

REPORTS OF STANDING COMMITTEES REPORTING DIRECTLY TO THE COUNCIL
allowed in terms of Section 8(1)(f)(b)(i) of the Rules and Orders for consideration by the Council

Agenda of the Council Meeting of the

CITY OF TSHWANE METROPOLITAN MUNICIPALITY

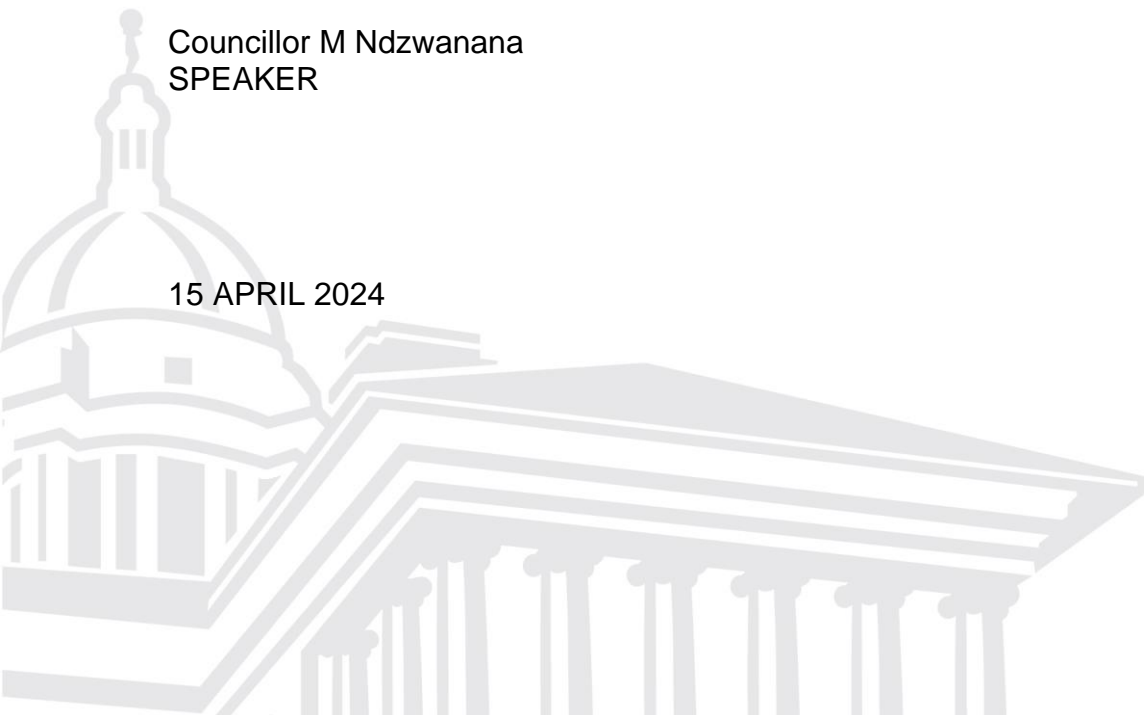
which will be held in the Council Chamber, Tshwane House, Madiba Street, Pretoria, on **THURSDAY, 25 APRIL 2024** at **10:00**, to consider the matters as set out in the agenda.

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B.	FROM THE SECTION 79 OVERSIGHT COMMITTEE: ECONOMIC DEVELOPMENT AND SPATIAL PLANNING: MEETING: 12 APRIL 2024.....	4-36
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Councillor M Ndzwanana
SPEAKER

15 APRIL 2024



F. REPORT TO COUNCIL

The Speaker, in terms of Section 8(1)(f)(b)(i) of the Rules and Orders, proposes to Council that the report contained in this agenda, from the meeting of the Section 79 Oversight Committee: Economic Development and Spatial Planning held on 12 April 2024, be submitted for consideration, and subsequently requests the Chair of Chairs, Alderman IP du Plooy, to present the report to Council.

COUNCIL AGENDA: CITY OF TSHWANE METROPOLITAN MUNICIPALITY:
25 APRIL 2024

REPORT TO COUNCIL

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(The recommendations appear on the pages indicated in brackets)

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B.	FROM THE SECTION 79 OVERSIGHT COMMITTEE: ECONOMIC DEVELOPMENT AND SPATIAL PLANNING: MEETING: 12 APRIL 2024	
1.	Economic Development and Spatial Planning Department (Economic Development Division) A survey conducted on the City of Tshwane Preference for investment, including reasons for or against investing in the City (From the Section 79 Oversight Committee: Economic Development and Spatial Planning: meeting: 12 April 2024)	4-36 (36)

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COUNCIL AGENDA: CITY OF TSHWANE METROPOLITAN MUNICIPALITY:
25 APRIL 2024

REPORT TO COUNCIL

Makgorometje Makgata
COUNCIL: 25 APRIL 2024

1. A SURVEY CONDUCTED ON THE CITY OF TSHWANE PREFERENCE FOR INVESTMENT, INCLUDING REASONS FOR OR AGAINST INVESTING IN THE CITY
(From the Section 79 Oversight Committee: Economic Development and Spatial Planning: meeting: 12 April 2024)

1. PURPOSE

The purpose of the report is to:

- Provide the rational for conducting the investment survey;
- Indicate the research methodology followed in conducting the survey;
- Indicate the overwhelming negative results and impact on the investment community in Tshwane and;
- Present a short- and medium-term implementation plan to address the findings of the survey.

2. STRATEGIC OBJECTIVES

The application is in accordance with the following strategic objectives:

- 2.1 A CITY THAT FACILITATES ECONOMIC GROWTH AND JOB CREATION.
- 2.2 A CITY THAT IS OPEN, HONEST AND RESPONSIVE.

3. BACKGROUND AND DISCUSSION

- 3.1 REVIEW OF LITTERATURE

One of the primary roles of economic development, particularly at the local municipal level, is to foster a favorable and sustainable environment where businesses can thrive. Echoing this sentiment, the National Framework for Local Economic Development (DPLG, 2006) directs municipalities to establish conditions that attract investment, promote enterprise growth, ensure economic fairness, and stimulate job creation.

Similarly, the Donor Committee for Enterprise Development (DCED, 2008) argues that improving the business environment fosters competitive markets, enhancing the effectiveness and longevity of other development efforts. Despite recognizing the importance of sound regulations to safeguard various interests and enable market economies to function efficiently, many developing and transitioning nations face challenges with overly restrictive regulatory frameworks, high development costs, bureaucratic delays, and business risks, hindering economic progress, deterring both domestic and foreign investors, and stifling innovation and expansion.

A conducive business environment is essential for attracting, facilitating, and expanding investments, which are fundamental for fostering a robust local economy, driving economic growth, and broadening economic opportunities. Moreover, investment, particularly direct investment, fosters job creation, leading to improved socio-economic conditions and better community well-being. A favorable business climate is also crucial for nurturing small, medium, and micro-enterprises (SMMEs).

Red tape, which has become synonymous with local government, refers to excessive bureaucratic procedures, regulations, and administrative barriers that impede the efficiency and effectiveness of governmental processes. Red tape encompasses complex and time-consuming permitting processes, unclear regulations, excessive paperwork, lack of transparency, opportunities for corruption, inefficient public services, and high compliance costs.

Understanding the investment climate is crucial for attracting and retaining both foreign and local investors. Creating a conducive investment environment for cities involves various elements that collectively attract and retain investors, foster economic growth, and enhance the overall quality of life for residents. Some key elements from the literature on this topic include:

- Adequate infrastructure, including transportation networks, connectivity and utilities;
- A transparent and predictable regulatory framework;
- Stable macroeconomic conditions;
- Access to a skilled and educated workforce;
- A vibrant innovation ecosystem;
- A high quality of life; and

- Collaboration between stakeholders

Various multilateral and donor agencies, such as the United Nations Conference on Trade and Development (UNCTAD) and the Organisation for Economic Co-operation and Development (OECD), have produced reports aimed at identifying and defining the essential components of a conducive business environment. However, many of these studies predominantly focus on regulatory aspects. Notable reports such as the World Bank's Subnational Ease of Doing Business Report (2018) and the City of Tshwane Customer Satisfaction Survey (2018) shed light on concerns expressed by investors and businesses, highlighting key areas for improvement and showcasing best practices adopted by cities to enhance their business climates and advance economic development goals.

The current administration prioritizes attracting investment, creating new jobs, and retaining existing ones. It is therefore imperative for the City to create an environment conducive to addressing the evolving factors influencing the investment decisions of local and international investors. This involves streamlining permitting processes, providing process certainty, and enhancing the city's capacity to attract and facilitate investment. Such efforts will elevate investor satisfaction and bolster the city's positive image and reputation, serving as effective tools for investment promotion and retention.

3.2 RESEARCH METHODOLOGY

This research survey consists of a brief literature review and an empirical study.

3.2.1 Literature review

The literature review is based on the main objective of the survey, which is to determine the conduciveness of the City of Tshwane as a business and investment destination. The literature review thus forms the foundation of the study. The salient themes emanating from the literature review not only recognizes established research on the topic but also informs the design of the survey instrument.

3.2.2 Empirical study

This survey adopts a mixed-method research paradigm as this method allows for a more thorough exploration of the research objective. The target population for this survey comprises of all medium and large commercial enterprises based in the City of Tshwane. Cluster sampling using the City's Regional Industrial Forum and Property Development Forum databases was used in this survey. The sample was divided into clusters that approximately reflect the whole population. A sample of n=500 was then chosen from a random selection of these clusters.

3.2.3 Research instrument

Google Forms has been chosen as the research instrument for this survey. Google Forms is a reliable way to survey because it offers several advantages such as, allowing the researcher to collect data from any location, providing automatic descriptive statistics and ensuring confidentiality of participant data. The use of online questionnaires through Google Forms has also been found to increase response rates and improve data fidelity compared to paper-based questionnaires. The survey questions were validated through pre-testing with a small group of individuals from the study sample.

3.2.4 Data analysis

Upon closure of the survey and collection of the data, the survey results were exported to excel for further analysis. Descriptive statistics and qualitative analysis techniques (thematic and content analysis) were used to code and analyse the data. The thematic and content analysis of open-ended questions were done using a formula for the calculation of multiple criteria in a range. In this regard, the number of all respondents was counted but the response was not taken into consideration if it could not be matched to a specific theme. Furthermore, a single respondent has in many instances respond to multiple criteria, which was counted and allocated to a specific theme. This has an impact on the count in the frequency distribution, which therefore does not amount to 100%.

3.3 SURVEY FINDINGS

This comprehensive survey delves into the perspectives, preferences, and challenges faced by investors, shedding light on the factors that shape their decisions. Through a systematic analysis of survey responses, this survey provides insights into how the City can enhance the investment environment to foster economic growth and development. The survey registered a response rate of 34% (168 respondents) from a sample size of 500.

3.3.1 RESPONDENT PROFILE

As illustrated in the graph below, approximately 43% of survey respondents identified as consultants while developers and/or investors account for 15.5%. 9.5% of respondents are in the business service industry, followed closely the construction industry accounting for 8.3% of respondents. Including architects at 4.2% and manufacturers at 3.6%, these six categories account for 84.1% of all survey respondents.

