

CHAPTER FIFTEEN: RECOMMENDATIONS

15.1 INTRODUCTION

Up to this point the market research contributed to the development of a comprehensive understanding of retail centre development in second economy areas. It also contributed to an understanding of the positive and negative impacts that retail centre development has on second economy areas. It further examined the impeding factors underlying retail development in second economy areas from a developer's and funder's point of view.

The purpose of this chapter is to integrate these findings into effective leverage mechanisms to improve the evolving role and function of retail centre development in second economy areas and to minimise the negative impacts thereof.

This chapter focuses firstly on recommendations for formal retail centre development in second economy areas, and secondly on local business support measures to strengthen the local business environment, which will enable it to absorb the impact of such developments and to increase its overall level of sophistication.

15.2 FORMAL RETAIL CENTRE DEVELOPMENT RECOMMENDATIONS

Overall, retail centres represent critical building blocks of nodal development within second economy areas – serving as catalytic anchors. They should however, be developed in the right location with sufficient space for the site to develop into a mature mixed use node over time.

Diagram 15.1 indicates the critical inputs for retail centre development in second economy areas, key role players involved and the key challenges underlying their inputs.

Overall the critical inputs required for retail centre development include:

- ✓ Land;
- ✓ Capital;
- ✓ Human resources;
- ✓ Statutory approvals and authorisation;
- ✓ Market potential – critical demand thresholds.

These inputs are obtained from a number of key role players – local municipality, district and provincial government, tribal authorities and the private sector and NGOs. However, each of these role players faces a number of challenges with regard to their inputs into the process.

Therefore, to streamline retail centre development in these areas and to increase the positive impact thereof, these challenges should be overcome. Specific leverage mechanisms are required to reach this objective – refer to Table 15.1.

Diagram 15.1: Critical Inputs, Role Players and Challenges of Retail Centre Development in Second Economy Areas

