

ECONOMIC IMPACT ASSESSMENT FOR THE DEVELOPMENT OF NEW BERTH 605 AND ASSOCIATED INFRASTRUCTURE TO SUPPORT THE CONTAINER HANDLING FACILITY AT THE PORT OF RICHARDS BAY, KWAZULU NATAL

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I, Tinotenda Makoni, declare that:

- I act as an independent specialist in this application.
- I will perform the work relating to the application in an objective manner, even if this results in views and findings that are not favourable to the applicant.
- I declare that there are no circumstances that may compromise my objectivity in performing such work.
- I have expertise in conducting the specialist report relevant to this application, including knowledge of the Act, Regulations and any guidelines that have relevance to the proposed activity.
- I will comply with the Act, Regulations and all other applicable legislation.
- I have no and will not engage in, conflicting interests in the undertaking of the activity.
- I undertake to disclose to the applicant and the competent authority all material information in my possession that reasonably has or may have the potential of influencing – any decision to be taken with respect to the application by the competent authority; and – the objectivity of any report, plan, or document to be prepared by myself for submission to the competent authority.
- All the particulars furnished by me in this form are true and correct.
- I realise that a false declaration is an offence in terms of Regulation 49 A and B and is punishable in terms of the Act.

Signature:



Date: 08/10/2025

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List of Acronyms

Acronym	Description
CBD	Central Business District
CHF	Container Handling Facility
DFFE	Department of Forestry, Fisheries and the Environment
EAP	Environmental Assessment Practitioner
EPCM	Engineering, Procurement & Construction Management
EIA	Environmental Impact Assessment
FTE	Full time equivalent
GDP	Gross Domestic Product
GVA	Gross Value Added
ha	Hectares
IDP	Integrated Development Plan
IDS	Industrial Development Strategy
IoT	Internet of Things
IPAP	Industrial Policy Action Plan
KZN	KwaZulu Natal
NEMA	National Environmental Management Act
n.d	No date
PDFP	Port Development Framework Plan
PGDP	Provincial Growth and Development Plan
PGDS	Provincial Growth and Development Strategy
PoRB	Port of Richards Bay
PSEDS	Provincial Spatial Economic Development Strategy
RBIDZ	Richards Bay Industrial Development Zone
SDF	Spatial Development Framework
S&EIR	Scoping and Environmental Impact Reporting
SEZ	Special Economic Zone
TNPA	Transnet National Ports Authority

Executive Summary

TNPA proposes a new deep-water Berth 605 and associated infrastructure in the Bayview Precinct of the Port of Richards Bay to expand container handling capacity and improve port efficiency. The Project forms part of the Port's Master Plan and aligns with national, provincial and local policy priorities for infrastructure-led growth and trade competitiveness.

The assessment shows that the economic effects of the Project are overwhelmingly positive, with only one negative economic impact identified. This is limited to the construction phase, where temporary disruption to business access and port logistics may occur. With mitigation in place, this impact is rated as low significance and is temporary. In contrast, the positive economic impacts are both material and sustained. During construction, the Project will inject over R8.3 billion into production, add more than R2.5 billion to GDP, generate more than 10 000 FTE jobs and raise household income by approximately R1.2 billion. The skills profile of employment is weighted toward semi- skilled and skilled roles, offering both immediate opportunities and pathways for local upskilling. These impacts are rated moderate to high significance, reflecting the scale of investment and the multiplier effects through supply chains and induced spending.

In the operational phase the Project continues to deliver measurable benefits. OPEX linked activity is expected to add R4.4 billion to production, contribute R1.8 billion to GDP, support nearly 5 000 FTE jobs and raise household income by over R700 million. The skills profile in this phase shows an even greater emphasis on skilled positions, aligning with the technical requirements of port operations. These impacts are again rated moderate to high significance, highlighting the role of the Berth in sustaining logistics services, strengthening value chains and supporting trade-led growth in the region.

The proposed development of Berth 605 in the Bayview Precinct of the Port of Richards Bay represents a strategic investment that will expand container handling capacity and enhance the competitiveness of the Port. Overall, the assessment concludes that the development of Berth 605 is economically acceptable and desirable. On this basis, the Project should be authorised subject to conditions that manage construction-phase disruption and secure local employment, training and procurement opportunities to maximise long-term developmental benefits.

Table 1 provides a summary of the economic impacts identified in the assessment together with their significance ratings.

Table 1: Summary of Economic Impact Assessment

Phase	Economic Impacts	Character	Significance Before Mitigation/Enhancement	Significance After Mitigation/Enhancement
Construction Phase	Temporary disruption of business activities at the Port of Richards Bay	-	Low 28	Low 21
	Temporary Stimulation of the Regional and Local Economy	+	Moderate 45	Moderate 50
	Temporary Increase in Production	+	Moderate 45	Moderate 50
	Temporary Employment Creation	+	Moderate 56	Moderate 60
	Temporary Increase in Household Income	+	Moderate 45	Moderate 45

Phase	Economic Impacts	Character	Significance Before Mitigation/Enhancement	Significance After Mitigation/Enhancement
Operation Phase	Regional Economic Development	+	Moderate 56	Moderate 60
	Improved Trade Competitiveness	+	Moderate 60	High 64
	Employment Creation	+	High 70	High 70
	Increase in government revenues	+	Moderate 39	Moderate 52
Cumulative Impacts	Enhanced Trade Competitiveness	+	High 68	High 72
	Strengthened Supply Chain Networks	+	Moderate 48	High 64

1. Introduction

WSP was commissioned by Transnet National Ports Authority (TNPA) to undertake a Scoping and Environmental Impact Reporting (S&EIR) process for the proposed new development of Berth 605 and associated infrastructure located in the Port of Richards Bay (PoRB) within the KwaZulu Natal (KZN) Province. As part of the specialist studies, it was identified that an Economic Impact Assessment was required. WSP subsequently appointed Urban-Econ Development Economists to conduct the Economic Impact study. This report seeks to assess the potential economic impacts of the proposed project. The study forms part of the S&EIR process as prescribed in the National Environmental Management Act No. 107 of 1998 (NEMA) and its subsequent amendments.

1.1. Study Scope and Methodology

This economic impact assessment report contains information that together with other specialist studies allows assessment of the proposed development from a sustainable development perspective and assists in identifying “the most practicable environmental option” that provides the “most benefit and causes the least damage to the environment as a whole at a cost acceptable to society” (Department of Environmental Affairs, 2014). In light of the above and in line with the Environmental Impact Assessment (EIA) Regulations of 2014 as amended, the purpose of the economic impact assessment is to ensure that the project, if approved, provides for justifiable economic and infrastructure development outcomes. As such the objectives are to:

- Identify, predict and evaluate economic aspects of the environment that may be affected by the proposed development activities and associated infrastructure.
- Advise on the alternatives that best avoid negative impacts or manage and minimise them to acceptable levels, while optimising positive effects.

Based on the understanding of the proposed development’s objectives, the scope of work for the economic specialist is outlined below.



Figure 1: Study Approach and Methodology

Source: *Urban-Econ Methodology (2025)*

- Engagement with the Environmental Assessment Practitioner (EAP), project proponent (TNPA) and other specialists to obtain background on the development.
- Delineation of the project’s zones of influence in consultation with the broader team.
- Identification of affected communities, land uses and economic activities, both as sensitive receptors (vulnerable to disruption) and beneficiaries (likely to benefit from the project).
- Development of a baseline socio-economic profile of the study area including both existing conditions and prevailing economic activities.

