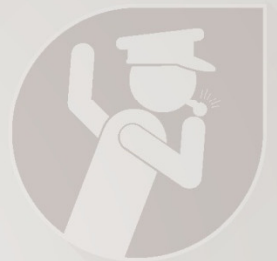




**Western Cape
Government**



Mossel Bay Municipality

2019



CONTENTS

MOSSEL BAY: AT A GLANCE

1.	DEMOGRAPHICS	1
2.	EDUCATION	5
3.	HEALTH	10
4.	POVERTY	15
5.	BASIC SERVICE DELIVERY	18
6.	SAFETY AND SECURITY	22
7.	THE ECONOMY	26
8.	PUBLIC INFRASTRUCTURE SPEND	31
	SOURCES	33

Mossel Bay: At a Glance

Demographics

Population Estimates, 2019; Actual households, 2016



Population

96 513



Households

31 766

Education

2018



Matric Pass Rate	83.1%
Learner Retention Rate	66.2%
Learner-Teacher Ratio	28.5

Poverty

2018



Gini Coefficient	0.615
Human Development Index	0.747

Health

2018



Primary Health Care Facilities

13

Immunisation Rate

66.6%

Maternal Mortality Ratio (per 100 000 live births)

0

Teenage Pregnancies - Delivery rate to women U/18

14.9%

Safety and Security

Actual number of reported cases in 2018/19



Residential Burglaries

968

DUI

465

Drug-related Crimes

1 048

Murder

46

Sexual Offences

125

Access to Basic Service Delivery

Percentage of households with access to basic services, 2016



Water

98.0%

Refuse Removal

87.2%



Electricity

95.9%



Sanitation

95.6%



Housing

88.2%



Road Safety

2018

Road User Fatalities 17

Labour

2018

Unemployment Rate (narrow definition)

14.8%



Socio-economic Risks

- Risk 1** Growing inequality
- Risk 2** Increasing service delivery demands
- Risk 3** Deteriorating education outcomes

Largest 3 Sectors

Contribution to GDP, 2017

Finance, insurance, real estate and business services

28.1%

Wholesale and retail trade, catering and accommodation

17.3%

Manufacturing

14.8%

1

DEMOGRAPHICS

Accurate and reliable population data lies at the heart of the municipal budget and planning process as it is the primary variable informing the demand for basic services and the subsequent allocation of resources. Changes in population figures can mostly be attributed to three broad demographic processes namely, fertility, mortality and migration rates.

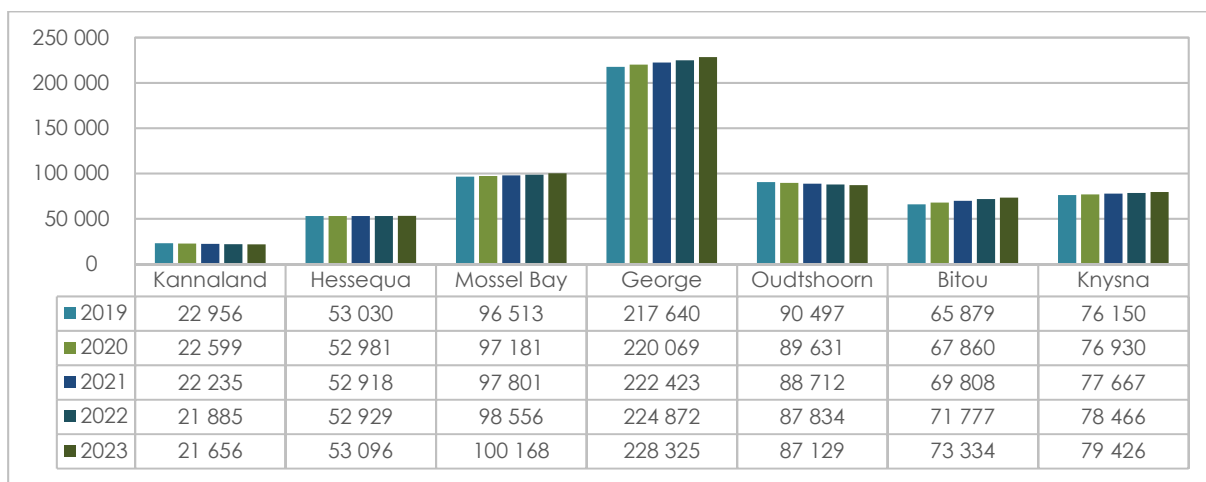
This chapter provides a concise yet meaningful overview of key demographic variables that could assist in municipal planning and budgeting, namely, estimates of population size, a sex ratio analysis, the distribution of population projections within age cohorts, dependency ratios, the number of households and household size compositions as well as an overview of population density per local municipal area.

The demographic data provided in this chapter was sourced from the Department of Social Development who used Stats SA's 2018 Mid-Year Population Estimates (2002 - 2030) to project population growth for the period 2019 to 2025.

Data source: Department of Social Development, 2019



POPULATION



Mossel Bay currently has a population of 96 513, rendering it the second most populated municipal area in the Garden Route District (GRD). The total population is estimated to increase to 100 168 by 2023 which equates to 0.9 per cent average annual growth. The population growth rate of Mossel Bay is above that of the GRD's estimated population growth of 0.8 per cent over this period.

Mossel Bay: Sex Ratio (SR), 2019 – 2023					
Municipality	2019	2020	2021	2022	2023
Kannaland	91.6	91.4	91.2	91.1	90.4
Hessequa	92.3	92.1	91.9	91.9	91.5
Mossel Bay	93.8	93.4	93.0	92.9	92.0
George	95.6	95.5	95.3	95.2	93.9
Oudtshoorn	90.0	89.8	89.6	89.5	88.8
Bitou	98.2	98.2	98.1	98.0	97.0
Knysna	95.8	95.5	95.2	95.2	93.7
Garden Route District	94.4	94.1	94.0	93.9	92.9

The overall sex ratio (SR) depicts the number of males per 100 females in the population (Moultrie et al., 2013: 9). As per above table, there are less males than females in Mossel Bay. The SR for Mossel Bay declines slightly over the 2019 to 2023 period, from 93.8 in 2019 to 92.0 in 2023. The lower number of males can be attributed to a wide range of factors; including factors where the variance in life expectancy can be attributed to a range of social and behavioural dynamics (Stats SA, 2018: 23).

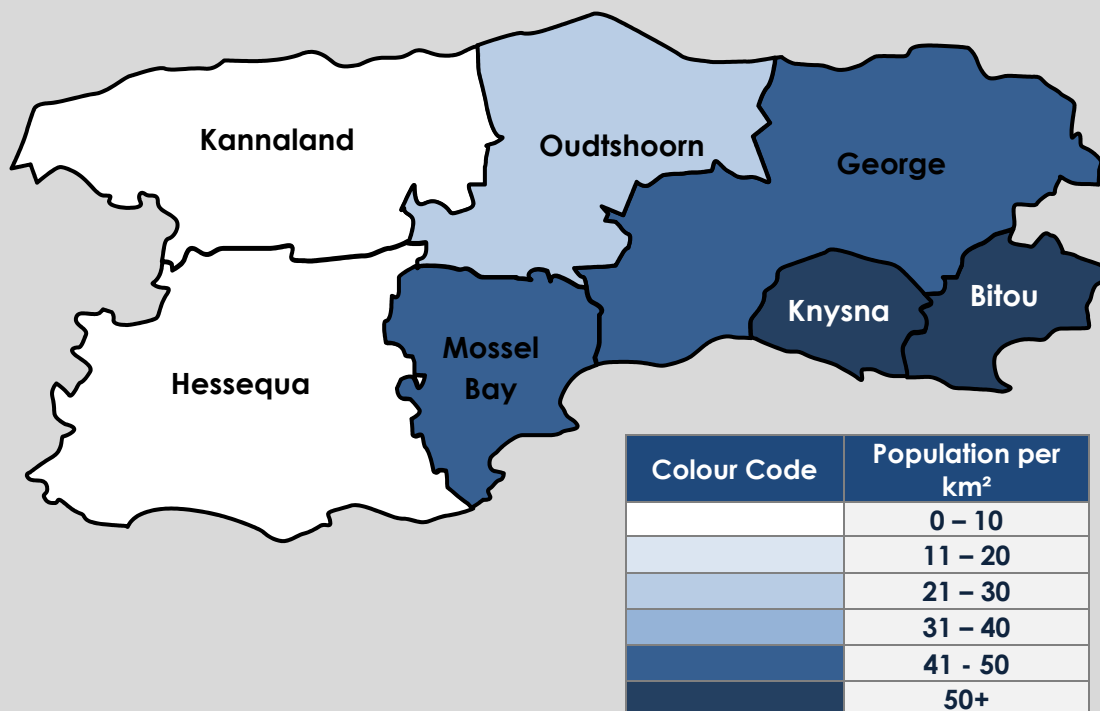
Mossel Bay: Age Cohorts, 2019 – 2025				
Year	Children 0 – 14 Years	Working Age 16 – 65 Years	Aged 65+	Dependency Ratio
2019	22 886	62 333	11 294	54.8
2022	22 613	63 277	12 666	55.8
2025	23 044	65 170	14 055	56.9
Growth	0.1%	0.7%	3.7%	-

The above table depicts Mossel Bay's population composition per age cohorts. These groupings are also expressed as a dependency ratio which in turn indicates who are part of the workforce (age 15 – 64 years) and those, who are dependent on them (children and seniors). A higher dependency ratio means a higher pressure on social systems and the delivery of basic services.

Between 2019 and 2025, the highest growth was recorded in the Aged cohort (65+) which grew at an annual average rate of 3.7 per cent. The child and working age cohorts in turn only grew by 0.1 and 0.7 per cent respectively. The notable increase in the aged cohort is expected to increase the dependency ratio towards 2025.

POPULATION DENSITY

Amidst rapid urbanisation across the Western Cape, population density figures will aid public sector decision makers to mitigate environmental, individual health and service delivery risks.