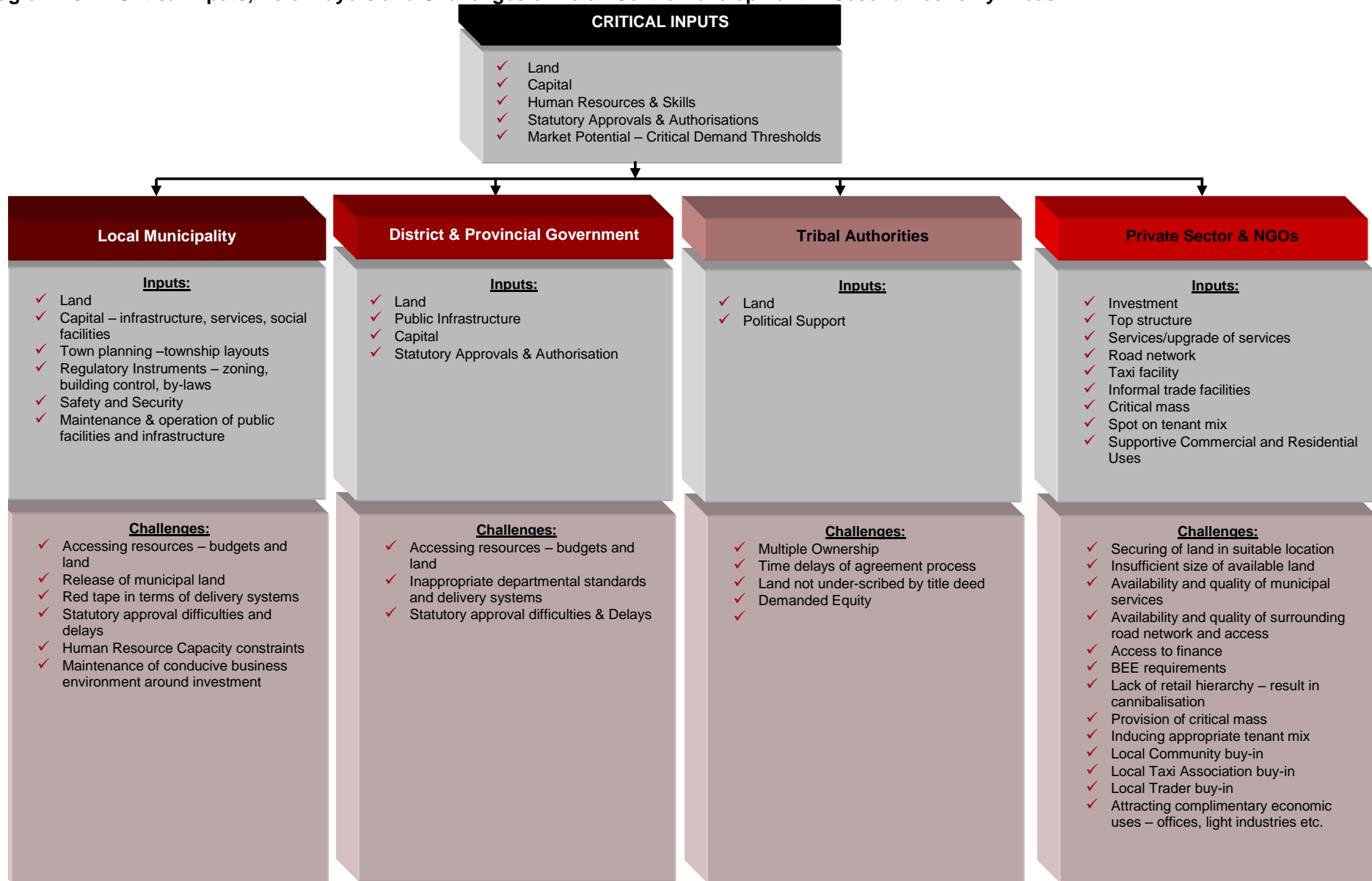


Table 15.1: Leverage Mechanisms for Retail Centre Development

Leverage Mechanisms	Description
Making government land available	<ul style="list-style-type: none"> ✓ Develop an inventory of available government land in the area ✓ Identify portions of land to be made available at related market values ✓ Put land out on tender
Township layouts should provide for an economic node	<ul style="list-style-type: none"> ✓ Township layouts should make provision for economic nodes anchored by retail centres ✓ Development guidelines and a precinct plan should be developed for the node ✓ Provision should be made for a sizeable portion of land to accommodate a retail centre of between 15 000m² and 30 000m² retail GLA (between 4.5 and 9.0 hectares). ✓ Provision should also be made for future growth and expansion and diversification of the node ✓ This should be supported by additional land to accommodate supporting uses – offices, light industries, mixed income residential uses and public/social facilities – resulting in a vibrant mixed use node ✓ Economic node should be located within a highly accessible and visible location – with emphasis on linkages with public transport facilities, high volumes of daily commuters etc. ✓ The focus of nodal development should be on capturing the mass and momentum of nodal synergies ✓ It should be supported by the correct land use rights in order to speed up the development process ✓ If township layouts originally did not make provision for such nodes, they should be revised and land use rights should be revised accordingly ✓ Open the township register to accommodate the sale and transfer of land in the node
Public sector commitment	<ul style="list-style-type: none"> ✓ Develop and maintain public infrastructure in and around the economic node where private sector investment is located ✓ Provide and upgrade services (water, electricity and sewerage) as incentives to private sector investment in these second economy areas ✓ Improve accessibility via main road and internal road network development and upgrades as well as via pedestrian walkway development and upgrades ✓ Invest in public facility development – community healthcare centres, government department offices, pension pay points, police stations etc. as part of the nodal development
Streamline application processes	<ul style="list-style-type: none"> ✓ Prioritise retail centre applications in these second economy areas ✓ Provide concessions on rezoning applications ✓ Provide a service advising applicants on zoning application requirements – contributing to fast tracked approvals ✓ Ensure an integrated town planning scheme
Service delivery in second economy areas	<ul style="list-style-type: none"> ✓ Government must prioritise service delivery in second economy areas – with emphasis on the location of proposed mixed use nodes ✓ Allocate municipal budgets for service delivery in these nodes
Obtaining tribal land	<ul style="list-style-type: none"> ✓ Develop an inventory of the various portions of tribal land that are suitable for private sector investment ✓ Conduct meetings with tribal authorities in terms of the availability of tribal land for private sector investment ✓ Offer certain incentives to tribal authorities for the land
Develop a retail hierarchy	<ul style="list-style-type: none"> ✓ Due to the fact that the specific location and current supply determine the role and function of a centre within a second economy area it is recommended that a more simplified retail typology should be applied in these areas:

Leverage Mechanisms	Description																					
	<table border="1" data-bbox="587 219 1353 533"> <thead> <tr> <th data-bbox="592 219 847 248">Format</th> <th data-bbox="850 219 1098 248">Type</th> <th data-bbox="1101 219 1348 248">GLA</th> </tr> </thead> <tbody> <tr> <td data-bbox="592 253 847 421" rowspan="5">Traditional</td> <td data-bbox="850 253 1098 282">Very large</td> <td data-bbox="1101 253 1348 282">50 000m²+</td> </tr> <tr> <td data-bbox="850 286 1098 315">Large</td> <td data-bbox="1101 286 1348 315">26 000m² – 50 000m²</td> </tr> <tr> <td data-bbox="850 320 1098 349">Medium</td> <td data-bbox="1101 320 1348 349">11 000m² -25 000m²</td> </tr> <tr> <td data-bbox="850 353 1098 383">Small</td> <td data-bbox="1101 353 1348 383">6 000m² -10 000m²</td> </tr> <tr> <td data-bbox="850 387 1098 416">Very small</td> <td data-bbox="1101 387 1348 416">0m²-5 000m²</td> </tr> <tr> <td data-bbox="592 421 847 533" rowspan="3">Specialised</td> <td data-bbox="850 421 1098 450">Large</td> <td data-bbox="1101 421 1348 450">20 000m² +</td> </tr> <tr> <td data-bbox="850 454 1098 483">Medium</td> <td data-bbox="1101 454 1348 483">11 000m² – 20 000m²</td> </tr> <tr> <td data-bbox="850 488 1098 517">Small</td> <td data-bbox="1101 488 1348 517">5 000m² -10 000m²</td> </tr> </tbody> </table> <ul style="list-style-type: none"> ✓ The hierarchy is based on the international shopping centre hierarchy ✓ The focus of this hierarchy is on the size of the centre ✓ Correlation exists between the size of the centre and its function ✓ Smaller centres in smaller rural and township areas can fulfil the function of larger centres ✓ The hierarchy will therefore consist of a range of retail centres of various sizes ✓ The market carrying capacity will determine the number and sizes of centres that could be developed in these areas. 	Format	Type	GLA	Traditional	Very large	50 000m ² +	Large	26 000m ² – 50 000m ²	Medium	11 000m ² -25 000m ²	Small	6 000m ² -10 000m ²	Very small	0m ² -5 000m ²	Specialised	Large	20 000m ² +	Medium	11 000m ² – 20 000m ²	Small	5 000m ² -10 000m ²
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Ensuring critical mass and tenant mix	<ul style="list-style-type: none"> ✓ Conduct market research in order to determine the ideal retail centre size, making provision for future expansion ✓ Conduct market research in order to match tenants with consumer market characteristics and demand profile ✓ Increase critical mass by developing mixed income residential projects in direct proximity to proposed development site ✓ Provide incentives to attract financial institutions to move into the centre 																					
Community buy-in	<ul style="list-style-type: none"> ✓ Involve the local community in the planning and development process ✓ Hold public meetings, workshops and briefing sessions in which the advantages of the centre are discussed ✓ Provide information, explanations and options with regard to centre composition, role, function, local businesses support, taxi facilities etc. 																					
Local taxi association buy-in	<ul style="list-style-type: none"> ✓ Involve the local taxi associations in the planning and development process ✓ Discuss the requirements of these associations pertaining to the size of the rank and supporting facilities 																					
Local trader buy-in	<ul style="list-style-type: none"> ✓ Involve the local traders in the development and planning process pertaining to formalised informal trade facilities provided ✓ Discuss the requirements of these informal traders and develop concepts for the various types of facilities that could be offered at different rentals ✓ Reach an agreement and, in association with local council, allocate facilities to informal traders ✓ Develop by-laws to regulate these traders and enforce these by-laws on a regular basis – by means of local police 																					
Improve safety and security	<ul style="list-style-type: none"> ✓ Improve visibility and frequency of policing in and around this node ✓ Appoint local security company to secure the retail centre ✓ Implement CCTV system within business node ✓ Introduce security through design mechanisms 																					
Ensure clean environment	<ul style="list-style-type: none"> ✓ Appoint local cleaning / waste removal companies to ensure a clean and clutter free business environment 																					
Business growth and development	<ul style="list-style-type: none"> ✓ Addressed subsequently 																					

15.3 LOCAL BUSINESS SUPPORT AND DEVELOPMENT RECOMMENDATIONS

In order to minimise the impact that formal retail centre development has on the local business environment, specific support measures should be put in place to strengthen, develop and formalise local businesses. Alternative business models should also be promoted to accommodate SMMEs within or in proximity to formal retail centres – refer to section 15.4.