- v. Collection and analysis of data with primary data gathered (where necessary) through interviews or stakeholder engagement to address data gaps.
- vi. Assessment of potential direct, indirect and cumulative socio-economic impacts both positive and negative.
- vii. Formulation of mitigation and enhancement measures and assessment of residual risk.
- viii. Provision of a reasoned opinion on the acceptability of the proposed development based on the findings.

1.2. Data Sources

To provide an accurate assessment of the zone of influence's economic profile, several secondary data sources are utilised and analysed. Secondary data was sourced from the following databases and documents:

- Quantec Research Standardised Regional Database, 2025
- National strategic documents
- Provincial strategic documents
- Regional strategic documents
- TNPA strategic planning documents

1.3. Assumptions and Limitations of the Study

This study has formulated key assumptions that form the basis of the assessment and discussions of the study. These assumptions are in line with known gaps in the knowledge as well as limitations presented within the study and are as follows:

The project will be conducted based on several assumptions, which include but are not limited to:

- Project-related information supplied by the EAP for the analysis is assumed to be reasonably accurate.
- Although the secondary data sources used to compile the economic baseline profile are not exhaustive, they can be viewed as indicators of broad economic trends within the zone of influence.
- The identification of possible impacts is based on the experience of the specialist with similar studies in the past and given the existing desktop-level knowledge of the economic environment.
- The analysis has been conducted based on the information that was accessible to the specialist within the specified timeframes.

The limitations of the study include the following:

- Possible impacts cannot be predicted and rated with complete accuracy, even when circumstances are similar and these predictions and ratings are based on research and years of experience, taking the specific set of circumstances into account.
- Examining the zone of influence from the local municipality up to the broader provincial level, double counting needs to be noted, as datasets for broader regions are inclusive of local regions.

1.4. Report Structure

The remainder of the report is structured into the following chapters shown in Table 2.

Table 2: Report structure

	Section title	Description
1	Introduction	Provides the background to the report and the methodology used to conduct the research process.
2	Project description and locational overview	Provides an outline of the Project, including its components and the locational context of the site.
3	Policy Review and Analysis	Provides the legislative and policy context of port development, outlining alignment at the national, provincial and local levels.
4	Baseline Profile of the Economic Environment	Provides an overview of the status quo and economic conditions of the City of uMhlathuze and King Cetshwayo District Municipality.
5	Economic Impact Assessment	Provides an identification and analysis of economic impacts during the construction and operational phases of the development, as well as cumulative impacts.
6	Need and Desirability Assessment	Provides an assessment of the need and desirability of the Project, based on identified socio-economic impacts and a review of relevant legislative, strategy and policy texts.
7	Recommendations and Reasoned Opinion	Provides a reasoned opinion, in line with the requirements of the EIA Regulations, regarding whether the proposed development should be authorised.

2. Location Overview and Project Description

2.1. Location Overview

When conducting an economic impact assessment, understanding the project locational factors helps identify potential impacts and the receptors that might be affected. This section aims to give an overview of the proposed development's location and the various dynamics surrounding the proposed project site. It considers the area in which the project will take place, enabling a better understanding of what economic activities the project will directly and indirectly affect during the construction and operational phases.

Richards Bay is characterized by a mix of industrial, residential, commercial and recreational zones. The PoRB dominates the industrial landscape and adjacent to the Port, the Richards Bay Industrial Development Zone (RBIDZ), hosts various heavy, medium and light industries, contributing significantly to the region's economy. Residential areas offer a variety of housing options, including single-family homes and multi-unit complexes catering to the local population. Commercial activities are concentrated in the central business district (CBD) providing retail, office spaces and services to residents and businesses. Recreational spaces, including parks and sport grounds, are interspersed throughout the city enhancing the quality of life for the residents. Additionally, agricultural land adds ecological value to the region. This diverse land use profile necessitates comprehensive planning to balance development with environmental conservation, ensuring sustainable growth for Richards Bay. Figure 2 shows a map of the land use profile of Richards Bay.



Figure 2: Land Use Profile of Richards Bay

Source: Google Earth Pro & Urban-Econ (2025)

The land use around the PoRB is a mix of heavy industry, industrial development zones, residential areas, commercial services and agricultural land, with a clear focus on supporting the Port's operations

and regional economic growth while balancing the needs of local communities and environmental concerns.

The RBIDZ, located south of the Port, is dedicated to heavy and medium industries such as energy, chemicals and mineral processing, playing a crucial role in the region's industrial growth. Adjacent industrial areas support large-scale manufacturing and bulk commodity processing, leveraging the Port's logistical capabilities. Agricultural land, primarily located further inland and to the west, is used for farming activities such as sugarcane production and horticulture, although limited near the coast due to industrialization. Residential areas offer housing for workers and are positioned away from the most industrialized zones, while the Richards Bay CBD serves as the commercial heart of the city, with retail, office spaces and services. This land use profile reflects a balance between supporting industrial activities, catering to local communities and preserving agricultural spaces further from the Port. Figure 3 shows a map of the land use profile around the PoRB.