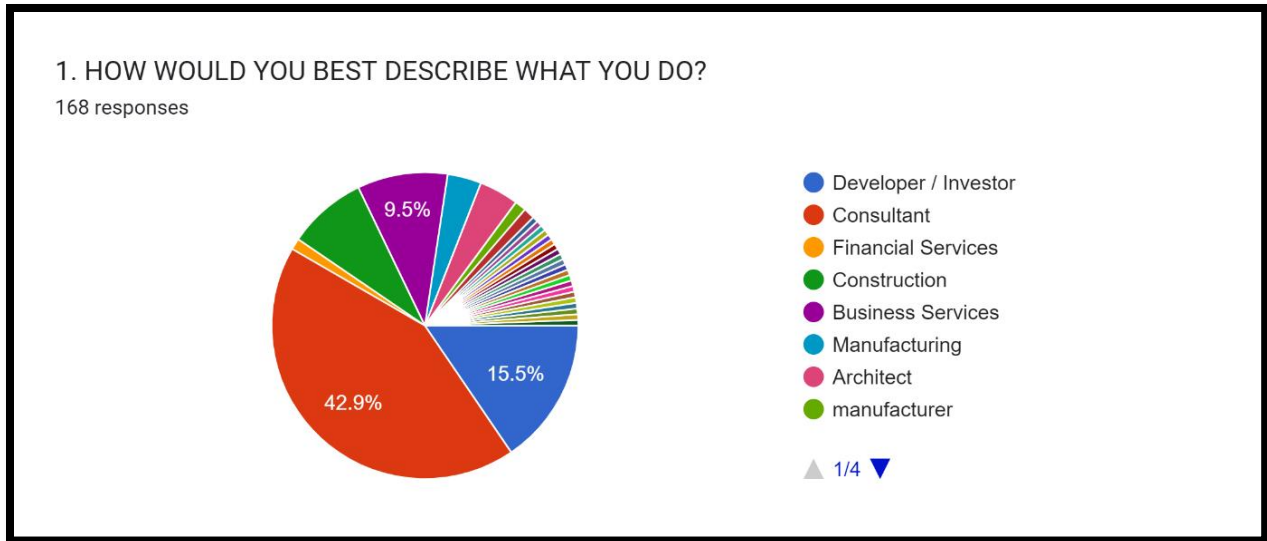


Figure 1:

Breaking the above-mentioned categories down into its top three sub-categories, we find that 90 of the 160 survey respondents represent the broad consultant segment. In this regard, 40% of respondents identify as planners, 31.1% identify as architects and 4.4% identify as other.

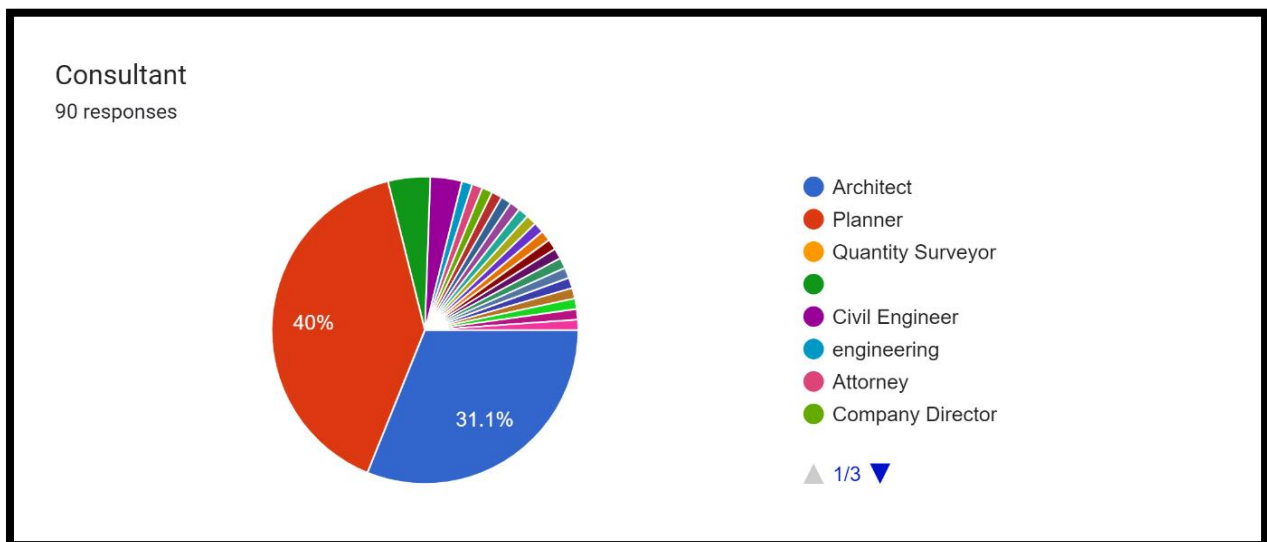


Figure 2

Only 14 of 160 respondents responded to this sub-category question, of which 63% equally identified as transaction advisor (21.4%), other (21.4%) and not applicable (21.4%)

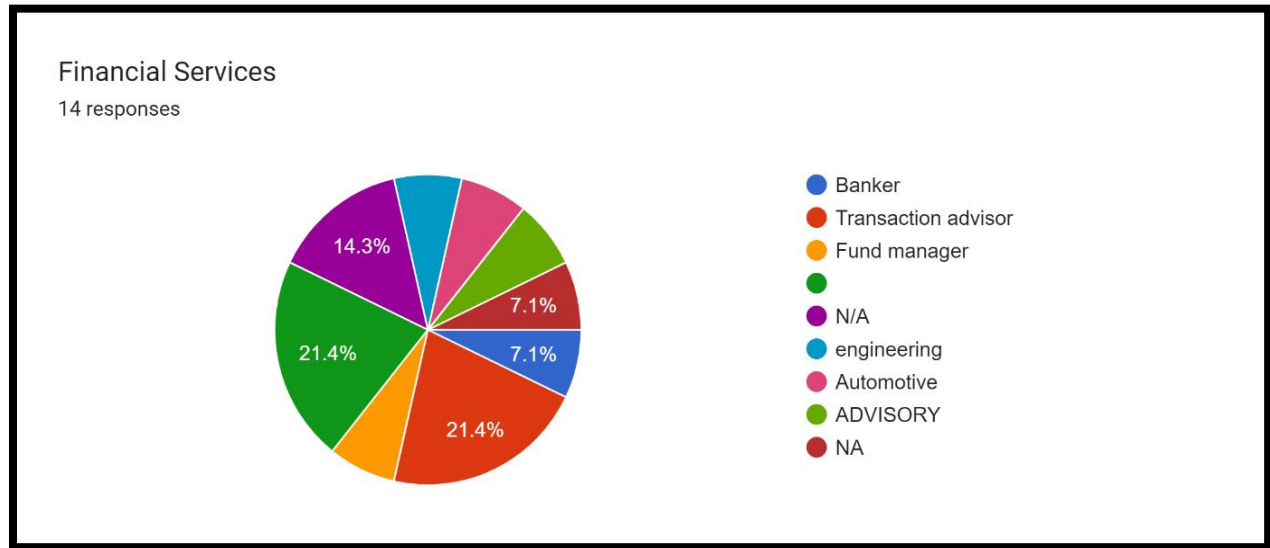


Figure 3

Like the financial services sub-category, only 15 respondents responded to the construction sub-category. In this sub-category builders, sub-contractors and other account for 60% of all responses.

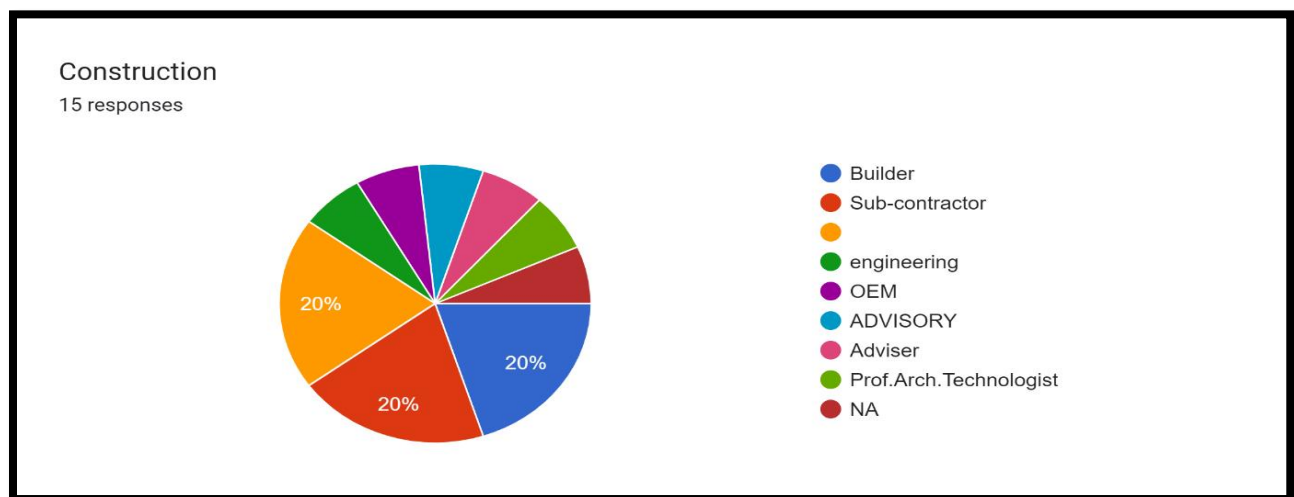


Figure 4

From the business services sub-category, the top three responses are legal (20.8%), other (16.7%) and accountants (8.3%).

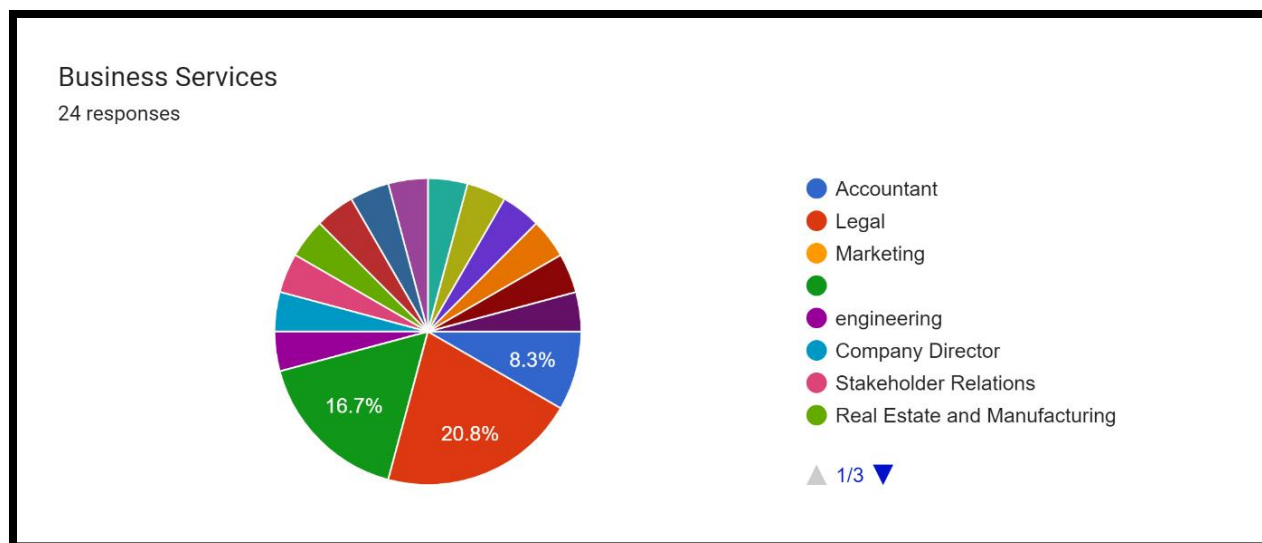


Figure 5

3.3.2 SECTORAL REPRESENTATION

From a sectoral representation perspective, the top five sectors that have responded to the survey are construction (44%), manufacturing (16.1%) financial, insurance, real estate, or business services (14.9%), wholesale, retail, catering, or accommodation (3.6% and community, social or personal services (2.4%) respectively. Jointly, these five sectors/industries account for approximately 79% of all survey responses.