This will enable increased employment creation and will assist in increasing the overall level of sophistication of these businesses enabling them to develop in such a manner that they will be able to occupy space within formal retail centres.

Local business/SMME development requires specific inputs as indicated by Diagram 15.2. The key inputs include:

- ✓ Funding;
- ✓ Business facilities;
- ✓ Business management and skills training;
- ✓ Business development support;
- ✓ Financial systems.

These inputs are largely obtained from different spheres of government, business development service providers and small businesses/SMMEs. These role players also face a number of challenges in providing the required inputs – Refer to Diagram 15.2.

In order to overcome these challenges specific leverage mechanisms are required to ensure delivery – Refer to Table 15.2.

Diagram 15.2: Local Business Support and Development

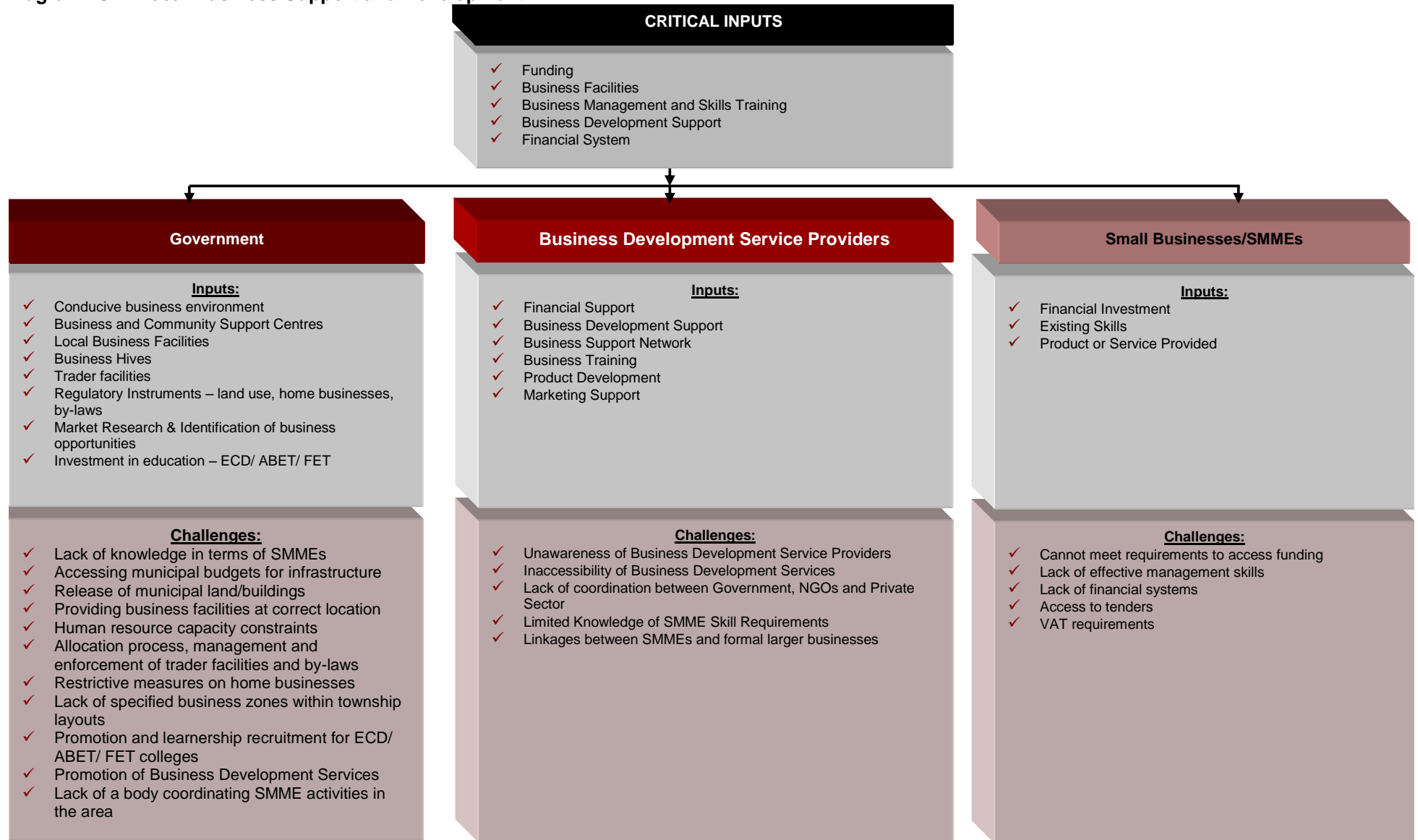


Table 15.2: Leverage Mechanisms for Local Business Support and Development

Initiatives	Description
Compile and regularly update SMME database	<ul style="list-style-type: none"> ✓ Compile a SMME database for the township/rural area ✓ Classify SMMEs according to business sophistication measure ✓ Develop SMME economic performance and contribution monitoring system ✓ Monitor the performance of the SMMEs regularly and provide feedback via information sessions
Establish a SMME forum	<ul style="list-style-type: none"> ✓ It enables SMME networking ✓ Information sharing ✓ Linkages to big businesses
Establish a one stop information centre	<ul style="list-style-type: none"> ✓ The centre should be linked to: <ul style="list-style-type: none"> • Municipal LED desk and forum • SMME business development services • SMME capacity building and skills development services ✓ This enables easy access to information, advice, market and government and procurement opportunities
Develop local business support centre and business hives	<ul style="list-style-type: none"> ✓ Develop a local business support centre or satellite of existing centres ✓ Develop SMME hive – emphasis on retail and service industries ✓ This should be integrated into one building
