Part of this report include a fieldwork within Alexander Bay, Port Nolloth, Kleinsee, Hondklipbaai and Springbok to investigate untapped opportunities as well as hindrances so as to provide recommendations.

10.1 Alexander Bay

Observation

Alexander Bay is a small mining town located on the Southern Bank of the Orange River. The Orange River meets the Atlantic Ocean at Alexander Bay. The Orange River wetland forms the border between South Africa and Namibia. Key economic activities in the area are Tourism (Oranjemund, 4x4 Eco Tail); Agriculture (Beauvallon) and Mining (Alexkor, ReMax). However, mining drives the greatest economy activities in the area.

Infrastructure:

- The town has a lot of old infrastructure and not much new infrastructure development in and around the area.
- Roads are poorly maintained and a vigorous need to facelift/build new road in the small town with enormous potential
- Little to no signage in the town.

Education:

- The town has a total of 2 schools in the area namely Alexanderbaai High School and Gassie Marree Primary School.

- There are schools around the surrounding towns (Kubus) and (Sandrift) namely Johan Heins Primary School in Kubus and Dryfsand in Sandrift. These schools are feeders to the **Alexandra Baai High School**.
- The mentioned schools are distinctive primary institutions that actively preserve Nama culture, offering instruction in the language and promoting adherence to its cultural practices

Tourism:

- Orange River Mouth is the biggest tourist attraction.
- Most of the tourism site are stationed in the mining operational area and great potentials.
- Namakwa 4x4 Eco Trail

Interviews: Wilma James (Namakwa Tourism Guide)

NAMAKWA 4X4 ECO TRAIL

The trail starts in Pella with camping sites along the route and ends in Alexander Bay. The camping sites are divided in two packages; the Namakwa package (sites on the banks, or very close to, the mighty Orange River) and the Richterveld package (sites are not on the river banks). The Namakwa package is entry to the trail from Pella to Vioolsdrift and the Richterveld package is from Vioolsdrift to Alexandra Bay as the exit to the trail. The project employs two personnel one (1) permanent and one (1) temporary. The project is reliant on mainly on funding models from both government and private sector as partners.

CHALLENGES
There are no camping facilities available for 4x4 Eco trail clients upon reaching Alexander Bay, as it marks the culmination of the trail.
Lack or no accommodation facilities for influx of tourists or clients
Pella, serving as the starting point, lacks a satellite office for the Namakwa 4x4 Eco Trail, resulting in a lack of oversight regarding the number of 4x4 vehicles on the trail, thereby raising safety concerns for clients due to the absence of vetting and administration.
The communities along the route do not benefit from an added value chain, as local businesses fail to seize the opportunity to cater to 4x4 clients.
Limited access to funding poses a challenge.

Many tourist attractions are situated within the mine.
There exist significant barriers to entry onto the mine premises.
POTENTIAL
To tackle the issue of accommodation shortages, there is a camping site called Pagvlei that was once in operation but has since been abandoned and is now deteriorating. This site could potentially serve as a solution to the accommodation challenge.

POTENTIAL

The Orange River Mouth

The Orange River stands out as one of the primary tourist attractions in Alexander Bay. Consequently, many tourists completing the 4x4 trail express a keen interest in witnessing the convergence of the Orange River Mouth. The tourism potential associated with this sight is significant.

However, a challenge arises as vehicles are not permitted to drive on the beach, necessitating a walk to the Orange River Mouth for a clear view of where the Atlantic Ocean meets the Orange River. Alternatively, visitors can view the mouth from a distance while remaining in their vehicles. To address this issue, the Namakwa 4x4 Eco Trail has introduced horseback riding and horse/donkey carts along the beach, providing assistance to tourists seeking access to the Orange River for viewing purposes. This horse-riding initiative also contributes to the community by employing local residents to provide chauffeured horseback rides with their own horses. The project operates with four horses specifically designated for this purpose.

CHALLENGES
Access to the Orange River Mouth
Most tourists are interested in viewing the Orange River Mouth but there is no accommodation in Alexander Bay.
Limited horses for a large influx of tourist wanting to see the Orange River Mouth
Environmental protection rights limit any construction of infrastructure on the beach
No maximum utilisation of tourism opportunities in and around the Orange River Mouth

POTENTIAL
Fishing at the Orange River Mouth
Ranching

Agriculture (Beauvallon Farm)

Richtersveld Growers Project

The Richtersveld Growers project, situated along the banks of the Orange River, has formed a Joint Venture Agreement with Richtersveld CPA, establishing ownership of the irrigation farms: Dunvlei, Beauvallon, Brandkaros, Beesbank, and Arriesdrft. The Northern Cape Provincial Government has further invested R6.7 million in farming equipment for the Richtersveld Growers farm in the Namakwa District (Mzansi Agriculture Talk, 2024), enabling the development of 400 hectares of land across these areas.

This project has the potential to generate 290 jobs, consisting of 90 permanent positions and 200 seasonal positions, providing employment opportunities for many community members. The farm cultivates a variety of crops, including raisins, onions, wheat, maize, lucerne, and potatoes. Richtersveld Growers recently tapped into the raisin market in Upington, facilitating the transportation and delivery of their raisins to the area. The remaining produce is sold in local markets, contingent upon prevailing market prices.

CHALLENGES
Road infrastructure
Accommodation
Access to markets
No economic stimulus besides the mines
No social upliftment from the mines
POTENTIAL
Fishing at the Orange River Mouth, however, there is no accommodation in Alexander Bay.

There should be more focus on tourism because it is a long-term investment.

Camping sites for 4x4 Eco Trail clients

Surrounding study areas – DFFE (Site Assessment Report), 2022.

Sanddrift (Aquaculture)

Sanddrift is a small town located approximately 50 km inland of Alexander Bay along the Orange River. The Sanddrift site is currently situated approximately 40m above the Orange River and the area and size of the land is large enough to farm the freshwater species, Nile and Mozambique tilapia, African sharptooth catfish including freshwater ornamentals species since temperatures range from 13 °C to 30°C in the area.

CHALLENGES

Access to markets

Road infrastructure

Access to land and water, which are key attributes for aquaculture
--

Dinvlei

The Dinvlei site has the most potential for freshwater aquaculture based on the location in Alexander Bay next to the Orange River, size of the land, water source availability and existing infrastructure due to the previous cattle farm. The climate conditions are suitable for farming Tilapia African Sharptooth Catfish.

CHALLENGES

Access to markets

Rietfontein

The Rietfontein site shows potential for marine aquaculture is located in the mining area between Alexander Bay and Port Nolloth. Since it was a previous pacific oyster

farm, there is infrastructure on site (e.g. dam). The site is in close proximity to the ocean and there appears to be sufficient land for an economically viable project. However, there are mining activities currently taking place on site and there is uncertainty of how the two activities can co-exist.

Recommendation: Further investigation is also required to gain an understanding of why the initial oyster farm closed, so as to not to repeat any mistakes of the past.

The scoping of the three sites Dinvlei, Reitfontein and Sanddrift highlighted the need for aquaculture technical partners and aquaculture skills development required to develop an aquaculture sector in the Northern Cape. The current road infrastructure needs maintenance and upgrading. If an aquaculture sector is developed in the area, it would rely solely on the N7 to move product into and out of the region, limiting development to the domestic market. It is therefore recommended that other infrastructure in terms of air and marine transport be investigated to open up export markets.

FINDINGS

The fieldwork included questionnaires distributed within Port Nolloth, Alexander Bay and Kleinsee. Most of the people interviewed in Port Nolloth and Alexander Bay were coloured, female and within 36-45 age range, while in Kleinsee participants were mainly whites, female and three participants from 15-25, 26-35 and 56-65 age groups participated.

The majority of the participants in Alexander Bay have Secondary levels followed by tertiary and are employed while other are pensioners and entrepreneurs. Most participants find economic activities beneficial and the mining sector is the main economic activity followed by agriculture, tourism and farming. The major hindrance to economic potential was highlighted as infrastructure and solution to that was

establishing a committee to develop a plan of action to deal with blockages. The participants suggested that recycling, manufacturing, tourism, agriculture, fishing, beach projects and small-scale mining could boost the economy in the area and this will require financial resources to unlock the potential. Participants stated that SMME's were not involved in the Oceans Economy.