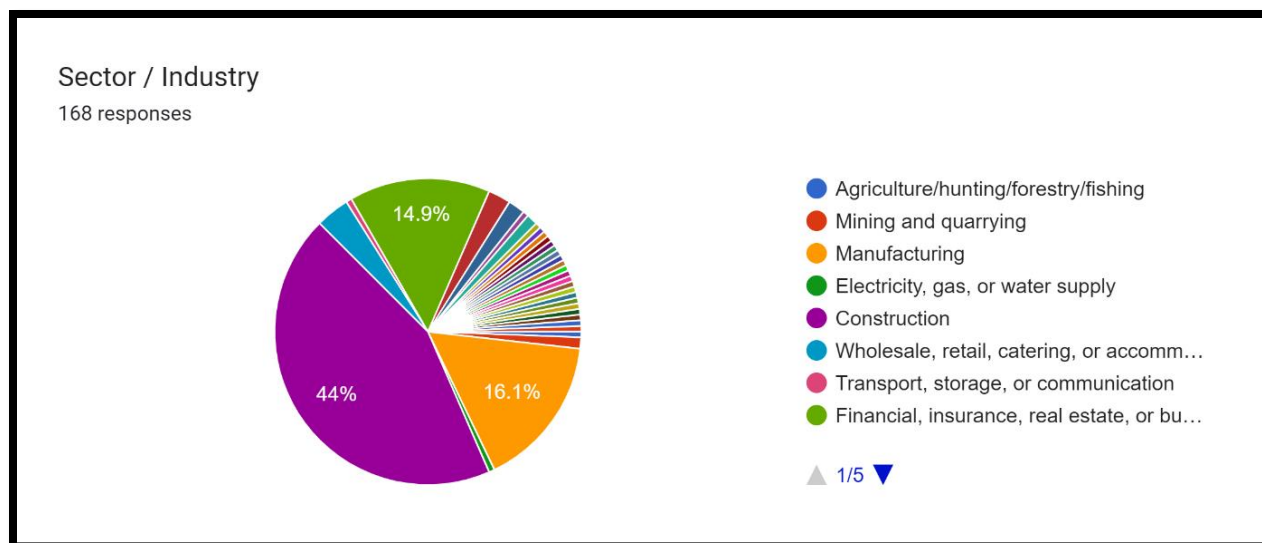


Figure 6

3.3.3 ECONOMIC AND GROWTH PROSPECTS OUTLOOK

It is extremely worrying that approximately 85% of survey respondents appear to be very pessimistic about economic and growth prospects within the City, in the near to medium term. This perception is commensurate with the National Treasury's 2024 economic outlook, which indicates that GDP growth in South Africa has averaged only 0.8% since 2012 owing to severe infrastructure and capacity constraints in the energy, freight, rail, and port sectors, underpinned by structural barriers to economic activity.

3. WHAT IS YOUR OUTLOOK REGARDING ECONOMIC GROWTH PROSPECTS FOR THE CITY OVER THE NEXT 3 – 5 YEARS?

168 responses

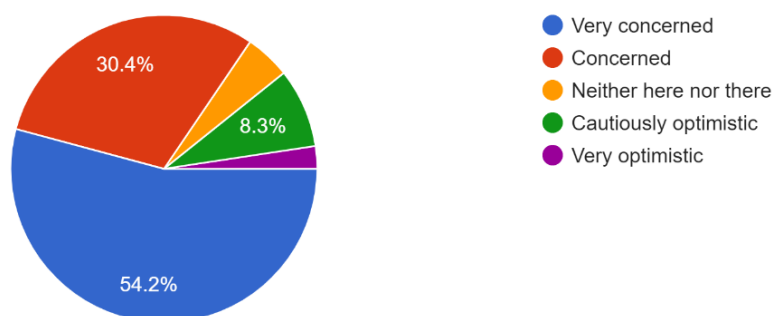


Figure 7

3.3.4 CONDUCTIVENESS OF CITY AS AN INVESTMENT DESTINATION

Like the poor perception of the City's growth and economic prospects, approximately 77% of survey respondents perceive the City's business and investment environment to be totally uncondusive. Only 23% of respondents appear to be satisfied with the business and investment environment in the City.

4. WHAT IS YOUR PERCEPTION OF THE CONDUCTIVENESS OF THE CITY AS AN INVESTMENT AND BUSINESS LOCATION?

168 responses

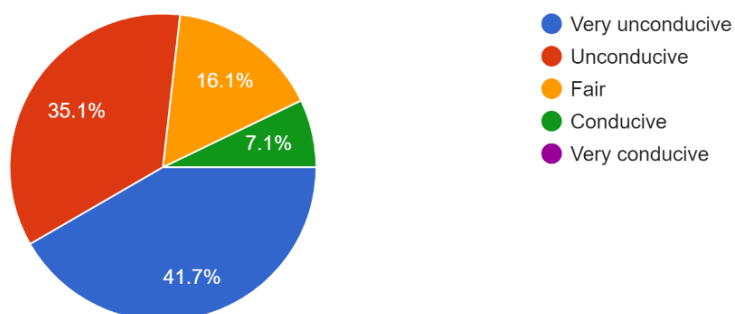


Figure 8

Further responding to the conduciveness of the City's business and investment environment, 130 of the 160 respondents cited poor service delivery, red-tape, and developmental approval delays (71%), Incompetent, unhelpful and corrupt personnel (24%) and poor infrastructure (18%) as the top three reasons for the poor conciseness of the City's business and investment environment. This implies that failure to correct these factors will negatively impact upon the City's ability to attract and retain much need investment to ensure sustainable economic growth.

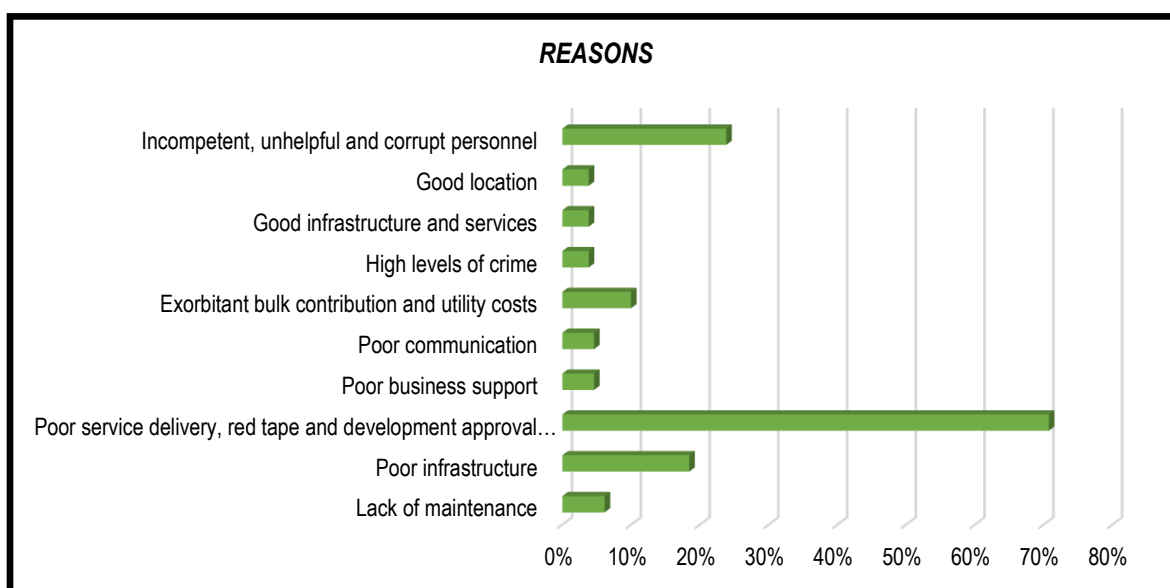


Figure 9

3.3.5 CURRENT INVESTMENT AND EXPANSIONS

Notwithstanding the poor perceptions in respect of the City's economic and growth prospects and business and investment conduciveness, 50% of survey

respondents are currently investing in and/or expanding their operations within the City.

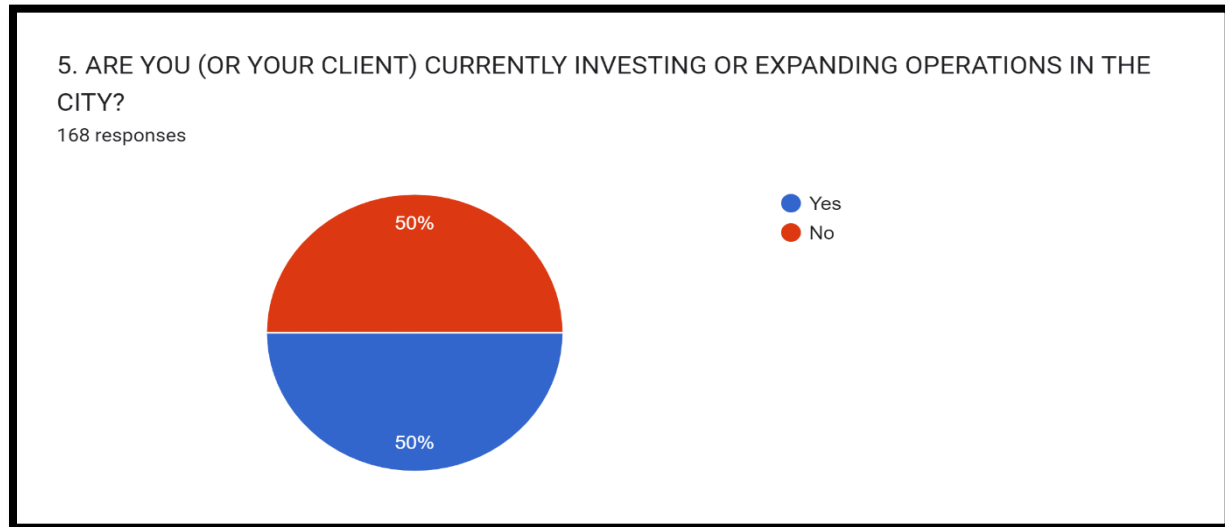


Figure 10

It is interesting to note from the data that the majority of current investors (38%) in the City are medium-sized investors falling within the R1 million to R99 million investor category. This category (21%) also accounts for a significant number of employment creation. Adding the responses of the 77 investors that responded positively to this question and who are currently investing in and/or expanding their operations within the City, the data indicates that the total investment is approximately R141 billion, leading to the creation of approximately 262 000 new employment opportunities.

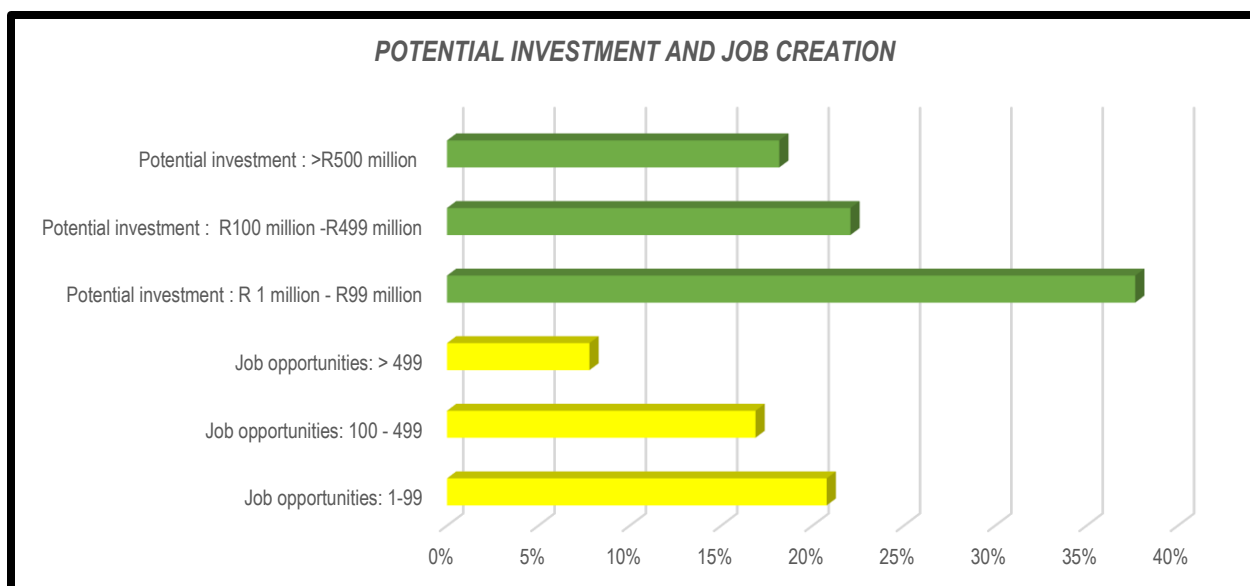


Figure 11

3.3.6 FUTURE INVESTMENT AND EXPANSIONS

Similar to question 3.3.5 above, a greater number (55%) of responses to this question were positive. It is however of great concern that a significant number of respondents (45%) responded in the negative indicating that they will no longer be undertaking any investments and expansions in the City.