Capacity building and skills development programmes	<ul style="list-style-type: none"> ✓ Conduct a SMME skills audit of SMMEs in the locality to identify skills gaps ✓ Develop and implement skills and capacity development programmes from the audit ✓ Implement the following generic capacity building programmes: <ul style="list-style-type: none"> • Entrepreneurship • Small business management • Financial management • Marketing, pricing and promotion • Human resources management • Tendering and procurement processes • Various technical skills ✓ Research and develop SMME incubation programmes with sectors to include post incubation support
SMME incubation and mentorship programmes	<ul style="list-style-type: none"> ✓ This should be done based on a sectoral approach
Regular economic evaluation and information dissemination to SMMEs on	<ul style="list-style-type: none"> ✓ Communicate the following information to SMMEs on a regular basis – through the forum, public information sessions or workshops: <ul style="list-style-type: none"> • Declining economic sectors • Growing sectors • Stable sectors • Sectors with investment potential • New SMME opportunities
SMME business development and support	<ul style="list-style-type: none"> ✓ SEDA to establish presence within the local area ✓ Hold information sessions in townships and market the various business development support services and role players: <ul style="list-style-type: none"> ✓ National support institutions: <ul style="list-style-type: none"> • Department of Trade and Industry (DTI) • Small Enterprise Development Agency (SEDA) – non-financial support programmes • Khula Finance – financial support programmes • Industrial Development Corporation (IDC) – finance and incentives • The Business Place – national network of walk-in entrepreneurial centres. ✓ National finance Institutions: <ul style="list-style-type: none"> • Business Partners – loan amount R150k to R15 million • Commercial banks – loan amount R60k to R120 million • Khula Retail Financial Intermediaries – loan amount R5k to R120 million • Khula Credit Guarantee Scheme – loan amount R120k to R600k • Industrial Development Corporation – loan amount – R200k to R15 million • Sizani Advisory Services – loan amount R100k upwards • South African Micro Finance Apex Fund – loan amount up to R10k • Umsobomvu Youth Fund – loan amount not specified • Zimele – equity financing up to R1.5 million. ✓ National Business Networks: <ul style="list-style-type: none"> • Foundation of African Business and Consumer Services (FABCOS)