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In 2019, the population density of the Garden Route District was 27 persons per square kilometre. In order of highest to lowest, the various local municipal areas in the GRD compare as follows:

- Knysna 69 people/km²
- Bitou 66 people/km²
- **Mossel Bay 48 people/km²**
- George 42 people/km²
- Oudtshoorn 26 people/km²
- Hessequa 9 people/km²
- Kannaland 5 people/km²

2

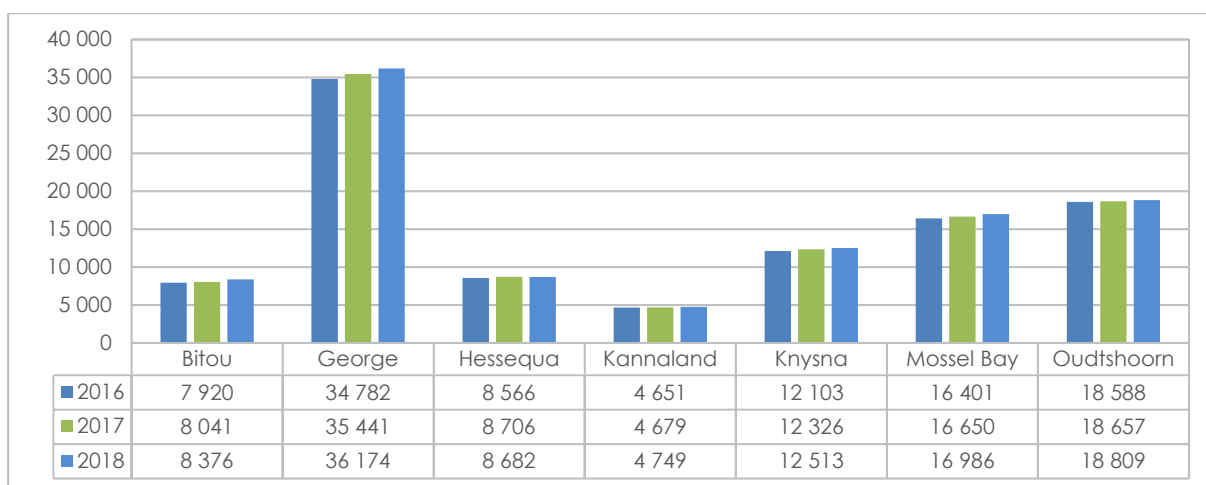
EDUCATION

The quality of education is closely correlated with economic development and social cohesion. Dramatically improving education outcomes is imperative not just to achieve the economic growth rates that South Africa needs to end poverty and increase inclusion, but also to tackle social ills such as crime and substance abuse.

Data source: Western Cape Education Department, 2019



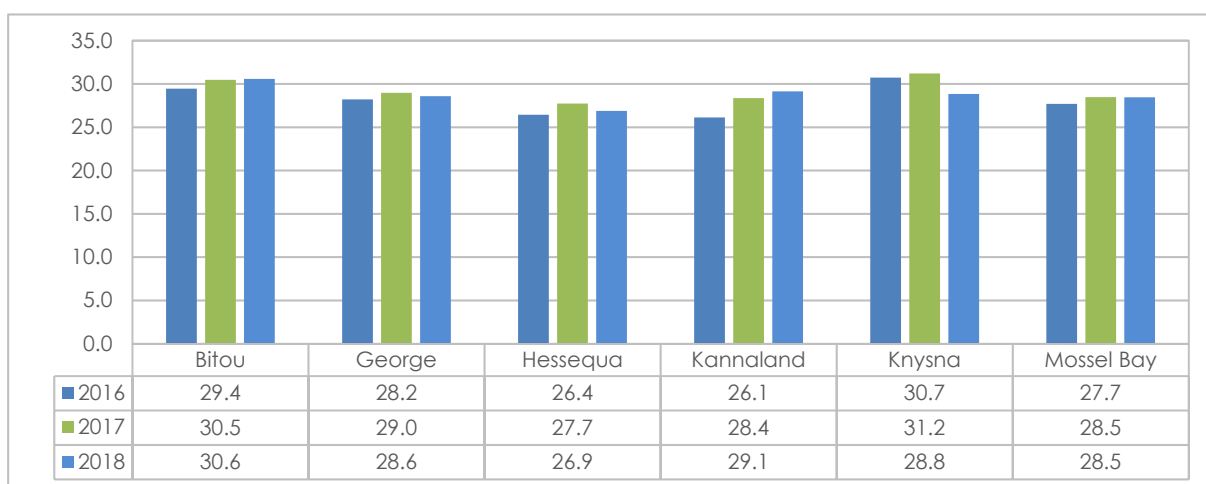
LEARNER ENROLMENT



Learner enrolment in Mossel Bay increased from 16 401 to 16 986, on average annually by 1.8 per cent between 2016 to 2018. The average District growth over the period was slightly lower at 1.6 per cent.

LEARNER-TEACHER RATIO

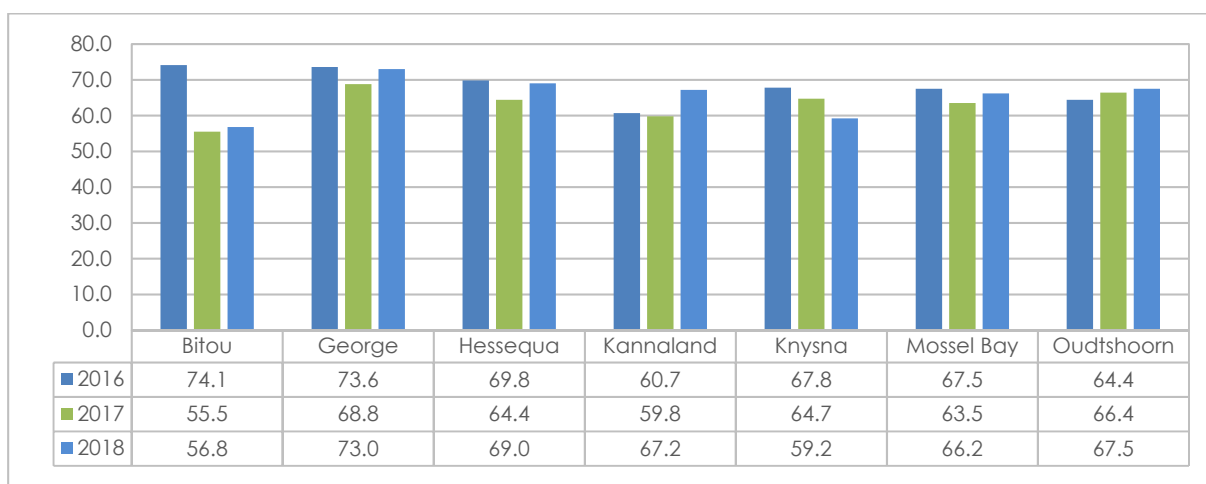
Factors influencing the learner-teacher ratio is the ability of schools to employ more educators when needed and the ability to collect fees. The learner-teacher ratio could also education outcomes through its impact on learner performance.



The learner-teacher ratio in Mossel Bay increased from 27.7 learners in 2016 to 28.5 learners in 2017 and remained unchanged at 28.5 learners in 2018. Bitou recorded the highest (30.6) learner-teacher ratio in the District, with Hessequa (26.9) recording the lowest. The overall District rate was at 28.7.

LEARNER RETENTION

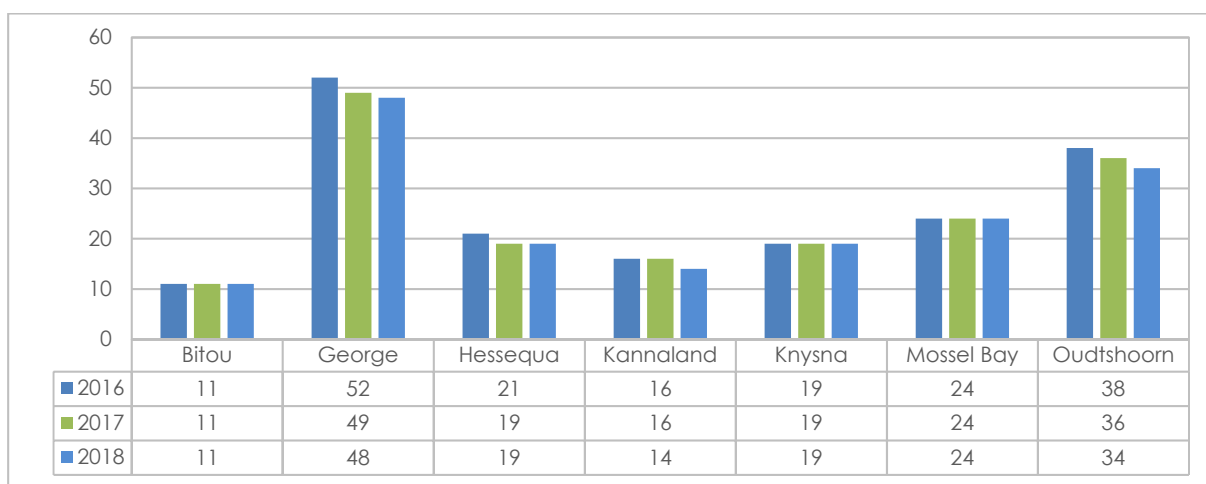
The learner retention rate is influenced by a wide array of factors, including economic influences such as unemployment, poverty/very low household income/indigent households, as well as social concerns such as teenage pregnancies. Being able to retain learners is essential for positive education outcomes and as such when considering education outcomes/results, retention rates should be kept in mind.



The learner retention rate for the Mossel Bay municipal area fluctuated between 2016 and 2018 dropping from 67.5 per cent in 2016 to 63.5 per cent in 2017, but increasing again to 66.2 per cent in 2018.