DEMOGRAPHY

Figure 1: GENDER ALEX

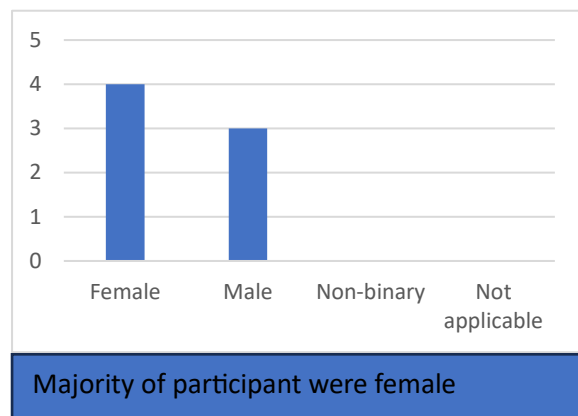


Figure 2: AGE ALEX

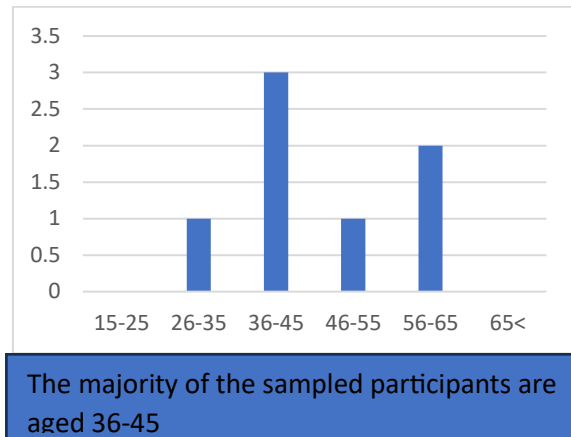


Figure 3: ETHNICITY (ALEX)

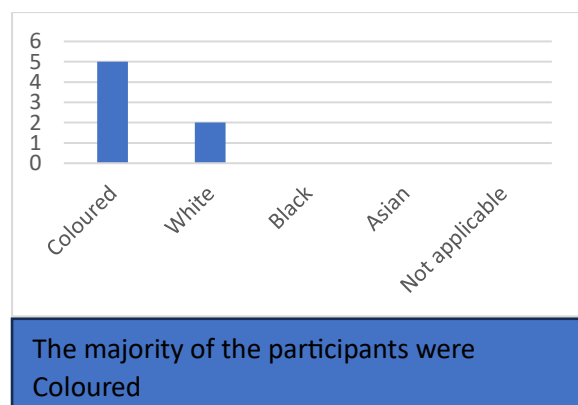
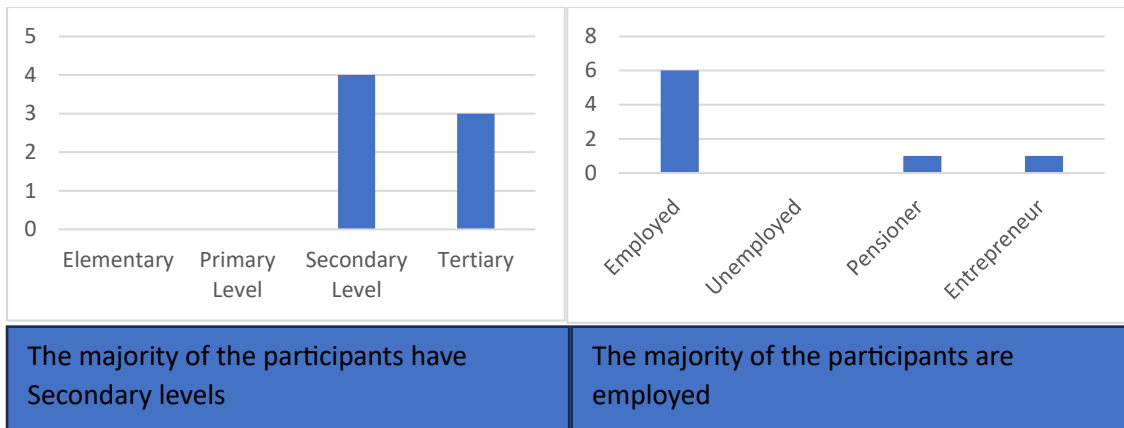


Figure 4: EDUCATIONAL BACKGROUND ALEX

Figure 5: OCCUPATION ALEX



UNDERSTANDING THE ECONOMIC LANDSCAPE

Figure 6: MAJOR ECONOMIC ACTIVITIES ALEX

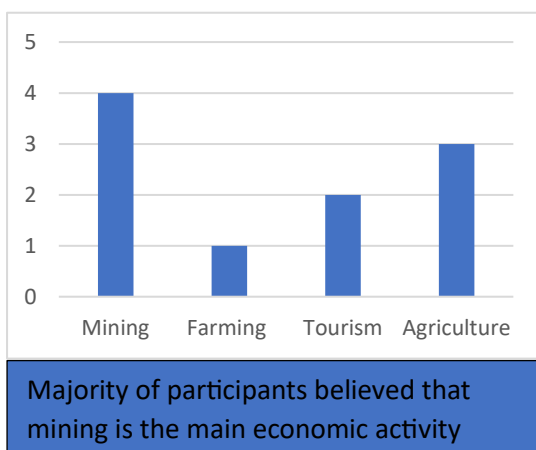


Figure 7: ECONOMIC ACTIVITIES ARE BENEFICIAL ALEX

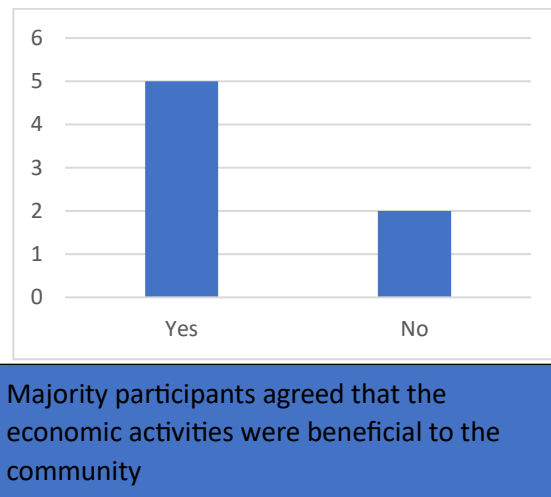
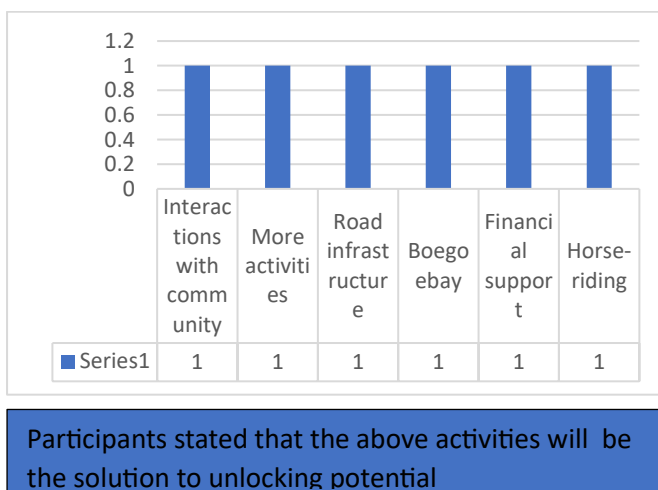
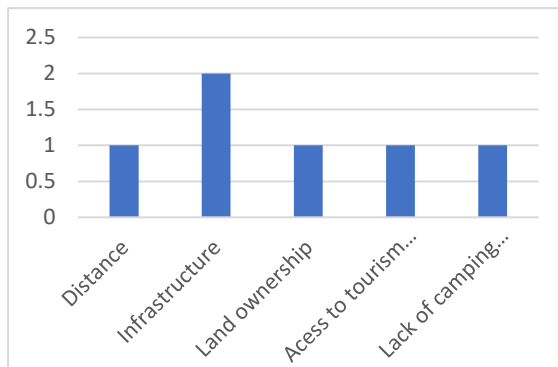


Figure 8: SOLUTION TO UNLOCKING POTENTIAL ALEX



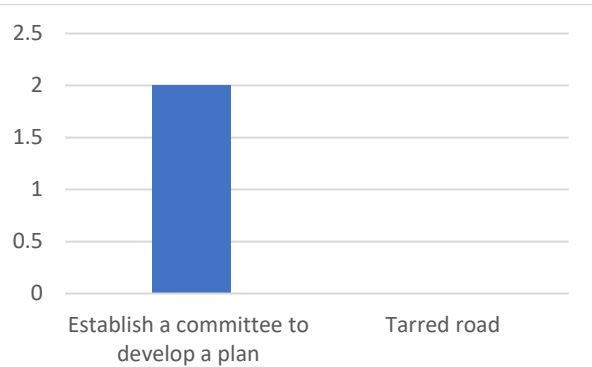
BLOCKAGES/CHALLENGES HINDERING ECONOMIC POTENTIAL

Figure 9: MAJOR CHALLENGES ALEX



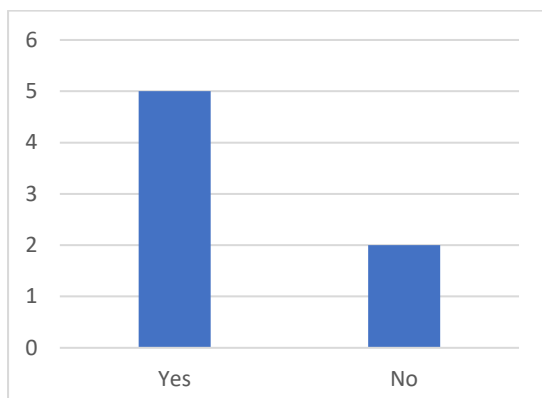
Infrastructure was identified as the major challenge in the community

