

INEQUALITY AND ECONOMIC MARGINALISATION

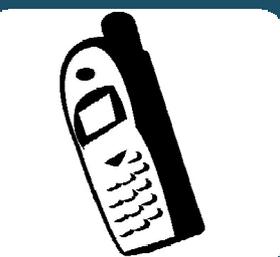
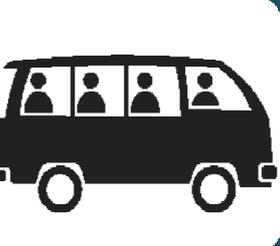


Business health check: Western Cape Bus Operators' Transport Co-operative Ltd (Siyakhula)

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TIPS
TRADE & INDUSTRIAL POLICY STRATEGIES



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ABOUT THIS RESEARCH

The 2007 Annual Report of the Accelerated Shared Growth Initiative of South Africa (AsgiSA) identified a need to focus on what was then called 'the second economy', and on mechanisms to ensure shared growth reaches the margins of the economy. The Second Economy Strategy Project was initiated in this context. It reported to the AsgiSA High Level Task Team in the Presidency, but was located outside government in TIPS.

A review of the performance of government programmes targeting the second economy was completed in early 2008. The project then commissioned research and engaged with practitioners and policymakers inside and outside government. A strategic framework and headline strategies arising from this process were approved by Cabinet in January 2009, and form part of the AsgiSA Annual Report tabled on 16 April 2009.

In South Africa, people with access to wealth experience the country as a developed modern economy, while the poorest still struggle to access even the most basic services. In this context of high inequality, the idea that South Africa has 'two economies' can seem intuitively correct, and has informed approaches that assume there is a structural disconnection between the two economies. The research and analysis conducted as part of the Second Economy Strategy Project highlighted instead the extent to which this high inequality is an outcome of common processes, with wealth and poverty in South Africa connected and interdependent in a range of complex ways. The different emphasis in this analysis leads to different strategic outcomes.

Instead of using the analytical prism of two economies, the strategy process placed the emphasis on the role of structural inequality in the South African economy, focused on three crucial legacies of history:

- The structure of the economy: its impacts on unemployment and local economic development, including competition issues, small enterprise, the informal sector, value chains and labour markets.
- Spatial inequality: the legacy of the 1913 Land Act, bantustans and apartheid cities, and the impacts of recent policies, looking at rural development, skewed agriculture patterns, and the scope for payment for environmental services to create rural employment.
- Inequality in the development of human capital: including education and health.

TIPS's work around inequality and economic marginalisation is built on the outcomes of this strategy process.

The research undertaken under the auspices of the Second Economy Strategy Project continues to be relevant today as government explores policy options to reduce inequality and bring people out of the margins of the economy. This report forms part of that research.

A list of the research completed is available at the end of this report. Copies are available on the TIPS website: www.tips.org.za.

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BACKGROUND

Siyakhula, or the Western Cape Bus Operators' Transport Cooperative Ltd, operates within the bus sector of the transport industry. A brief description of the sector follows in order to contextualise the operations of the cooperative.

The transport, storage and communications sector increased its share in real output growth in the Western Cape from 8% in 1995 to 11% in 2002. However, the sector's growth was due primarily to high growth in the communications sub-sector rather than within the transport sub-sector. The total income of the transport sector was estimated at R14-billion in 2002.

A review of the public transport system in the Western Cape showed that scheduled bus services in the province, particularly in the Metro, declined dramatically over the past decade in terms of the extent (or coverage) of routes, frequency and quality of services. This was largely due to the impact of poor service levels coupled with increased competition from minibus taxis providing commuters with a convenient alternative.

There are about 22,000 buses in the transport industry in South Africa of which approximately 17,000 are involved in formal public transport activities (i.e. for reward/subsidy). The other 5,000 buses are found in commerce and industry and government institutions where they are mostly used for in-house purposes (i.e. not for reward/subsidy). Within the industry, it is possible to distinguish between the big operators, such as Putco and Golden Arrow, and the small operators who own between one and 30 buses.

The public transport buses provide direct employment to about 30,600 people throughout the country with about 153,000 people indirectly dependent on the industry (or directly related to employment in companies). The industry also supports a large number of suppliers, such as bus and chassis manufacturers, fuel and tyre companies, that are in some way dependent on the industry for employment. The public transport operators undertake approximately 816 million passenger trips per annum.