EDUCATIONAL FACILITIES

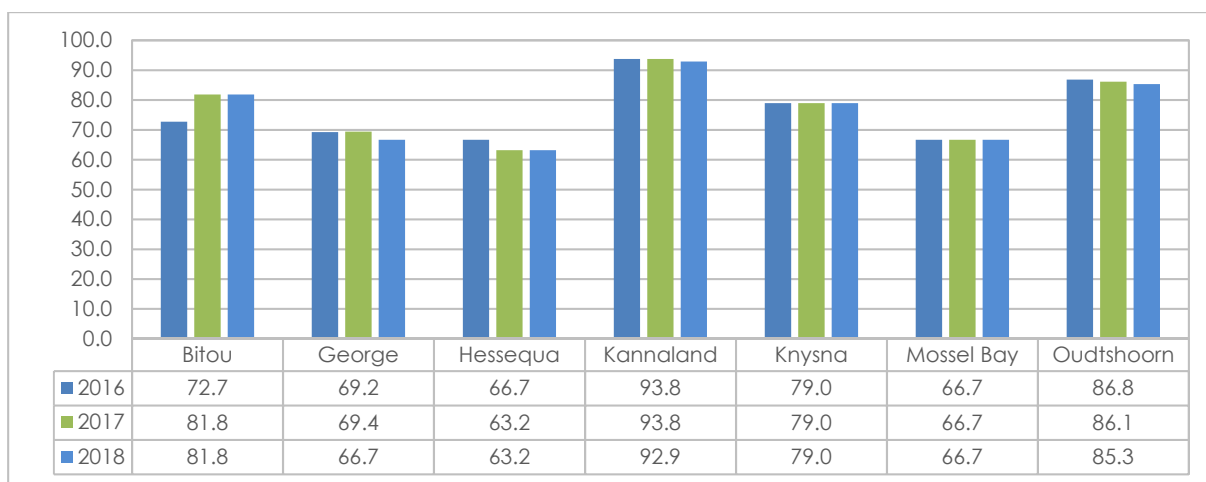
The availability of adequate education facilities such as schools, Further Education and Training (FET) colleges and schools equipped with libraries/media centres could positively affect academic outcomes.



In 2018, the Mossel Bay municipal area had a total of 24 public ordinary schools, the third largest number of schools in the District. This however is only indicative of the number of schools, but not of the learner capacity or number of learners at the schools.

NO-FEE SCHOOLS

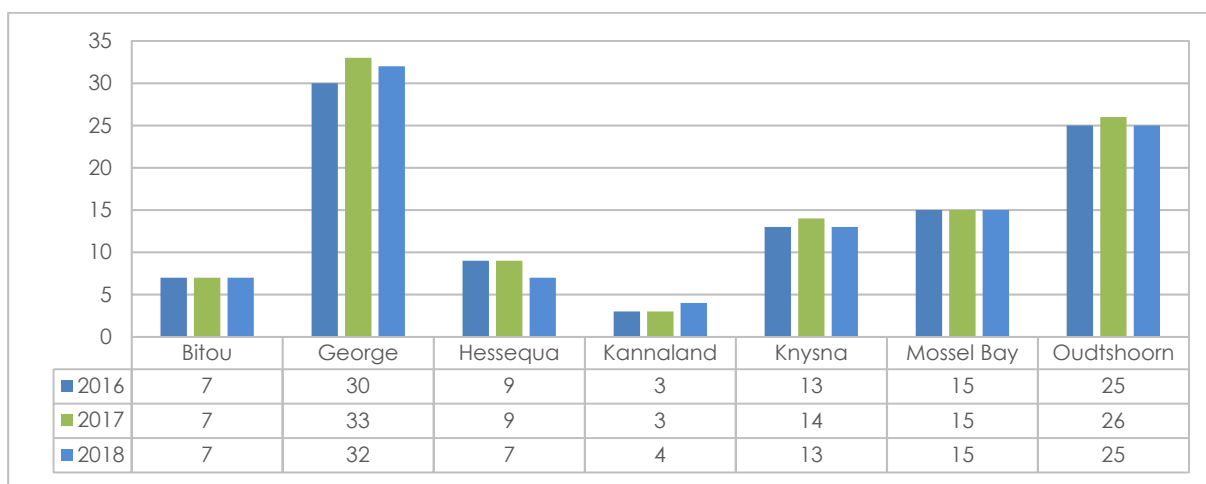
The proportion of no-fee schools in the Mossel Bay municipal area remained unchanged at 66.7 per cent for the period 2016 to 2018.



This is below the GRD average where 74.6 per cent of schools in 2018 were no-fee schools.

SCHOOLS WITH LIBRARIES

The presence of school libraries together with library staff are said to have a positive impact on student achievement.



Within the Mossel Bay municipal area, the number of schools equipped with libraries remained unchanged at 15 from 2016 to 2018.

EDUCATION OUTCOMES



Education remains one of the key avenues through which the state is involved in the economy. In preparing individuals for future participation in the broader market, policy decisions and choices in the education sector play a critical role in determining the extent to which future economic growth and poverty reduction plans can be realised. This section reflects on the matric pass rates amongst the various local municipal areas in the GRD.

Area	2016	2017	2018
Bitou	76.4	78.0	82.2
George	83.4	83.7	79.9
Hessequa	93.6	87.4	84.7
Kannaland	88.9	89.2	85.6
Knysna	77.9	72.4	77.1
Mossel Bay	87.4	83.5	83.1
Oudtshoorn	93.1	80.1	82.2
Garden Route District	85.7	82.0	81.3

Mossel Bay's matric pass rate regressed slightly from 87.4 per cent in 2016 to 83.5 per cent in 2017, dropping to 83.1 per cent in 2018. Between 2016 and 2018 the matric pass rates have generally declined across the District. The average District rate in 2018 was 81.3 per cent.

3

HEALTH

Health is a major factor contributing to the general quality of life in the Mossel Bay municipal area. It is therefore important to monitor the public health facilities as well as a variety of factors as such as diseases like HIV and TB as well as general health issues such as maternal health, that affects the community. This socio-economic profile provides the basic statistics concerning these issues. Since the focus of this profile is on the public health facilities, data on private facilities are not included.

Data source: Department of Health, 2019



HEALTHCARE FACILITIES

All citizens' right to access to healthcare services are directly affected by the number and spread of facilities within their geographical reach. South Africa's healthcare system is geared in such a way that people must move from primary, with a referral system, to secondary and tertiary levels.

Area	PHC Clinics		Community Health Centres	Community Day Centres	Hospitals		Treatment Sites	
	Fixed	Non-fixed			District	Regional	ART Clinics	TB Clinics
Mossel Bay	2	11	0	2	1	0	15	17
Garden Route District	32	37	0	7	6	1	51	86

In terms of healthcare facilities, the Mossel Bay municipal area had 13 primary healthcare clinics (PHC) in 2018, which comprises of 2 fixed and 11 mobile clinics as well as 2 community day centres. In addition, there is a district hospital, 15 antiretroviral treatment clinics/treatment sites and 17 tuberculosis clinics/treatment sites.

EMERGENCY MEDICAL SERVICES



Access to emergency medical services is critical for rural citizens due to distances between towns and health facilities being much greater than in urban areas. Combined with the relatively lower population per square kilometre in rural areas, ambulance coverage is greater in rural areas in order to maintain adequate coverage for rural communities. The provision of more operational ambulances can provide greater coverage of emergency medical services.

In 2018, the GRD had 2.0 ambulances per 10 000 population. The Mossel Bay municipal area was slightly above this figure, with 3.0 ambulances per 10 000 inhabitants. It is worth noting that this number only refers to Provincial ambulances and excludes all private service providers.

HIV/AIDS

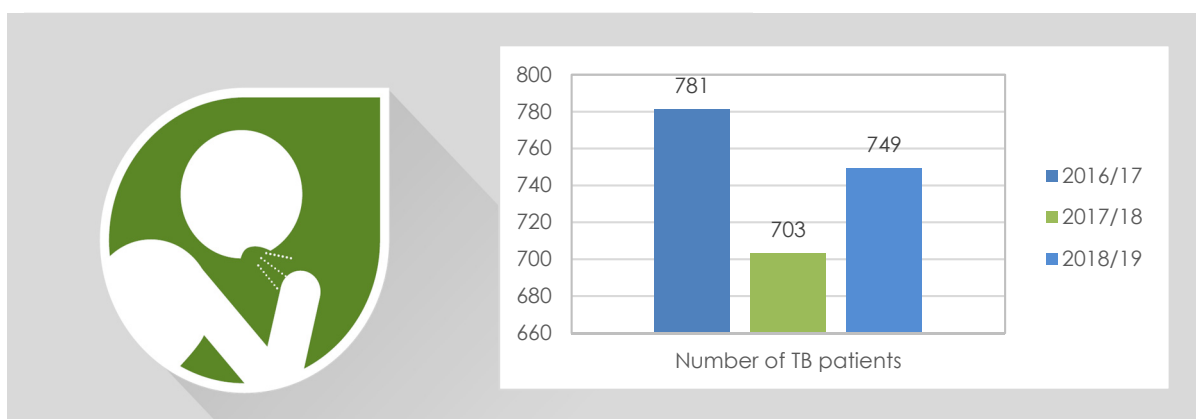
HIV/AIDS is among the top ten causes of death in the Western Cape Province, accounting for 8.0 per cent of deaths in 2016. HIV/AIDS management is crucial given its implications for the labour force and the demand for healthcare services.

Area	ART clients that remain with treatment month end		Number of new ART patients	
	2017/18	2018/19	2017/18	2018/19
Mossel Bay	4 052	4 147	530	527
Garden Route	21 577	23 317	3 478	3 009

Mossel Bay's total registered patients receiving ARTs increased between 2017 and 2018 (increase of 95 patients). The number of new antiretroviral patients fell by 3, from 530 to 527 between 2017 and 2018. This could be an indication that the number of HIV infections is decreasing or an indication that less people are being tested and receiving access to HIV treatment.

A total of 23 317 registered patients received antiretroviral treatment in the GRD in 2018 compared to 21 577 registered patients in 2017. Mossel Bay, with 4 147 registered patients in 2018, represents 17.8 per cent of the patients receiving ART in the GRD.