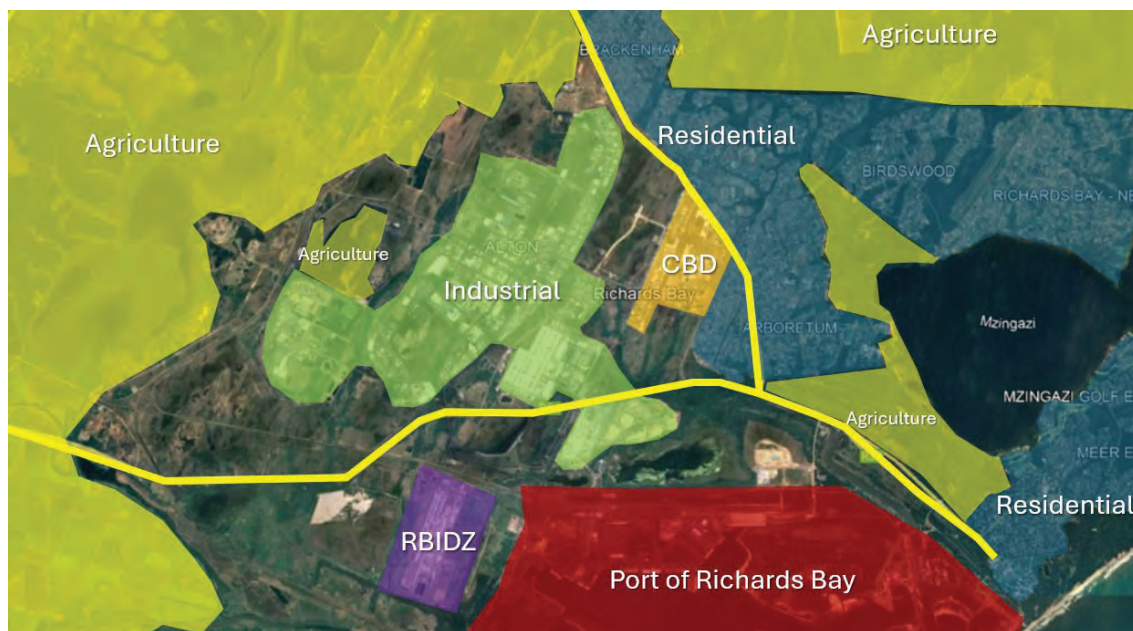


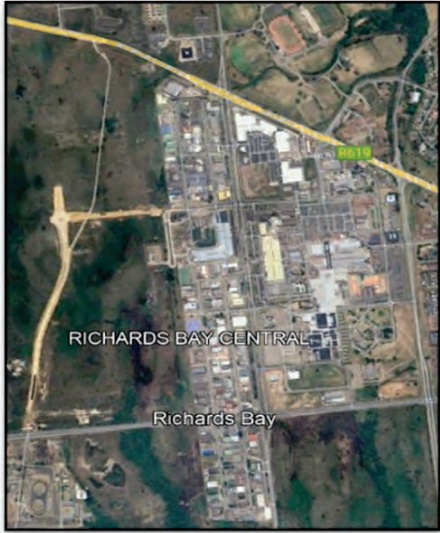
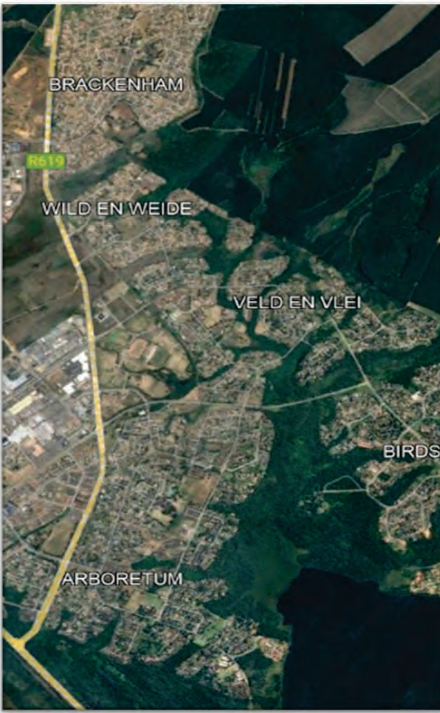
Figure 3: Land Use Profile of Economic activities around the Port

Source: Google Earth Pro & Urban-Econ (2025)

Table 3 outlines and describes the main land uses in Richards Bay with regards to the PoRB.

Table 3: Description of the main economic land uses in Richards Bay with regards to the PoRB

Land Use/Area	Description	Visual Representation
Alton	Alton is a significant industrial area within Richards Bay, home to numerous manufacturing and processing industries, including heavy and light industrial activities. This area contributes substantially to the local economy through industrial output and employment opportunities.	

Land Use/Area	Description	Visual Representation
	The presence of numerous businesses means that the operational impacts of Berth 605 need to be carefully considered.	
Richards Bay CBD	The CBD is the heart of Richards Bay featuring a concentration of commercial activities such as retail stores, offices, banks and restaurants. It includes municipal offices and other government services, making it a focal point for administrative activities.	 <p>An aerial photograph of the Richards Bay Central Business District (CBD). The image shows a dense cluster of commercial buildings, including offices, retail stores, and banks. A major road, the R619, runs through the area. The text 'RICHARDS BAY CENTRAL' and 'Richards Bay' are overlaid on the image.</p>
Residential Areas including: <ol style="list-style-type: none"> 1. Arboretum 2. Brackenham 3. Wild En Weide 4. Aquadene 5. Birdswood 6. Veld En Vlei 7. Meer En See 8. Richards Bay – Ntshingimpi si 	These are residential neighbourhoods offering a range of housing options, from single-family homes to apartment complexes. These areas are equipped with necessary amenities such as schools, healthcare facilities and recreational spaces.	 <p>An aerial photograph showing several residential areas in Richards Bay. The areas are labeled: 'BRACKENHAM', 'WILD EN WEIDE', 'VELD EN VLEI', 'BIRDS', and 'ARBORETUM'. The R619 road is also visible. The image shows a mix of housing types, including single-family homes and apartment complexes, surrounded by greenery and infrastructure.</p>

Land Use/Area	Description	Visual Representation
Richards Bay Airport	The airport provides regional air connectivity, facilitating business travel and tourism. It supports local businesses by improving access to national and international markets.	
Other public Amenities including: <ol style="list-style-type: none"> 1. Richards Bay Public Library 2. Richards Bay Clinic 3. Melomed Richards Bay Private Hospital 4. Netcare The Bay Hospital 5. Mandlanzini Sports Field 	This includes amenities such as parks, libraries, sports facilities and community centres, contributing to the quality of life for residents. Hospitals, clinics and educational institutions are part of the public amenities that support community well-being and development.	

Land Use/Area	Description	Visual Representation
Tourist Attractions and Accommodation including: <ol style="list-style-type: none"> 1. Boardwalk Inkwazi Mall 2. Crafts And Curious 3. Meerensee Boat Club and Zululand Kayak Club 4. Waterways Estate and Mzingazi Accommodation 5. BON Hotel Waterfront and Cubana (Richards Bay) 6. Portuguese On the Bay and Richards Bay Small Craft Harbour 7. Naval Island, Alkantstrand Skate Park and Alkantstrand Beach 8. Enseleni Nature Reserve 	<p>The strategic land use arrangement in Richards Bay, with industrial activities concentrated in the centre and west and tourist attractions located to the east near the beach, serves to mitigate direct conflicts between industrial emissions and tourism.</p>	 

Source: Various internet searches, 2025

The PoRB is South Africa's most northern and eastern port located in City of uMhlathuze Local Municipality (CoU) and King Cetshwayo District Municipality (KCDM) within KZN. It is located 160 km northeast of Durban and 465 km southwest of Maputo. The Port occupies 2 157 hectares (ha) of land area and 1 495 ha of water area, but has the potential to expand when required, making it potentially one of the largest ports in the world.

A dedicated railway line connects the Port with Mpumalanga and Gauteng and was designed specifically to handle the majority of South Africa's coal exports. Other rail links connect Richards Bay with Durban in the south and Swaziland and Mpumalanga to the north. The Port has extensive rail and

conveyor belt systems, servicing the Berths from nearby factories and plants (KZN Department of Transport, n.d). Richards Bay has a strategic connectivity with the N2, which is on the western border of the town of Richards Bay. R34 is another key corridor that connects Richards Bay with the key areas in the west of KZN such as Melmoth, Eshowe, Ulundi, Vryheid, Newcastle and many more. The local and regional accessibility is presented in Figure 4.