6. DO YOU (OR YOUR CLIENT) PLAN TO CONTINUE INVESTING AND EXPANDING IN THE CITY OVER THE NEXT 3 -5 YEARS?

168 responses

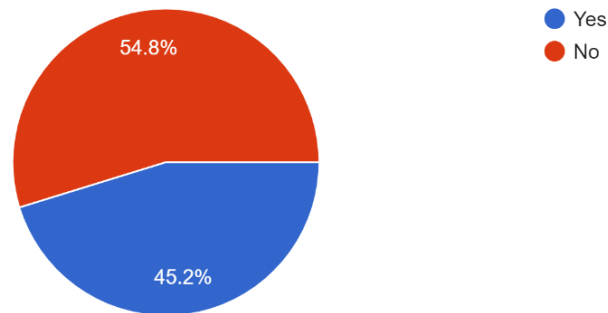


Figure 12

Of the 160 survey respondents, only 86 responded to this further question. The three main reasons given for curtailing investment and expansion plans within the City in the short to medium term are poor service delivery, red-tape, and development approval delays (56%), incompetent, unhelpful and corrupt personnel (16%) and exorbitant bulk contribution and utility costs (7%). The negative impact of this is a potential loss of R51.5 billion in investment and 51 500 employment opportunities.

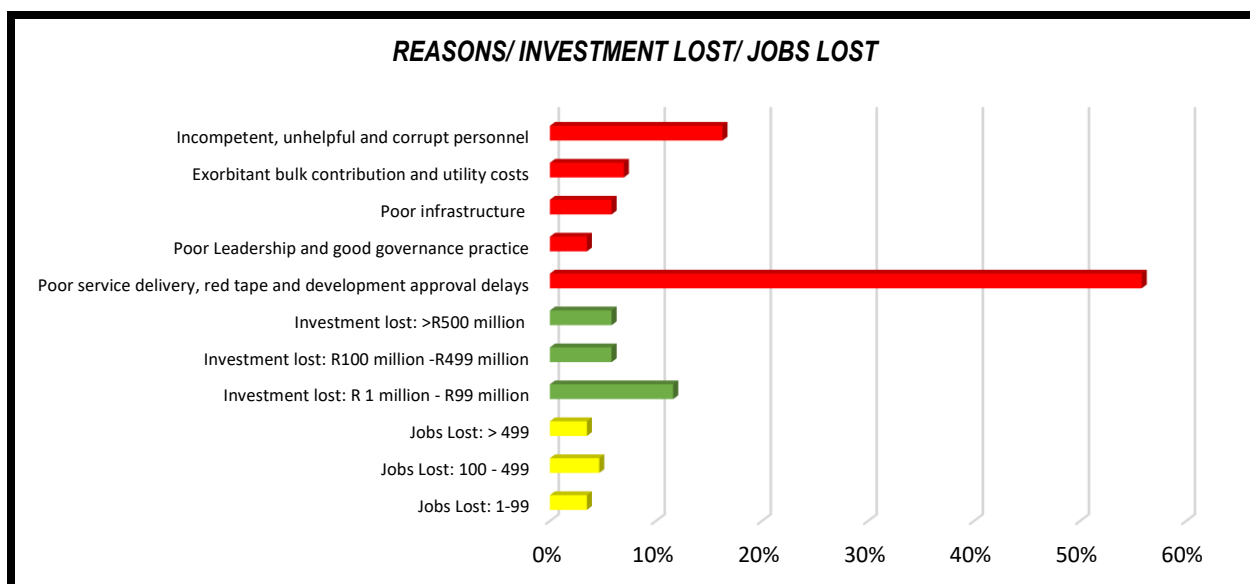


Figure 13

3.3.7 RECENT TERMINATION OF INVESTMENT

It is particularly worrisome to note that 66.1% of survey respondents have recently terminated or put on hold planned investments and expansions.

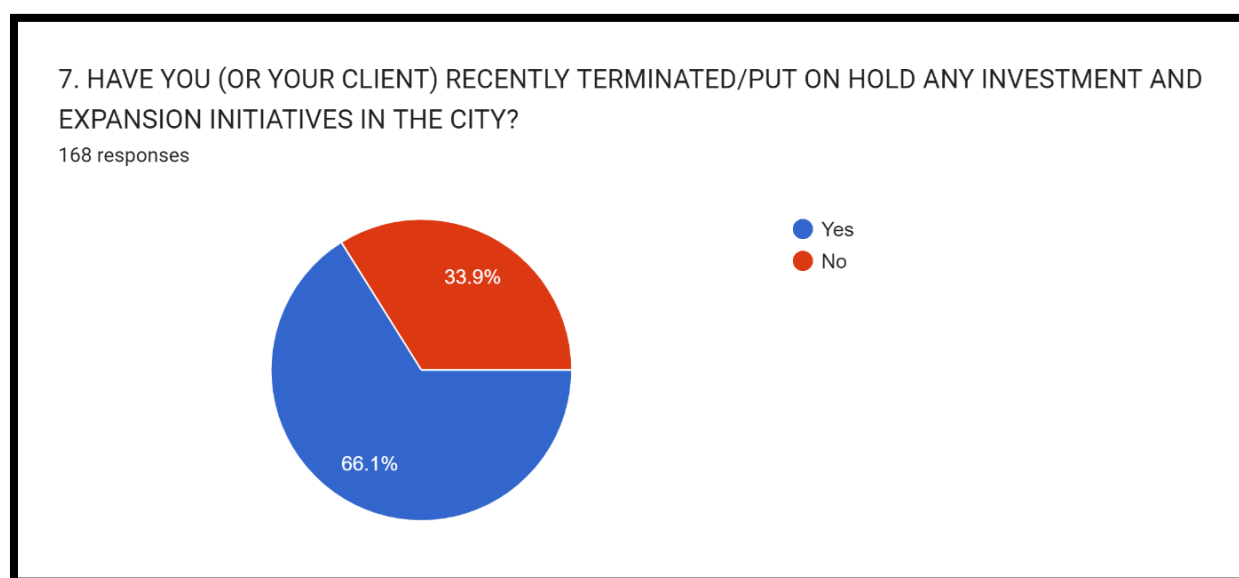


Figure 14

Again, the three main reasons for terminating or putting on hold planned investments and expansions are delays in development approvals and red-tape, poor service delivery and infrastructure availability and exorbitant bulk contribution and utility costs. The negative impact of this is a loss of R13 billion in investment that would have led to the creation of approximately 3000 employment opportunities. Again, the small-medium-sized investor in the R1 million to R99 million investment category appears to have been most impacted by the poor business and investment conditions in the City.

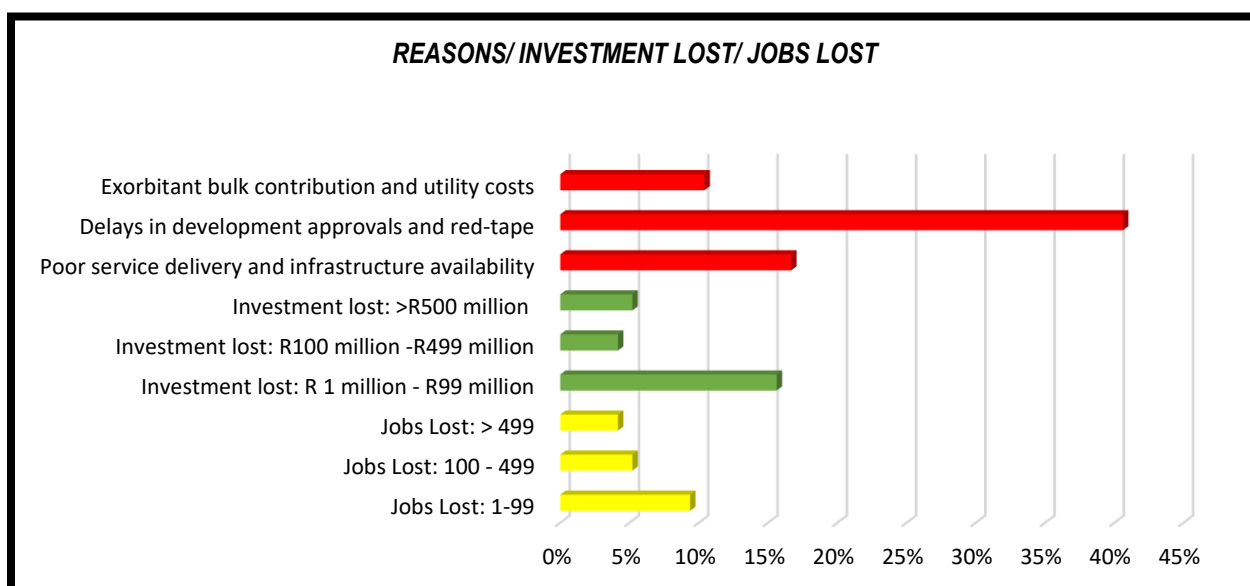


Figure 15

3.3.8 POTENTIAL RELOCATION FROM THE CITY

It should be of great concern that a whopping 71% of respondents indicated that they plan to relocate from the City of Tshwane to a more suitable and conducive business location, as illustrated in the two charts below. 110 of the 160 survey respondents substantiated their response by indicating that the main reason for relocation from the City of Tshwane is due to poor service delivery, lack of infrastructure maintenance and development approval delays. Potential relocation and capital flight from the City would likely result in the loss of 55 000 employment opportunities.

8. ARE YOU (OR YOUR CLIENT) CONSIDERING AN ALTERNATIVE INVESTMENT LOCATION IN THE NEXT 3 -5 YEARS?

168 responses

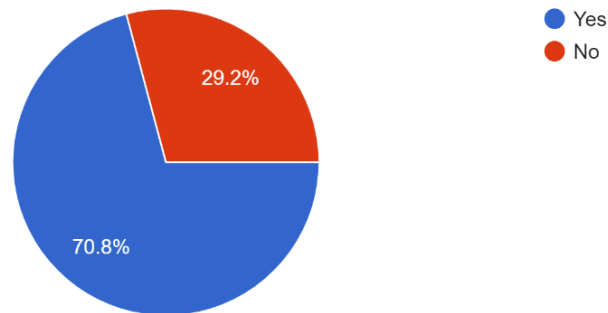


Figure 16

From the respondents who indicated a location, the Western Cape appears to be the location of choice (32%). While 23% of respondents indicated other for location, 15% indicated that they were actively investigating alternative locations within other metropolitan municipalities in Gauteng.

REASONS/ LOCATION/ JOBS LOST

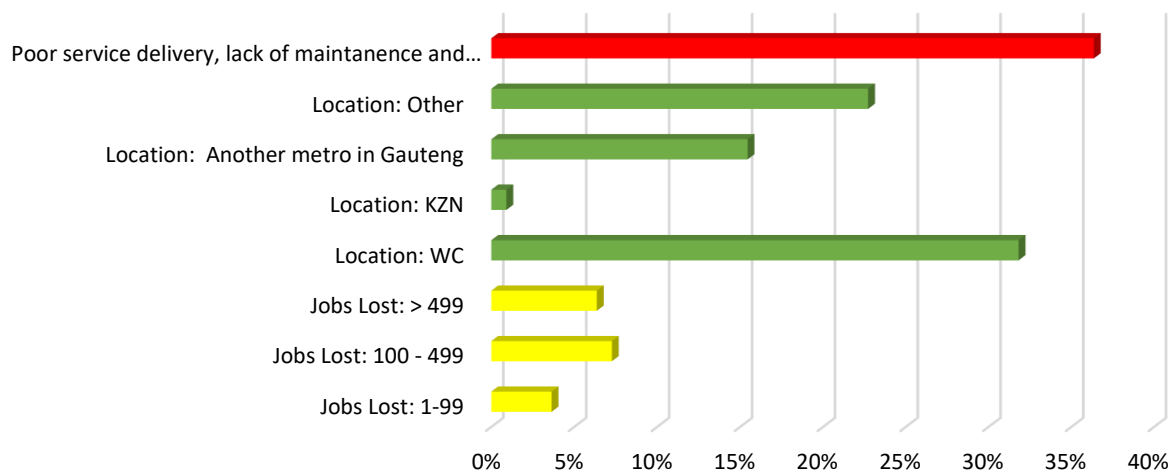


Figure 17

3.3.9 OVERALL INVESTMENT EXPERIENCE

In terms of the overall investment and development experience in the City, a whopping 75% of investors and developers are either very dissatisfied or dissatisfied while 21.4% are neutral in this regard. Only a small percentage of respondents (3.6%) indicate a positive investment and/or development experience.