The public transport industry is represented by the Southern African Bus Operators' Association (SABOA). SABOA was formed as a national body in 1980 by the five leading bus companies in order to protect their interests as subsidised transport operators by the Department of Transport. SABOA has gone through a significant transformation and now represents about 76% of the public transport fleet.

Members are offered the following services by SABOA: commuter, contract, learner, organised party, charter and tourism, cross border (international), and scheduled coaches. Given the broad membership of SABOA, its profile could be regarded as representative of the industry as a whole, as evident in Table 1.

Table 1: SABOA members in 1996 and 2007

Category	Number of members in 1996	Number of members in 2007
Sales	136,800	165,000
Total	136,800	165,000
Principal members		
1-30 buses	95 (74.8%)	774 (96%)
30+ buses	32 (25.2%)	33 (4%)
International members		
Swaziland	-	2
Namibia	-	1
Lesotho	-	1
Affiliated Associations		
COASA	10	-
PTA Zimbabwe	-	160
Vhembe	-	15
Supplier members	37	70
Total	174	1,056

A real challenge for small and new bus operators within the industry is the ongoing contracting and subsidy arrangements within the public transport sector that exclude new market entrants or small players. In some respects, the existing contracting arrangements are understandable given the huge capital investment required for a fleet of buses. It is impossible, therefore, to have a high turnover of contracts. It is a catch-22 situation for the small contractors: they battle to compete in the sector against the bigger subsidised companies, however, in order to be competitive, they require public sector subsidised contracts but they are excluded from those given their small fleets. For any player in the public transport sector, it is difficult to compete in the absence of transport subsidies because commuters cannot pay market related fares. Nationally, only approximately 10% of all subsidised bus services are operating on competitive tendering systems. The National Department, however, is engaged in designing tenders for public transport services which should result in almost 20% of subsidised bus services nationally being operated on a competitive tendering system. That would open up the market to the smaller contractors.

Opening up the market is also evident at a provincial level through two initiatives included in the Provincial five-year Strategic Delivery Plan (2005) and Transport Budget Vote 10 (2005/06), and these are:

- The empowerment of the minibus/taxi industry to promote Black Economic Empowerment (BEE) through training to support the envisaged tendering process for public transport contracts; and
- A contract mentorship facility linked to training sessions on procurement and which is aimed at supporting emerging contractors to tender and contract effectively.

But there is still a long way to go. For example, in the Cape Metropolitan area, the formal public transport services are being subsidised through contracting arrangements with Metrorail and bus services such as Golden Arrow.

Historically, there has been widespread frustration with the transport industry operating in a vacuum because of an inability to resolve the contracting framework (*Business Day*, 8 April 2003). It should be noted that recently a BEE group, Hosken Consolidated Investment,

acquired the entire shareholding of the Golden Arrow bus company and it is understood that it has secured the continuation of contracts across the Cape Peninsula, Cape Flats and unified City of Cape Town, and will be transporting an average of 180,000 people per day. That contract operates on a recoverable discount system based on clip cards operated in collaboration with a government-administered fund. The company has also invested in 40 MAN explorer vehicles over the past year.

A significant portion of the minibus taxi service operates in direct competition with scheduled bus and rail public transport services. It is argued by operators that the subsidised rail and bus services are eroding the viability of those services, impeding investment into vehicles (and their maintenance), forcing traffic violations (such as overloading or speeding) and contributing to service level decline. That competition has been accompanied by sporadic violence and intimidation, particularly during the impasse with Golden Arrow a few years ago and which resulted in bus drivers being targeted. The incidence of fraud and corruption against Golden Arrow management, pertaining to contract claims, brought the service contract issue to a head.

It is understood that the Province is currently establishing about 20 negotiated local area and corridor contracts and replacing the historical Interim Contracting dispensation. In addition, further contracts are to be considered to address the district municipal areas (SABOA website; Western Cape MEDS Transport Sector Study, 2005).

This report consists of two additional sections: one describing the cooperative in detail and the other outlining lessons learnt.

THE COOPERATIVE

Contextual and project background

Western Cape Bus Operators' Transport Cooperative (hereafter Siyakhula) was established in 2000. The reason for its establishment was to address the problem of small bus operators who were battling to compete against the larger, subsidised players in the industry. In order to access government contracts, small operators recognised that there was a need to pool their resources. And the logic behind the Siyakhula cooperative was precisely that: to tender and negotiate collectively for subsidized contracts.

Siyakhula is a primary cooperative and chose that business form because it is better suited to members who owned mainly informal businesses at the time. The cooperative has open and unlimited membership. Membership affords the individual the opportunity to carry on with his/her own business and at the same time be part of the cooperative. It also affords equal membership.

