



Western Cape
Government

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Greater Saldanha Regional Spatial Implementation Framework

SWOT Analysis Report

Updated Version

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Glossary of Terms & Abbreviations

APP -	Annual Performance Plan	IDP -	Integrated Development Plan	SAPS -	South African Police Services
BAU -	Business-As-Usual	IDZ -	Industrial Development Zone	SBIDZ -	Saldanha Bay Industrial Development Zone
BEPP -	Built Environment Performance Plan	IPBF -	Intergovernmental Planning and Budgeting Forum	SBM -	Saldanha Bay Municipality
CoCT -	City of Cape Town	IPC -	Intergovernmental Planning Committee	SEA -	Strategic Environmental Assessment
CSIR -	Council for Scientific and Industrial Research	IPTN -	Integrated Public Transport Network	SDF -	Spatial Development Framework
CTIA -	Cape Town International Airport	IUDF -	Integrated Urban Development Framework	SDI -	Spatial Development Initiative
DAFF -	Department of Agriculture, Forestry and Fisheries	JPI -	Joint Planning Initiative	SIP -	Strategic Infrastructure Project
DEA&DP -	Department of Environmental Affairs and Development Planning	KNPS -	Koeberg Nuclear Power Station	SMEs -	Small and Medium Enterprises
DCF -	District Coordination Forum	KV -	Kilo Volts	SPLUMA -	Spatial Planning and Land Use Management Act
DCoG -	Department of Cooperative Governance	LUPA -	Land Use Planning Act	SWOT -	Strengths Weaknesses Opportunities Constraints
DoA -	Department of Agriculture	MERO -	Municipal Economic Review and Outlook	TCT-	Transport for Cape Town
DPME -	Department of Planning, Monitoring and Evaluation	MIG -	Municipal Infrastructure Grant	TNPA -	Transnet National Ports Authority
DoHS -	Department of Human Settlements	MinMay -	Ministers and Mayoral Committee	ToR -	Terms of Reference
DoP -	Department of the Premier	NEMA -	National Environmental Management Act	VI -	Vulnerability Index
DWA -	Department of Water Affairs	NHRA -	National Heritage Resources Act	VPUU -	Violence Prevention through Urban Upgrading
DWS -	Department of Water and Sanitation	NLTA -	National Land Transport Act	WC -	Western Cape
EIA -	Environmental Impact Assessment	NMT -	Non-Motorised Transport	WCG -	Western Cape Government
EPWP -	Expanded Public Works Programme	OECD -	Organisation for Economic Co-operation and Development	WCIF -	Western Cape Infrastructure Framework
FFC -	Financial and Fiscal Commission	PAZ -	Precautionary Action Zone	WMA -	Water Management Area
GCM -	Greater Cape Metro	PCF -	Premier's Coordinating Forum		
GCMRSIF -	Greater Cape Metro Regional Implementation Framework	PERO -	Provincial Economic Review and Outlook		
GCFR -	Greater Cape Functional Region	PLTF -	Provincial Land and Transport Framework		
GDP -	Gross Domestic Produce	PRASA -	Passenger Rail Agency of South Africa		
GDPR -	Gross Domestic Produce (Regional)	PSDF -	Provincial Spatial Development Framework		
GHG -	Green House Gas	PSG -	Provincial Strategic Goal		
GPS -	Growth Potential of Towns Study	PRZ -	Provisional Restructuring Zone		
GSR -	Greater Saldanha Region	RSDF -	Regional Spatial Development Framework		
GRSRIF -	Greater Saldanha Regional Spatial Implementation Framework	RSEP -	Regional Socio-Economic Programme		
HIA-	Heritage Impact Assessment	RSIF -	Regional Spatial Implementation Framework		
HWC -	Heritage Western Cape	SAHRA -	South African Heritage Resource Authority		
ICMA -	Integrated Coastal Management Act	SALGA -	South African Local Government Association		
ICT -	Information and Communication Technology	SANRAL -	South African Roads Agency Limited		
		SANBI -	South African National Biodiversity Institute		

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1. Introduction

1.1. Background

In March 2014, the Minister of Environmental Affairs and Development Planning approved the Western Cape Provincial Spatial Development Framework (PSDF).

In adopting a strategic view of the Provincial space economy, the PSDF identified three functional regions where significant development trends and/or development potentials were seen to exist. One of these identified functional regions is the emerging Greater Saldanha Regional Industrial Complex, with the Saldanha Bay/Vredenburg growth centre at its heart.

This Greater Saldanha Region (GSR) is noted as experiencing a wide range of developmental and environmental initiatives driven by an array of role-players. These initiatives, furthermore, are likely to be progressively realised in implementation programmes over an extended period of time.

It is against this background that the Western Cape Government: Department of Environmental Affairs & Development Planning (WCG: DEADP), in partnership with the municipalities in the West Coast district, agreed to collaborate in preparing a Regional Spatial Implementation Framework (RSIF) for the broadly defined Greater Saldanha Region, with a specific focus on the Saldanha Bay/Vredenburg development centre and the adjoining towns of the bordering municipalities.

1.2. Project Terms of Reference

The Greater Saldanha RSIF (GSRISIF) is directed to address the following priorities for the Greater Saldanha Region:

- Improving regional competitiveness;
- Skills Development (education) linked to Job Creation (assimilating young people out of schools);