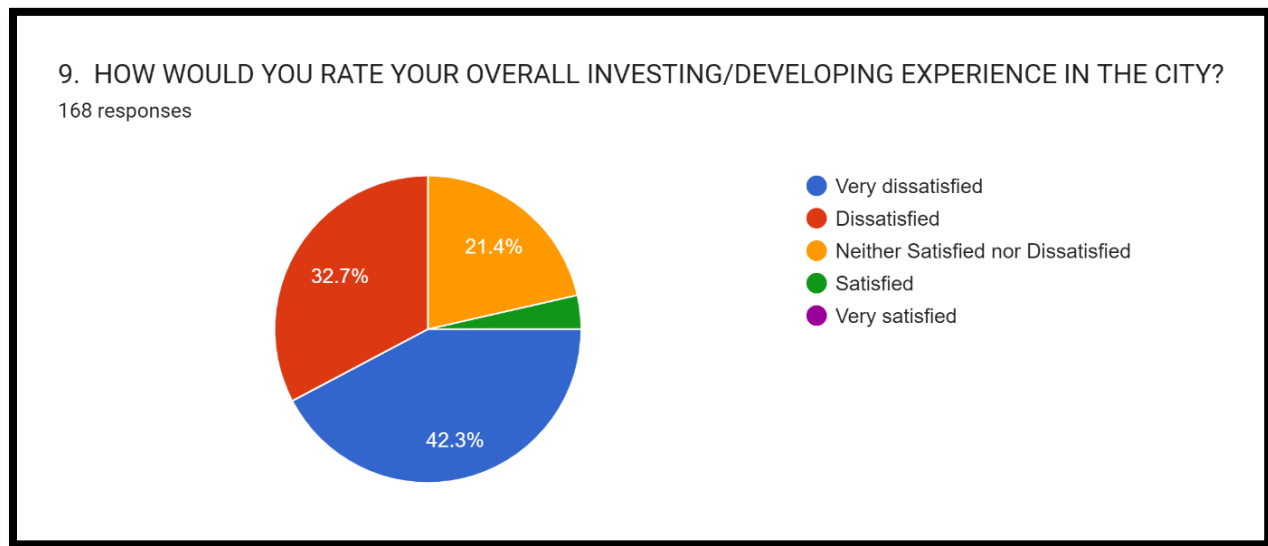


Figure 18

3.3.10 CITY INVESTMENT FACILITATION SERVICES

In line with the responses of question 3.3.9 above, a very large number of respondents, approximately 80%, are disenchanted with the City's investment facilitation services. 17.9% of respondents perceive these services to be of an average standard.

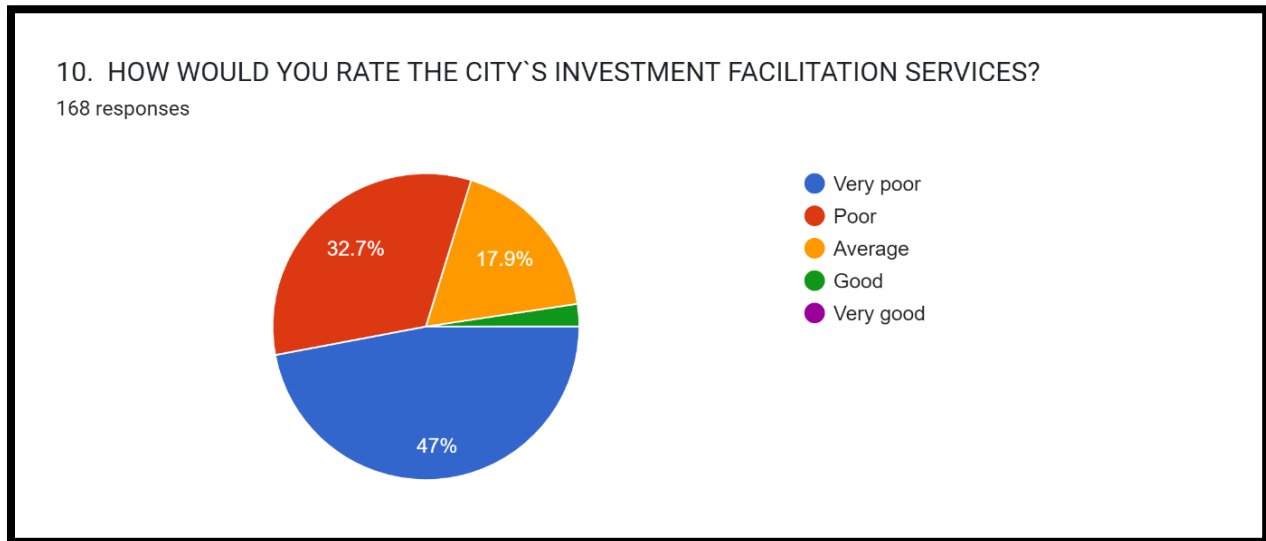


Figure 19

3.3.11 CITY INVESTMENT AFTERCARE SERVICES

Similar to the responses relating to the City's investment facilitation services, the majority of respondents (76%) are of the opinion that the City's investor aftercare services are virtually non-existent. 21.4% are however of the opinion that these services are of an average standard. Only 2.4% of survey respondents appear to have derived value from these services.

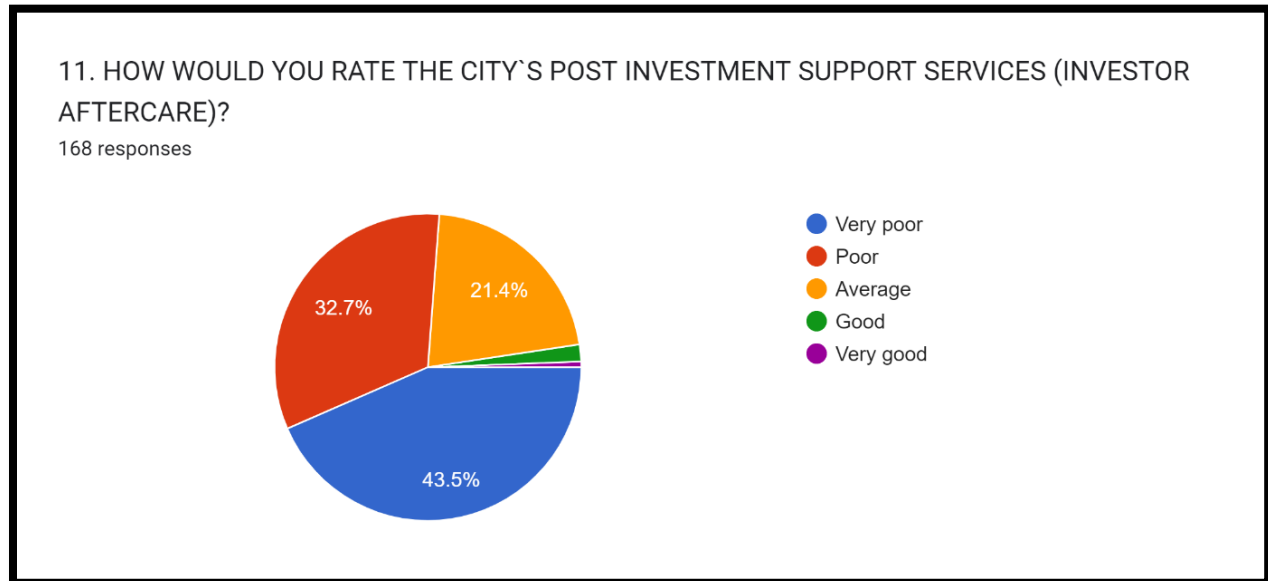


Figure 20

3.3.12 EASE OF DOING BUSINESS FACTORS

The charts below illustrate the level of investor and developer satisfaction concerning a number of ease of doing business factors from a time, cost and process perspective. In this regard 23 factors were identified and polled. Due to the number of factors and corresponding visual data, the main chart output is broken up into a few charts for purposes of better illustration.

It is interesting to note that the majority of survey respondents indicated that they are very dissatisfied with all 23 ease of doing business factors, followed closely by either dissatisfied or neither satisfied nor dissatisfied. A very small percentage of respondents indicated that they are satisfied with these 23 factors in terms of time, cost and process.