TUBERCULOSIS (TB)



Tuberculosis (TB) is closely linked to HIV and AIDS. Tuberculosis accounted for 7.6 per cent of the premature deaths in the Province in 2016.

Mossel Bay experienced a decline in TB cases from 781 in 2016 to 703 in 2017, but with a slight increase again to 749 in 2018. The Mossel Bay municipal area, with its 781 TB patients in 2018, represents 16.0 per cent of the District's total patient load. The TB patients are treated in 17 TB clinics or treatment sites within the Mossel Bay municipal area.

CHILD HEALTH

The United Nations Sustainable Development Goals aims by 2030 to end preventable deaths of new-borns and children under 5 years of age, with all countries aiming to reduce neonatal mortality to at least as low as 12 per 1 000 live births and under-5 mortalities to at least as low as 25 per 1 000 live births (Source: UN SDG's).

Area	Immunisation Rate		Malnutrition		Neonatal Mortality Rate		Low birth weight	
	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19
Mossel Bay	58.7	66.6	0.9	0.1	12.7	4.8	16.9	14.5
Garden Route District	61.1	65.7	2.7	1.5	11.4	9.0	17.8	16.4

The **immunisation rate** in the Mossel Bay municipal area has been generally low, increasing from 58.7 per cent in 2017 to 66.7 per cent 2018.

The **number of malnourished children** under five years in Mossel Bay in 2017 was 0.9 per 100 000 persons, declining to 0.1 in 2018.

Neonatal mortality rate (NMR) (per 1 000 live births) in the Mossel Bay area has improved slightly from 12.7 in 2017 to 4.8 in 2018.

The **low birth weight** indicator improved from 16.9 per cent in 2017 to 14.5 in 2018.

DEFINITIONS

Immunisation: The immunisation rate is calculated as the number of children immunised as a percentage of the total number of children less than one year of age. Immunisation protects both adults and children against preventable infectious diseases. Low immunisation rates speak to the need for parents to understand the critical importance of immunisation, as well as the need to encourage parents to have their young children immunised.

Malnutrition: Expressed as the number of malnourished children under five years per 100 000 people. Malnutrition (either under- or over-nutrition) refers to the condition whereby an individual does not receive adequate amounts or receives excessive amounts of nutrients.

Neonatal mortality rate: Measured as the number of neonates dying before reaching 28 days of age, per 1 000 live births in a given year. The first 28 days of life (neonatal period) represent the most vulnerable time for a child's survival. The Province's target for 2019 is 6.0 per 1 000 live births.

Low birth weight: Percentage of all babies born in facility that weighed less than 2 500 g. Low birth weight is associated with a range of both short- and long-term consequences.

MATERNAL HEALTH

Area	Maternal Mortality Rate		Delivery Rate to Women under 20 years		Termination of Pregnancy Rate	
	2017/18	2018/19	2017/18	2018/19	2017/18	2018/19
Mossel Bay	82	0	14.4	14.9	0.5	0.5
Garden Route	81	55	15.0	15.9	0.6	0.6

In 2018, the **maternal mortality rate** in the Mossel Bay municipal area was 0 per 100 000 live births, while for the GRD it was 55 deaths per 100 000 live births.

The **delivery rate to women under 20 years** has remained relatively stagnant between 2017 and 2018 in Mossel Bay and the GRD, at 14.9 and 15.9 per cent respectively.

The **termination of pregnancy rate** remained unchanged at 0.5 per cent for 2018 in the Mossel Bay municipal area, which is slightly below the District's 0.6 per cent.

DEFINITIONS

Maternal mortality rate: *Maternal deaths per 100 000 live births in health facilities. Maternal death is death occurring during pregnancy, childbirth and the puerperium of a woman while pregnant or within 42 days of termination of pregnancy, irrespective of the duration and site of pregnancy and irrespective of the cause of death (obstetric and non-obstetric).*

Births to teenage mothers: *Deliveries to women under the age of 20 years as proportion of total deliveries in health facilities. Teenage pregnancy is almost always unplanned; as a result, when young parents are placed in a position to care for their children, life can become particularly tough, especially if they do not have family or social support.*

Termination of pregnancy: *The percentage of terminations as a proportion of the female population aged 15 to 44 years. Government hospitals, designated private doctors and gynaecologists, and non-profit providers offer safe and legal termination of pregnancy. To have a free abortion, the request must be made at a primary healthcare clinic, where the pregnancy will be confirmed, counselling provided, an appointment made, and a referral letter be given to a facility where the procedure can be performed.*

4

POVERTY

This section shows living conditions and economic circumstances of households in the Mossel Bay municipal area based on the most recent data including Global Insight and Quantec. Economic theory suggests that when an economy prospers its households are expected to enjoy an improved standard of living. On the contrary, a declining economy tends to lower the standards of living of people. This section uses indicators in terms of GDP per capita, income inequality and the human development index to show the current reality of households residing in the Mossel Bay municipal area.

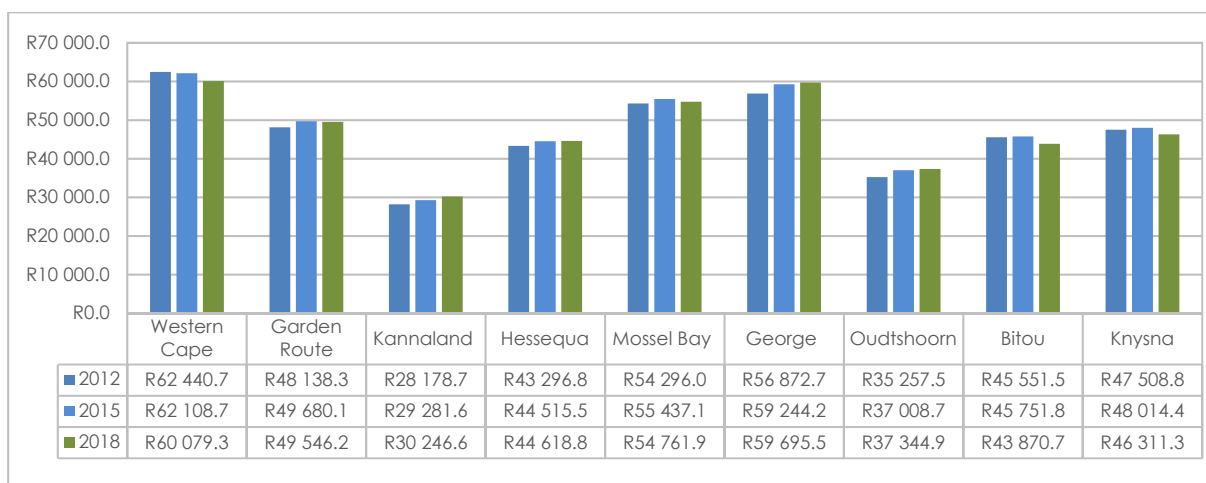
The deteriorating financial health of households and individuals under the weight of economic pressures, specifically between 2011 and 2015, has resulted in an increase in the poverty levels, according to the Poverty Trends in South Africa report released by Statistics South Africa in 2017. The report cites rising unemployment levels, low commodity prices, higher consumer prices, lower investment levels, household dependency on credit, and policy uncertainty as the key contributors to the economic decline in recent times. These recent findings indicate that the country will have to reduce poverty at a faster rate than previously planned.

According to the report the categories of people vulnerable to poverty remained to be African females, children 17 years and younger, people from rural areas, and those with no education. Inflation-adjusted poverty lines show that food poverty increased from R219 in 2006 to R531 per person per month in 2017. The lower-bound poverty line has increased from R370 in 2006 to R758 per person per month in 2017 while the upper-bound poverty line has increased from R575 in 2006 to R1 138 per person per month in 2017.



GDPR PER CAPITA

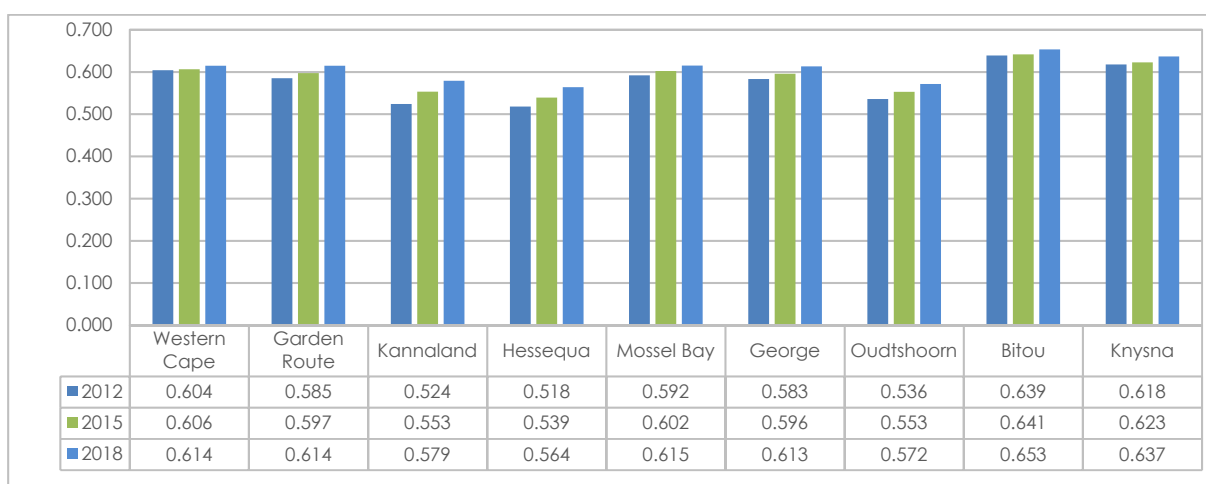
An increase in real GDP per capita, i.e. GDP per person, is experienced only if the real economic growth rate exceeds the population growth rate. Even though real GDP per capita reflects changes in the overall well-being of the population, not everyone within an economy will earn the same amount of money as estimated by the real GDP per capita indicator.



At R54 762 in 2018, Mossel Bay's real GDP per capita was the second highest in the District and just short of the Provinces R60 0079. The GRD's GDP per capita averaged at R49 546.