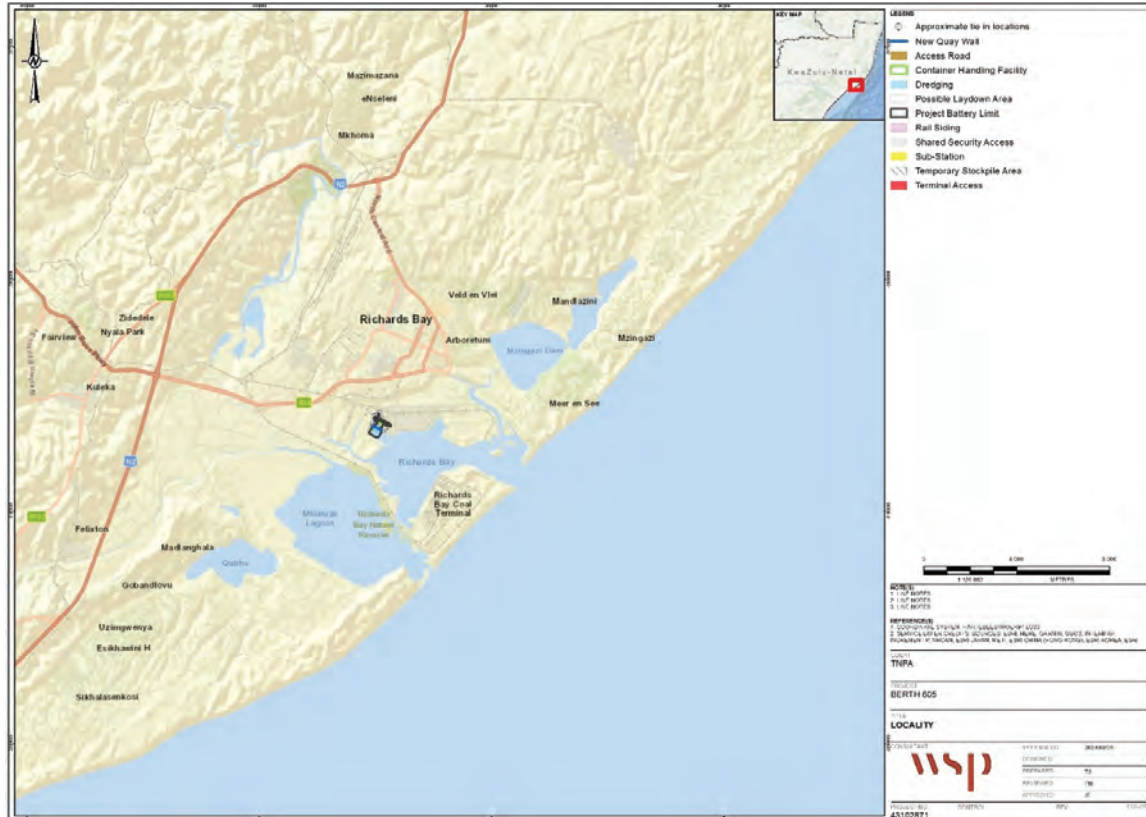


Figure 4: Local and regional accessibility

Source: Google Earth & Urban-Econ (2025)

The PoRB has three precincts, namely the South Dunes, Bayvue and Newark. Figure 5 shows a map and layout of the PoRB and the respective precinct and their current berths.



Figure 5: Precincts and berth layout of the PoRB

Source: TNPA Port Development Framework Plans (PDFP) (2022)

The Bayview Precinct has been designated as a strategic area for handling and consolidating general cargo, including dry bulk, liquid bulk (such as phosphoric acid and liquid pitch) and break bulk, including containers, within the Port of Richards Bay. Located on the northern side of the Port, the precinct is bordered to the west by the former BP Billiton Bayside Aluminium Smelter, to the north by Thulazihleka Pan and to the east by Tuzi-Gazi. This precinct effectively hosts terminals for dry bulk, break bulk and liquid bulk operations including significant facilities.

TNPA functions in terms of the National Ports Act (No.12 of 2005) in which TNPA is responsible for the provision of port services and facilities within all ports of South Africa. In its role as the master planner, TNPA plans to improve, develop and maintain port infrastructure. Various development opportunities were identified by TNPA across the three precincts at the PoRB and are reflected in the Port Development Framework Plan (PDFP) and the Port of Richards Bay Master Plan 2021 – 2035.

The Berth 605 development in the Bayview Precinct is a flagship project by TNPA aimed at expanding the Port of Richards Bay's container handling capacity. The proposed Berth 605 in the Bayview Precinct will be used as a dedicated berth for the container handling facility in the PoRB. It forms part of the Richards Bay Port Master Plan which outlines twenty (20) proposed development projects to strengthen the Port's competitiveness and operational efficiency.

2.2. Project Description

The scope of work for this Project is constructing a new deep-water berth for container handling. The following structures and infrastructure are deemed necessary to achieve the overall objective of the project and are included in the project description:

- **New berth pocket and quay wall** – The new Berth 605 is to be maintained at a proclaimed depth of -14.5 m PCD to accommodate the design vessel. The design dredging depth will consider only the sedimentation and sounding accuracy, i.e. 0.6 m below -14.5m PCD, providing a design depth of -15.1 m PCD. The quay wall will be a mass concrete gravity wall with backfill infill. It will have a wide base and hollow in the middle to allow for the void to be backfilled with sand. This provides a wider footprint but a lower density which will result in a more stable foundation. The basin length (quay length) at -14.5 m PCD depth of 338 m was found to be sufficient, accepting overlap of the design vessel into the Berth 606 quay space, as was confirmed by the mooring analysis study. The quay wall is therefore expected to be 360 m in length considering the overlap. There will also be allowance for however the quay wall will be designed to accommodate a -19 CD depth for future dredging if required.
- **End of berth basin slopes** – The Berth 605 must fit within the space between the end of the existing Berth 606 and the South Dunes Road. The location of the end of Berth 606 berth pocket is defined as the end of the existing berth which is the lower retained earth wall. With a slope of 1V:3H from -14.5 CD to the existing ground level is 60 m long, this provides a total berth length of 338 m from the toe of the embankment to the start of Berth 606. This will support a vessel of 315 m Length Overall (LOA).
- **Scour protection** – For the scour design, it is assumed that all sediment within the basin is erodible, representing a worst-case scenario. However, WSP acknowledges the presence of underlying rock layers in the area at depths ranging from -5 m CD to -17 m CD. These layers might impact the final design, but this will only be considered during the detailed design phase of the scour protection system. A revetment (sloped embankment) will be constructed on the seaward side of the Urania Road. This slope must be protected against wave and propeller action to maintain the structural integrity of the Urania Road. A rip-rap scour protection system will be considered.
- **Dredging** – Dredging activities will be undertaken to a proclaimed depth of -14.5 m Chart Datum (CD) The design dredging depth will consider only the sedimentation and sounding accuracy, i.e. 0.6 m below -14.5m PCD, providing a design depth of -15.1 m PCD. There will also be allowance for however the quay wall will be designed to accommodate a -19 CD depth for future dredging if required.
- **Dredge disposal** – An estimated 2.8 million cubic metres of dredged material will be disposed of at an authorised offshore disposal site.
- **New rail siding** – The proposed rail siding design is based on the container handling facility design capacity of 1 million Twenty Foot Equivalent Units (TEUs) per annum, which differs from that of the other design components which caters for 275 000 TEU design throughput per annum. Based on the design throughput and the current requirement of a 50-wagon container train, it is proposed that the rail siding will consist of two rail lines that are 370m each in length, each servicing 2 rakes of 25-wagons each. The existing Mhlathuze Yard will be used for shunting and staging purposes to service the new proposed rail siding.