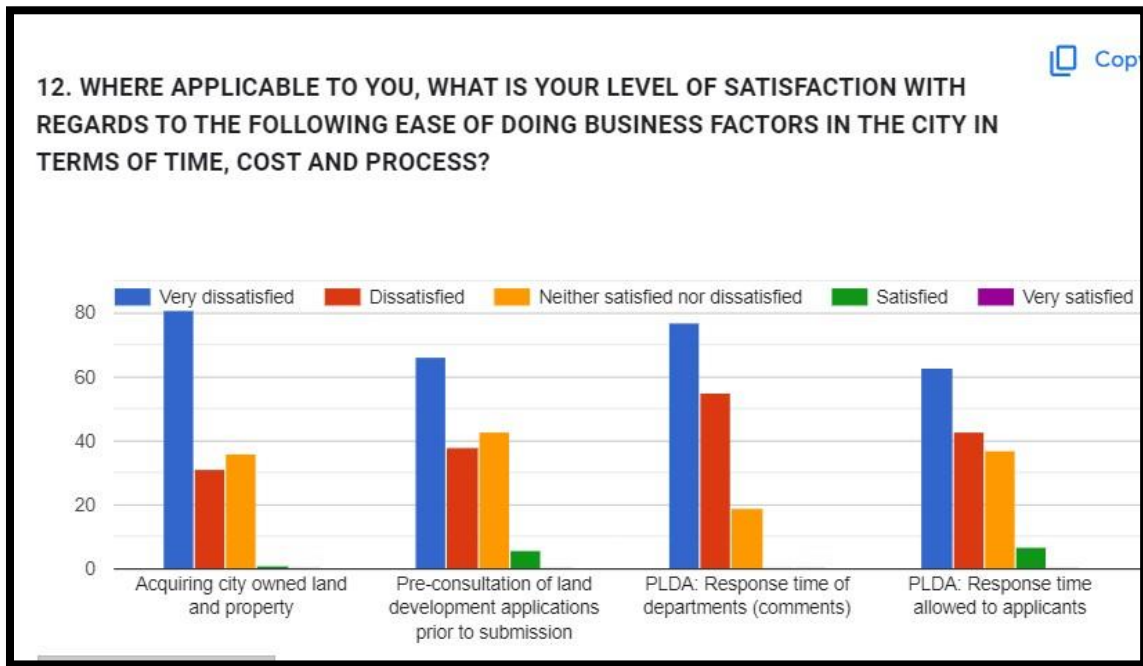


Figure 21

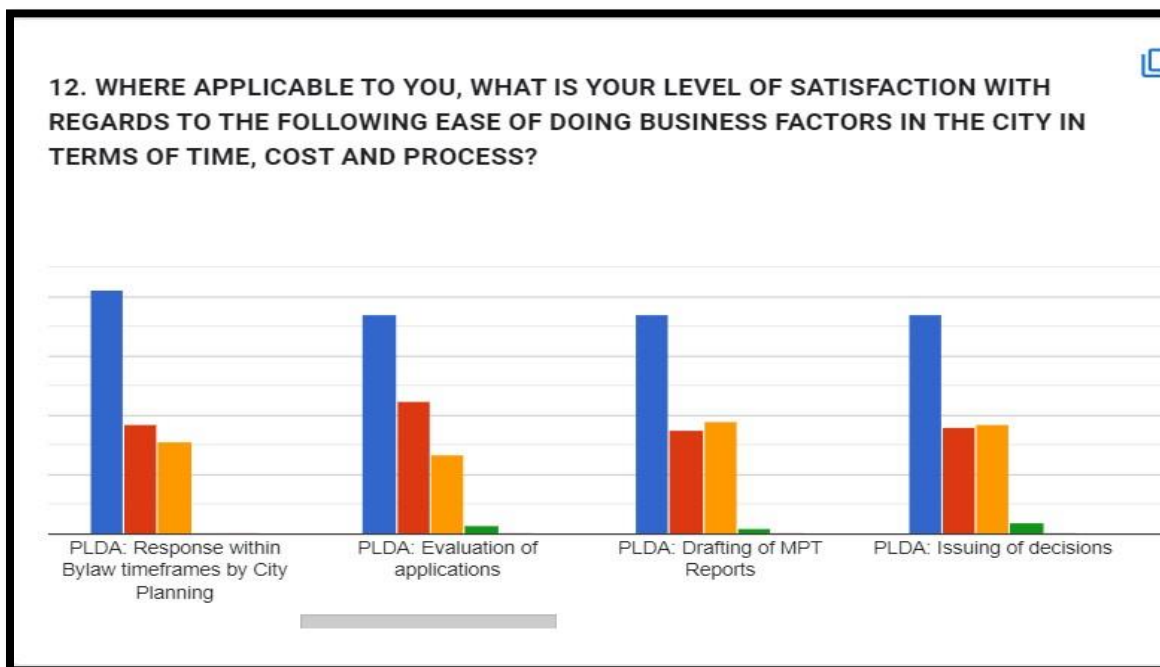


Figure 22

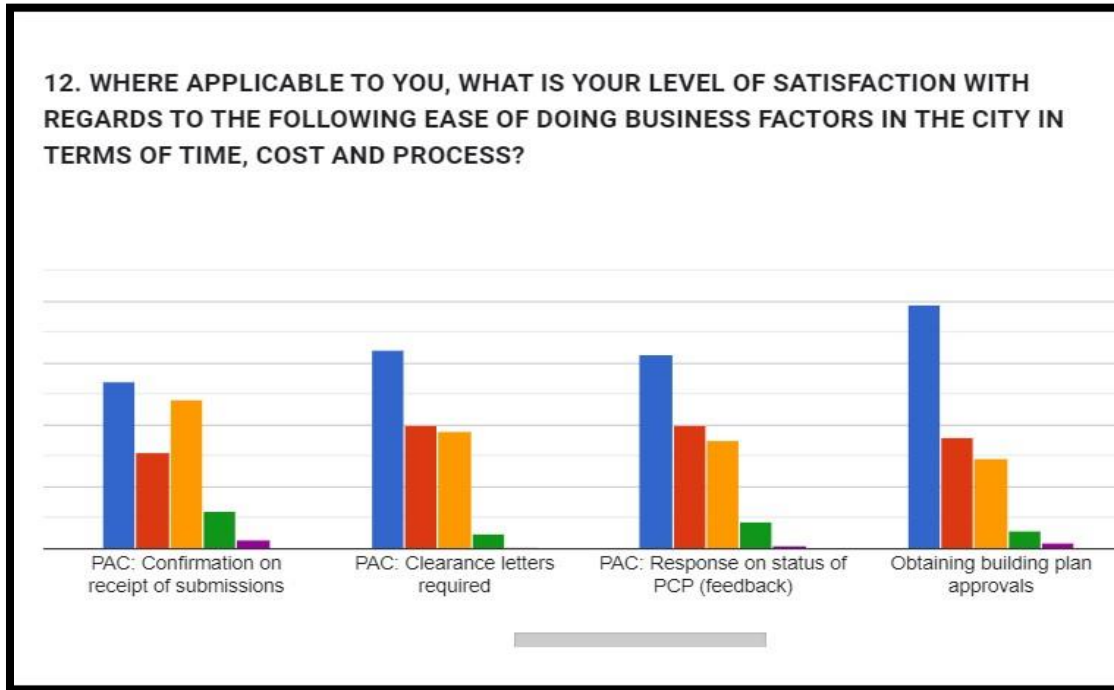


Figure 23

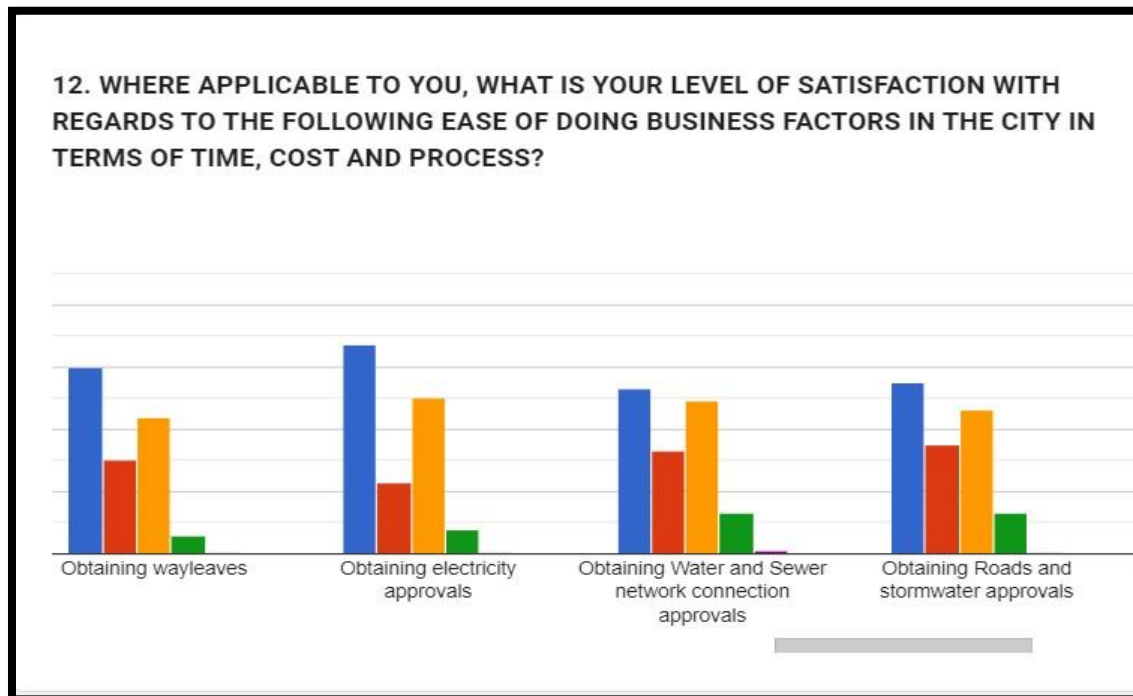


Figure 24

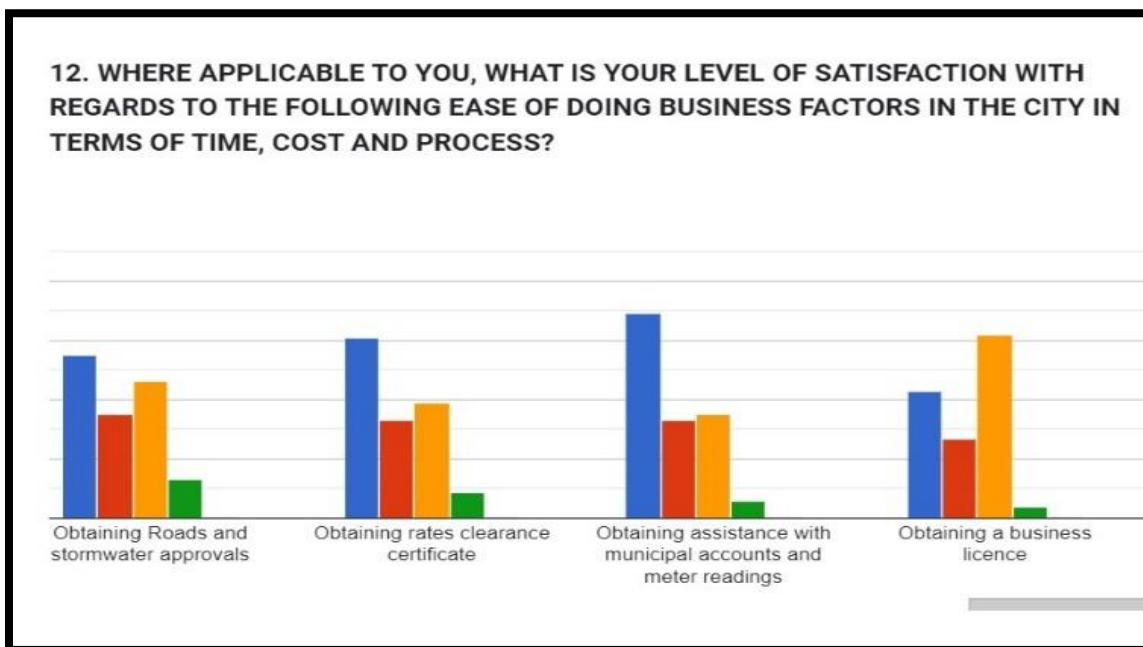


Figure 25

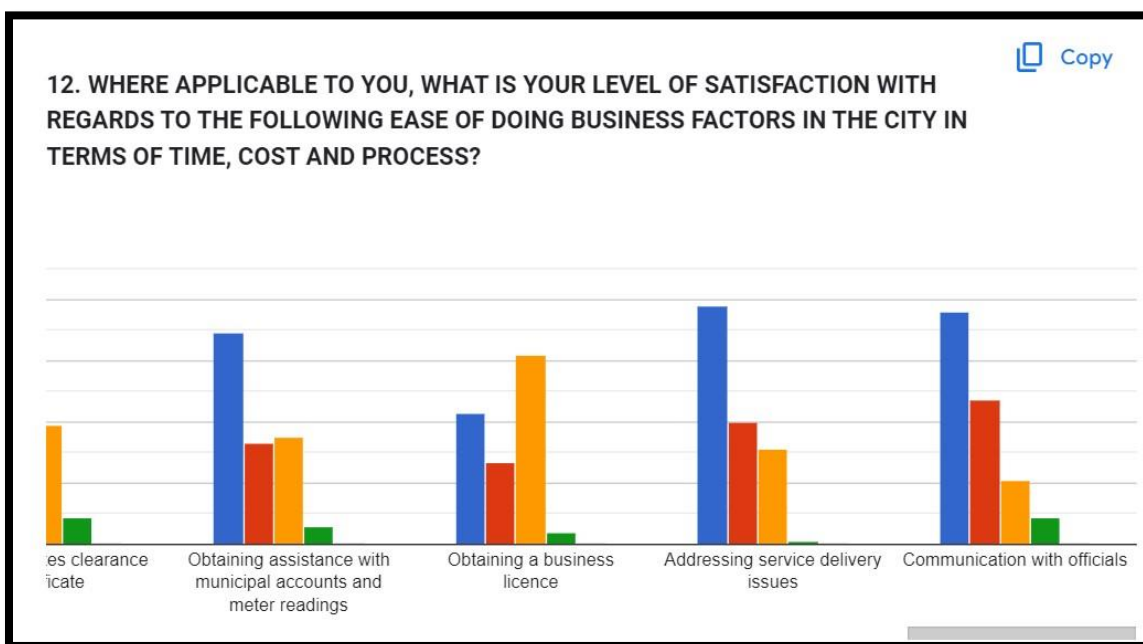


Figure 26

3.3.13 INVESTMENT FAST TRACKING

Most respondents (71.5%) indicated that investment fast-tracking features as a very important/important aspect of their decision-making processes. While 16.1% of respondents are neutral in this regard, 10.1% don't factor in this aspect of investing and developing into their decision-making processes.