INCOME INEQUALITY

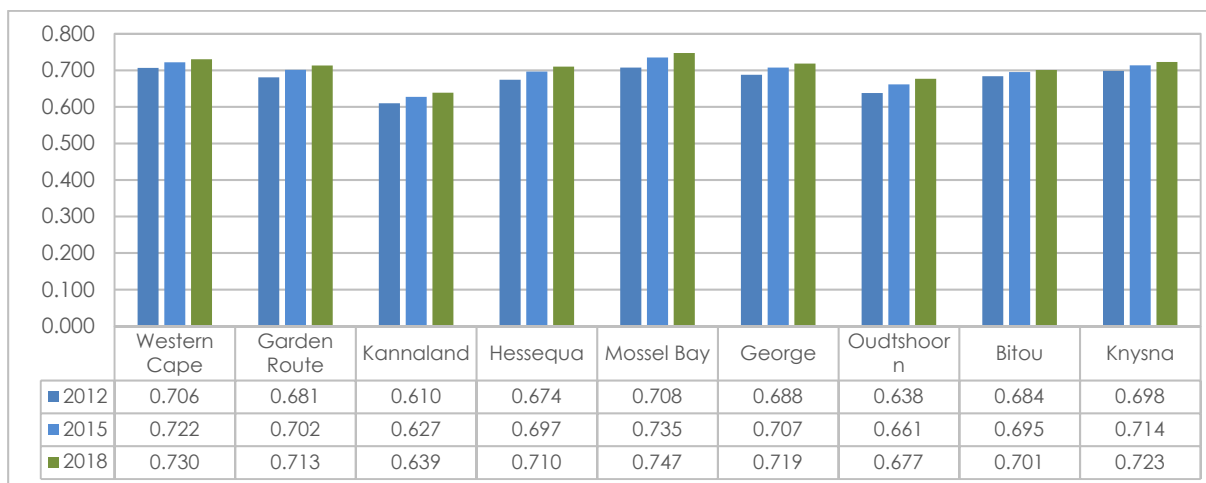
The National Development Plan (NDP) has set a target of reducing income inequality in South Africa from a Gini coefficient of 0.7 in 2010 to 0.6 by 2030. Income inequality in the Mossel Bay area has worsened between 2012 and 2018, with the gini coefficient increasing from 0.592 in 2012 to 0.615 in 2018.



Inequality levels in Mossel Bay as measured by the gini coefficient (0.615 in 2018) was marginally higher than the GRD (0.614). Bitou had the highest inequality levels in the District, with 0.653 and Hessequa the lowest with 0.564.

HUMAN DEVELOPMENT

The United Nations uses the Human Development Index (HDI)¹ to assess the relative level of socio-economic development in countries. Indicators used to measure human development include education, housing, access to basic services and health indicators. Per capita income is the average income per person of the population per year; per capita income does not represent individual income within the population. The life expectancy and infant mortality rates are other important criteria for measuring development.



There has been a general increase in the HDI of the Mossel Bay municipal area, the GRD as well as for the Western Cape (shown above between 2012 and 2018). Mossel Bay's HDI has increased from 0.71 in 2012 to 0.75 in 2018, sitting just above the GRD's 0.71 and the Western Cape's 0.73.

¹ The HDI is a composite indicator reflecting education levels, health, and income. It is a measure of peoples' ability to live a long and healthy life, to communicate, participate in the community and to have sufficient means to be able to afford a decent living. The HDI is represented by a number between 0 and 1, where 1 indicates a high level of human development and 0 represents no human development.

5

BASIC SERVICE DELIVERY

The Constitution of the Republic of South Africa states that every citizen has the right to access adequate housing and that the State must take reasonable legislative and other measures within its available resources to achieve the progressive realisation of this right. Access to housing also includes access to services such as potable water, basic sanitation, safe energy sources and refuse removal services, to ensure that households enjoy a decent standard of living.

This section uses Statistics South Africa's Community Survey 2016, Statistics South Africa's Non-Financial Census of Municipalities (2015 to 2018) as well as information by Quantec Research to reflect on the most recent household information and service trends.



ACCESS TO BASIC SERVICES

Since no new household survey information is available, this section highlights housing and household services access levels from the most recent available information from Statistics South Africa's Community Survey 2016. The next household survey which includes municipal level access to household services will be the Census in 2021.

Community Survey 2016	Mossel Bay	Garden Route District
Total number of households	31 766	189 345
Formal main dwelling	28 004 88.2%	162 325 85.7%
Water (piped inside dwelling/within 200 m)	31 142 98.0%	183 441 96.9%
Electricity (primary source of lighting)	30 474 95.9%	178 646 94.3%
Sanitation (flush/chemical toilet)	30 374 95.6%	181 973 96.1%
Refuse removal (at least weekly)	27 715 87.2%	168 079 88.8%

Above table indicates access to housing and services (2016) in the Mossel Bay municipal area, with a total of 88.2 per cent (31 766 households) enjoying access to formal housing. Access to water, electricity, sanitation and were however higher than this at 98.0 per cent, 95.9 per cent, 95.6 per cent respectively, while refuse removal services was marginally below at 87.2 per cent.

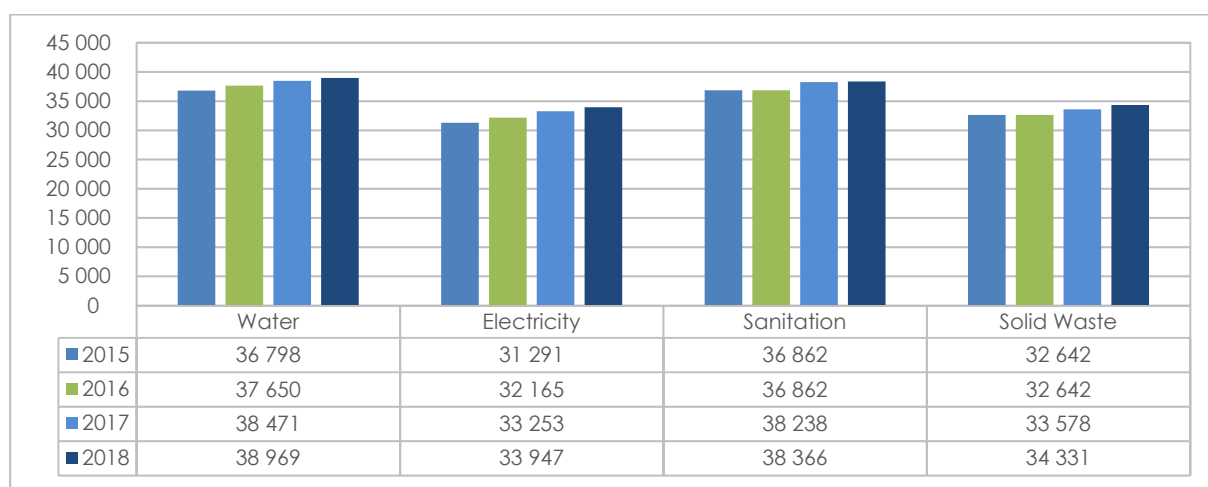
Dwelling Type	Mossel Bay	%	Garden Route District	%
House or brick structure on a separate stand or yard	21 865	73.8	131 752	76.3
Traditional dwelling/hut/structure made of traditional materials	180	0.6	1 150	0.7
Flat in a block of flats	850	2.9	4 046	2.3
Town/cluster/semi-detached house (simplex, duplex or triplex)	2 113	7.1	6 186	3.6
House/flat/room, in backyard	370	1.2	2 568	1.5
Informal dwelling/shack	3 497	11.8	23 733	13.7
Room/flatlet not in backyard but on a shared property	408	1.4	1 156	0.7
Other/unspecified/NA	357	1.2	2 045	1.2
TOTAL	29 639	100.0	172 636	100.0

Access to decent formal housing is regarded as a basic human right and an important indicator of the level of human development within an economy. Above below presents a more recent picture of the different types of dwellings for households living within the Mossel Bay municipal area in 2018 (Quantec Research, 2018). In terms of access to informal dwellings, the proportion in the GRD is 13.7 per cent (23 733 households). At 11.8 per cent (3 497), the proportion of informal dwellings in Mossel Bay was slightly lower than that of the District.

CONSUMER UNITS

A key element to the sustainable management of services is accurate and reliable information on the demand for services, including free basic services, to enable informed projections on future demand. This section reflects on services growth based on information from Statistics South Africa's Non-Financial Survey of Municipalities. The unit of measure is a consumer/billing unit which is not comparable to household level information. Services provided by municipalities are done per 'plot' or consumer/billing unit. However, since households are the unit of measurement more often used in demographic surveys, an understanding of household dynamics remains important.

The figure below illustrates the access to basic services in the Mossel Bay municipal area between 2015 and 2018 as indicated through Statistics South Africa's Non-Financial Census of Municipalities².



In 2018, water services represented the largest number of consumer units at 38 969. This is followed by sanitation at 38 366 and solid waste at 34 331. In 2018, electricity services had the lowest number of consumer units at 33 947. Between 2015 and 2018, electricity (2 656 units) recorded the largest increase in the number of consumer units followed by water (2 171 units), solid waste (1 689 units), and sanitation services (1 504 units).