Figure 10: SOLUTIONS



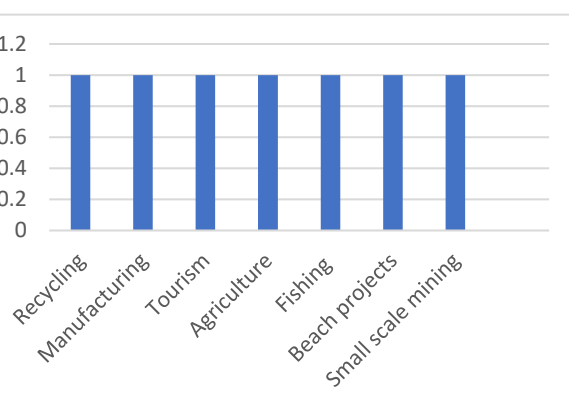
More emphasis put on establishing a committee to develop a plan of action was suggested as a

Figure 11: SUFF RESOURCE UNLOCKING ECON ACTIVITIES



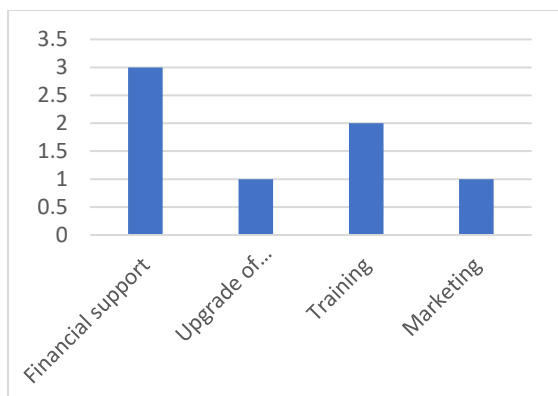
Majority of the participants agreed that there is sufficient resources to unlock

Figure 12: INITIATION TO BOOST ECON ACTIVITIES



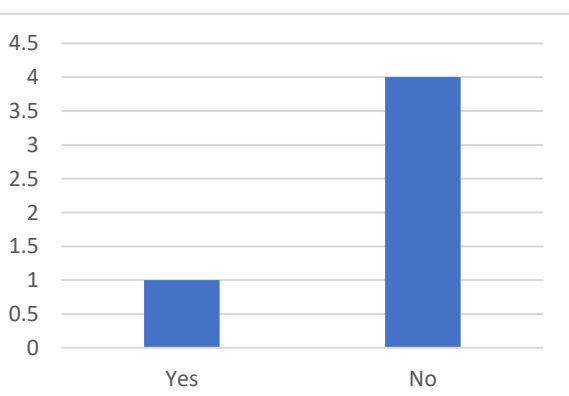
Participants agreed that all the above activities could boost the economy

Figure 13: SUPPORTED NEEDED TO UNBLOCK ECON PROJECT



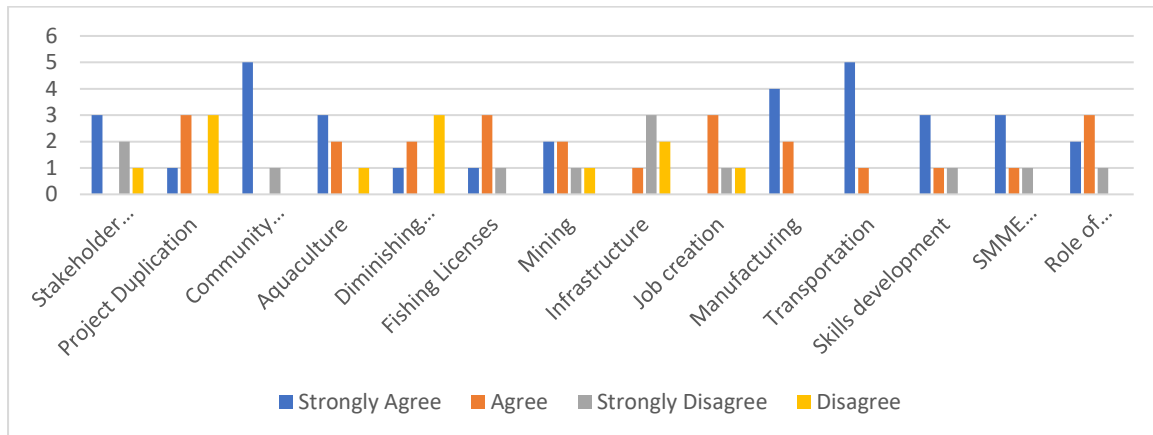
Financial resources were needed to unblock economic projects

Figure 14: SMME INVOLVEMENT ALEX



Participants stated that SMME's were not involved in the Oceans Economy

Figure 15: STATEMENTS ALEX



10.2 Hondeklipbaai



Observation

Hondeklipbaai is located on the west coast of South Africa, approximately 570 km from Cape Town. Hondeklipbaai is known for its fishing opportunities that are used by people living in Cape Town. The town offers the opportunity of catching tuna, yellowtail fish, cape bream fish, snoek and crayfish. However, snoek and crayfish are mostly caught by the fishermen as the other types of fish are scares in their area.

The biggest challenge is that fishermen travel from Cape Town with permits to catch snoek and crayfish and transport it back to their city for various activities. the community is not benefitting from the fishing activities that are taking place. As a result, there is no financial injection into the town. Therefore, community members are highly dependent on EPWP interventions for income.

Due to limited economic activities in the area, community members travel to Springbok to purchase groceries and their essential items. They spend close to R400 or R500 for a return trip to Springbok. Key infrastructure support needs were highlighted in supporting the Honderklipbaai Development:

Fish storage facilities

Small-scale fishers encounter difficulties in storing fish, leading them to sell below market price to avoid spoilage, inability to freeze fish for transportation, and inability to maintain stock for future demand. These challenges diminish the potential value of each to catch, leaving fishers with limited economic empowerment.

Processing facilities

Hondeklipbaai lacks formal fish processing facilities, and fishers cannot economically access distant ones. Consultations with local fishers revealed that basic fish gutting, filleting, scaling, and freezing facilities are needed to meet both the available fisheries resource and the immediate needs of the fishers.

Small-scale fisheries development nodes centred around cooperatives

The Small-Scale Fisheries Policy emphasizes the importance of value addition throughout the supply and value chain, along with capacity building and technical support for small-scale fishing communities. This ensures that these communities can

benefit from the Policy and fishing rights allocation to community-based legal entities. Small scale fishery cooperative has been established; however, it is not functional.

Challenges Identified: Challenges faced by Hondeklipbaai small-scale fishers include:

Low-profit margins (No storage etc)	Limited access to services
Limited growth potential	Organizational structures
Regulatory constraints	Access to markets
Remote location	Lack of skills/educational capacity
Infrastructure	

Recommended Interventions: Specific interventions proposed include:

Constructing lobster and fish processing facilities	Acquiring fishing vessels,
Upgrading infrastructure	Capacity building
Establishment of co-operatives for lawful access to fisheries resources and participation in abalone ventures	Stakeholder buy-in and coordinated development approach
Specialist expertise, and support for co-operative structures.	

Fishing activities at the Hondeklipbaai



Dilapidated building of Oceania that was previously used to harvest fish



Admiral property that belongs to the Department of Public Works

10.3 Kleinzee

Observation

Kleinzee, located on the west coast of South Africa's Northern Cape province at the mouth of the Buffels River, is a small village. Positioned just south of Grootmis, it sits 72 km southeast of Port Nolloth and 105 km west of Springbok. Historically, Kleinzee was a closed company town renowned for its diamond mining operations until the

2000s. Evidence of its past prosperity is apparent in the aged and poorly maintained infrastructure, including settlements and roads.