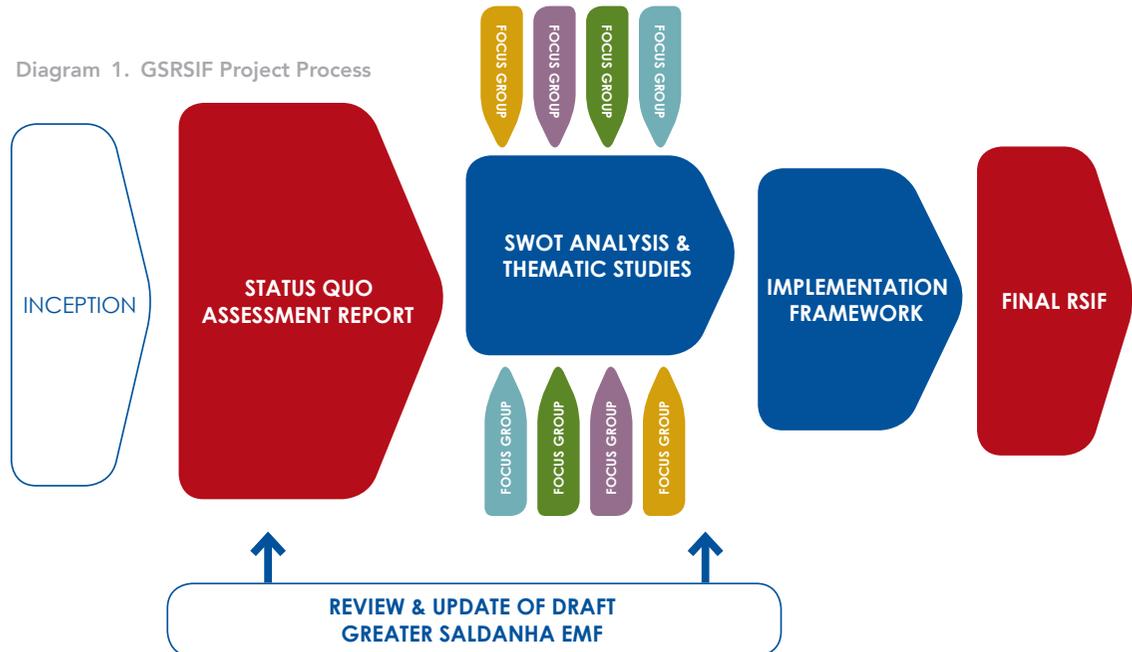
- Integrated Social Strategy: Co-ordination and building of social capital in all stakeholders through an appropriate structure (per municipality) supported by a Social Contract; and
- Infrastructure: Integrated Planning and Budgeting.

In addressing all the above, the project Terms of Reference specifies that the GSRISIF should contain – at minimum – the following elements:

1. A vision for the integrated development of the functional region.
2. An assessment of the existing levels of development in the functional region.
3. An assessment of the challenges of provincial land use planning in relation to other provincial functional areas listed in Schedules 4 and 5 of the Constitution;
4. An assessment of Provincial priorities, objectives and strategies, dealing in particular with:

- Compliance with land use planning principles as set out in LUPA;
- Biodiversity, ecology, tourism, heritage and agricultural resources, socio-economic development, efficient use of resources and government infrastructure; and
- Adaptation to climate change, mitigation of the impact of climate change, renewable energy production and energy conservation.

5. A review and update of the Greater Saldanha Area Environmental Management Framework that includes a Strategic Environmental Management Plan.
6. Proposals to unlock opportunities in the functional region's space-economy, including the identification of a list of catalytic governmental regional infrastructure projects by determining bulk infrastructure requirements for water, solid waste, energy, and transport over the next 15 years; taking into account existing Infrastructure Growth Plans (IGP) and the Industrial Project Inventory conducted by



the DEDAT; also including three-year action plans to align and inform the MTEF.

7. An accessibility analysis for social infrastructure (i.e. education, health, libraries and sport facilities) for the West Coast District.
8. Proposals on the rationalisation and clustering of social services and facilities in order for government to deliver these services in an integrated and financial sustainable manner.
9. A determination of the viability of different public transport options, as well an investigation on the shift from road to rail for freight.
10. Proposals on settlement level strategies that align housing with transport, land-use, economic and large-scale infrastructure decisions within a long-term vision of a more integrated region.
11. Categories of land development that will require approval under section 53(1) of LUPA.
12. A description of the process followed in the drafting of the Regional Spatial Implementation Framework.

1.3. Outputs of the GSRISF

Following an initial scoping phase of work, the full range of outputs required of the GSRISF was reassessed and a variation order was approved by the Provincial Tender Bid Adjudication Committee, in March 2017

Accordingly, in order to achieve the desired GSRISF project outcomes, the Professional Team is to deliver a number of outputs within an overall 21-month programme, as follows:

- a) Inception Report (month 1)
- b) Status Quo Assessment Report (months 2 – 6)
- c) SWOT Analysis (months 6 – 12)
- d) Thematic Component Studies (months 2 – 17)
 - Review and Update of draft Greater Saldanha Environmental Management Framework
 - West Coast District Social Facilities Study
 - Economic Infrastructure Assessment
 - Information Communications Technology (ICT) Thematic Study

- Energy Grid/Corridors Framework
- Regional Transport and Freight Assessment

e) Summary Report and Implementation Framework (months 17 – 21)

1.4. This Report

This report addresses the strengths, weaknesses, opportunities and threats (SWOT) analysis component of the overall work.

This report follows on from the completion of a fast-track Status Quo assessment and focuses on developing a broad strategic understanding of the developmental implications and informants stemming from the Status Quo report. Specifically, the objective is for the Professional Team and the Technical Working Group to reach a common understanding of the key resources and development potentials of the study area as well as the main regional-scale issues that need to be addressed in the GSRISF going forward.

1.5. Outputs

- Initial draft SWOT Analysis Document for internal review and comment by DEADP and other relevant sector department roleplayers
- Discussion of draft SWOT with SWOT Focus Group
- Final draft of SWOT

Going forward, specialist Focus Groups will be convened to provide expert input towards the further Thematic Component Studies and the final Implementation Framework.

Originally, the project Terms of Reference made provision for 8 Focus Group sessions plus 10 Open Days to elicit input over the lifespan of the project. Section 3 below sets out a proposal regarding how Focus Groups might be convened per theme.