Siyakhula has 54 members, all of whom are small bus operators, a criterion which is essential for membership. All of the cooperative members are also members of the SABOA Western Cape region.

Currently 87% of members are men and 13% are women. While there are some women in the taxi industry, there are not many women in the small bus industry. Mr Maluka, the interviewee and Chief Executive Officer (CEO) of Siyakhula, claims that he does not know of one woman who started a small bus company; women in the industry, according to him, inherited their businesses. Sixty percent of members are coloured and 39% are African. There is one white female member.

Each member is required to contribute R10,000 on approval of membership.

Business overview

The primary business activity of the cooperative is to participate in Sibanye's affairs. Sibanye is a BBBEE Pty (Ltd) company that was registered in 2000. Siyakhula Cooperative has a 33% stake in that company. The other partners in Sibanye are the Abahlobo (consisting of 10 shareholders) and Golden Arrow bus services. Each of the three Sibanye partners had to contribute 20 brand new buses in equity.

The cooperative managed to acquire 20 brand new buses through negotiated agreements with suppliers such as MAN. Golden Arrow, which at that stage was primarily white owned, approached the cooperative in 2000 to be part of Sibanye. The cooperative had established networks with the large bus services as a member of SABOA. The initial contact with Golden Arrow was made when it invited small bus operators to a SABOA meeting in 1994 as part of the organisation's transformation process.

Sibanye managed to obtain a subsidised bus contract, which is known as the Atlantis Service, in 2000. The Atlantis Service provides a major commuter service between Cape Town, Atlantis, Malmesbury, Mamre, Pella and Darling. The cooperative members could never have accessed this subsidised contract either individually or even collectively as a cooperative because the fleet required was too large.

Sibanye was awarded another lucrative contract in December 2004 to operate the Jammie Shuttle, the University of Cape Town's (UCT) student and staff transport service.

Siyakhula gets paid a monthly dividend by Sibanye and that is shared among the members. Members use the funds to invest in their businesses and that involves maintenance, repairs and expansion. Until this year, profits from the business were used to pay off the debt incurred for the purchase of the buses.

Sibanye manages the operations, such as the planning of the service, employment of staff and maintenance of buses, of the Atlantis and Jammie Shuttle Services on behalf of its shareholders.

The objective of Siyakhula is to develop individual member businesses and not to replace them. The cooperative arranges training in transport and business related matters, such as transport economic, labour relations and technical skills. Since the start of Siyakhula, most of the members have formalised their businesses. The most basic form of formalisation is when a member starts to keep financial records. Transport operators are forced by the Transport Act to register as tax payers; if they don't, they do not qualify for an operating license. As the members are exposed increasingly to the economics around transport, the more formal their businesses become. This is reflected in proper pricing, the employment of drivers to free the owner up to concentrate on marketing and networking and securing public transport insurance. In the past, members would buy or inherit a bus and start operating without bothering to apply for a license. Once a member has an operating license, then s/he is obligated to take out insurance and to produce a vehicle license.

Milestones

The contracting of Mr Maluka, a transport economist, by the small operators to assist and lead their cooperative and SABOA in the province is a milestone. The original reason was a mistrust of Golden Arrow, which used to oppose public transport contracts for small operators. Mr Maluka volunteered for his first two years in this capacity.

The realisation that as a collective of small operators they can compete against the big operators in the sector is another milestone. This resulted in attitude changes and increased confidence among members.

The big break for the cooperative was securing the partnership with Sibanye. It is extremely difficult to compete without subsidies in the public transport industry. Commuters cannot afford market related fares. One has to increase turnaround to compensate, but even then it is difficult to cover costs and improve the service.

The purchase of 20 buses without having to pay upfront was also significant. The supplier awarded the buses on a rental basis and was prepared to take back the buses without adverse financial implications if the cooperative ailed. After some time, the supplier converted the rental into an outright sale, and the debt was paid off a year ago. The cooperative is paid a dividend of R300,000 per month through the leasing of these buses to Sibanye. No expenses need to be paid from this amount.

A decision was taken by the members to close membership in October 2006 while Mr Maluka was in hospital; a decision about which he was extremely concerned.

Labour and human resources

The cooperative does not employ any staff.

Mr Maluka is a member and CEO of the Siyakhula cooperative. He is not a small bus operator but this membership criterion was wavered because the conceptualising idea for cooperative and the partnership with Sibanye was his idea. Mr Maluka is not paid by Siyakhula but is paid by Sibanye as the CEO of Sibanye.