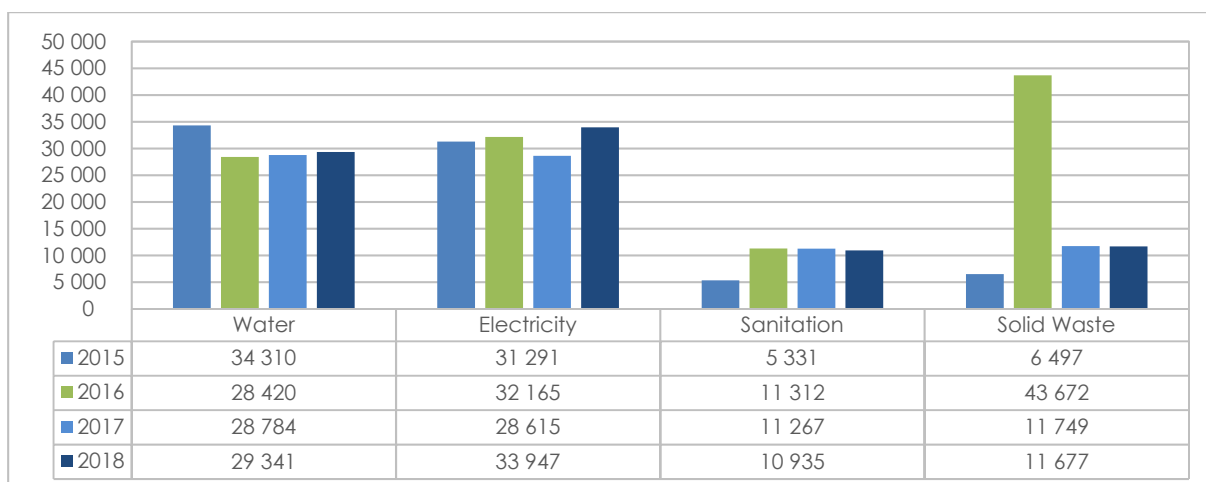
The figure below illustrates access to free basic services. Indigent households qualify for free basic water, electricity, sanitation and waste removal services. In 2018, the Mossel Bay Municipality had a total of 12 212 indigent households;

² Consumer/billing units are used as the unit of measurement. An entity to which the service is (or would be) delivered, and which receives one bill if the service is billed, alternatively known as a delivery point. (This concept is often referred to as a household by municipalities, but this is not strictly correct, as households and consumer units do not coincide one to one, particularly in blocks of flats, on stands where there are multiple households in the same dwelling, or in additional dwellings, such as garden flats, backyard rooms, etc., and in the case of public taps.)

FREE BASIC SERVICES

As per the Constitution, it is the responsibility of the local sphere of government to provide services that satisfy the basic needs of its citizens. The Municipal Systems Act in turn defines a basic municipal service as those necessary to ensure an acceptable and reasonable quality of life and, if not provided, would endanger public health or safety or the environment. Such basic services include, but are not limited to the provision of water, sewage collection and disposal, refuse removal, municipal health services, street lighting, parks and recreation facilities etc.

Government however provides a basket of free basic services (water, sanitation, refuse removal and electricity) which aims to improve the lives of the poorest and most vulnerable communities. In order to qualify for the basket of free basic services, a household must be classified as an indigent household as per criteria determined by individual local municipalities. In general, a household is classified as indigent when the occupants in said households earn a combined income of less than a certain amount (poverty threshold) defined by the indigent policy of a municipality at that point in time. Municipalities review their indigent policies (and as such the determined amount) on an annual basis to bring the defined amount in line with reigning socio-economic conditions. According to Statistics South Africa, in 2017 most municipalities classified an indigent household as a family earning a combined income of less than R3 200 per month.



Even though there has been an increase in indigent households receiving water and electricity between 2017 and 2018, over the same period access to free basic services declined significantly for sanitation and solid waste removal services by 332 and 72 households respectively.

6

SAFETY AND SECURITY

The South African Police Service and Stats SA published the country's crime statistics for 2018/19, showing which how criminal activity has changed in the past financial year.

The 2018/19 financial year saw increases in all contact crimes, including murder, sexual offences, attempted murder, assault with intent to cause grievous bodily harm, common assault, common robbery and robbery with aggravating circumstances.

Over the last year, 21,002 people were murdered across the country, up by 686 from 2017/18. The most common causes of murder were misunderstandings/arguments, followed by domestic violence and gang-related killings. According to the 2018/19 crime stats, the murder rate increased by a staggering 3.4 per cent compared to the previous financial year. Most of these murders were committed between Saturday and Sunday, suggesting that weekends are the most violent and deadly periods in South Africa. The 2018/19 crime statistics indicate that there were 3 974 murders in the Western cape. The murder rate is currently at 59.4 per 100 000 people.

Sexual offences have, according to SAPS and Stats SA, shot up by 4.6 per cent in 2018/19 compared to the previous financial year. SAPS and Stats SA further revealed that a total of 52 420 sexual offences were reported in 2018/19, an increase of 3 212 compared to 2017/18.


Data from the 2018/19 crime stats shows that Nyanga and Delft, appear as two of the most dangerous areas of residence in South Africa. Both these Cape Town settlements feature prominently in crimes such as murder, rape, car hijacking, house robbery and cash-in-transit heists. Nyanga is the top murder hot spot in the country, with 289 murder cases reported in the past financial year. This is followed by Delft, which had 247 reported cases and Khayelitsha came in third with 221 cases.

The data depicted in the following section was sourced from the 2018/19 Crime Statistics released by SAPS and Stats SA in September 2019. Incidence of crime per 100 000 were calculated using actual crime and estimated population figures provided by the Department of Social Development.

The information relating to crash fatalities were sourced from the Department of Transport and Public Works.



MURDER



		Municipal Area	2016/17	2017/18	2018/19
Actual Number	Mossel Bay		41	47	46
	Garden Route District		181	183	215
Per 100 000	Mossel Bay		43	49	48
	Garden Route District		30	29	35

Definition: The unlawful and intentional killing of another person.

The 2018/19 crime statistics released by SAPS and Stats SA indicate that the number of murders in South Africa has increased by 3.4 per cent to over 21 002 cases recorded in 2018/19. This gives South Africa a rather alarming figure of 58 murders a day. Within the Western Cape Province, murders have increased by 245, from 3 729 to 3 974, in 2018/19.

Within the Mossel Bay municipal area, the number of murders decreased marginally from 47 in 2017/18 to 46 in 2018/19. The murder rate (per 100 000 people) decreased from 49 in 2017/18 to 48 in 2018/19. At the same time, the murder rate for the GRD increased from 29 to 35.

SEXUAL OFFENCES




		Municipal Area	2016/17	2017/18	2018/19
Actual Number	Mossel Bay		113	92	125
	Garden Route District		1 037	1 046	1 059
Per 100 000	Mossel Bay		120	96	131
	Garden Route District		170	168	172

Definition: Sexual offences includes rape (updated to the new definition of rape to provide for the inclusion of male rape), sex work, pornography, public indecency and human trafficking.

The rate of sexual offences in South Africa is amongst the highest in the world. With respect to the crime statistics released by SAPS and Stats SA, sexual offences in South Africa increased by 4.6 per cent in 2018/19 compared to the previous financial year. SAPS and Stats SA further revealed that a total of 52 420 sexual offences were reported in this observed financial year, an increase of 3 212 compared to 2017/18. In 2018/19, there were 125 sexual offences in the Mossel Bay municipal area. Mossel Bay's sexual offences rate (per 100 000 people) increased 131 but was significantly lower than the District's 172.

DRUG-RELATED OFFENCES




Municipal Area		2016/17	2017/18	2018/19
Actual Number	Mossel Bay	1 813	1 448	1 048
	Garden Route District	10 931	10 809	7 330
Per 100 000	Mossel Bay	1 923	1 506	1 099
	Garden Route District	1 787	1 733	1 192

Definition: Drug-related crimes refers to the situation where the perpetrator is found to be in possession of, under the influence of, or selling illegal drugs.

According to the 2018/19 crime statistics, the Western Cape Province has the highest rate of drug related in the country at 1 203 per 100 000 people. However, the 2018/19 stats showed figures have declined since 2017/2018. In 2017/18, 36.2 per cent of all drug-related crimes in South Africa occurred in the Province, however, this year, the Province's proportion declined slightly, recording 35.0 per cent of the country's drug-related crime. Drug-related crime within the Mossel Bay municipal area dropped significantly from 1 448 cases in 2017/18 to 1 048 cases in 2018/19. The GRD's drug related offences also decreased sharply from 10 809 in 2017/18 to 7 330 in 2018/19. When considering the rate per 100 000 people, with 1 099 crimes in 2018/19, the Mossel Bay municipal area is below that of the District and Province's rates of 1 192 and 1 203 respectively.

DRIVING UNDER THE INFLUENCE




Municipal Area		2016/17	2017/18	2018/19
Actual Number	Mossel Bay	365	444	465
	Garden Route District	1 441	1 739	1 745
Per 100 000	Mossel Bay	387	462	488
	Garden Route District	213	250	193

Definition: Driving under the influence (DUI) refers to a situation where the driver of a vehicle is found to be over the legal blood alcohol limit. This is a crime detected through police activity rather than reports by members of the public.

Despite concerted efforts by government our roads are still considered amongst the most dangerous in the world. The number of cases of driving under the influence of alcohol or drugs in the Mossel Bay area shows an increase of 21, from 444 in 2017/18 to 465 in 2018/19. This translates into a rate of 488 per 100 000 people in 2018/19, which is well above that of the District's 193.

RESIDENTIAL BURGLARIES



		Municipal Area	2016/17	2017/18	2018/19
Actual Number	Mossel Bay		958	970	968
	Garden Route District		5 654	3 616	3 278
Per 100 000	Mossel Bay		1 016	1 009	1 015
	Garden Route District		1 239	1 174	1 107

Definition: Residential burglary is defined as the unlawful entry of a residential structure with the intent to commit a crime, usually a theft.

The 2018/19 crime statistics released by SAPS and Stats SA indicate that the number of residential burglaries in the Western Cape decreased by 3 244 from 42 662 in 2017/18 to 39 418 in 2018/19. Residential burglary cases within the Mossel Bay municipal area also decreased slightly from 970 in 2017/18 to 968 in 2018/19. Within the broader GRD, there was also a decrease in residential burglaries from 3 616 in 2017/18 to 3 278 in 2018/19. At 1 015, Mossel Bay's rate per 100 000 people is well below that of the District's 1 107.

ROAD USER FATALITIES

Area	2016	2017	2018
Mossel Bay Municipality	16	12	17
Garden Route District	127	137	132

Definition: The type of road user that died in or during a crash i.e. driver, cyclist, passengers, pedestrians.