The area's history as a closed mining town under De Beers reflects a lack of diverse economic activities within the small town, known locally as a "dorpje." Presently, the Abalone Farm and the VSM company, which supplies kelp for the abalone farm, are the primary operational stakeholders. Recently, there has been renewed activity in mining, with Kleinzee Holding undertaking efforts to revive old mines in the area. Given this context, it is important to mention that the area is also notorious for illegal mining activities, known locally as "zama-zama." This explains the heightened importance of roadblocks by both the South African Police Service (SAPS) and military personnel when entering and exiting the town during our visit to the area.

Scoping the area

To gather primary data, we opted to conduct interviews with a prominent local business in the engineering sector to gain insights into the area's current situation. Our second participant was the owner of the Abalone Farm, a key stakeholder in the region that provides employment opportunities to the community. Despite our efforts, we were unable to obtain information from Kleinzee Holdings

Kleinzee engineerings

The owner indicated that he has been in operation for over forty years, and only recently received the title deed to his workshop from De Beers Holdings. Since De Beers' departure, business has slowed down, prompting him to sell machines to external stakeholders, including Kleinzee Holding. One of the challenges he has encountered is that, due to the sluggish market, some external clients, who are not properly vetted, engage in illegal mining activities. Consequently, many of the machines he designed for legitimate use by diggers were confiscated by the Kleinzee (SAPS). Additionally, he expressed his willingness to share his engineering skills with the local community if given the opportunity.



Abalone farm

The farm was established in 2018 and faced adverse effects from the COVID-19 pandemic, resulting in market closures. However, it is now gradually returning to pre-pandemic levels. The farm operates under a funding model and receives support from the Department of Forestry, Fisheries and the Environment (DFFE) and Agri Seta.

Apart from farming, the main economic activities in the area include the Oyster Hatchery and Mining. The Abalone farm primarily serves clients in Asia, particularly in Hong Kong and Taiwan.

The farm employs nearly 60 permanent staff and approximately 50 temporary workers. Once harvested, the Abalone is transported to Buffelsjags Farm, where it is processed according to market demand, whether for live sale, canning, or drying.

CHALLENGES

No road infrastructure making it difficult for accessibility to the market and costly for wear and tear

No attraction stimulus in the area to unlock economic activities
No to little tertiary service and their self-reliant for basic services
Illegal mining

SITE EXCURSION

Processing of Abolone:

Receiving Point 1

Abalone is procured from Buffelsjags and Abagold in Hermanus and they are received via trucks from the breeding plants to Kleinzee. The abalone is separated, sorted stored in their respective net basket which they'll live in for plus minus 5 years.



The Abalone farm at a glance



At 6 months the Abalone is graded and scaled to check how far they've grown, required or standard length is at 25mm



FEED



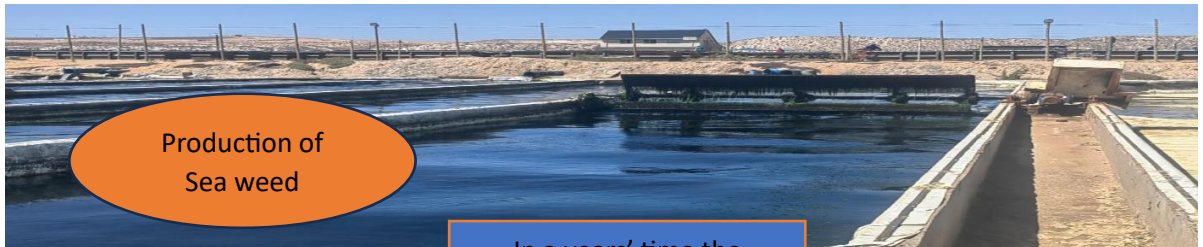
VSM TRUCK
delivering KELP feed



KELP

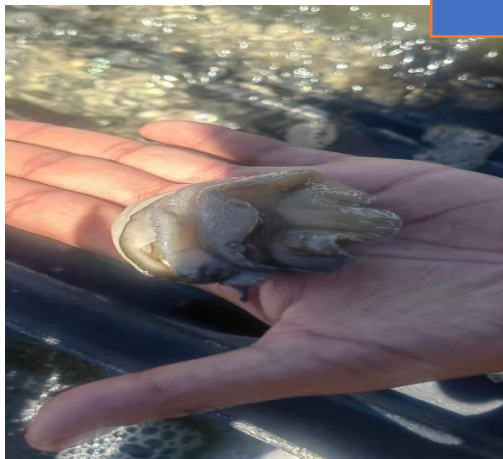


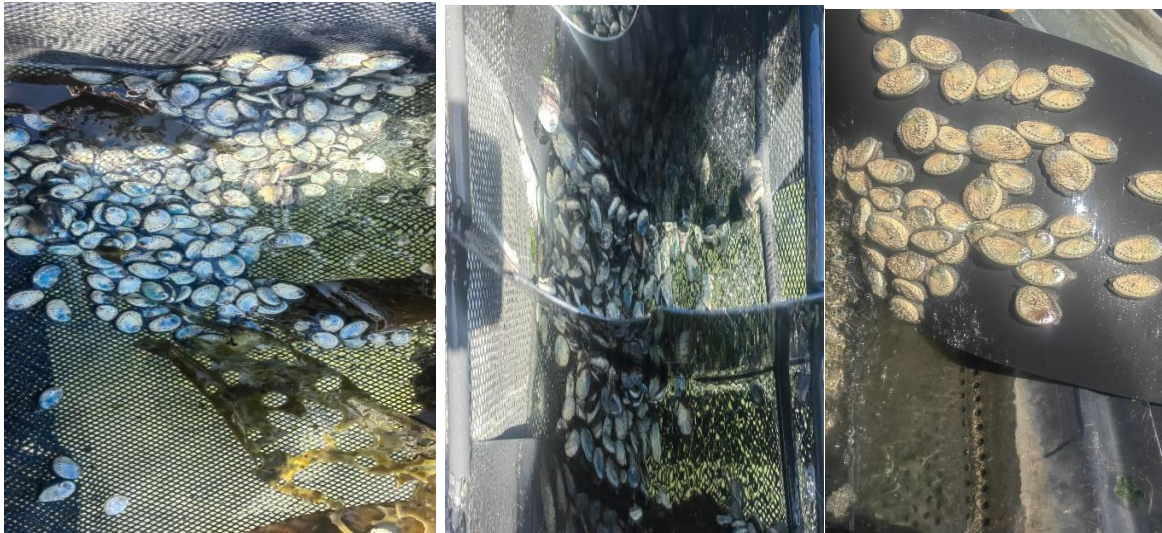
DRY
KELP



Production of
Sea weed

In a years' time the
abalone is graded again to
check on the growth
through grams





The last grading happens when their ready for exporting



The bigger and heavier the Abalone the more in value in the market. Given the Abalone has not reached maturity stage it is taken back to the ocean and re-harvested when ready. This is to grow it on natural environment





Final Destination



FINDINGS

Most of the participants from Kleinsee are employed and have tertiary education followed by secondary. The major economic activity is mining and abalone farming followed by kelp farming which most participants believe are beneficial. Since the road infrastructure is a major challenge, majority of participants believing building tarred would unlock the potential of the town. As opposed to Port Nolloth and Alexander Bay, participants in Kleinsee stated that SMME's were involved in the Oceans Economy.

DEMOGRAPHY

Figure 16: GENDER KS

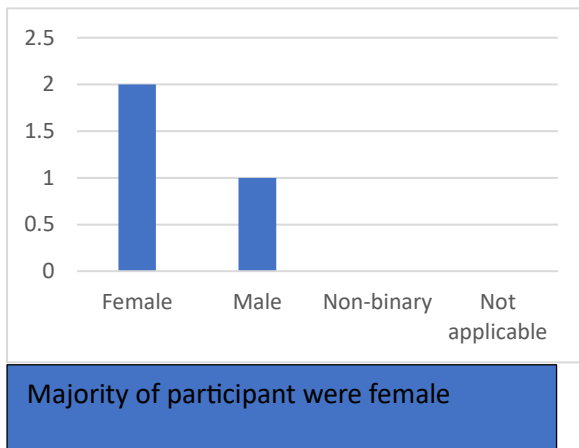
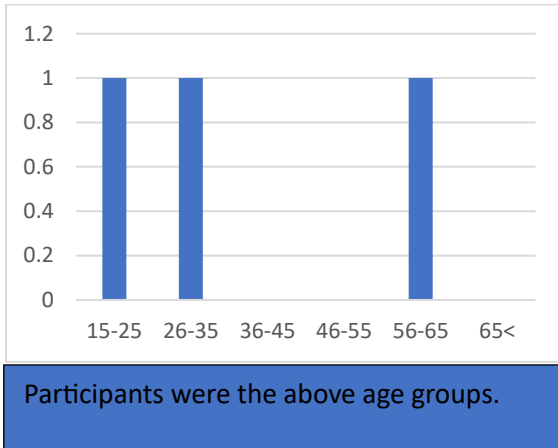