Initiatives	Description
	<ul style="list-style-type: none"> – umbrella body of black business organisations active in informal sector • Afrikaanse Handelinstituut (AHI) – multi-sectoral employer organisation • South African Chamber of Business (SACOB) – represents nearly 100 local business chambers • Black Management Forum (BMF) – helps empower managerial leadership, develop ownership and creation of managerial structures and processes • National Business Initiative (NBI) – public interest organisation with over 180 leading SA and international companies as its members – aims to help business community contribute to socio-economic progress, employment creation and delivery of basic services within local government structures. • Business and community support centres – a range of provincial centres ✓ Training providers, agencies and courses: <ul style="list-style-type: none"> • Online Training Courses - LearntheNet, Centre for Business Management, Fred Pryor Seminars • Organisations and Associations – inwent, Free Market Foundation, SETA, Institute of Quality, Institute of Administration and Commerce, Thrive Learning Facilitation, Triple Trust Organisation, South African National Accreditation System • Business Courses – MBA, Certificate in Small Business Management, Micro-eMBA, Butterworths labour relations training • Distance Education – Unisa, Technikons, Universities, Colleges • Skills Training – ABET, The skills Portal, Institute for Quality, Northlink College ✓ Assist local SMMEs to apply for financial support ✓ Local municipality should revise their procurement policies to favour local SMMEs ✓ Organise and sponsor SMME Entrepreneur of the Year Awards ✓ Conduct SMME awareness campaigns within the area
Provision of accessible and affordable business premises	<ul style="list-style-type: none"> ✓ Delineate an SMME zone within the township ✓ Provide a range of business facilities at affordable rentals – business premises, offices, market stalls, etc ✓ These facilities should be serviced with water and electricity ✓ Formal business premises should also be serviced by telecommunication ✓ Informal trade facilities can include a basic trading area (2m² for R68 per month – share water, storage, shelter), trading pods(6m² for R130 per month – electricity, water and storage - sharing) and kiosks (25m² for R188 per month – water, electricity, storage, roof) ✓ Restrictions on home based businesses should also be addressed – promoting Home based industries
Evaluation of tax regime	<ul style="list-style-type: none"> ✓ SMMEs face the burden of tax compliance – tax clearance and VAT remittance ✓ Government should evaluate the tax regime to lessen the burden on SMMEs ✓ Local municipalities should also develop investment policies and incentives to encourage SMME growth – through rebates, tax holidays and preferential procurement
Formalisation of SMMEs	<ul style="list-style-type: none"> ✓ Focus on the Business Sophistication Measure – Level 5 and 6 – representing the ideal type of businesses to be formalised. ✓ Aim business development support services towards these type of businesses ✓ This will enable increased employment creation within second economy areas.

15.4 TOWARDS A MODEL FOR DIVERSIFIED COMMERCIAL TOWNSHIP NODES

The reality of the real estate development environment is that the market is extremely well segmented and specialised, i.e. very specific developers and funds provide a very particular type of product only to a very specific segment of the market. Hence, the market is characterised by very specific networks and systems that have slowly evolved over time, straddling all sectors of the market, including banking / financing, tenanting, design, development, etc. If one facet is out of kilter, the system comes to a grinding halt - hence the

difficulty of recruiting and incorporating low-key local traders into a formal scheme. Franchise opportunities do exist, but not all local traders are suitably equipped and focused to trade in a shopping centre environment – perhaps in a part of the larger node, in a suitably configured scheme, but not within the centre per se.

Subsequent paragraphs provide an overview of some aspects which may become future components of ever expanding mixed use township commercial nodes. None of the following are actually regarded as workable best practise solutions by the industry, but they may provide a basis from which future models and solutions could be derived.

Examples analysed include Blue Haze Mall in Hazyview (Mpumalanga), Pan Africa in Alexandra (Johannesburg) and Mapleton Shopping Centre and Trader Square (Ekurhuleni, Gauteng).

Blue Haze Mall, Hazyview, Mpumalanga

This modern regional shopping centre is currently the largest shopping centre in Mpumalanga and Limpopo province with close to 200 shops. It has approximately 54 500m² of retail GLA and consists of 186 shops over three retail floors, as well as 1 500 parking bays. It was developed in 2005 by Twin City Hazytoo (Pty) Ltd.