GREATER SALDANHA RSIF – PACKAGE OF REPORTS

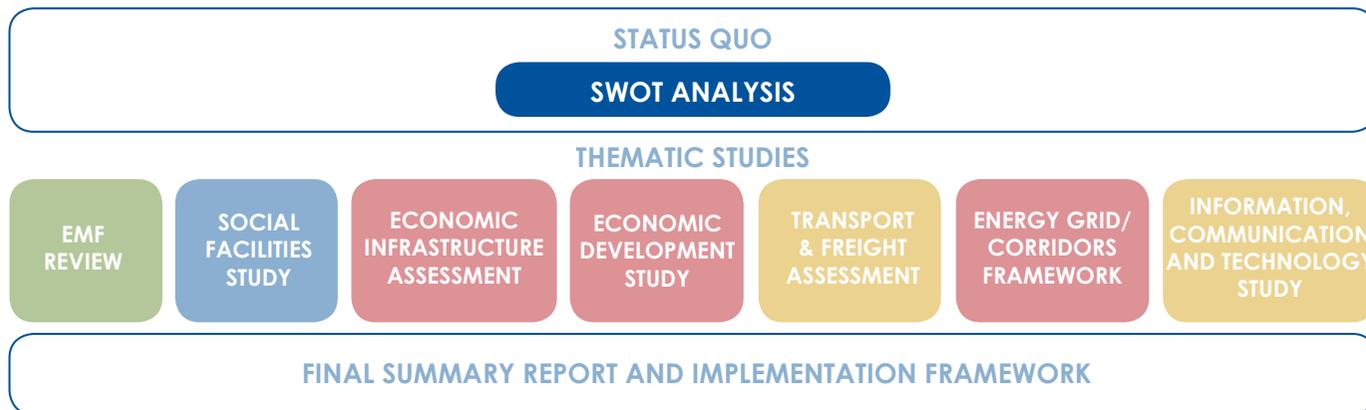


Diagram 2. GSRISF Project Package of Reports

2. SWOT

2.1. Strengths and Weaknesses

Typically, strengths and weaknesses are issues identified at a more localised level (so-called internal issues) that can be influenced or responded to by local stakeholders and institutions. These aspects are considered below at the scales of the West Coast District (WCD), the Greater Saldanha Region (GSR) and the Saldanha Bay Municipality (SBM).

2.1.1. West Coast District Strengths and Weaknesses

Table 1. West Coast District Strengths and Weaknesses

STRENGTHS	IMPLICATIONS FOR GSRSIF	EMERGING THEMES
<p>Relative economic diversity in comparison to narrowing of sectoral focus at Provincial level and, in particular, comparative advantage of the agriculture and fishing sector, and the mining and quarrying sector when compared to other districts in the Western Cape</p>	<p>As per the MERO, 2016, the WCD economy has a somewhat more diversified economy than other districts in the WC province, with the primary sector (agriculture, fisheries and mining) making up some 21.4% of regional GDP, the secondary sector (manufacturing, construction, energy and water) comprising 26.4%, and the tertiary sector – which dominates the WC economy overall – making up some 52.1%.</p> <p>This broad base of the district economy potentially provides resilience and flexibility in development strategies (i.e. not over-emphasising investment in one particular sector at the expense of other activities).</p>	<ul style="list-style-type: none"> • Socio-economic development paths in the primary, secondary and tertiary sectors • The balance between sectoral growth and development <p>PSDF THEME: SPACE ECONOMY</p>
<p>Relative strength in global trading linkages compared to other districts in the Province</p>	<p>These strengths in global trade linkages rely on transportation and freight linkages via key hubs such as Saldanha Bay Port or the Port of Cape Town (and hence also linkages to the Greater Cape Metro).</p> <p>It also appears to be the case that this exposure to global trade currently occurs mainly through the minerals and commodities sector. General freight movements and possibly even agricultural exports from Saldanha Bay Port need to be nurtured where possible and suitable.</p>	<ul style="list-style-type: none"> • Transport and freight logistics and linkages at regional and global scales; • The sustainability of key export sectors of the economy <p>PSDF THEME: SPACE ECONOMY and RESOURCES</p>

STRENGTHS	IMPLICATIONS FOR GRSIF	EMERGING THEMES
<p>Commitment to AgriPark concept by DRDLR and outreach to Provincial and Municipal roleplayers</p>	<p>While there is a danger that the DRDLR AgriPark concept may prove to be too rigid in its ideological approach, there is a strong possibility that the investments to be committed in terms of this programme will strengthen certain commodities (production, processing, marketing etc.) in the district, which would serve to underpin the continued relative diversity of the district space economy</p>	<ul style="list-style-type: none"> Cooperative governance in support of a common goal to strengthen the agricultural and fisheries sectors in WCD; Focus on developing the primary sector to become more inclusionary of emerging farmers. <p>PSDF THEME: SPACE ECONOMY</p>
<p>Current committed projects for road upgrading are leading to a strengthened road network and improved connectivity within the WCD and between WCD and surrounding areas</p>	<p>Whilst the linkages from the central and southern parts of the West Coast District to the Greater Cape Metro region are well acknowledged, these will strengthen with the ongoing development of key routes.</p> <p>Simultaneously, it seems likely that linkages to the north via the Northern Cape to Namibia will also strengthen with time.</p> <p>Finally, it is also likely that easterly linkages to the Northern Cape and, especially, to the N1 corridor inland will continue to strengthen and bring opportunities for socio-economic development.</p>	<ul style="list-style-type: none"> Understanding better the opportunities that may arise from improved road (and rail) linkages across the district <p>PSDF THEME: SPACE ECONOMY</p>
WEAKNESSES	IMPLICATIONS FOR GRSIF	EMERGING THEMES
<p>WCD is a water scarce region that is projected to be more severely impacted in this regard by climate change effects (winter rainfall area)</p>	<p>The broad context of the WCD and the Greater Saldanha areas being water scarce regions impacts on all existing and prospective activities in the area (both and urban and rural development and associated activities).</p> <p>If no sustainable and cost-feasible solutions can be found, it is inevitable that the trajectory of human development in this region will be compromised over time and growth will stagnate.</p>	<ul style="list-style-type: none"> Infrastructure and water supplies. The need for innovative and sustainable (environmentally and financially) solutions to water supply needs for urban and rural development <p>PSDF THEMES: SETTLEMENT; RESOURCES and SPACE ECONOMY</p>
<p>High prevalence of social pathologies (e.g. foetal alcohol syndrome) and trend increase in crime</p>	<p>This is a multi-dimensional issue but also relates to spatial issues around settlement development, spatial configuration and design (place making) and achieving improved equity in access to opportunities and social support/development facilities</p>	<ul style="list-style-type: none"> Social development as well as social facilities development to ensure adequate spatial provision/levels of access Settlement design and spatial transformation in settlements Rural development <p>PSDF THEME: SETTLEMENT</p>