Figure 17: AGE KS



Ethnicity

Figure 18: RACE KS

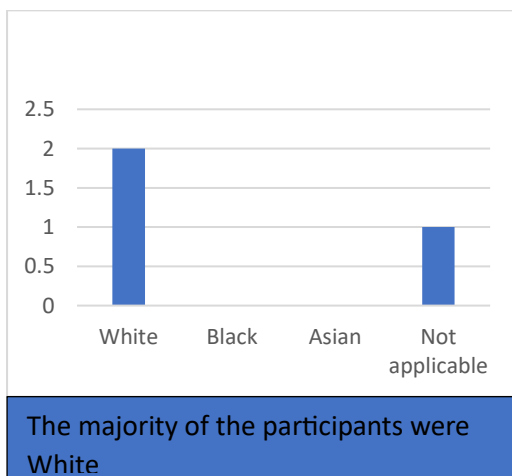
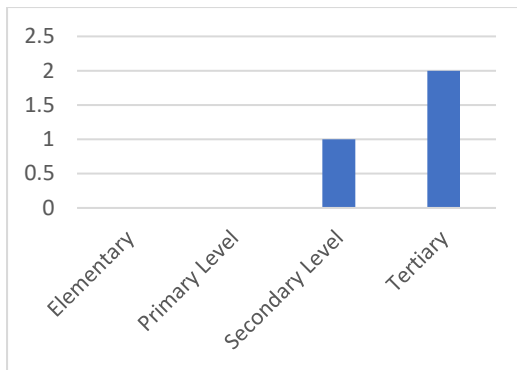
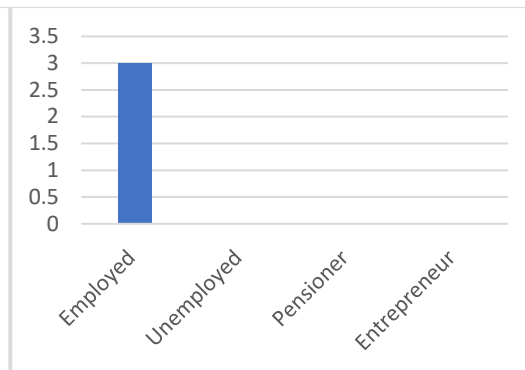


Figure 19: EDUCATIONAL BACKGROUND KS



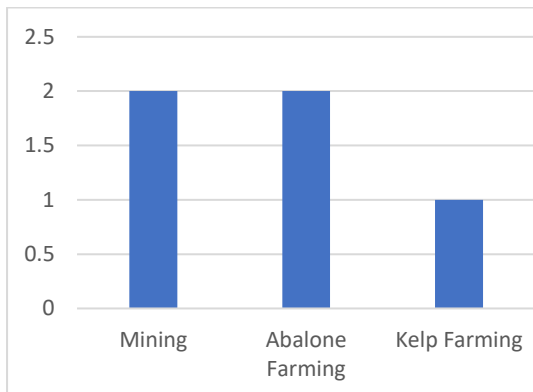
The majority of the participants have Tertiary levels

Figure 20: OCCUPATION KS



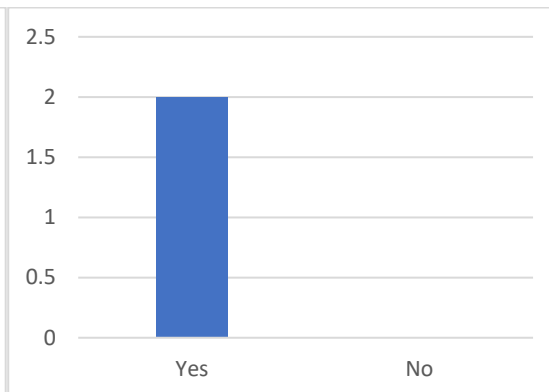
Majority of participant were employed

Figure 21: MAJOR ECON ACTIVITIES KS



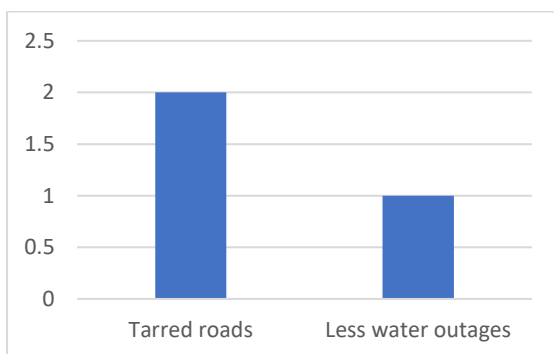
Majority of participants believed that mining and Abalone Farming are the main economic activity

Figure 22: ECON ACTIVITIES ARE BENEFICIAL KS



Majority participants agreed that the economic activities were beneficial to the community

Figure 23: SOLUTION TO UNLOCKING POTENTIAL KS



Majority of participant believing building tarred would unlock the potential of the town

BLOCKAGES/CHALLENGES HINDERING ECONOMIC POTENTIAL

Figure 24: MAJOR CHALLENGES KS

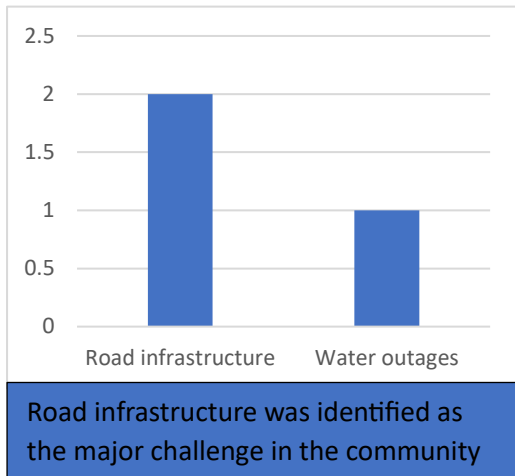
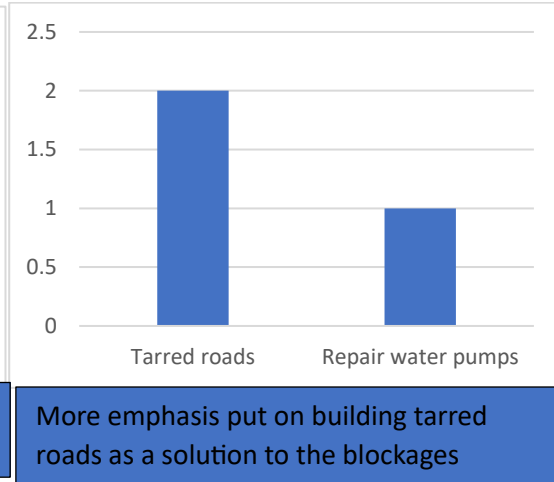