- ✓ Anchor tenants include: Superspar, Standard Bank, FNB, Pep Stores, Ackermans, Jet, Elleries, Boxer, Pick n Pay, Edgars, Woolworths, Mr. Price, Foschini, Clicks, ABSA, Nedbank, Truworhts and KFC.
- ✓ What makes this centre different or unique in a sense is the high representation of non-nationals within the centre.
- ✓ An interesting characteristic is the high number of wholesalers – examples include BH Cash 'n Carry, Angor Trading, Mirza Wholesalers, Boxer Superstore, Ansari Wholesalers, Helen Wholesalers, Lucky Wholesalers and many more.
- ✓ These wholesalers are supported by a range of factory and local stores – predominantly fashion orientated – examples include Sabbath Factory Store, Hop Fashion, Dora Fashions, Mr America, Kazi & Sons, Street Beat, Mano Fashion, Mary Fashion and many more.
- ✓ Another interesting characteristic is the financial services located in the mall beside the national banks – Money Wise, Izwe Loans, Beuka Loans, HV Financial Services, Loan Wise just to name a few.
- ✓ The majority of these non-nationals represent Indian businesses, contributing to the success of the centre due to the affordability and price bargaining of these traders – as is evident from other centres such as Oriental Plaza, in Fordsburg, Johannesburg.



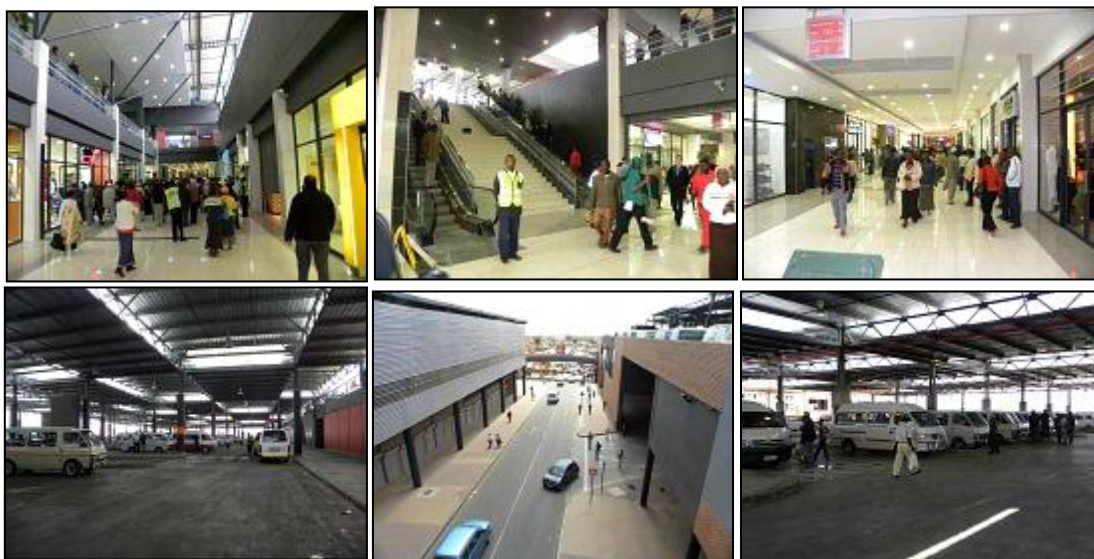
Pan Africa Shopping Centre, Alexandra, Johannesburg

Pan Africa Shopping Centre represents a comprehensive retail and taxi node including a super-efficient 50 000m² taxi rank, three level holding facility, public parking and structured informal trading. The combined retail offering of the node exceeds 40 000m² – equivalent to that of a regional shopping mall.

Pan Africa Shopping Centre is located at the entrance to Alexandra – 10 000 people and 1 500 operating taxis use the area every day. A new formal retail centre of approximately 16 000m² retail GLA now forms part of the mix. It is anchored by Pick ‘n Pay and supported by leading national tenants such as Exact, John Craig, Skipper Bar, Legit, Link Pharmacy, Jet Mart, Pep, Markham, Post Office, Nedbank, Savells, Fairdeal, Glomail, Multiserve, OK furniture, Vodacom, MTN. 80% of the retail centre is filled by these national tenants, supported by 20% of regional and local shops – ranging from fashion and beauty to medical, internet cafés and DVD rentals.



It also includes an impressive variety of food outlets – McDonalds, King Pie, Steers, Debonairs, Fish ‘n Chips, KFC, Milky Lane, Captain Dorego’s etc. It is said that the integration of the new centre as part of the very busy transport hub was, without a doubt, the most challenging aspect of the project but also the most satisfactory – due to the creation of an incredibly convenient shopping experience for consumers. The mall was developed by the Pan Africa DevCo – a development company established by TebfinDevelopments in partnership with local entrepreneurs and the two main taxi associations in Alexandra – ATA and ARMSTA.