According to a recent study, the majority of road fatalities in Africa fall within the working age cohort - between the ages of 15 - 64 years - whilst three out of four fatalities were found to be male (Peden et al., 2013). The untimely death of these primary breadwinners therefore impacts directly upon not only the livelihood of family structures, but deprive society of active economic participants that contribute towards growth and development. The socio-economic impact of such road fatalities has proven to be particularly devastating in South Africa where the majority of road users hail from poor and vulnerable communities.

The number of road user fatalities increased significantly in the Mossel Bay municipal area in 2018, compared to the previous year. Fatalities for 2018 totalled 17 compared to 12 cases in 2017. Comparative figures for the District indicates an overall decrease in the number of road user fatalities in the District, from 137 in 2017, to 132 in 2018.

7

THE ECONOMY

Economic activity within municipal boundaries is important as it shows the extent of human development and the living standards of communities. Although municipalities have no power to increase or decrease taxes to stimulate economic activity, there are few levers that local government authorities have control over to contribute to economic performance, including, among others, procurement of goods and services, job creation through expanded public works programmes as well as creating an enabling environment for small businesses.

The ability of households to pay for services such as water, electricity, sanitation, and refuse removal depends on income generated from economic activities. A slowdown in economic activity may result in job losses and the inability of households to pay for services, leading to reduced municipal revenues. Data on macroeconomic performance, especially the information on sectoral growth and employment, is useful for municipalities' revenue and expenditure projections.



ECONOMIC SECTOR PERFORMANCE

In the Mossel Bay municipal area, the local economy was dominated by the finance, insurance, real estate and business services (R2.090 billion; 28.1 per cent), followed by the wholesale and retail trade, catering and accommodation sector (R1.291 billion; 17.3 per cent) and manufacturing (R1.104 billion; 14.8 per cent) in 2017. Combined, these top three sectors contributed R4.485 billion (or 60.1 per cent) to Mossel Bay's economy, estimated to be worth R7.452 billion in 2017.

Mossel Bay: GDP performance per sector, 2008 - 2017									
Sector	Contribution to GDP (%) 2017	R million value 2017	Trend		Average Real GDP growth (%)				
			2008 - 2017	2014 - 2018e	2014	2015	2016	2017	2018e
Primary sector	6.2	461.1	1.8	0.0	5.3	-1.6	-4.4	7.8	-6.9
Agriculture, forestry & fishing	4.9	363.2	2.1	-0.3	5.0	-2.1	-5.6	9.3	-8.1
Mining & quarrying	1.3	98.0	0.7	1.4	6.7	0.2	0.5	2.0	-2.3
Secondary sector	22.0	1 639.8	-0.9	-2.5	-1.8	-3.2	-1.7	-3.2	-2.8
Manufacturing	14.8	1 104.3	-0.5	-2.4	-2.0	-3.5	-1.2	-3.0	-2.1
Electricity, gas & water	2.1	156.0	-3.6	-2.9	-3.5	-4.0	-4.5	-1.7	-0.8
Construction	5.1	379.6	-0.9	-3.0	-0.4	-1.6	-2.6	-4.6	-5.9
Tertiary sector	71.8	5 351.3	2.9	2.2	3.0	2.6	2.1	1.8	1.6
Wholesale & retail trade, catering & accommodation	17.3	1 291.2	2.1	1.2	1.7	2.3	1.9	-0.3	0.2
Transport, storage & communication	10.0	748.3	2.4	2.1	3.7	1.4	1.6	1.8	1.9
Finance, insurance, real estate & business services	28.1	2 090.6	3.9	3.4	3.8	4.0	3.1	3.4	2.7
General government	9.6	716.2	2.5	0.6	2.9	0.0	-0.1	-0.4	0.9
Community, social & personal services	6.8	505.0	2.0	1.5	1.9	1.3	1.9	1.8	0.6
Total Mossel Bay	100.0	7 452.3	2.0	1.1	2.1	1.0	0.9	1.1	0.2

The tertiary sector, which contributes 71.8 per cent of total GDP in the municipal area, was valued at R5.4 billion in 2017. This sector is primarily driven by the finance, insurance, real estate and business services and the wholesale and retail trade, catering and accommodation sectors. The main contributor to GDP in the region - the finance, insurance, real estate and business services sector - achieved average annual growth rates of 3.9 per cent between 2008 and 2017, which was nearly double the 2.0 per cent growth rate achieved by the municipal area as a whole. Estimates for 2018 indicate a slight slowdown in this sector, with a projected growth rate of 2.7 per cent for 2018. The tertiary sector is, however, the only sector within the municipal region that has shown growth in 2018.

The secondary sector in the municipal area has been experiencing contractions in growth between 2008 and 2017. The manufacturing sector, which has realised a negative average growth rate over the period, has not also experienced positive growth rates between 2014 and 2018 (estimate). The electricity, water and gas sector has fared even worse - recording a contraction of 3.6 per cent from 2008-2017, the sector has failed to achieve positive growth rates between 2014 and 2018 (estimate). Similarly, the construction sector has suffered contractions year-on-year since 2015. Estimates for 2018 indicate that the trend will continue in the construction sector, with marginal improvements being registered in the other two sectors.

The municipal area's smallest sector - the primary sector - comprises agriculture, forestry and fishing, valued at R363.2 million in 2017, and mining and quarrying, valued at R98.0 million in 2017. Overall, the primary sector has achieved average growth rates of 1.8 per cent per annum (2008 - 2017), largely due to the stagnation in the mining and quarrying sector. The outlook for 2018 paints an unfavourable picture for the sector, with the agriculture, forestry and fishing sector being particularly concerning with an estimated contraction in growth of 8.1 per cent.

LABOUR

In terms of employment, the primary sector lost 1 111 jobs between 2008 and 2017, which was mainly due to the agriculture, forestry and fishing sector wherein 1 109 jobs were lost. Since 2016, the primary sector has been declining in employment opportunities year-on-year, which is likely to persist at a subdued rate, according to estimates for 2018.

Mossel Bay: Employment growth per sector 2008 – 2017									
Sector	Contribution to employment 2017	Number of jobs 2017	Trend		Employment (net change)				
			2008 - 2017	2014 - 2018e	2014	2015	2016	2017	2018e
Primary sector	10.4	3 762	-1 111	50	-98	465	-127	-133	-57
Agriculture, forestry & fishing	10.1	3 652	-1 109	46	-101	459	-131	-133	-48
Mining & quarrying	0.3	110	-2	4	3	6	4	0	-9
Secondary sector	15.1	5 440	-1 010	-249	41	-82	-83	-31	-94
Manufacturing	9.0	3 256	-417	-86	-3	2	-87	49	-47
Electricity, gas & water	0.3	105	13	-1	3	1	1	0	-6
Construction	5.8	2 079	-606	-162	41	-85	3	-80	-41
Tertiary sector	74.5	26 926	5 749	2 776	677	832	26	811	430
Wholesale & retail trade, catering & accommodation	24.7	8 909	1 871	1 036	122	367	18	427	102
Transport, storage & communication	4.6	1 667	575	100	51	112	-140	67	10
Finance, insurance, real estate & business services	20.0	7 225	2 067	1 314	244	343	195	222	310
General government	9.7	3 522	501	21	169	-85	48	-137	26
Community, social & personal services	15.5	5 603	735	305	91	95	-95	232	-18
Total Mossel Bay	100.0	36 128	3 628	2 577	620	1 215	-184	647	279

During the 2008 and 2017 period, the Mossel Bay municipal area recorded 3 628 jobs, mainly due 5 5749 jobs being created in tertiary sector, which was offset by job losses in primary and secondary sectors. The most jobs were created by the finance, insurance, real estate and business services sector (2 067), wholesale, retail, catering and accommodation sector (1 871) and the community, social and personal services sector (735).

The majority of workers in the Mossel Bay's labour force in 2017 were semi-skilled (41.7 per cent), while 32.7 per cent were skilled.

Mossel Bay: Trends in formal labour force skills				
Formal employment by skill	Skill level contribution (%)	Average growth (%)	Number of jobs	
	2017	2014 - 2018e	2017	2018e
Skilled	32.7	3.8	8 358	8 630
Semi-skilled	41.7	1.6	10 656	10 804
Low-skilled	25.6	1.4	6 528	6 544
Total Mossel Bay	100.0	2.3	25 542	25 978

The growth in skilled employment (3.8 per cent) was fastest over the period 2014 – 2018, compared with semi- and low-skilled employment. With the strong growth in skilled employment, further capacitation of low-skilled and semi-skilled workers is crucial to maintain a steady supply of skilled labour to the area.