WEAKNESSES	IMPLICATIONS FOR GSRSIF	EMERGING THEMES
<p>Long term job loss trends in agriculture and fishing sector</p>	<p>The MERO, 2016, reports that job losses in this key primary sector in the WCD have been occurring steadily since 2004, with somewhat of a recovery in the period 2009 – 2015 but not sufficient to overturn the long-term negative trend.</p> <p>Given the overall relative strength of the WCD agriculture and fishing sector within the province (refer Strength above) this trend may suggest that job losses are resulting from changes in the way that enterprises are being run (use of technology etc.) and this implies a need to focus on re-skilling strategies that could either enhance lacking skills in the agricultural workforce or, alternatively, re-skill people from this sector for possible opportunities in other employment sectors.</p>	<ul style="list-style-type: none"> Skills upgrading and the need for addressing re-skilling and re-training of certain elements of the labour force <p>PSDF THEME: SPACE ECONOMY</p>
<p>Relatively poor public transport linkages between urban settlements</p>	<p>Because of the large distances separating many settlements across the WCD – and even in areas where settlements have higher populations and are more closely located to each other – public transport remains a challenge. It is not easy for people to move across distances between areas to seek social services, commercial and/or work opportunities</p>	<ul style="list-style-type: none"> Opportunities to improve public transportation via road and rail <p>PSDF THEME: SPACE ECONOMY and SETTLEMENT</p>
<p>Low density, disaggregated overall pattern of settlement makes it difficult to provide sustainable levels of excellence in the delivery of public goods and services</p>	<p>Again, this issue relates to the challenges posed by time and distance across a large and under-populated region.</p> <p>This fact of the spatial pattern of development of the WCD heightens the need to adopt careful strategic approaches towards the provision of social services.</p>	<ul style="list-style-type: none"> Social development as well as social facilities development to ensure adequate spatial provision/levels of access Settlement design and spatial transformation in settlements Rural development <p>PSDF THEMES: SETTLEMENT</p>

2.1.2. Greater Saldanha Region Strengths and Weaknesses

Table 2. Greater Saldanha District Strengths and Weaknesses

STRENGTHS	IMPLICATIONS FOR GSRSIF	EMERGING THEMES
<p>Investment in regional transportation links are increasing the flow of goods, services and people and bringing positive development trends to bear in the GS region</p>	<p>There are a number of aspects that the GSRSIF can unpack in this regard, including the spatial implications of the movement of goods and services (and people) and requisite transit facility requirements.</p> <p>This also relates to the discussions around inland port facilities, logistics and warehousing opportunities and intersects with the work being done in this regard by the GCM RSIF.</p>	<ul style="list-style-type: none"> Transport and Freight is a clear area where additional input is required to understand better the spatial implications of investments being made (or considered) in road and rail networks (as well as in the Port of Saldanha Bay). <p>PSDF THEME: SPACE ECONOMY</p>
<p>Environmental and Heritage resources</p>	<p>Tourism is seen as a sustainable economic sector with growth potential but some of this relates to the management of the natural and heritage resources that provide much of the “draw”.</p>	<ul style="list-style-type: none"> This aspect needs to be considered in an environmental focus group discussion and provision needs to be made in terms of appropriate Spatial Planning Categories and Land Use Management Guidelines <p>PSDF THEME: RESOURCES and SETTLEMENT</p>
<p>Route upgrades and network extensions along the R27 and N7 corridor are further strengthening linkages to the GCM (and proposed Atlantis SEZ) as well as to the Northern Cape</p>	<p>The particular opportunities for positive social and economic interactions in various sectors needs to be understood.</p> <p>To an extent, this can be drawn from the work done in the GCM RSIF</p>	<ul style="list-style-type: none"> Transport and freight issues Socio-economic development trends <p>PSDF THEME: SPACE ECONOMY</p>
<p>Developed spare capacity in major infrastructure service networks in Malmesbury and surrounds</p>	<p>The potential for additional industrial development (possibly related to primary produce processing and freight logistics) and possible linkages to hinterland activities needs to be better understood</p>	<ul style="list-style-type: none"> Transport and freight issues Socio-economic development trends <p>PSDF THEME: SPACE ECONOMY</p>
<p>Multi-nodal urban development trends leading to growth in residential demand</p>	<p>With emerging trends towards deconcentration in certain urban activities and the prospect of future technologies further reducing the need for place-bound economic activity, there are potential scenarios where the growth in demand for accommodation in smaller settlements with possibly higher amenity could be envisaged.</p> <p>This needs to taken into account in future revisions of SDFs etc.</p>	<ul style="list-style-type: none"> This issue overlaps to an extent with discussions on socio-economic growth trends Issues related to transportation as well as infrastructure and ICT developments are also central to the debate. <p>PSDF THEME: SPACE ECONOMY and SETTLEMENT</p>