For the Jammie Shuttle contract, Sibanye employs 62 people on a full-time basis, which includes drivers, administration staff and cleaners. These are all new jobs that were created since December 2004 and were initiated with the start of the Jammie Shuttle contract.

The Atlantis Service contract employs 109 people, all of whom are seconded by Golden Arrow to Sibanye. Sibanye took over Golden Arrow's contract for this route. The trade unions did not want their members to sever their ties with Golden Arrow and an arrangement was made for them to continue their Golden Arrow contracts. They are paid directly by Golden Arrow, which, in turn, is paid by Sibanye. There were 87 employees when the contract was initiated in 2000.

Mr Maluka is the only member of the cooperative employed by Sibanye. Other members are busy operating their own businesses. Currently, there is no conflict of interest as all the work of the cooperative is contracted through Sibanye.

Real jobs are created by the business in which the cooperative participates.

Table 2: The cooperative's average direct and indirect wage bill

	Per week (R)	Per month (R)
		UCT: 250,000
Direct		Atlantis: 350,000
Indirect		

Sibanye complies fully with the Basic Conditions of Employment Act (BCEA).

Sibanye's staff members are members of the Transport and Omnibus Workers' Union or the South African Transport and Allied Workers' Union (SATAWU). Golden Arrow's staff members belong to the same union.

Sibanye has even experienced industrial action with a half-day strike occurring on 11 March 2007 regarding wage negotiations.

Overtime, maternity leave, minimum wage, hours of work and Unemployment Insurance Fund (UIF) contributions are in place.

Management and control

The Siyakhula Board has nine members who meet monthly. They do not take decisions other than declaring dividends because everything is done by Sibanye. Sibanye provides monthly financial and operational reports to the Board. Operational decisions are taken by the CEO, Mr Maluka, and any major decision is proposed to the Board for its support.

Mr Maluka is the mentor to the cooperative.

Any conflict is dealt with through negotiation and consensus. No members have had to be excluded from the cooperative. Generally, all members are satisfied as they receive monthly dividends.

As was stated earlier, the CEO is not remunerated by the cooperative. He is also the CEO of Sibanye and is remunerated in that capacity. Board members are paid for meetings and each director receives R750 a month.

Institutional character and exit conditions

The cooperative has statutes.

There is an application form and members sign a code of conduct. The conditions for entry are that an applicant must be:

- A small bus operator;
- A member of SABOA;
- A Previously Disadvantaged Individual (PDI); and
- Able to contribute R10,000.

If a member is to be expelled, proper disciplinary procedures must be conducted by the Board.

The statutes of the cooperative have not been updated in terms of the 2005 Act. No copy of the statutes was provided on request.

The cooperative is cohesive with no serious conflict present. The reason for the cohesiveness is that members are receiving good dividends and have the potential to earn profits as the debt for the buses is paid off.

The free-rider problem is not really an issue in the cooperative, unless one interprets cynically that all the members as free-riders because members are not required to do anything. Once their R10,000 membership fee is paid in, they simply have to receive their dividends and profit share.

Business support received to date

No business support has been received by the cooperative. The cooperative was formed because individual small bus operators could not access governmental subsidies available to the industry within which they are located.

Production inputs

The cooperative currently has a fleet of 20 buses. New buses are required if new contracts are to be tendered for.

If the cooperative wishes to expand and tender for further governmental public transport contracts, then it would need to purchase new buses. A new bus costs approximately R1.1m; if a tender requires 50 buses, then the cooperative would require R50m. Sibanye has an existing financing facility of R60m with a commercial bank. The cooperative does not have such a facility. Members have chosen to invest their financial returns from the cooperative in expanding their individual businesses' fleet sizes or improving their buses by refurbishing them.

Marketing arrangements

The cooperative does no marketing because it relies on its contracts through Sibanye.

The Sibanye contract is indefinite as Siyakhula has a share in Sibanye. The Jammie Shuttle contract expires in December 2009.

At this stage, the cooperative is not interested in changing its marketing arrangements.

The existing work of the cooperative, through Sibanye, ensures a stable and secure return for the members of the cooperative.

Capital and financing

Start-up capital for the cooperative was provided through member contributions of R10,000 each and through the contract with the bus supplier. Finance was accessed through Stannic Bank and MAN Financial Services, which is a Joint Venture with ABSA, for transport operator financing.

The initial debt incurred by Siyakhula was for the purchase of the 20 buses for the Sibanye equity requirement and was for the sum of approximately R50m. It took four years for the cooperative to repay that debt. The debt repayments were financed through the profit share of the cooperative paid by Sibanye. Members still received their monthly dividends during this period.