- **New access road** – a new shared access road and vehicle access control point to the PoRB, the Container Handling Facility (CHF) and the adjacent vacant land surrounding the CHF is proposed. The new road will be an estimated 735 m length with a width of 30 m. It will consist of two (2) lanes each direction and three (3) intersections; at Urania Road, at Ventura Road and one to the container handling facility.
- **Footprint of the Container Handling Facility (CHF) and apron area** – The CHF will be built and operated by the container handling facility operator therefore this S&EIR process only considers the disturbance footprint of the CHF and not the associated permits that it will require when operational. The total area considered is 6.75 Ha for the container handling facility. The apron area is an operational area located behind the quay wall and is used for the movement of trucks. The apron area is an estimated 33 m wide and 400 m in length.
- **Provision of electrical supply to feed the facility operations and equipment** – The preferred alternative is applicable where the required electrical demand is within the available capacity of the current existing 11 kV network. A new feed will be taken from the existing 11 kV network to provide electrical power to the new container handling facility and quay wall. However, while there is existing capacity on the current 11 kV network, this is limited and may not be able to provide for the full electrical demands in the future. To protect against restricting future electrical supply constraints, a new 11 kV Switching Station fed from the existing Primary Substation is proposed.
- **Water** – The existing 225mm diameter water main will be extended along with the new quay wall to supply ship water along the new quay. At the end of the new quay wall extension the water main will follow Urania Road to tie into the existing 150mm diameter pipe in the vicinity of the existing gate house. Connections to new buildings will be off takes from either the existing network directly, or via extensions to the existing network brought to the boundary of the proposed CHF. A tie in point will be provided. Connections to new buildings will be off takes from either the existing network directly, or via extensions to the existing network brought to the boundary of the proposed container handling facility. A tie in point will be provided which will consist of approximately 500 m of pipework with a diameter of 150 mm. Inside the quay wall, water will be provided to landing valves for ships and firefighting.
- **Sewerage** – The existing sewer network has been evaluated to identify areas that require upgrades to accommodate the extension of the sewer network for the new proposed container handling facility. The sewerage system will allow for wastewater from new toilets, basins, baths and showers. The proposed sewer will be designed to tie into the closest existing pipe network or an existing pump station closest to the proposed container handling facility. Sewerage inside the container handling facility will be designed to accommodate for approximately 160 people. The new sewerage pipeline will have a connection point at the northwestern boundary of the container handling facility. It will be approximately 100 m in length and 160 mm pipe diameter. The preferred alternative involves designing a sump to accommodate the facility's sewer through gravity flow, with pumping from the sump to the existing pumpstation PS20, located north of the facility. The final sewer pipe route will be determined during the design phase.
- **Stormwater** – The existing stormwater network has been evaluated to identify areas that require upgrades to accommodate the extension of the stormwater network for the new proposed CHF. The existing stormwater network located east of the proposed CHF discharges into the basin through the existing quay wall. It is therefore proposed that the same principal

apply with the new stormwater pipe through the new quay wall. Stormwater pipes will be installed to collect stormwater runoff from the container handling facility to the new quay wall. The pipeline will be approximately 360 m along the quay line and 400 m on the other side with a 900mm pipe diameter. It will have a velocity of 0.6 m/s for self-cleaning, to prevent sand settling inside the pipe and blocking. There will also be cross drainage at the new rail siding which will be 400 m in length and 600 mm diameter. The existing network discharges into the bay through the existing quay wall.

- **Provision for temporary laydown and stockpile areas** – Areas for temporary stockpiles and laydown areas have been designated and will be further assessed as part of the project. An approximate area of 4.2 Ha, 220 m in length and 170 m wide to be used as a potential lay down area for the project. In addition, two temporary stockpile areas are proposed. The first image is an area of approximately 2.4 Ha, 250 m in length and 100 m wide. The area is located SE of the CHF. The second area is split into two areas across the Harbour Arterial Road. These areas cover an area of approximately 6 Ha. The infilling of approximately 6 Ha of the basin is also being considered for stockpiling (this infilled area also forms part of the basin to be dredged).

Figure 6 shows the layout of the project's components for the proposed Berth 605.



Figure 6: Map and layout of Berth 605 project components

Source: WSP (2025)

2.3. Zone of Influence Delineation

The potential zone of influence of the proposed development will not be limited to the PoRB but will extend beyond the boundaries of the proposed development site due to the potential economic impacts.

The development of Berth 605 will contribute directly to enhancing the Port's ability to handle larger volumes of containerized cargo, further cementing its position as a vital gateway for international and regional trade. By expanding the Port's capacity, the development of Berth 605 will support the increasing demand for shipping services and facilitate greater trade throughput, strengthening South Africa's global trade network. The proposed project will help unlock the full potential of the PoRB, boosting its role in regional and global trade.

As such, the following zones of influence are delineated for the purpose of the analysis:

1. Primary zone of influence:

This is the immediate location of the proposed project where direct effects on the environment, economy and local communities are expected. It typically includes the project site and its surroundings where construction and operational activities will directly occur. For the purpose of the analysis of the impact of the development of Berth 605 in the PoRB, as well as the assessment of potential local economic impacts that could ensue from the proposed development, the primary zone of influence is determined to be the City of Umhlathuze Local Municipality.

2. Secondary zone of influence:

This area extends beyond the immediate project site to encompass the broader region. It includes communities and environments that may experience indirect impacts due to the project, such as increased economic activity, infrastructure development, or service demands. In the context of this economic impact assessment, KZN is identified as the secondary zone of influence, which is inclusive of King Cetshwayo District. This designation means that while the proposed project's direct effects will be felt most immediately within its primary location, its influence will also extend throughout the province.

3. Tertiary zone of influence:

The tertiary zone of influence extends to the national level, encompassing the broader South African economy. While the direct and indirect impacts of the project are largely localised within Richards Bay and KZN, the tertiary zone experiences induced impacts that result from the economic activity generated by the project at a national level.

While this report prioritises the mentioned zones, relevant information about other areas will also be included when necessary.

3. Policy Review and Analysis

This section provides descriptions on the policies and strategic documents that were identified as applicable to the zones of influence from various spheres of government. This context plays an important role in identifying and assessing the potential economic impacts associated with the project and a key component of the economic impact assessment process is to assess the proposed project in terms of its suitability with regards to the planning and policy context.

3.1. National Policy Framework

South Africa, with its extensive coastline and numerous seaports, has a well-developed framework of policies and regulations governing the operation and management of its ports. These policies and regulations are essential for ensuring maritime safety, security, trade facilitation and environmental protection. Table 4 presents the main policies relating to the development of the PoRB Berth 605 from a national policy perspective.

Table 4: Summary of main national policies relating to the development of the PoRB Berth 605

Policy / Regulation	Development Principles	Alignment of the Project
National Ports Act No. 12 of 2005	<ul style="list-style-type: none"> Governs the planning, development and management of ports in South Africa. Promotes port infrastructure investment, trade facilitation and efficient operations. Emphasises security, environmental protection and equitable access. 	<ul style="list-style-type: none"> The development of Berth 605 aligns with the Act by expanding port infrastructure, increasing container handling capacity and improving logistics efficiency. Supports the National Ports Authority's mandate to modernise and enhance competitiveness. Reinforces Port safety, environmental compliance and operational reliability.
National Development Plan (NDP) 2030	<ul style="list-style-type: none"> Advocates for large-scale infrastructure investment to support inclusive growth. Prioritises improved trade logistics and regional integration. Emphasises job creation and sustainable economic development. 	<ul style="list-style-type: none"> Berth 605 supports NDP objectives by increasing the Port's capacity to handle higher cargo volumes and larger vessels, thereby enhancing trade efficiency. Creates direct and indirect employment opportunities during construction and operations. Strengthens South Africa's position in regional and global trade networks.
Operation Phakisa: Oceans Economy (2014)	<ul style="list-style-type: none"> Seeks to unlock economic potential of South Africa's oceans through fast-tracked development. Focuses on marine transport, port infrastructure and coastal economic activities. 	<ul style="list-style-type: none"> The project contributes to the maritime transport and port infrastructure focus areas of Operation Phakisa. Facilitates growth in container trade and supports marine logistics, a key ocean economy enabler.