WEAKNESSES	IMPLICATIONS FOR GRSIF	EMERGING THEMES
<p>Limited availability of water services adequate to demand in case of development lift-off</p>	<p>This is a fundamental issue for GS. It appears to be so complex that a resolution currently is not obvious, although much is made of a combination approach that seeks to minimise water loss and usage as well as explore potential in water re-use technology.</p> <p>Water, however, is essential to both the urban and rural economies of the area and this is a most crucial challenge.</p>	<ul style="list-style-type: none"> • Infrastructure development and the potential for re-engineering/retro-fitting infrastructure in areas so as to minimise water losses • Sustainable infrastructure as a potential game changer • Impact of climate change • Overall, a need for an update on processes underway to attend to the challenges <p>PSDF THEME: RESOURCES, SPACE ECONOMY and SETTLEMENT</p>
<p>Limited availability of energy adequate to demand in case of development lift-off</p>	<p>As with water, the availability of energy supplies is fundamental to the development potential of the area.</p> <p>This issue also intersects with game changing approaches on sustainable infrastructure and the future shift to the use of green energy sources and natural gas.</p> <p>Spatial implications at a regional level need to be considered and mapped, if possible.</p>	<ul style="list-style-type: none"> • Energy infrastructure development • Mix of energy sources and the future need for spatial provision to enable these • Overall, a need for an update on processes underway to attend to the challenges <p>PSDF THEME: RESOURCES, SPACE ECONOMY and SETTLEMENT</p>
<p>Decline in employment in rural enterprises (agriculture and fishing) has reportedly led to a mismatch in skill sets of unemployed members of labour force in relation to skill needs in sectors displaying positive growth trends</p>	<p>Should the anticipated growth take off in the secondary (industrial) and tertiary (business services etc.) sectors, this will lead to a strengthened demand for skills/labour in these sectors and both local businesses and local residents need to be empowered and upskilled to be able to take advantage of these opportunities, should they arise</p>	<ul style="list-style-type: none"> • The need to develop well-targeted skills development programmes that are accessible to local residents • The need for capacity building programmes to support existing local business and small and medium enterprises <p>PSDF THEMES: SPACE ECONOMY</p>
<p>Continued lack of institutional coordination and alignment</p> <p>Differential levels of operational effectiveness of different institutions (e.g. municipal capacity)</p>	<p>Given the anticipated focus of development being centred ultimately on the Regional Growth Centre of Saldanha/Vredenburg, there needs to be a focus on providing institutional support and capacity building for the SBM.</p> <p>However, just as important would be the explicit recognition of the potential benefits that may accrue from a take-off in development for neighbouring municipalities (Swartland and Bergrivier).</p>	<ul style="list-style-type: none"> • Cooperative governance and sustaining appropriate intergovernmental forums to ensure cooperation and mutual understanding of challenges and opportunities across the GS Region <p>PSDF THEME: SPACE ECONOMY</p>

WEAKNESSES	IMPLICATIONS FOR GRSIF	EMERGING THEMES
<p>Limited capacity to respond to dynamic informal settlement formation (more of which could result if development is seen to take off)</p>	<p>This is flagged as a potential institutional vulnerability and capacity issue. However the spatial consequences of increasing informal settlement growth need a flexible strategic approach to be adopted.</p>	<ul style="list-style-type: none"> Again, this issue relates best to the spatial strategies and land use management guidelines to be developed in the revised SDFs <p>PSDF THEME: SETTLEMENT</p>
<p>Challenges posed by construction camp formations in remote localities that could remain as legacy problems after completion of projects</p>	<p>In principle, this can be seen as a management challenge as it is understood that companies and contractors wish to pursue strategic approaches to the provision of accommodation for their workforces that works for them.</p> <p>However, the challenge is to ensure that contractual obligations are set in place so as to ensure that no liability falls on the municipality in future in relation to issues or problems caused when construction activities cease.</p>	<ul style="list-style-type: none"> Again, this issue relates best to the spatial strategies and land use management guidelines to be developed in the revised SDFs <p>PSDF THEME: SETTLEMENT</p>
<p>Mismatch of skills in the local population in relation to areas of development potential and growth</p>	<p>The spatial dimension to this weakness relates to providing space and/or access to training opportunities for people in the local area.</p> <p>The mix of training that is required will need to be identified by other interest groups</p>	<ul style="list-style-type: none"> This is a social development issue that intersects with the issues raised by future projections on the socio-economic growth trajectory of the area and accompanying skills requirements <p>PSDF THEMES: SPACE ECONOMY</p>

2.1.3. Saldanha Bay Strengths and Weaknesses

Table 3. Saldanha Bay Strengths and Weaknesses

STRENGTHS	IMPLICATIONS FOR GRSIF	EMERGING THEMES
Existing operational status of Saldanha Bay port	Port's status as one of 9 TNPA ports scheduled for enhancement and expansion to be clarified in terms of potential future range of activities to be supported	<ul style="list-style-type: none"> • Transportation and Freight • Intersects with Space Economy and need to better understand trajectory of socio-economic trends in GS area <p>PSDF THEME: SPACE ECONOMY</p>
Regional Gateway status of Saldanha/Vredenburg	The emergence of Saldanha/Vredenburg as a regional centre and focus for urban development and industrialisation (economic growth) needs to be explored in relation to regional linkages, including those to the south (GCM) and to the north (Velddrif/Laaipelek)	<ul style="list-style-type: none"> • Regional contextualisation to be located into revision of SBM SDF <p>PSDF THEME: SPACE ECONOMY and SETTLEMENT</p>
Funded commitments to SB-IDZ	The IDZ is set to proceed and is receiving funding support. Given its formal designated identity as an Oil and Gas Sector-focused IDZ, certain assumptions are to be made related to the future nature of its activities and the spatial implications of these in terms of other future related activities in the Back of Port area and surrounding industrial areas.	<ul style="list-style-type: none"> • Clarity on the future trajectory of the Oil and Gas Sector in the light of the Paris Agreement and growing pressures to reduce fossil fuel exploration and exploitation would be very useful. <p>PSDF THEME: SPACE ECONOMY</p>
Institutional support favouring development from National and Provincial Government as well as SOEs	<p>There is an array of officially endorsed programmes that include spatial targeting of investment in the GS area, including SIPS 5 and 8, Operation Phakisa, Project Khulisa, the medium-term outlook on the West Coast district Agri-Park etc. These need to be further explored in terms of their regional spatial implications and their downstream and upstream economic effects.</p> <p>The spatial potential for projects related to green energy (renewables and natural gas) should ideally be identified.</p>	<ul style="list-style-type: none"> • As with the above issue, there is a need to get more clarity, if possible, on the status of targeted investments that relate to activities that may not currently be favoured in terms of global economic and environmental trends. • The scope for further investment in green infrastructure (renewable energy) in the light of this would be a useful input. <p>PSDF THEMES: SPACE ECONOMY</p>
Established level of interest in industrial development on the part of investors (as per WCIP)	The spatial implications related to the types of envisaged projects and their backwards and forwards linkages in terms of supply of inputs and routing of outputs is necessary.	<ul style="list-style-type: none"> • Clarity on the nature of the enterprises seeking to locate in SBM and possibly Swartland and Bergrivier would be very useful. • The transportation and freight linkages and likely routes and associated needs should be spatially mapped. <p>PSDF THEME: SPACE ECONOMY and SETTLEMENT</p>