Figure 25: SOLUTION KS



ECONOMIC DEVELOPMENT OPPORTUNITIES

Figure 26: SUFFICIENT RESOURCES TO UNLOCK ECON

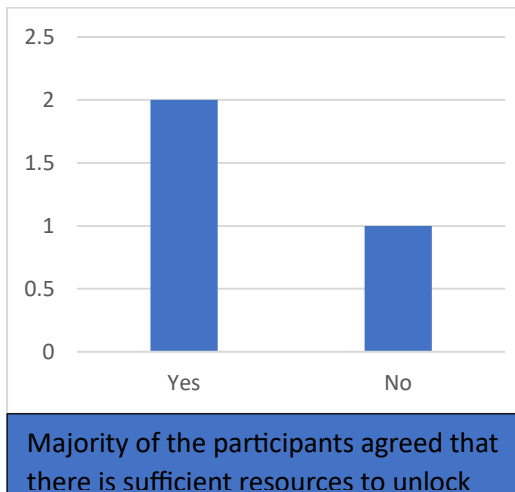


Figure 27: INITIATIVES TO BOOST ECON ACTIVITIES

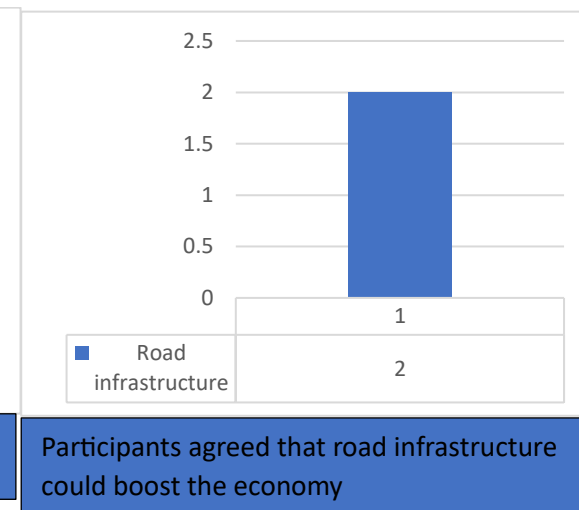


Figure 28: SUPPORT NEEDED TO UNBLOCK ECON PROJECT

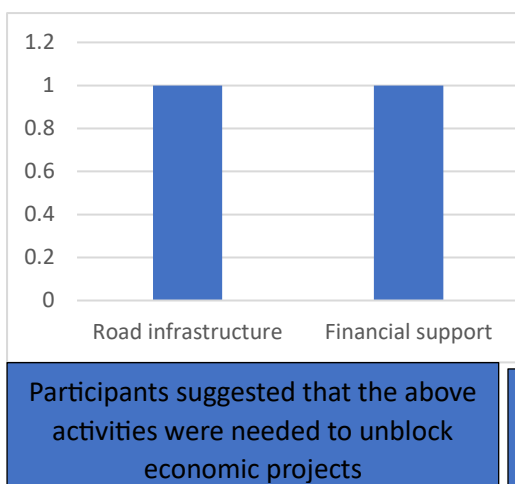


Figure 29: SMME INVOLVEMENT KS

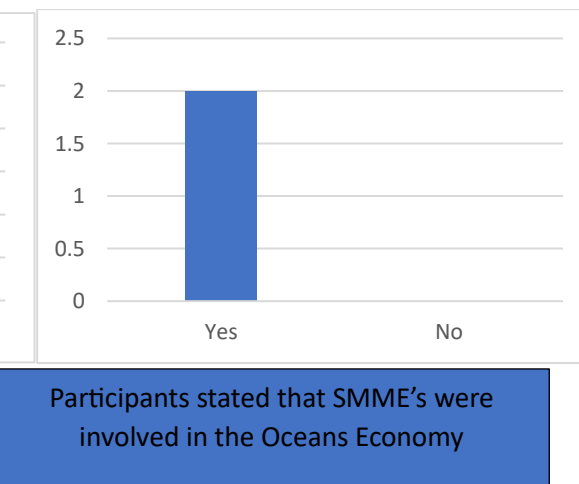
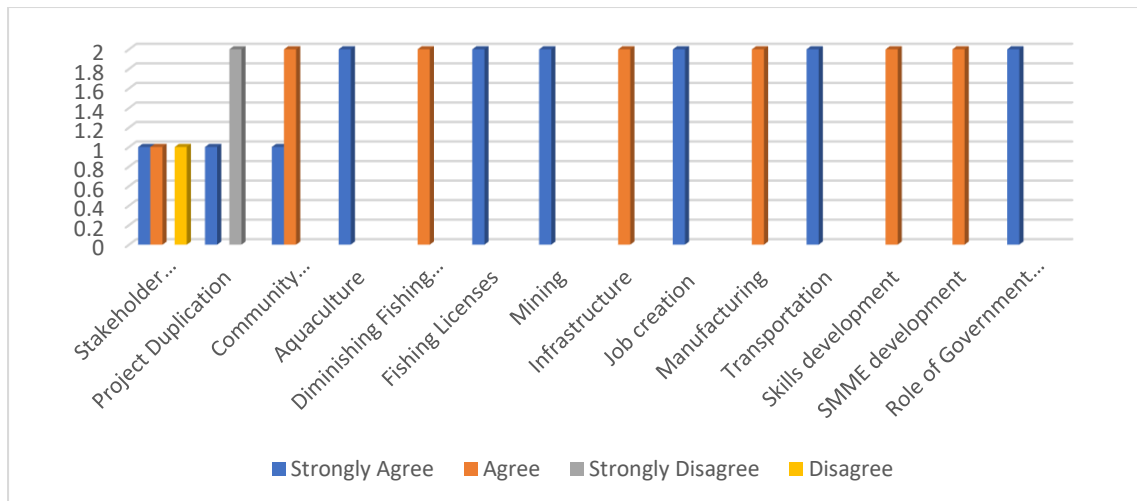


Figure 30: STATEMENTS KS



10.4 Port nolloth

Observation

Port Nolloth is a town and small domestic seaport in the Namaqualand region on the northwestern coast of South Africa, 144 kilometres northwest of Springbok. It is the seat of the Richtersveld Local Municipality.

Port Nolloth is the CBD of the Richtersveld area and is also the holidaymaker's destination of choice. The town is a sleepy commercial hub with a number of, accommodation establishments, restaurants, ATMs, and a petrol station. Tourists can enjoy the sun, sand and sea at McDougall's Bay, or experience Nama culture on day trips to the nearby villages of Kuboes, Eksteenfontein, Lekkersing and Sanddrift. It is also a gateway to the Richtersveld National Park, located 160 kilometres to the north along the Orange River.

Scoping the area

To gather primary data, we opted to conduct interviews with a Tourism Officer at the Richtersveld Local Municipality gain to insight on the existing and upcoming economic activities.

With the need to establish a port for the Northern Cape, it is important to note that there are 3 Ports planned/in the Pipeline

- The Port of Port Nolloth – Coordinated by Department of Transport
- Small Harbour Development project – Coordinated by Department of Roads and Public works
- Boegoebaai project – Coordinated by NCEDA

Re-opening port of Port Nolloth

Previously, Port Nolloth was operating as an international port. As a result, National Department of Transport and Transnet put plans in place to re-open the port as a international port. The port is within the standards of Department of Transport's requirements. The reason behind re-opening the port is to revive the economy of the municipality, as it needs a great boost. The port has the potential of unlocking opportunities for Port Nolloth and Richtersveld. However, it will be managed by port of Cape Town. This initiative has been prioritized because Boegoebaai port still has few years to go before it reaches completion.

Area reserved to act as port area



Source: Richtersveld Local Municipality, 2024.

Port of Port Nolloth will be operating as last port of call. This means that all vessels crossing the Port Nolloth borders, whether they are coming into South African waters, or leaving, will have to report to the boarder control and port officials even if they do not stop.

Opportunities that currently exists.

Plans are in place to ensure that all compliance requirements will be met by the 25th July. How do we make sure at a local government level that everyone is working together to ensure that services that are required are in place

- With the coastal traffic taking place there is a need for refreshment cruise changers and currently the nearest is in Cape Town, with the opening of the Port of Port Nolloth this will provide relieve on the Cape Town Ports
- There is an opportunity for expedition cruising – engagement with Silver Sea took place and they wanted to bring their first expedition cruise in March 2024, however due to the international requirements and compliance that the port needed to adhere to, they couldn't. Silversea is ready to dock at the current Tansnet National Port Authority (TNPA) Jetty with its current condition 2 more cruise liners are interested also.

Walvis Bay to Port Elizabeth

Leaving from Namibia's Walvis Bay, sail first for the famed elephant park of Ludritz. Then it's back on board for nine days in South Africa's dazzling diversity, where you'll stop off in Cape Town for an overnight, swim in the pristine waters of Mossel Bay and discover the game parks of East London. Complete your trip by sailing past the Cape of Good Hope and an overnight in Port Elizabeth, also known as the 'Windy City' or the 'Friendly City'.

Featured Expedition Host
Jan Conrad, Captain, Silver Cloud, Destination and Itinerary Management for 12 days of meaningful community engagement

CRUISE STARTS
MAR 23, 2024

CRUISE ENDS
APR 4, 2024

DURATION
12 DAYS

SHIP
SILVER CLOUD

The Silversea Expedition Cruise – planned to leave Walvis bay (Namibia) on the 23rd March stopover in Ludritz, then proceed to Port Nolloth, before continuing on their journey that will end in Port Elizabeth. Their plan was to stop over in Portnolloth, and

on in their 1st visit to planned have a braai with people of Portnolloth, then camp over at the Namakwa national Park with their 2nd visit.

CHALLENGES
Port will be managed by port of Cape Town
The closing of a portion of the road
Sufficient boarder control
Temporary landing site for zodiacs
Sufficient accommodation for newly deployed policing and border control officers
Caterers for special dietary needs
Sufficient medical supplies and enough medical staff
Pollution
Community policing
<p>The lighthouse has been identified a challenge in the risk assessment and TNPA is working on addressing the challenges that have been identified on the lighthouse, i.e.</p> <ul style="list-style-type: none"> ➤ The road to the lighthouse has been closed for the past 2 years ➤ Electricity has been cut off ➤ Lighthouse has not been operational for a while
POTENTIAL
Opportunities for recycling
Entertainment centres and theatres
Tour guides
Concierges – people waiting on 5 star guests
Boat restaurants
Event venues
Parks for walking, running and sprinting
Mechanic workshops
Boat shops
Yacht clubs
Green energy generation
Bigger hardware stores
Opportunity for courier companies

Divers for cleaning the ship, Painting etc
Beauty spa
Crew Change <ul style="list-style-type: none">➤ Disembark and new crew take over➤ Off signers (Will get off 7 days without Visa in the country)

Small Harbour Development



Dilapidated Fishing Jetty

Small Harbour Development project is part of the Operation Phakisa and is Coordinated by Department of Public works and Infrastructure. The project aims to renovate the currently dilapidated Fishing Jetty and build a small harbour which will be used for domestic purposes amongst others. The jetty belongs to DPWI. There are over 70 Small Harbours in the Country that are utilised for local operations and not international the aim is to have a small harbour in Portnolloth in the long run.