Policy / Regulation	Development Principles	Alignment of the Project
	<ul style="list-style-type: none"> Aims to promote inclusive growth and employment in ocean-related sectors. 	<ul style="list-style-type: none"> Promotes job creation and local economic development linked to ocean-based industries.
National Industrial Policy Framework (2007)	<ul style="list-style-type: none"> Identifies the need for efficient, cost-effective infrastructure as a foundation for industrial growth. Highlights constraints in port and rail infrastructure as barriers to competitiveness. Promotes targeted infrastructure investment to unlock industrial potential. 	<ul style="list-style-type: none"> Berth 605 directly addresses the call for infrastructure improvements by enhancing port performance and reducing trade bottlenecks. Supports industrial growth by enabling smoother movement of raw and finished goods. Encourages greater private-sector confidence in logistics capacity.
Industrial Policy Action Plan (IPAP) 2018/19–2020/21	<ul style="list-style-type: none"> Aims to grow the manufacturing sector and increase industrial exports. Supports strategic infrastructure investment to reduce the cost of doing business. Promotes the development of trade-enabling infrastructure. 	<ul style="list-style-type: none"> The expansion of container handling capacity through the proposed Berth 605 supports IPAP by facilitating higher throughput of industrial goods. Enhances the Port's ability to support industrialisation and export-oriented growth. Aligns with the need to improve logistics infrastructure to drive down business costs.
Re-imagined Industrial Strategy (RIS) 2019 <i>(building on IPAP 2018/19–2020/21)</i>	<ul style="list-style-type: none"> Aims to revitalise key industrial sectors through sector-specific Masterplans. Promotes investment in trade-enabling infrastructure. Prioritises industrial competitiveness, localisation and job creation. 	<ul style="list-style-type: none"> The development of Berth 605 supports RIS objectives by enabling and boosting trade competitiveness. Aligns with goals of sectoral growth, especially for export-oriented industries supported through the Masterplans (e.g. automotives, agro-processing).

Source: South African Government (2025)¹

3.2. Provincial Policy Framework

The provincial government of KZN plays a role in shaping policies related to the economic development of the province, which includes strategies to enhance the economic contribution of the proposed new Berth. Table 5 presents the main policies relating to the development of the PoRB Berth 605 from a provincial policy perspective.

¹ <https://www.gov.za>

Table 5: Summary of main provincial policies relating to the development of the PoRB Berth 605

Policy / Regulation	Development Principles	Alignment of the Project
KZN Provincial Growth and Development Strategy and Plan (PGDS) 2011 and PGDP (2016 review)	<ul style="list-style-type: none"> Promotes infrastructure-led growth, particularly in transport and logistics. Enhances intermodal connectivity and competitiveness of strategic logistics hubs like the PoRB. Encourages alignment between port, municipal and provincial planning. Supports economic diversification, job creation and regional integration. 	<ul style="list-style-type: none"> The Berth 605 project supports PGDS goals by attracting trade volumes and strengthening Richards Bay's strategic economic role. Improves inland connectivity and enhances port efficiency, facilitating broader regional economic activity.
Provincial Spatial Economic Development Strategy (PSEDS) 2016	<ul style="list-style-type: none"> Identifies strategic provincial economic nodes (e.g., Richards Bay) for focused infrastructure development. Promotes spatial alignment of infrastructure investment and economic potential. 	<ul style="list-style-type: none"> The Project aligns with the designation of Richards Bay as a priority node and logistics hub in the province. Reinforces the spatial logic of investing in areas with strong existing infrastructure and economic potential.
KZN Industrial Development Strategy (IDS) 2010	<ul style="list-style-type: none"> Emphasises port and rail infrastructure as key enablers of industrial competitiveness. Encourages leveraging geographic advantages (e.g., coastal access) for targeted industrial growth. Seeks to integrate local industries into global value chains. 	<ul style="list-style-type: none"> Berth 605 expands infrastructure essential to supporting industrial sectors. Enhances access to global markets, lowering transport costs and increasing industrial competitiveness. Strengthens Richards Bay's role as a base for industrial expansion aligned with the IDS.
KZN Export Strategy (2013)	<ul style="list-style-type: none"> Aims to grow and diversify the province's export base. Supports improved trade logistics and supply chain optimisation. Enhances the global competitiveness of local industries. Promotes integration into international markets. 	<ul style="list-style-type: none"> The increased container handling capacity from Berth 605 enables greater export volumes and product diversity. Improves supply chain efficiency and logistics performance, directly supporting export-led growth. Reinforces the PoRB's role as a gateway for KZN exporters to access global markets.

Source: KZN Planning Commission (2025)²

² <http://www.kznppc.gov.za>

3.3. Local Policy Framework

Table 6 presents the main policies relating to the development of the PoRB Berth 605 from a local policy perspective.

Table 6: Summary of main local policies relating to the development of the PoRB Berth 605.

Policy / Regulation	Development Principles	Alignment of the Project
King Cetshwayo District Municipality Integrated Development Plan (IDP) 2025–2026	<ul style="list-style-type: none"> • Promotes infrastructure-led growth (roads, ports, water, sanitation). • Promotes spatial cohesion and strong economic nodes (e.g. Richards Bay industrial corridor). • Promotion of Local Economic Development (LED), Small, Medium and Micro Enterprises (SMMEs) and public–private partnerships. • Focus on regional employment, service delivery and economic upliftment. 	<ul style="list-style-type: none"> • Supports infrastructure expansion and integration, especially linking PoRB to key logistics corridors. • Reinforces Richards Bay's status as an economic hub. • Creates jobs and uplifts local SMMEs during both construction and operations.
City of uMhlathuze Fifth-Generation IDP 2022–2027 cycle with Review 2024/2025	<ul style="list-style-type: none"> • Prioritises municipal infrastructure delivery (roads, water, energy), bolstering service provision. • Stimulates economic growth via industrial development and trade improvements. • Positions the Port as a global competitor. • Focuses on service delivery, economic competitiveness and port modernization. 	<ul style="list-style-type: none"> • Directly supports Port infrastructural capacity and operational efficiency. • Underpins industrial growth and attracts investment. • Bolsters municipal economic objectives through enhanced trade capability. • Promotes inclusive growth and sustainable service improvements aligned with local vision.
City of uMhlathuze Local Economic Development Strategy (LED) 2018	<ul style="list-style-type: none"> • Identifies the Port of Richards Bay as a key economic driver. • Prioritises infrastructure development to attract investment and support local industries. • Promotes SMME participation in large-scale projects. • Supports skills development and job creation. 	<ul style="list-style-type: none"> • Berth 605 strengthens the Port's role as a logistics and industrial anchor. • Enables increased trade volumes and supports investment into priority sectors. • Offers opportunities for local contractor and supplier participation. • Aligns with goals for inclusive and sustained economic growth.

Source: uMhlathuze Government (2025)³

The Berth 605 project is a significant infrastructure development with multi-layered benefits for South Africa, KZN, King Cetshwayo District Municipality and the City of uMhlathuze.