Currently, the monthly dividends paid over to the cooperative are R300,000. The dividends paid to each member were:

- 1st year: R20,000;
- 2nd year: R60,000;
- 3rd year: R75,000;
- 2006: R100,000 each; and
- 2007: anticipated to be R100,000.

The cooperative does not have capacity to manage cash flow as Sibanye does this on Siyakhula's behalf.

The cooperative's experience with loan finance is limited to the purchasing of the buses and was extremely positive.

The cooperative has a register with all the buses listed. There is no other asset register.

Future capital requirements are dependent on whether or not the cooperative accesses further bus contracts. If this is the case, then the cooperative will require both operating and

capital financing – the latter for additional buses and ticketing machines. This will be applicable if the cooperative is awarded a contract in its individual capacity.

Currently, however, the cooperative does not market itself in this way.

The cooperative is also not concerned about bus refurbishment as the life span of a bus is 15 years, and their existing buses are only five years old.

Business overview

The current financial year performance of the enterprise is extremely strong: 57% of the business turnover is profit.

Table 3: The cooperative's turnover and profit in R'm

	Amount (R'm)
Turnover	3.5
Gross profit	2.0
Net profit	2.0

Dividends have been received by members for the past four years. Profits have not been distributed as yet owing to debt repayment. Profits will be distributed to members from 2008 onwards.

Table 4: Five year projections (R'm)

Item	Year 1	Year 2	Year 3	Year 4	Year 5
	2007/08	2008/09	2009/10	2010/11	2011/12
Turnover (R'm)	3.5	3.5	3.5	3.5	3.5
Gross profit	2.0	2.0	2.0	2.0	2.0
Net profit	2.0	2.0	2.0	2.0	2.0

At this stage financial performance not anticipated to improve unless it gets its own contracts as Sibanye is purchasing its own buses.

Sibanye will retain its Atlantis Service contract and be re-awarded the Jammie Shuttle contracts.

The key assumption in the financial performance of the cooperative is that Sibanye will retain its existing contracts and continue to manage the contracts on behalf of the cooperative.

The cooperative is dependent on its relationship with Sibanye for its performance. There appears to be limited skills transfer in terms of large contract management from Sibanye to Siyakhula. The members appear content with this arrangement. If Siyakhula was to compete independently, then it would be faced with the ongoing constraints of capital acquisition and accessing transport subsidies.

LESSONS LEARNT

Several lessons can be extracted from the case study of the cooperative.

- The nature of a cooperative, that is, the pooling of resources and working together with other parties, is fundamental to improving the competitiveness of individual members. Small business can compete with large firms if they cooperate together.
- A cooperative consisting of small and informal members can benefit significantly from forging a business partnership with an established firm within the industry.
- Knowledge of the industry is essential to developing the correct business strategy. The fact that the small bus operators had a transport economist as a mentor was a factor that assisted in them making the right business decision.
- The fact that an established partner manages the operations of the business contributes to the success of the cooperative's current business.
- There is limited potential for the cooperative to tender for contracts independently of its established partner as its capacity has not been developed internally nor have the playing fields been levelled in the industry.
- Access to capital by new market entrants remains an obstacle to the expansion of the business.
- There is limited conflict in the cooperative as members are receiving financial benefits from their membership.
- The capacity of the cooperative has not necessarily been strengthened, but the capacity of individual cooperative members has definitely increased. Most of the members are not formalised.
- The cooperative's share within Sibanye is the reason for the success of the members. Individual members could not have accessed these shares as the demands were too rigorous, namely, to operate and own a fleet of 20 buses.
- The fact that the members voted to close membership in 2006 was something which sent out a word of caution to the CEO who then said: "Don't give people money that they haven't worked for as then they deny others the opportunity – they grow greedy".
- There is a concern that members do not put any effort into the cooperative except for their upfront payment of R10,000 and it is more likely that it is a really good investment vehicle rather than anything else.

ANNEXURE: CONTACT DETAILS

Full name of the organisations	Short name / abbreviation
Western Cape Bus Operators' Transport Cooperative Ltd	Siyakhula
Postal address	Email address
P.O. Box 839, Bellville	maluka@netactive.co.za
Telephone number	Fax number
021-946 4612 021-685 5342 083-593 0449	021-946 4615
Interviewees' names	Interviewee's position
Mr George Maluka	CEO of Sibanye CEO and founder of Siyakhula Transport economist

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