STRENGTHS	IMPLICATIONS FOR GSRSIF	EMERGING THEMES
Strengthening linkages to GCM and proposed Atlantis SEZ (R27 upgrade) and the Northern Cape	The projection is that linkages to the GCM and iron ore mines in the Northern Cape will strengthen along the rail, R27 and N7 corridors and this will lead to an increase in traffic of goods and people. This needs to be explored and unpacked.	<ul style="list-style-type: none"> From a socio-economic trend perspective, it would be useful to have better information on the likely direction of the Atlantis SEZ and potential synergies between that and SBM and Swartland activities. To understand the potential increase of freight from iron ore mines via road and rail Transportation and freight issues also need to be explored. <p>PSDF THEME: SPACE ECONOMY and SETTLEMENT</p>
Coastal tourism	<p>A mooted growth in coastal tourism is seen in some quarters as a viable alternative (or, at least, an adjunct) to significant additional industrialisation in Saldanha and Vredenburg.</p> <p>The implications of this could be explored further, also taking into account the possible impacts on environmental quality and amenity of climate change trends and issues such as water scarcity.</p>	<ul style="list-style-type: none"> The economic potential of coastal tourism in the GS area to be discussed The environmental issues related to an intensification of such tourism and the likely pressures for coastal settlement growth to be considered. <p>PSDF THEME: SETTLEMENT; RESOURCES and SPACE ECONOMY</p>
West Coast Fossil Park Attraction	<p>The area is acknowledged for its scientific and historical value and attracts both visitors as well as scientific researchers to the area.</p> <p>Its preservation from the encroaching pressures related to the expansion of Saldanha industrial areas is a priority.</p>	<ul style="list-style-type: none"> An environmental management issue, this also may relate to the issue of managing pressures related to exploitation of phosphate resources in the Langebaanweg and Elandsfontein areas. <p>PSDF THEMES: RESOURCES</p>
Existing fishing industry footprint and capacity in Saldanha-located factories	With the shifting of fish stocks further south-east, the industry retains a strong position in the processing of produce in the Saldanha factories, which is now transported from south coast areas where catches remain significant.	<ul style="list-style-type: none"> This aspect relates both to Transport and Freight corridors as well as promoting resilience in local industry <p>PSDF THEME: SPACE ECONOMY</p>
Arcelor Mittal plant and ongoing commitments to remain operational	Noting the resilience of the industry and its strategic importance as well as its importance within the local space economy, it is also important to understand the resource needs of the plant in terms of water usage and effluent treatment/management.	<ul style="list-style-type: none"> Enhanced understanding of the socio-economic importance of the steel plant and associated activities/industries Infrastructural needs <p>PSDF THEME: SPACE ECONOMY, SETTLEMENT and RESOURCES</p>

WEAKNESSES	IMPLICATIONS FOR GSRSIF	EMERGING THEMES
<p>Institutional challenges at local level could hinder efficient responses to development opportunities and/or threats</p>	<p>There is a recognition that certain weaknesses exist in the capacity of the SBM to respond to the opportunities and challenges presented by the current trends for development in the area.</p> <p>This is an acknowledged weakness that is being addressed through support from various sectors.</p>	<ul style="list-style-type: none"> From a spatial planning perspective, the SBM SDF revision is seen as an opportunity to “land” relevant strategic responses to dealing with issues and challenges <p>PSDF THEME: SPACE ECONOMY and SETTLEMENT</p>
<p>Environmental issues and challenges resulting from port operations and industrial activities (e.g. red dust pollution; pollution threats to Bay ecology etc.)</p>	<p>It needs to be acknowledged that past decisions around the industrialisation of Saldanha as well as the use of the port for iron ore and other commodity export/import has impacted on the aesthetic and environmental amenity of the town and surrounds.</p> <p>Moreover, in some quarters it is argued that the negative environmental factors emanating from the air pollution caused by mineral export activities are an absolute barrier to any notion that fresh produce/agricultural goods might in future be exported from the Port of Saldanha Bay.</p>	<ul style="list-style-type: none"> This is seen as forming part of the EMF revision Spatial planning and land use management direction to be incorporated into the SBM SDF Revision <p>PSDF THEMES: SETTLEMENT and RESOURCES</p>
<p>Delays related to completion and approval of Greater Saldanha EMF have caused uncertainty and raised tensions between stakeholders in the area</p>	<p>This is deemed to be in hand in terms of the current processes to finalise the revision of the GS EMF, to investigate strategic biodiversity offset options, and to approve spatial directives stemming from this in terms of the revised SBM SDF</p>	<ul style="list-style-type: none"> Finalisation of EMZs and SPCs to be considered as part of the environmental discussions <p>PSDF THEMES: RESOURCES</p>
<p>Conflicts between critical biodiversity environmentally sensitive areas and the footprint of the proposed industrial areas in Saldanha. Lack of certainty over how to resolve this issue detracts from investor confidence in the area</p>	<p>The outcome of the revised EMF will highlight the zones of conflict between areas of irreplaceable vegetation and/or species in areas earmarked for industrial development. This is likely to lead to hold-ups in the implementation of development unless proactive steps are taken to facilitate solutions to the situation.</p> <p>However, it is important to note in this latter regard that an initial study to investigate Strategic Biodiversity Offsets and to posit potential solutions of the dilemma has been prioritised.</p>	<ul style="list-style-type: none"> The need to focus on developing proactive solutions to statutory obstacles to approval of industrial land for development, including investigating the potential for strategic offsets <p>PSDF THEME: RESOURCES</p>
<p>Existing SBM SDF outdated, does not address the dynamics of current development trends and initiatives</p>	<p>This, too, is deemed to be in hand now that the process to revise the SBM SDF has commenced.</p>	<ul style="list-style-type: none"> Inputs can be given through dialogue with the SBM and their appointed service providers as well as ongoing support from DEA&DP <p>PSDF THEME: SPACE ECONOMY and SETTLEMENT</p>