³ <https://www.umhlathuze.gov.za>

On a national level, the Berth 605 project plays a crucial role in enhancing South Africa's global competitiveness and trade capacity. The development will increase the Port of Richards Bay's container-handling capacity from 50 000 to 200 000 TEUs, making it a more significant hub for containerized cargo. This is vital for growing South Africa's role in international trade and improving logistical efficiency. By improving the infrastructure and capacity of one of the country's major ports, the project supports economic growth by facilitating the movement of imports and exports, particularly in key sectors like agriculture, mining and manufacturing. Additionally, the construction and ongoing operations at Berth 605 will create both direct and indirect employment opportunities, helping reduce unemployment rates and supporting the broader economy. The project also aligns with South Africa's goals of diversifying its economy and reducing reliance on bulk commodity exports by increasing container handling capacity, allowing the country to tap into growing global markets for manufactured goods and value-added products.

For KZN, the Berth 605 project is a major driver of provincial development and economic integration. The PoRB's upgraded infrastructure enhances the province's connectivity to both domestic and international markets, opening opportunities for businesses to expand and access new export markets, particularly in sectors like agriculture and manufacturing. The development will stimulate economic activity in the province by boosting port-related industries such as logistics, warehousing and distribution. Additionally, it is expected to attract investment in other infrastructure, such as roads and rail, creating a ripple effect throughout the region. The enhanced logistics capacity and improved trade routes provided by Berth 605 will also support KZN's economic planning and development strategies, including the province's industrialization initiatives.

At the King Cetshwayo District Municipality level, the Berth 605 project has direct implications for local communities, infrastructure development and regional economic activity. As the project progresses, it will create employment opportunities for people in the district, both during construction and in long-term operational roles, while also offering skills development in the logistics, construction and maritime sectors, which can lead to improved socio-economic conditions. Local businesses, especially in construction, services and supply sectors, will have opportunities to participate in the development and the influx of workers and contractors will generate demand for local services such as accommodation and food supply, thereby stimulating the local economy. Additionally, the project is likely to drive improvements in surrounding infrastructure, including road networks, water and electricity services, benefiting the local population and attracting further investment to the area.

For the City of Umhlathuze, the Berth 605 project holds transformative potential, particularly in urban development, economic growth and community upliftment. Umhlathuze, which includes Richards Bay, is already a key economic zone in South Africa due to the Port of Richards Bay and with Berth 605, the city will solidify its position as a critical economic hub for KwaZulu-Natal and the broader region, attracting businesses and increasing investment in both public and private sectors. The project will directly impact employment, creating long-term operational jobs at the Port and stimulating job growth in local industries such as transportation, hospitality and retail. The increased demand for housing, commercial real estate and public services will drive urban development, leading to upgrades in infrastructure to support the growing population and business activities, including transportation, healthcare and education. Additionally, the project could positively impact tourism, particularly in the business and corporate sector, with increased trade and investment likely to bring more visitors for business purposes, benefiting hotels, restaurants and entertainment services in the city.

The Berth 605 project stands as a catalyst for economic development at multiple levels, reinforcing South Africa's status as a competitive player in global trade while supporting the socio-economic advancement of local communities in KZN and Richards Bay. The Berth 605 development at the Port of Richards Bay is a key component of the Port's development, enhancing its container-handling capacity and operational efficiency. This project will enable the Port to accommodate larger vessels, manage more containerized cargo and diversify its cargo-handling capabilities, reducing reliance on bulk commodities. As part of the Port Master Plan, the development aligns with long-term goals to improve Port capacity, boost trade efficiency and strengthen regional and global connectivity. The development aligns with existing Port infrastructure and operational goals, while also minimizing disruption to other sectors. By supporting the Port's strategic vision for growth, Berth 605 will enhance Richards Bay's role as a critical economic hub, driving regional development and improving South Africa's competitiveness in international trade.

4. Baseline Profile of the Economic Environment

This section examines the key economic characteristics of the zone of influence, focusing on Richards Bay, the City of uMhlathuze and King Cetshwayo District Municipality (KCDM). Examining data at a local level, rather than at the provincial or national scale, allows for a more precise and detailed analysis, offering greater accuracy in identifying trends, patterns and outliers that may be overlooked in broader datasets.

Note: Only economic profiling is done in this section and excludes any social or environmental indicators.

4.1. Labour Dynamics

This subsection analyses the current employment levels in the zone of influence. Table 7 illustrates the employment status of the working age population in the zone of influence.

Table 7: Labour Market Indicators of Working Age Population, 2023

	Richards Bay	City of uMhlathuze	King Cetshwayo
Employed	53.2%	40.5%	29.8%
Unemployed	12.5%	18.7%	16.5%
Not Economically Active	34.3%	40.7%	53.8%
Labour Absorption Rate	Data not available	36%	27%
Labour Force Participation Rate	Data not available	40%	51%

Source: Quantec Standardised Regional Data (2025)

In Richards Bay, over 50% of the population is employed, which is higher than the employment rates in the City of uMhlathuze (41%) and in King Cetshwayo (30%). Richards Bay also boasts the lowest unemployment rate at 13%. Conversely, a majority of the working-age population in the City of uMhlathuze (40.7%) and King Cetshwayo (53.8%) are not economically active.

The labour absorption rate in the City of uMhlathuze was 36% in 2023, notably higher than the King Cetshwayo District average of 27%. This indicates that a larger share of the working-age population in uMhlathuze is currently employed, suggesting a relatively more active and engaged local labour market. However, the labour force participation rate, which stood at just 40% in uMhlathuze, remains low compared to 51% in the broader district, indicating that a significant portion of the working-age population remains economically inactive or disengaged from the formal labour market.

This context presents both a challenge and an opportunity for the development of Berth 605. On one hand, the low labour participation rate points to untapped labour potential in the area; individuals who are not currently employed or seeking work but may be drawn into the labour market if new opportunities arise. On the other hand, the relatively low absorption rate at the district level underscores the need for employment-generating projects that can catalyse broader economic participation.

The construction and operational phases of Berth 605 are expected to generate both direct and indirect employment. During construction, job opportunities will likely be created for local contractors and general labourers, offering temporary relief in the region. Once operational, the Berth will require skilled and semi-skilled labour for Port operations, logistics coordination, security, maintenance and administration.

Moreover, the multiplier effects of the project through increased demand in logistics, transportation and services are likely to spur additional employment within the City of uMhlathuze and the broader district. This can contribute to an increase in the labour force participation rate over time, particularly if the project is paired with targeted skills development initiatives that prepare residents for emerging opportunities.

Figure 7 compares youth and adults across employment, unemployment and the proportion of the population that is not economically active. The youth is categorised as ages between 15 and 34 years old and adults between 35 and 64 years old.