Boegoebaai Project

This is a deep see harbour development and it is currently in the planning phase. The aim is to build a deep harbour that will be utilised to export some of the goods outside the country. The Boegoebaai project also includes the green hydrogen project.

From above mentioned 3 ports, the Port of Port Nolloth is the only port that will require a less effort to have it operational to receive vessels and be utilised as a refreshment stop. Currently, the Department of transport is receiving requests for vessels that would like to stop over at Port Nolloth for refuelling and refreshment. This presents a great opportunity to revitalise the Port of Port Nolloth, which will also serve as precursor for the planned Boegoebaai port.

What will this mean for the municipality?

- A greater need for service delivery in terms of water, sanitation and up keeping of municipal infrastructure
- Serving a bigger community
- Identifying available land to be surveyed as residential and industrial areas
- Every new visitor is a potential investor whether it is the buying of holiday house or investment in business – it holds the potential of generating an income in terms of rates and taxes
- A tourism hub will become mandatory providing certain paid services such as compiled in the Tourism Hub proposal which is in progress
- If clientele picks up more staff might be needed over time
- The establishing of a fire station
- Relations with respective government departments to upgrade and utilize their existing infrastructure such as the fish factory for instance – this will have to be an ongoing process
- Establishing a public taxi rank

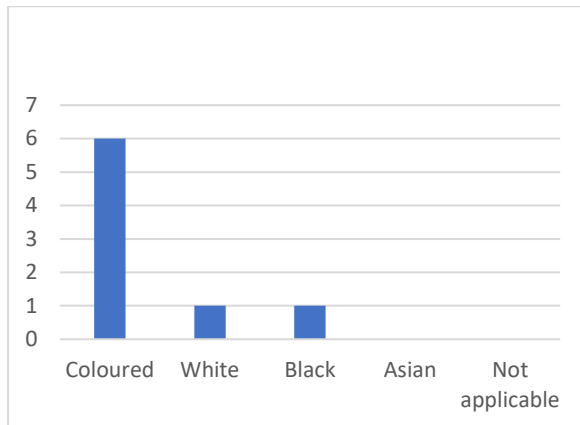
FINDINGS

The participants in Port Nolloth have tertiary level education and are employed. Furthermore, majority of the participants agreed that economic activities are beneficial and believe that mining is the main economic activity followed by fishing, agriculture and others. In terms of unlocking the potential skills development was highlighted as a major challenge followed by funding, teamwork and infrastructure. Majority of the

participants disagreed that there is sufficient resources to unlock economic activities and pointed out that financial resources were needed to unblock economic projects. Participants stated that SMME's were not involved in the Oceans Economy.

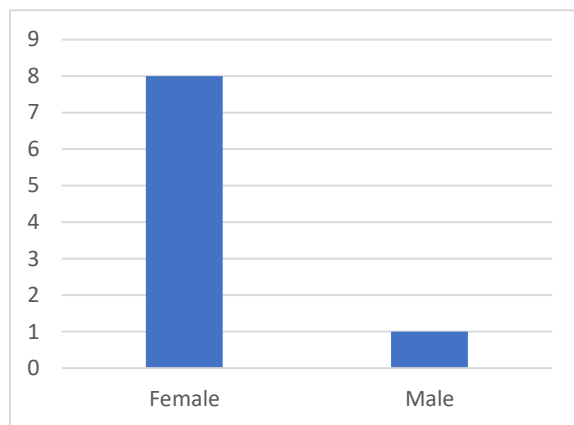
DEMOGRAPHY

Figure 31: RACE PN



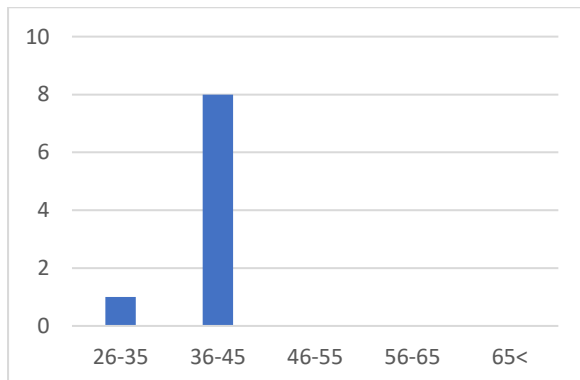
The majority of the sampled participants were coloured

Figure 32: GENDER PN



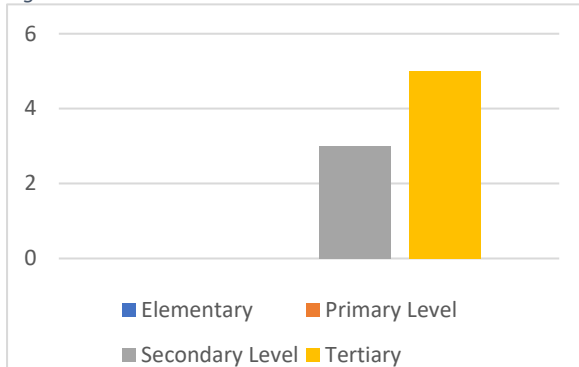
All participants during the survey were female

Figure 33: AGE PN



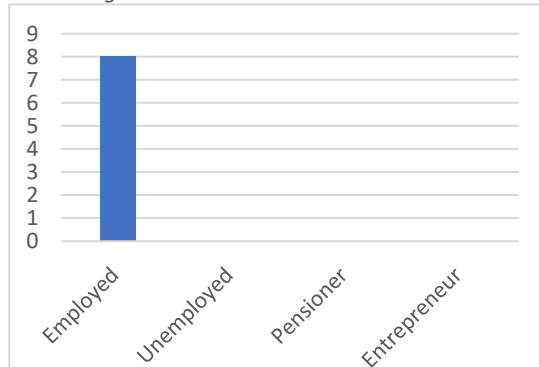
The majority of the sampled participants are aged 36-45

Figure 34: EDUCATIONAL BACKGROUND



The majority of the participants have Tertiary levels

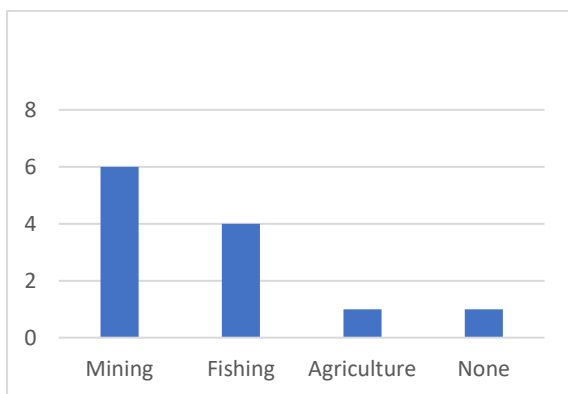
Figure 35: OCCUPATION PN



All participants were employed

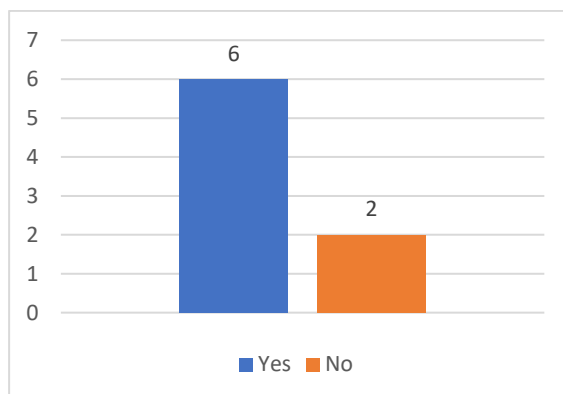
UNDERSTANDING ECONOMIC LANDSCAPE

Figure 36: MAJOR ECON ACTIVITIES



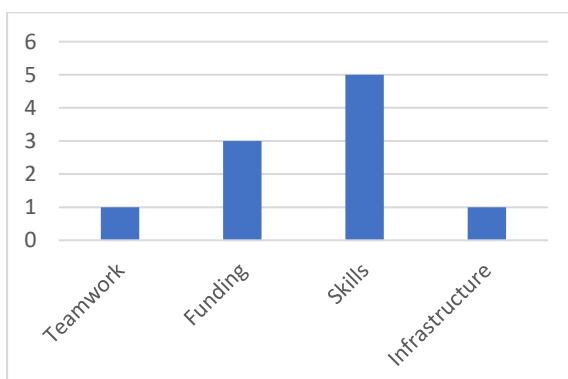
Majority of participants believed that mining was the main economic activity