2.2. Opportunities and Threats

Typically, Opportunities and Threats are to be understood as those issues that impact at a more global, national or provincial level (so-called external issues) and that cannot be controlled locally, but can only be responded to by local stakeholders and institutions.

2.2.1. Global

Table 4. Global Opportunities and Threats

OPPORTUNITIES
Technological advancements (e.g. improved viability of green and “clean” technologies – so-called Sustainable Infrastructure)
Stabilisation and eventual upturn in global economy
Growth in demand for commodities and increase in pricing (return to economically sustainable utilisation)
Return to geo-political stability
Strengthening of emerging market economies in relation to developed economies
THREATS
Climate change
Continued slow economic growth or further downturn
Continued depressed commodity demand and pricing
Continuing Geo-political conflicts or escalating game changers (e.g. Brexit; EU instability; Trump presidency; negative marketing impact of poor publicity/ overseas market perceptions etc.)

Table 5. National Opportunities and Threats

OPPORTUNITIES
Stabilisation of socio-political environment
Clampdown on corruption and wasteful expenditure and the stabilisation of ZAR
Improvement in business and investor confidence
Improvement in cooperative governance
Adoption and support of green technology and innovation
Prioritisation of focused skills development and workforce training
THREATS
Continuing drought conditions and ongoing water scarcity
Continued slow economic growth or further downturn
Downgrade in investment rating (fiscal austerity; more expensive access to capital)
Continued socio-political instability
Relationship tensions between national and provincial government
Poor performance of SOEs
Energy security diminishes
Continued instability/dysfunction of higher education sector

Table 6. Provincial Opportunities and Threats

OPPORTUNITIES
Improved effectiveness in governance (transversal and whole of society approaches)
Sustained support for capacity-challenged LMs
Effective cooperation and communication with national government and SOEs
Enhanced support and roll-out of focused skills development programmes
Commitment to re-engineering settlement structure, transport and infrastructure systems to move towards Sustainable Infrastructure approaches
THREATS
Continuing drought conditions and water scarcity
Competing priorities for investment/intervention
Inability to engage with and coordinate activities with national government and SOEs
Skills deficits in key functional areas
Persistence in socio-economic inequality
Climate change impacts on natural resource base (agriculture and environmental assets) and on coastal areas

3. Focus Group Proposals

As indicated in Section 1.5 above, following the identification of key thematic focus areas arising from the Status Quo and SWOT, an important element of the work to complete the Thematic Studies to input into the GRSIF will entail presenting work outputs to relevant Focus Groups that will be assembled from a range of

stakeholders appropriate to each specific Theme. This approach is based on the original intentions of the project Terms of Reference but extends the approach, as set out below.

Ultimately, it is envisaged that these Focus Group sessions would enrich the understanding of key issues within the Thematic Studies and will enrich subsequent RSIF proposals.

NOTE: Some Focus Groups were already completed as at the date of the finalisation of this SWOT report (March 2017).

Table 7. Proposed Focus Groups

PROPOSED FOCUS GROUP		NO. OF SESSIONS ALLOCATED	INTENDED OUTPUT OF FOCUS GROUP	RESPONSIBILITY FOR TAKING OUTPUT FORWARD
A	Social Development Focus Group (including discussion on social facilities), which would target two constituencies: the first would entail a session with departmental Regional Managers to look at a detailed view of issues and departmental plans (U-AMPS); the second and third would bring together officials from the WCDM, the 3 LMs and relevant Sector Departments together to discuss the issues, trends, current programmes and options towards an integrated strategy going forward. RSEP	Budget: 3 Sessions Session 1: Scoping Workshop held on 19 September 2016 Session 2: FG held on 22 November 2016 Session 3: FG held on 25 January 2017	1. Finalised Spatial Analysis of Social Facilities 2. Key proposals on filling gaps in services provision (need for additional facilities) PSDF Themes: SETTLEMENTS	DT&PW UAMP DoH UAMP DoE UAMP DSD UAMP WCDM (IDP) LMs (IDPs)
B	An Environmental Focus Group whose purpose would be to take the outputs of the EMF Revision (undertaken by Gibb) in the form of spatial proposals (Environmental Management Zones) and reconcile these into Spatial Planning Categories (land use management guidelines). It is anticipated that this work would require a single Focus Group session. Key roleplayers here would include Cape Nature, WCG: DEADP (different Chief Directorates), Gibb, Setplan, WCDM and the 2 LMs (Saldanha Bay and Bergrivier) as well as WCG: DEDAT	Budget: 1 Session 1 FG held on 14-February 2017	1. Finalised EMF with Environmental Management Zones 2. EMZ data aligned with and reflected in Spatial Planning Categories PSDF Themes: RESOURCES	DEADP (Oversight) SBM (SDF) Cape Nature