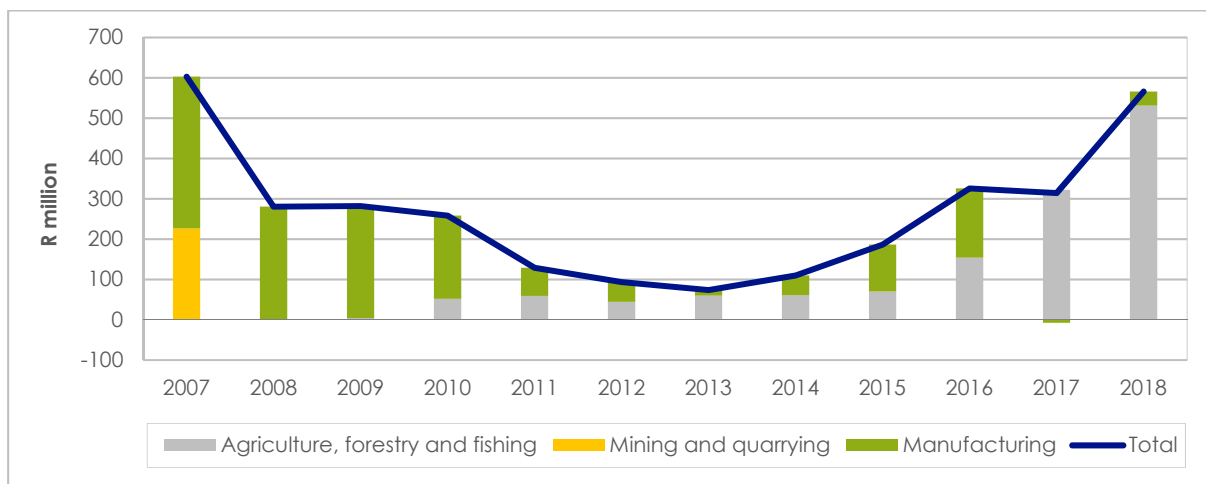
Narrow Unemployment Rates (%)											
Area	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Mossel Bay	12.4	13.5	14.7	14.6	14.4	14.0	14.0	13.7	14.7	15.0	14.8
Garden Route District	13.1	14.2	15.4	15.3	15.1	14.6	14.6	14.1	15.1	15.4	15.2
Western Cape	12.7	14.0	15.4	15.5	15.6	15.5	15.9	15.9	17.1	17.8	17.7

The unemployment rate³ in the Mossel Bay municipal area has been rising steadily from 2008 to 2011, falling back gradually thereafter to 2015, rising in 2016 and 2017 to peak at 15.0 per cent before regressing to 14.8 per cent in 2018. This is slightly lower than District rate of 15.2 per cent but notably lower than the Provincial rate of 17.7 per cent. Unemployment remains a key challenge for the Mossel Bay area, with rising population numbers. Up-skilling of the labour force, implementation of levers such as local economic development strategies are all key in order to increase potential employment opportunities and boost economic growth in the area.

³ Narrow definition: Percentage of people that are able/willing to work, but unable to find employment. In turn, broad definition refers to people that are able to work, but not actively seeking employment. Broad definition is more difficult to accurately measure/calculate.

INTERNATIONAL TRADE DYNAMICS

The Mossel Bay municipal area has maintained a trade surplus between 2007 and 2018. While the manufacturing sector was the dominant source of the surplus between 2007 and 2012, the value of exports from the manufacturing sector has been declining, directly correlating with the contractions in GDP experienced in this sector. Barring 2015, the agricultural sector has been the main contributor to the trade surplus observed since 2013.



In 2018, the municipal area registered a trade surplus of R565.7 million. Exports from the agricultural sector have been the predominant source of trade from the municipal area. In 2018, the value of exports from this sector amounted to R530.9 million. Figure 3.6 indicates that, of the R776.5 million total value of exports in 2018, agriculture accounted for 68.4 per cent, with the remaining 31.6 per cent being attributable to the manufacturing sector.



The municipal area was able to export some manufactured goods, but the economy in the region is still largely dependent on the agriculture, forestry and fishing sector, which is a large source of raw materials. Total imports in 2018 amounted to R210.8 million in 2018, 100.0 per cent of which were manufacturing-related goods.

Inorganic chemicals are the main product imported into the municipal area. With an import value of R39.9 million, Australia is the main import partner, from which copper oxides and hydroxides are imported to the region. Other suppliers of inorganic chemicals are Turkey, which supplies chromium oxides and hydroxides, and Malaysia, which supplies other inorganic acids and other inorganic oxygen compounds of non-metals.

8

PUBLIC INFRASTRUCTURE SPEND

Successfully leveraging infrastructure investment as a catalyst for broad-based economic growth and development can only be achieved through combined and complimentary contributions from all public-sector spheres as well as the private sector.

The OPMII compared the 2019/10 MTREF infrastructure commitments made by the Western Cape Government (WCG) within the geographical jurisdiction of a local municipality to the capital budget contributions made by the various local municipalities themselves. As the provincial and municipal financial years do not fully align, the municipal capital budget information was sourced from the approved 2018/19 MTREF budgets. The 2019/20 municipal capital budget spend detailed in the OPMII therefore referred to the outer year estimates and not actual committed funds.

With the approval of the 2019/20 MTREF municipal budgets, Provincial Treasury is for the first time able to compare actual 2019/20 provincial and municipal infrastructure budget commitments.

PROVINCIAL INFRASTRUCTURE SPEND

Provincial infrastructure spend within the geographical boundaries of the George municipal area will amount to **R606.2 million** across the 2019/20 MTEF.

Mossel Bay: Provincial Infrastructure Investments, 2019/20 MTEF (R'000)				
Vote	2019/20	2020/21	2021/22	Total
Education	8 000	-	-	8 000
Health	4 111	4 200	22 364	30 675
Human Settlements	83 158	85 550	123 450	292 158
Transport and Public Works	124 233	77 000	74 100	275 333
Total	219 502	166 750	219 914	606 166

The majority of provincial infrastructure spend will be directed towards human settlements (R292.2 million; 48.2 per cent) over the 2019/20 MTEF, followed by transport and public works (R275.3 million; 45.4 per cent) mostly for the refurbishment of roads. Notable allocations towards health (R30.7 million) and to a lesser extent, education, is also evident over 2019/20 MTEF.

MUNICIPAL INFRASTRUCTURE SPEND

As per schedule A5 in the approved 2019/20 budget, the Municipality's capital budget will amount to **R744.2 million** across the 2019/20 MTEF.

Mossel Bay: Capital Budget, 2019/20 MTEF (R'000)				
Functional Classification	2019/20	2020/21	2021/22	Total
Governance and Administration	65 819	10 165	24 642	100 626
Community and Public Safety	49 922	43 628	62 464	156 014
Economic and Environmental Services	33 917	52 364	32 022	118 304
Trading Services	159 734	83 825	125 685	369 244
<i>Energy Sources</i>	32 799	24 544	27 488	84 831
<i>Water Management</i>	65 684	23 808	32 425	121 917
<i>Waste Water Management</i>	52 561	31 923	62 322	146 806
<i>Waste Management</i>	8 690	3 550	3 450	15 690
Total	309 392	189 982	244 813	744 188

Trading services (R369.2 million across the 2019/20 MTEF) accounts for a large proportion of municipal capital expenditure as per budget schedule A5 of the 2019/20 adopted budget. In particular, there were substantial allocations towards water management (R122.0 million), waste water management (R146.8 million) and energy sources (R84.8 million) across the MTEF. Furthermore, economic and environmental services have a notable allocation of R118.3 million across the 2019/20 MTEF. Along with trading services, this represents the foundation of economic development and social upliftment across society.

SOURCES

1. Demographics

- Population: *Department of Social Development, 2019*
- Sex Ratio: *Department of Social Development, 2019*
- Age cohorts: *Department of Social Development, 2019*
- Number of Households: *Department of Social Development, 2019*
- Household size: *Department of Social Development, 2019*
- Population Density: *Department of Social Development, 2019*

2. Education

- Learner enrolment: *Western Cape Education Department, 2019; Annual Survey of Public and Independent Schools (ASS), 2018*
- Learner-teacher ratio: *Western Cape Education Department, 2019; Annual Survey of Public and Independent Schools (ASS), 2018*
- Learner retention: *Western Cape Education Department, 2019; Annual Survey of Public and Independent Schools (ASS), 2018*
- Educational facilities: *Western Cape Education Department, 2019; Annual Survey of Public and Independent Schools (ASS), 2018*
- No-fee schools: *Western Cape Education Department, 2019; Annual Survey of Public and Independent Schools (ASS), 2018*
- Schools with libraries: *Western Cape Education Department, 2019; Annual Survey of Public and Independent Schools (ASS), 2018*
- Educational outcomes: *Western Cape Education Department, 2019; Annual Survey of Public and Independent Schools (ASS), 2018*

3. Health

- Healthcare facilities: *Department of Health, 2019*
- Emergency medical services: *Department of Health, 2019*
- HIV/AIDS: *Department of Health, 2019*
- Tuberculosis: *Department of Health, 2019*
- Child health: *Department of Health, 2019*
- Maternal health: *Department of Health, 2019*

SOURCES

4. Poverty

- GDP per capita: *Quantec Research, 2019*
- Income Inequality: *IHS Global Insight, 2019*
- Human Development: *IHS Global Insight, 2019*

5. Basic Services

- Households: *Statistics South Africa, Community Survey 2016*
- Access to housing: *Statistics South Africa, Community Survey 2016*
- Access to water: *Statistics South Africa, Community Survey 2016*
- Access to electricity: *Statistics South Africa, Community Survey 2016*
- Access to sanitation: *Statistics South Africa, Community Survey 2016*
- Access to refuse removal: *Statistics South Africa, Community Survey 2016*
- Dwelling type: *Quantec Research, 2019*
- Consumer units: *Statistics South Africa, Non-Financial Census of Municipalities 2015, 2016, 2017 and 2018*
- Indigent Households: *Statistics South Africa, Non-Financial Census of Municipalities 2015, 2016, 2017 and 2018*
- Free Basic Services: *Statistics South Africa, Non-Financial Census of Municipalities 2015, 2016, 2017 and 2018*

6. Safety and Security

- Murder: *South African Police Service (SAPS), 2019, own calculations*
- Sexual offences: *South African Police Service (SAPS), 2019, own calculations*
- Drug-related crimes: *South African Police Service (SAPS), 2019, own calculations*
- Driving under the influence: *South African Police Service (SAPS), 2019, own calculations*
- Residential burglaries: *South African Police Service (SAPS), 2019, own calculations*
- Road user fatalities: *Department of Transport and Public Works, 2019*

SOURCES

7. Economy

- Sector Performance: *Quantec Research, 2019*
- Employment growth per sector: *Quantec Research, 2019*
- Trends in labour force skills: *Quantec Research, 2019*
- Unemployment rates: *Quantec Research, 2019*
- Trade balance: *Wesgro, 2019*
- Sectoral trade distribution: *Wesgro, 2019*

8. Public Infrastructure Spend

- Provincial Infrastructure Spend: *Estimates of Provincial Revenue and Expenditure (EPRE), 2019; Overview of Provincial and Municipal Infrastructure Investment (OPMI), 2019*
- Municipal Infrastructure Spend: *Final approved 2019/20 municipal budgets, Budget Schedule A5*