13. HOW IMPORTANT IS THE PROVISION OF INVESTMENT FAST-TRACKING AND GRANTING OF PROJECT PRIORITY STATUS IN YOUR INVESTMENT DECISION MAKING PROCESS?

168 responses

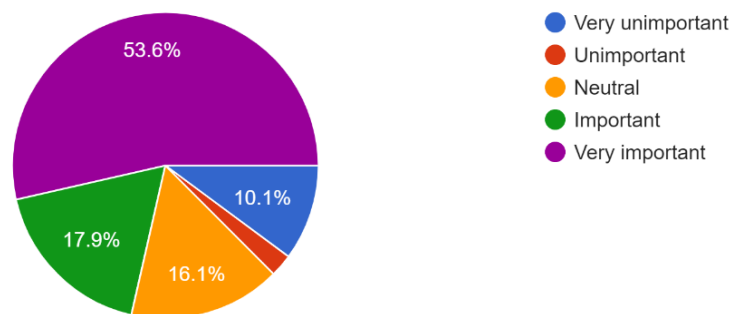


Figure 27

3.3.14 PERCEPTION OF CITY PERSONNEL ON PERFORMANCE OF CITY ECONOMY

It is cause for great concern that 84.5% of survey respondents perceive City officials as a deterrent for investment, job creation and economic growth. This sentiment is in line with the responses relating to, abandonment of current investment projects, planned future investments and possible relocation from the City to more conducive business destinations.

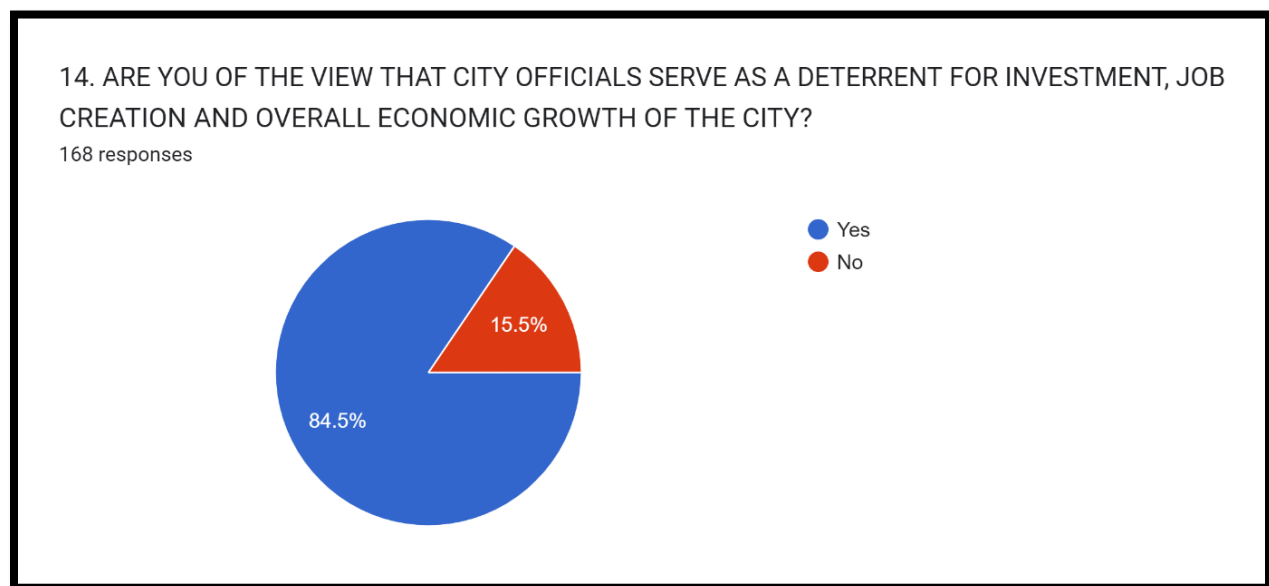


Figure 28

Of the 160 total survey respondents, 102 respondents further responded to the open-ended question which aimed to ascertain the name of officials that are perceived to be problematic. 47% of respondents have named officials, departments and regions that require urgent intervention to correct the status-quo. In addition, 15% of respondents indicated that there are too many officials to mention while 12% refused to name officials due to victimisation despite the survey being anonymous. The main reason given for this perception is behavior related with 39% of respondents indicating that City officials are rude and unhelpful. It is worthwhile noting that where officials, departments and regions are named, a recurring and repetitive pattern is noted.

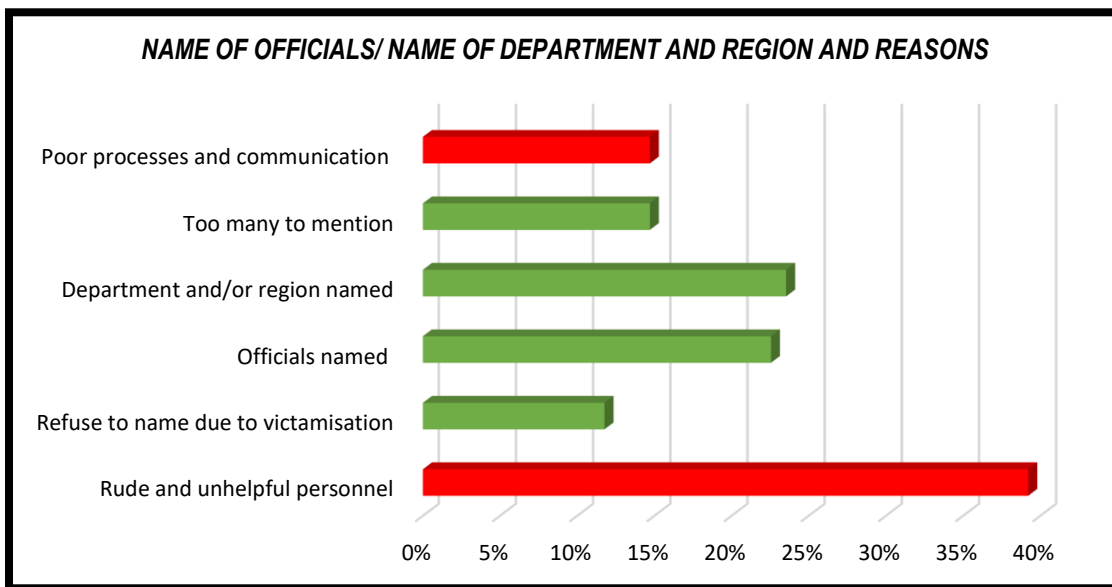
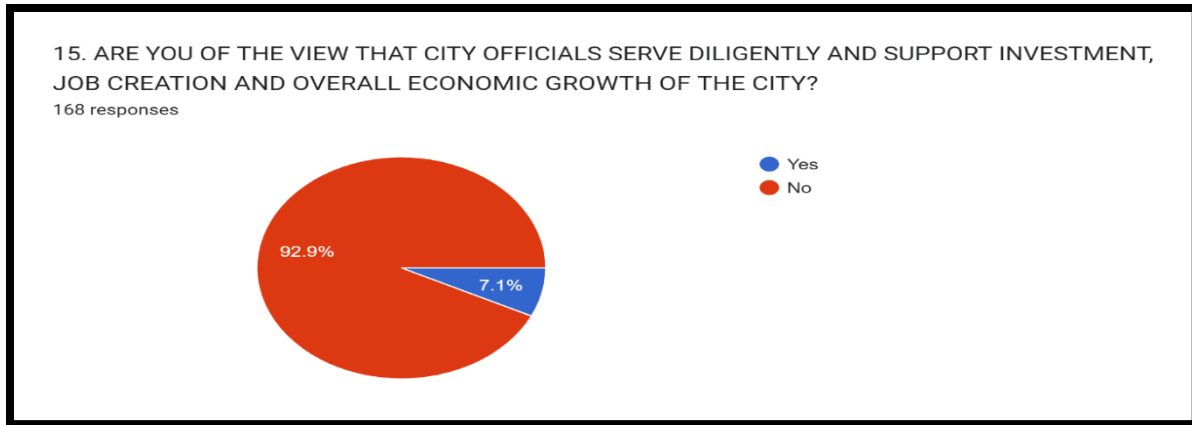


Figure 29

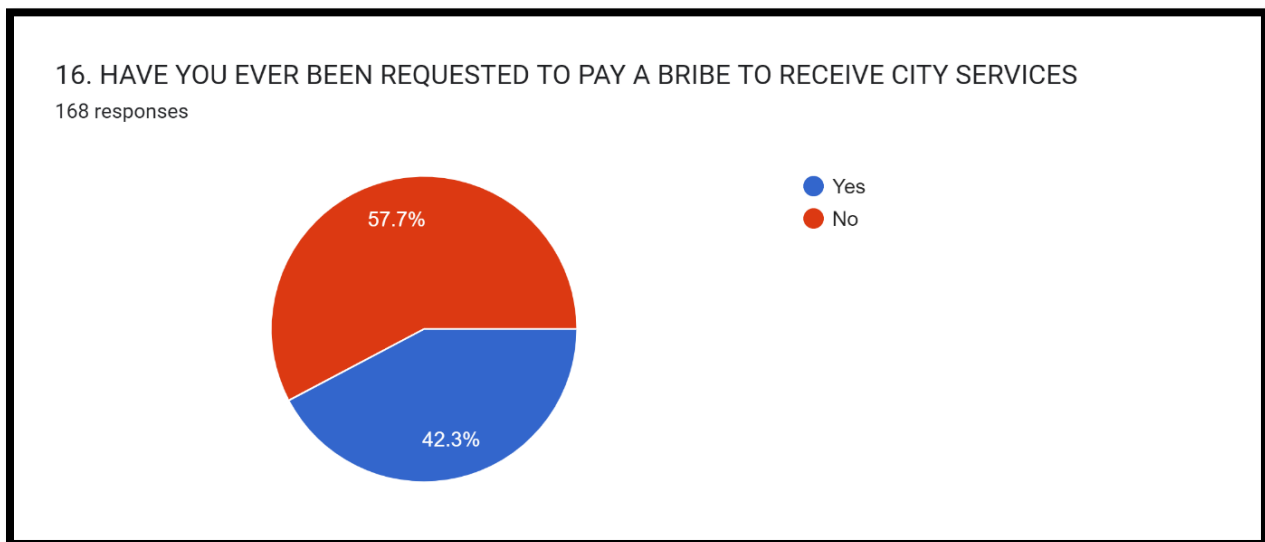
3.3.15 PERCEPTION OF CITY PERSONNEL ON WORK ETHIC

It is extremely disturbing to note that 92.9% of survey respondents are of the view that City officials lack the proper work ethic required to make a positive impact on the growth and development of the City. This response is coherent with the response in question 3.3.14 above and implies that correcting the behavior and work culture of City officials is a pre-requisite for improving the business and investment climate in the City.

*Figure 30*

3.3.16 BRIBERY AND CORRUPTION

While 57.7% of survey respondents indicated that that they were not requested to pay a bribe, 42.3% of respondents alluded to having been requested to pay a bribe to receive a service or preferential treatment. It must be noted that the data does not indicate if a bribe was actually paid or not.

*Figure 31*

3.3.17 TSHWANE ECONOMIC DEVELOPMENT AGENCY

With regards to the role and impact of the Tshwane Economic Development Agency (TEDA) a whopping 74% of respondents are unaware of their existence. Only 32 of 160 respondents further responded to the question on whether TEDA has been engaged and the level of service derived. As illustrated in figure 33 below, 31% report a poor level of service while 22% report poor service and 22% report an average level of service. The remaining 22%, although aware of TEDA did not engage in their services.