PROPOSED FOCUS GROUP		NO. OF SESSIONS ALLOCATED	INTENDED OUTPUT OF FOCUS GROUP	RESPONSIBILITY FOR TAKING OUTPUT FORWARD
C Infrastructure	<p>Infrastructure Focus Group whose emphasis would fall on clarifying and updating WCIP by giving consideration to infrastructure bulk supply and demand relevant to additional requirements stemming from Swartland and Bergrivier Municipalities.</p> <p>Key roleplayers would include the DEADP, DEDAT, DT&PW, Water Affairs, WCDM, the 3 LMS, PDG and Setplan.</p>	<p>Budget: 1 Session</p> <p>FG held on 10 March 2017</p>	<p>1. Report outlining additional considerations for infrastructure development priorities to those identified in the West Coast Industrial Plan (2016), taking into account the prospective impact of larger-scale development initiatives in the Swartland and Bergrivier Municipalities.</p> <p>PSDF Themes: SPACE ECONOMY SETTLEMENTS</p>	<p>DT&PW (planning & implementation)</p> <p>DEADP (coordination and information sharing)</p> <p>WCDM (IDP and SDF and ITP)</p> <p>LMS (IDPs, SDFs and ITPs)</p>
D SDF Alignment	<p>A Saldanha Bay SDF Alignment Focus Group and a Greater Saldanha Regional SDF Focus Group is proposed. The former will concentrate on aligning the GS RSIF and the SBM SDF Review, including the input from the EMF Review. This group would comprise of DEADP, SBM and their appointed consultants, Gibb and Setplan. DTPW DEDAT (RSIF PMT). The latter Focus Group will concentrate on inputting regional spatial informants to municipal SDFs in the GS study area. Berg River and Swartland local municipalities and WCD municipality will be added to the constituents of the Saldanha Bay SDF Alignment Focus Group.</p>	<p>Budget: 3 Sessions</p> <p>Target: Span over April to August 2017</p>	<p>1. Package of inputs (written and/or data) as agreed with SBM and their consultants</p> <p>2. Regional informants to municipal SDFs as per specifications in brief</p> <p>PSDF Themes: RESOURCES SPACE ECONOMY SETTLEMENT</p>	<p>SBM (SDF)</p> <p>BR (SDF)</p> <p>Swartland (SDF)</p> <p>WCD (SDF)</p>
E Energy	<p>Energy Focus Group, which would look at issues relevant to the sub-regional spatial implications of extending the power grid.</p> <p>Looking at regional capacity to broaden out from Saldanha focus and look at implications/needs of Malmesbury/Piketberg areas etc.</p> <p>Key roleplayers would include ESKOM, WCDM, the 3 LMs, DEDAT, DEADP, PDG and Setplan.</p>	<p>Budget: 1 Session</p> <p>Target: July 2017</p>	<p>1. Spatial data and illustration (maps) of spatial corridor for service lines and facilities</p> <p>PSDF Themes: SETTLEMENTS SPACE ECONOMY</p>	<p>DEADP (support)</p> <p>DEDAT (monitoring of progress)</p> <p>WCDM (IDP and SDF)</p> <p>LMS (IDPs and SDFs)</p>

PROPOSED FOCUS GROUP		NO. OF SESSIONS ALLOCATED	INTENDED OUTPUT OF FOCUS GROUP	RESPONSIBILITY FOR TAKING OUTPUT FORWARD
F ICT	<p>ICT Focus Group, which would look at issues relevant to the sub-regional spatial implications of the existing and new undersea data cables landing at Yzerfontein. Key roleplayers would include EDP, WCDM, Swartland LM, DEDAT, DEADP, PDG and Setplan</p>	<p>Budget: 1 Session</p> <p>Target: July 2017 2017</p>	<p>1. Spatial data and illustration (maps) of spatial corridor for service lines and facilities</p> <p>PSDF Themes:</p> <p>SPACE ECONOMY</p> <p>SETTLEMENTS</p>	<p>DEADP (support)</p> <p>DEDAT (monitoring of progress)</p> <p>WCDM (IDP and SDF)</p> <p>Swartland LM (IDP and SDFs)</p>
G Transport & Freight	<p>Regional Transport and Freight Focus Group whose emphasis would fall on clarifying transportation network linkages, priorities & spatial alignments around the regional multimodal framework of 3 centres: Saldanha/Vredenburg; Malmesbury and Piketberg. Key roleplayers would include the DT&PW, WCDM, the 3 LMS, Gibb and Setplan. TNPA</p>	<p>Budget: 1 Session</p> <p>Target: July 2017</p>	<p>1. Clarity on strategic intent of future regional transport approach (road, rail, ports and airports)</p> <p>2. Spatial data and map of key movement corridors and hubs</p> <p>PSDF Themes:</p> <p>SETTLEMENTS</p> <p>SPACE ECONOMY</p>	<p>DT&PW (planning & implementation)</p> <p>DEADP (coordination and information sharing)</p> <p>WCDM (IDP and SDF and ITP)</p> <p>LMS (IDPs, SDFs and ITPs)</p>
H Economic	<p>An Economic Focus Group, which is deemed to be of importance in providing further guidance on some of the more complex issues related to the economic development scenario(s) underpinning the RSIF.</p> <p>Building on the work of the WCIP, the role of Piketberg, Malmesbury and Atlantis in the regional space-economy needs to be explored, with particular attention to the linkages between the GS and GCM regions. The focus is not on Saldanha (that is the job of the SBM SDF/IDP) – but rather investigating regional industrialisation and other development opportunities and seeking regional synergies/linkages.</p> <p>Key players would include DEDAT, the WCDM and 3 LMs as well as DEADP. Other role players such as PT, EDP, IDZ, TNPA and business can possibly also be invited.</p>	<p>Budget: 1 Session</p> <p>Target August 2017</p>	<p>1. Consensus view on how to conceptualise the economic development trends and likely sectoral growth scenario(s) to inform planning, going forward</p> <p>PSDF Themes:</p> <p>SPACE ECONOMY</p>	<p>DEDAT</p> <p>DEADP</p> <p>WCDM (IDP and SDF)</p> <p>LMS (IDPs and SDFs)</p>

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