Figure 37: ECON ACTIVITIES ARE BENEFICIAL



Majority participant agreed that the economic activities were beneficial to the community

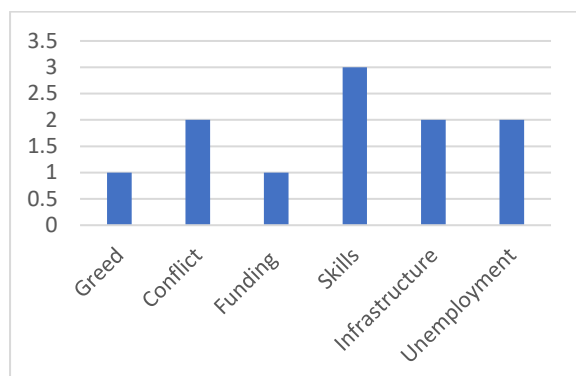
Figure 38: SOLUTION IN UNBLOCKING ECON ACTIVITIES



Skills development was identified as the solution to unlocking economic opportunities in the community

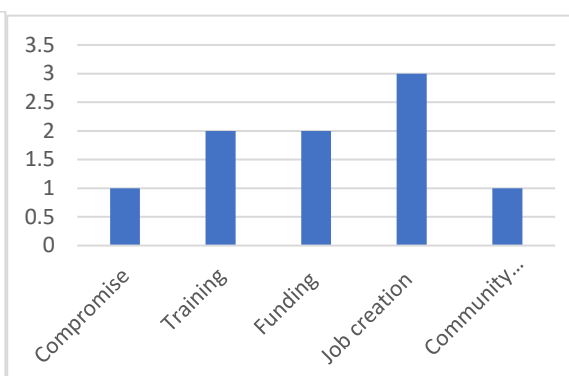
BLOCKAGES/CHALLENGES HINDERING ECONOMIC POTENTIAL

Figure 39: MAJOR CHALLENGE PN



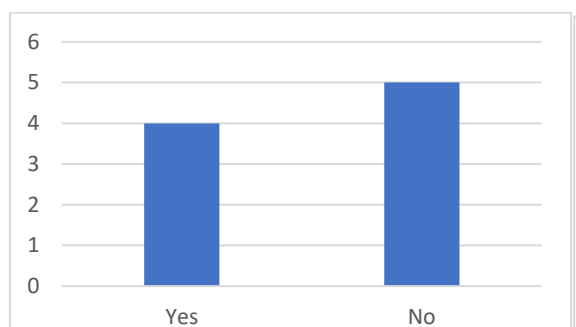
Lack of skills was identified as the major challenge in the community

Figure 40: SOLUTION TO CHALLENGES PN

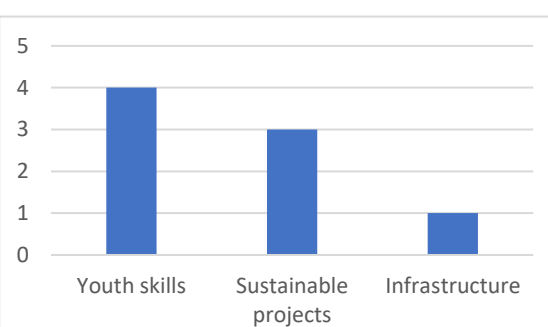


More emphasis on job creation was suggested as a solution to the blockages

Figure 41: SUFFICIENT RESOURCES TO UNLOCK ECON ACTIVITIES. Figure 42: INITIATIVE TO BOOST ECON ACTIVITIES

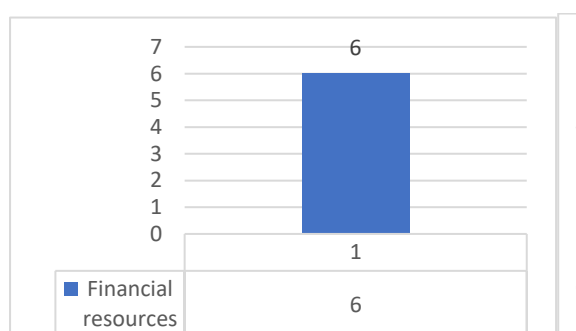


Majority of the participants disagreed that there is sufficient resources to unlock economic activities



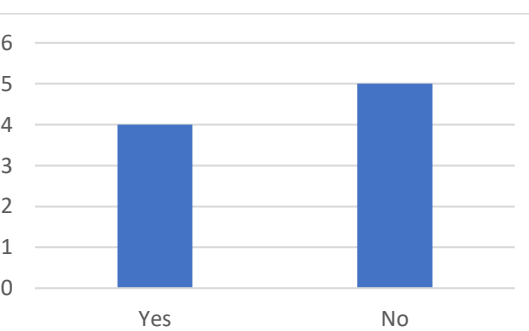
Participants in majority proposed that youth skills development could boost the economy

Figure 43: SUPPORT NEEDED TO UNLOCK ECON PROJECT



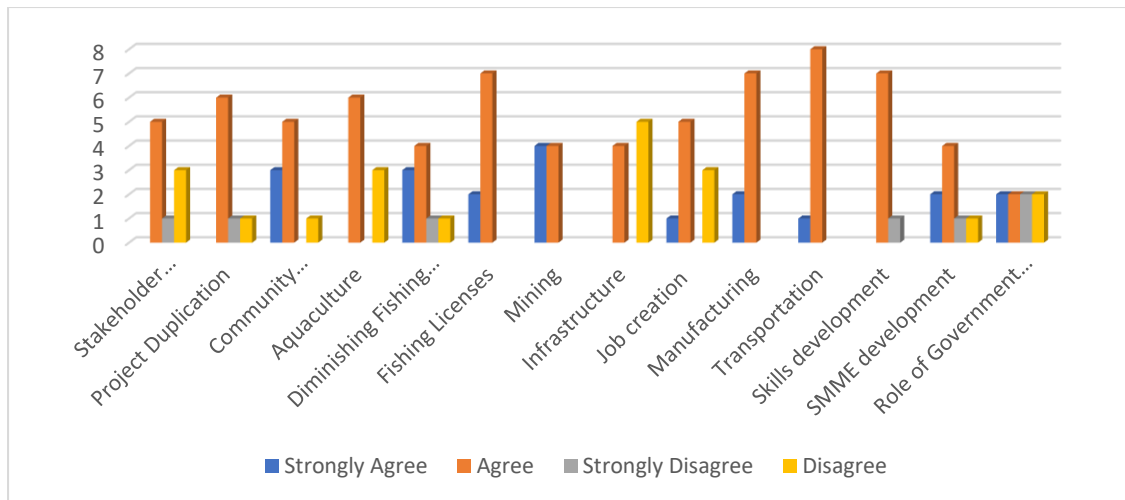
Financial resources were needed to unblock economic projects

Figure 44: SMMEs INVOLVEMENT PN



Participants stated that SMME's were not involved in the Oceans Economy

Figure 45: STATEMENT PN



11. Recommendations

This report began with a background on the oceans economy in the Northern Cape as well as the literature review which covered the potential and opportunities for the Northern Cape Province. furthermore, a fieldwork was embarked on with some interviews done. The findings point to the same thing in terms challenges and opportunities. It is therefore recommended that opportunities and potentials identified within the previous studies be followed up for the benefit of the provincial economy more importantly for the communities. Although, a fieldwork has been done while pressed for time it is recommended that another fieldwork should be embarked on to cover all the areas initially planned as well as robust engagements with the municipal officials in the space of oceans economy. The issue of fisherman travelling from Cape Town to catch the fish in Northern Cape and taking it back to Cape Town without benefiting the Northern community is another challenge that needs to be resolved by the provincial government through addressing the fishing quota system.

12. Conclusion

Although several studies have been done on the oceans economy for the Northern Cape Province, they all agree on the same opportunities and potentials. There has been progress made in some of the 12 projects identified within the Northern Cape Marine and Coastal Tourism Strategy while there is a challenge of funding for the rest

of the projects. It is critical for the provincial government to ensure viability of tourism in the province by availing the necessary funds for the rest of the projects to be realised.

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APPROVAL OF SUBMISSION

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