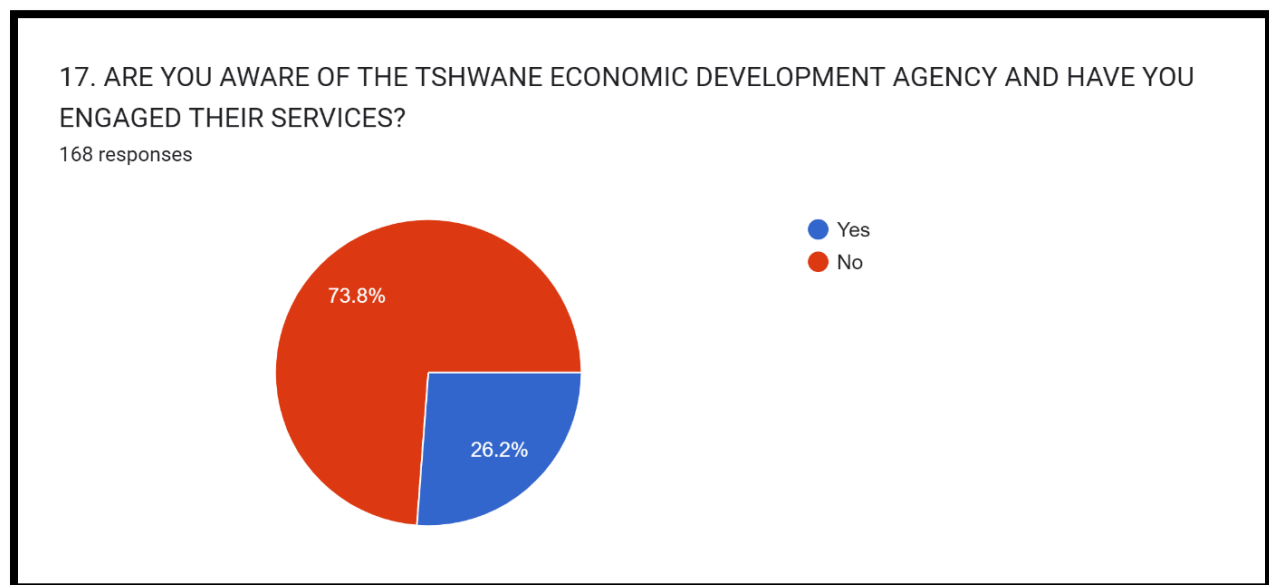


Figure 32

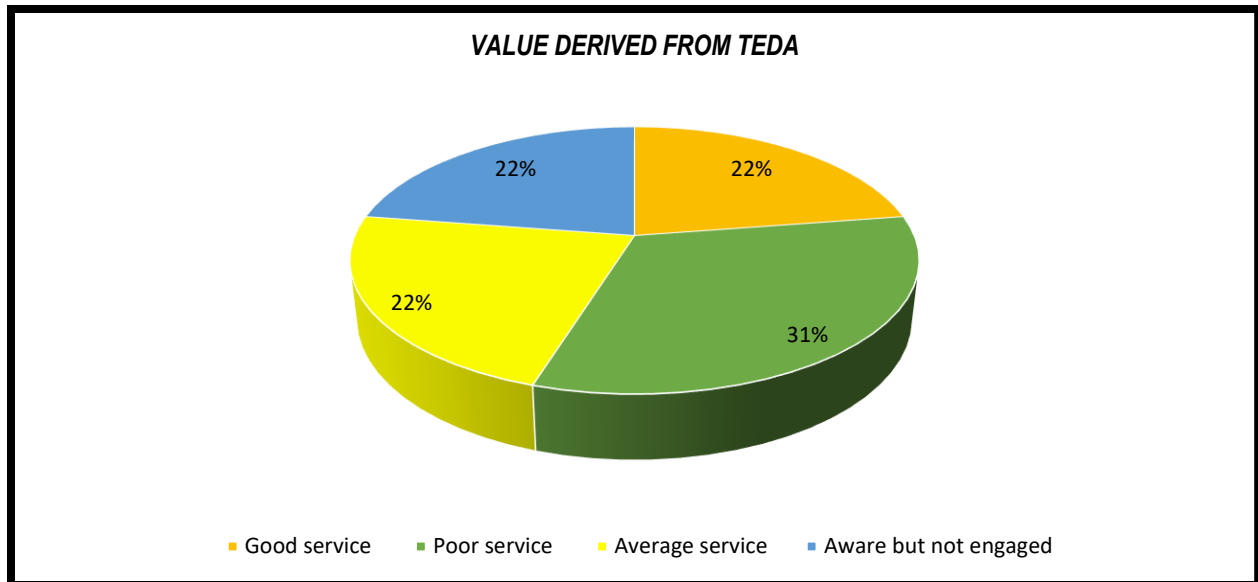


Figure 33

3.3.18 IMPROVING THE CITY BUSINESS AND INVESTMENT CLIMATE

With regards to improving the business and investment climate of the City, three key themes emerge, consistently, throughout the survey. 49% of respondents are of the view that City needs to employ competent and helpful personnel. 42% of respondents recommend that the City should focus on service delivery and address red tape and 32% of respondents indicate that the City should improve its development application processes and fast-track development applications.

It can be safely concluded from the data that notable improvements in these three areas will not only enhance the perception of the City's business and investment climate by the business and investor community but will also lead to greater levels of investment and employment in the City. This will have positive outcomes for revenue generation and the City's economic profile.

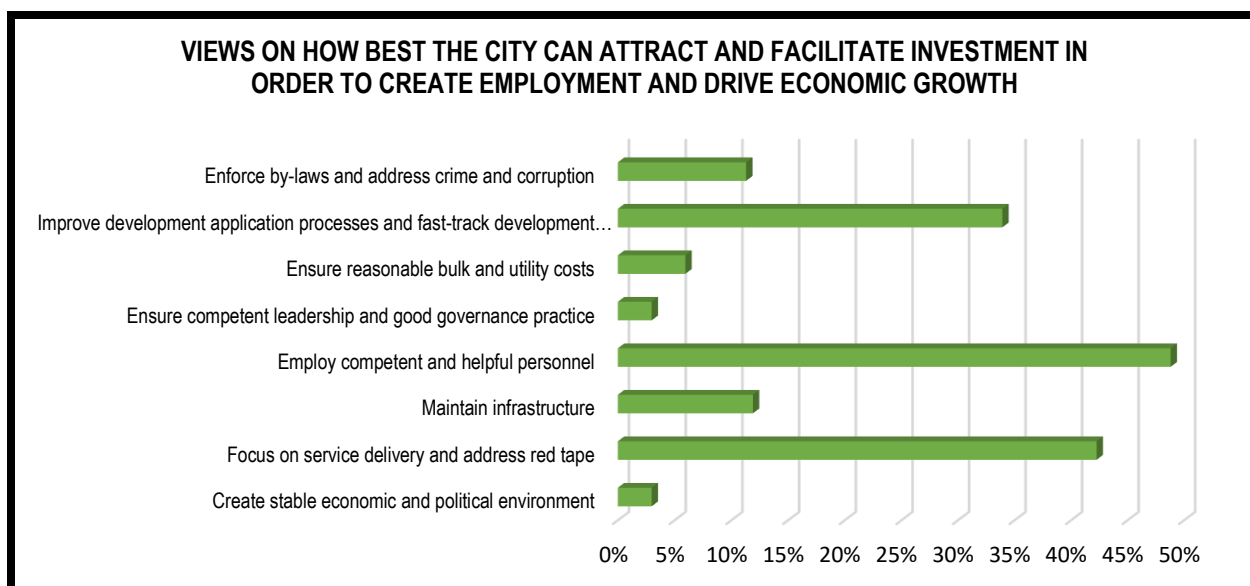


Figure 34

4. IMPLEMENTATION PLAN

The implementation plan is based on the outcome of the respondents and has been divided on short- and medium-term activities:

Table 1: Short-term Activities

Activity	Time	Responsible Department
Address reported Corruption.	Immediately.	Relevant Department.
Complaint box in all regions for clients to report officials or	Immediately.	Economic development and Spatial, Customer Relation Management.
Android/IOS Application developed to do the same.	2 Months (Can ask Clients to sponsor App development).	Group ICT, Economic Development and Spatial Planning Department
Red tape: Pre-Consultation with Clients allowed in other Metros.	Immediately.	Economic Development and Spatial Planning.

Address the reasons why investors identified the same officials stifling Investment in the city.	Immediately.	Group Human Capital, and Relevant Department.
Less Bureaucratic attitude by officials.	Immediately	All Departments
Value Chain Analysis of Planning approvals vs Corporate Legal	Immediately	Group Human capital, Relevant Departments
Present Outcome of Survey to relevant Council platforms for action and to establish implementation team	Immediately	Nominated Senior management
Training for staff on economic impact of investment and job creation	Immediately	Group Human Capital

Medium to Long-term activities

Activity	Timeframe	Responsible Department
Develop Electronic Systems to improve efficiency.	3 to 6 Months.	Group ICT and Economic Development and Spatial Planning.
Financial Model for financing bulk infrastructure.	6 to 12 months	Economic Intelligence.
Appoint additional Staff.	6 to 12 months.	Group Human Capital.
Relook by-laws to improve investment facilitation in the city.	6 to 12 months.	Economic development and Spatial Planning and Group Legal Services.
Conduct another Investment Survey	2 Years	Economic Development and Spatial Planning

5. COMMENTS OF THE STAKEHOLDER DEPARTMENTS

5.1 COMMENTS OF THE CHIEF FINANCIAL OFFICER

5.2 COMMENTS OF THE GROUP HEAD: GROUP LEGAL AND SECRETARIAT SERVICES

5.3 COMMENTS OF THE GROUP HEAD: ENVIRONMENT & AGRICULTURE MANAGEMENT

5.4 COMMENTS OF THE GROUP HEAD: COMMUNITY & SOCIAL DEVELOPMENT SERVICES

5.5 COMMENTS OF THE GROUP HEAD: HUMAN SETTLEMENT

5.6 COMMENTS OF THE GROUP HEAD: ROADS & TRANSPORT

5.7 COMMENTS OF THE GROUP HEAD: UTILITY SERVICES

6. IMPLICATIONS

6.1 HUMAN RESOURCES

None

6.2 FINANCES

None

6.3 CONSTITUTIONAL AND LEGAL FACTORS

None

6.4 COMMUNICATION

Investment Complaint box and Android/OIS application

6.5 PREVIOUS COUNCIL OR MAYORAL COMMITTEE RESOLUTIONS

None

7. CONCLUSION

The investment survey was conducted following the negative experience that the Economic Development Division has been facing when interacting with Investors in Tshwane as well as a finding received from the Group Audit and Risk on Trade and Investment for not conducting an investment survey to its value chain clients. Although the survey highlights many of the aspects already known to City officials, the report outlined some short- and medium-term activities that can be implemented to improve the investment environment in the City of Tshwane. Basic shortcomings such as service delivery and courtesy to clients is of concern. High level of corruption is also of great concern.

Most of our clients mentioned the same officials' names that are hindering investment growth in the city. The investment process is now primarily left to human intervention and putting in place electronic systems will improve the efficiency of the customer experience. It is crucial to put a monitoring mechanism in place when officials are interacting with our clients. For the short-term it is suggested that a complaint box is placed at all the regional offices and taken to head office once per month for analysis. It is further suggested that the City partners with the private sector to develop a monitoring application for Android and IOS for clients to rate their interaction with officials. This survey will be conducted bi-annually.

During the discussion of this item the Chairperson tabled the report and requested

Mr. Riaan Labuschagne from the Governance Support Office (GSO) to present the report to members of the committee. Hereafter Councillor H Frohlich and Councillor DT Willaim-Moses participated in a debate and Mr Riaan Labuschagne responded to the questions asked by Councilors.

Whereafter Councillor BK Mathevhula addressed the Committee regarding the content of the report, in the process of his address he raised some issues that were not relevant to the content of the report.

The Chairperson called Councillor BK Mathevhula to order several times on the irrelevant issues raised by Councillor BK Mathevhula. At that time the Chairperson in terms of Rules and Orders 37 (1) removed Councillor BK Mathevhula.

RECOMMENDED:

1. That the rational for conducting the investment survey be noted.
2. That the research methodology used in conducting the survey be noted.
3. That the overwhelming negative results of the survey on the investment community in Tshwane be noted and.
4. That the short- and medium-term implementation plan related to the outcome of the survey be noted.