Mapleton Shopping Centre and Trader Square, Ekurhuleni, Gauteng

Another alternative that has emerged, although much smaller in scale, is the development of trader squares next to or in proximity to formal retail shopping centres to accommodate local businesses. An example is the trader square in Mapleton, developed by a local developer next to the Pumula Cash ‘n Carry. Tenants are represented by local SMMEs paying affordable rentals.



In developing an alternative model for mixed use township nodes, the following should be taken into consideration:

- ✓ Second economy areas are characterised by a very active retail market.
- ✓ The market in these areas has flourished for very specific reasons, including under-supply and the fact that these markets are not overly regulated (specifically from a town planning regulatory point of view) – this should be viewed as positive.
- ✓ On the supply side, the market is well segmented and specialised.
- ✓ Land issues, almost without exception, dictate project progress and viability.
- ✓ Due to established leasing networks, it would be virtually impossible for a listed fund or scheme to recruit local traders into a new scheme. Established networks of brokers and retailers allow developments to be 70-80% tenanted within six to 12 months. The tenanting process entails a rigorous process of tenant screening and selection - including detailed assessments of business plans, historic sales performance, financial track records and forecasts. This network and associated information is virtually non-existent in second economy markets, and undermines potential local tenant recruitment. Government, parastatals and local business entrepreneurs would have to invest heavily in business development in order to bridge this gap.
- ✓ Opportunities exist to develop and diversify local township economies by leveraging developments as part of such mixed use nodes – in most instances, a formal commercial development serves as nodal anchor and catalyst for further development.
- ✓ The tenanting requirements of township shopping centres are intricately entwined with the risk profile of the project. Most local traders cannot be absorbed into formal centres for lack of financial sophistication and business models. Developments aimed at addressing this gap in the development cycle may be a prudent intervention – as this aspect is strongly associated with SMME development, a government function.
- ✓ The opportunity exists to develop more affordable trading space for SMMEs. Such opportunities are augmented by the development of a modern mall. Possible schemes could investigate appropriate support mechanisms for local developers to draw maximum benefit from such location advantages.
- ✓ None of the above three models are viewed as best practice examples by the industry, but selected elements may serve to suggest opportunities that could be enhanced and provided for in future as part of mixed use township nodes. The notion of developing double storey retail is not regarded as a viable solution for financial reasons and because of the fact that first floor traders typically experience 30-40% less foot traffic compared with ground floor tenants.

Retail development in second economy areas is clearly dynamic and vastly complex – a solution suitable to the dynamic in one market area can simply not be superimposed on another market area. Financial viability models are highly sensitive to variables such as land cost, local equity shares and holding costs - arguably more so than in first economy areas. Land dynamics in second economy markets, in particular in rural areas (although the problem is not limited solely to these areas), pose significant challenges to viable commercial development: unserviced land is often brought into the equation by the local community / tribal authority (mostly at no direct cost / expense to themselves).

Although this land is factored into the viability as 'equity', it more often than not, does not have the appropriate zoning and bulk services have to be brought to the site at great expense - all at the developer's expense. In addition, numerous development groups indicated that over and above the equity share and annual dividends to be paid to the local tribal authority / trust, the chiefs often demand further, more direct 'financial benefits' for themselves - which tend to escalate as the land accumulates value; effectively rendering many projects unviable and unattractive, sometimes years after project negotiations commenced and principal agreements were reached. In addition to the abovementioned interventions, the findings of this investigation furthermore suggest that there is merit in addressing the inefficiencies of the tribal system, in particular its hamstringing effect on economic development in many rural areas with commercial potential.

Second economy retail markets represent an extremely active market segment and every indication is that these markets should be spurred on rather than burdened; and deregulated rather than regulated. Almost without exception, a local dynamic emerges that benefits local stakeholders. The emphasis should largely be on leveraging the effect of the investment by stimulating local development and investment in the node, rather than by creating additional financial and procedural burdens for which developers and funds are not geared. The introduction of such interventions will almost certainly stifle a market segment which has been, at least in part, a stronghold of our SA real estate market and economy in extremely challenging times. In this context, it is worth noting that, even with the buoyancy of this market segment, only two (as far as could be established) township shopping centres received bank funding approval during the course of 2009 – one by McCormick and one by Heriot.

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