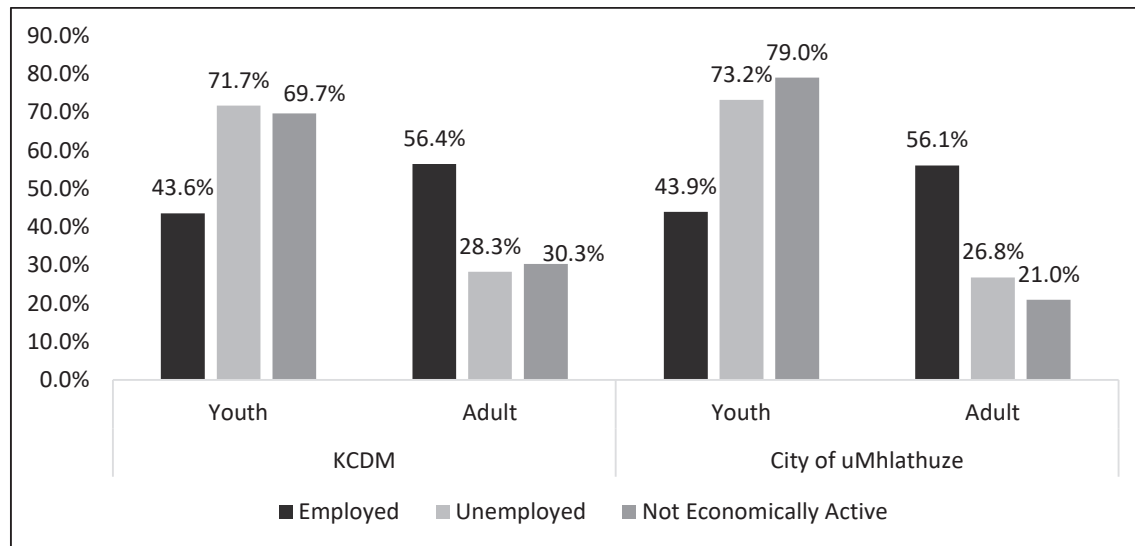


Figure 7: Proportions of Youth and Adult Employment and Unemployment in King Cetshwayo District Municipality and in the City of uMhlathuze, 2023

Source: Quantec Standardised Regional Data (2025)

Employment trends in the King Cetshwayo and City of uMhlathuze regions reveal notable disparities between adults and youth. The adult population shows relatively stable employment, with employment rates of 56.4% in King Cetshwayo and 56.1% in the City of uMhlathuze indicating greater integration into the labour market and better access to job opportunities. In contrast, youth unemployment is significantly higher, with rates of 71.7% in King Cetshwayo and 73.2% in the City of uMhlathuze, highlighting a critical issue in youth employment. These high unemployment rates suggest systemic barriers such as limited job opportunities, insufficient skills and economic stagnation.

The employment trends in the King Cetshwayo and City of uMhlathuze regions are particularly relevant to the Berth 605 development. As the project aims to significantly enhance the Port's capacity and efficiency it presents an opportunity to address the high youth unemployment rates observed in both regions. The development of Berth 605 can play a role in creating both direct and indirect employment opportunities, particularly in sectors such as construction, logistics and port operations. This development could provide much-needed jobs for young people and promote skills development, especially in on-the-job training and apprenticeships, which are key factors in improving youth employment outcomes.

The development of Berth 605 has the potential to improve labour market outcomes in the zone of influence by:

- Creating jobs across a range of skill levels

- Stimulating employment in downstream sectors
- Enhancing household income and overall economic inclusion

These dynamics strengthen the project's contribution to inclusive and sustainable local economic development, while also supporting the city's long-term goals for employment growth and poverty reduction.

Moreover, the increased industrial activity spurred by the development of Berth 605 is likely to attract new businesses and industries generating additional job opportunities in the surrounding areas. This aligns with the need to tackle systemic barriers to youth employment by fostering a more diverse and robust labour market. Additionally, the project could stimulate the local economy, leading to growth in service industries such as hospitality, retail and transportation, which also offer potential employment for youth.

4.2. Skills Levels

Following from the above discussion on the labour dynamics, Table 8 shows the skill levels of the labour market in King Cetshwayo District Municipality and the City of uMhlathuze.

Table 8: Skills Levels for the King Cetshwayo District Municipality and the City of uMhlathuze, 2022.

	Skilled		Semi-skilled		Low skilled	
	CoU	KCDM	CoU	KCDM	CoU	KCDM
Agriculture, forestry and fishing	0.9%	1.7%	4.6%	11.6%	9.1%	23.3%
Mining and quarrying	0.6%	0.4%	1.0%	0.9%	0.6%	0.5%
Manufacturing	10.1%	7.2%	17.5%	15.2%	12.6%	9.6%
Electricity, gas and water	0.3%	0.2%	0.6%	0.6%	0.4%	0.2%
Construction	2.4%	1.9%	7.3%	7.3%	5.7%	4.9%
Wholesale and retail trade	13.5%	12.2%	25.6%	22.4%	15.1%	11.9%
Transport, storage and communication	3.1%	2.3%	7.0%	6.1%	4.4%	2.9%
Finance and business services	16.1%	12.5%	22.0%	20.3%	13.1%	10.7%
Private Households	12.3%	13.8%	6.3%	7.4%	5.2%	4.7%
Community, social and personal services	40.8%	47.8%	8.1%	8.3%	33.8%	31.4%
Overall Aggregate	38.5%	61.5%	37.9%	62.1%	34.1%	65.9%

Source: Quantec Standardised Regional Data (2025)

The majority of the population in both the district and local municipalities is composed of skilled individuals, with 61.5% in King Cetshwayo and 38.5% in City of uMhlathuze. This significant representation of skilled workers especially in King Cetshwayo, suggests a workforce capable of engaging in complex tasks and contributing to more advanced economic activities. The high proportion of skilled labour is a positive indicator for industries that require specialised expertise, such as technology or engineering sectors. However, despite this skilled majority, it is essential to recognise the potential underutilisation of these workers in industries where semi-skilled and low-skilled labour dominates.

The population being low-skilled, accounting for 65.9% in King Cetshwayo and 34.1% in the City of uMhlathuze. The substantial presence of low-skilled workers highlights a vulnerability within the

labour market, where individuals may struggle to find employment opportunities that match their skill levels, potentially leading to economic stagnation or increased unemployment.

The semi-skilled population represents 62.1% in King Cetshwayo and 37.9% in the City of uMhlathuze, playing a crucial role in industries like manufacturing, where specialised yet not fully skilled labour is in demand. Notably, within the manufacturing sector, which is vital to both regions, semi-skilled workers dominate, comprising 15.2% of the district's workforce and 17.5% of the local workforce.

The development of Berth 605 is well positioned to absorb a wide range of skill levels during both its construction and operational phases:

- Construction phase: Will predominantly create opportunities for low- to semi-skilled workers in civil works, materials handling and site services. This is expected to activate a large portion of the underutilised low-skilled labour force reducing unemployment in vulnerable groups.
- Operational phase: Will require a more diverse range of roles including skilled positions such as crane operators, logistics coordinators, supervisors and maintenance technicians. This creates an opportunity to retain skilled individuals within the local economy, particularly in King Cetshwayo, where underutilisation of skilled labour is a growing concern.

Furthermore, the Project's presence can stimulate downstream job creation in warehousing, freight services, equipment maintenance, security and related industries, sectors that typically absorb semi-skilled labour and offer on-the-job learning pathways that can help upskill the local workforce over time.

4.3. Household Income

Household income is a useful indicator when creating an economic profile of the zone of influence. It provides key insights into the financial well-being of residents aiding the understanding of how the project may impact the area economically. Analysing income levels facilitates the understanding of employment trends and economic inequalities within the community.

Table 9 below shows the proportion of average annual household income of each area.

Table 9: Average Annual Household Income, 2022

Annual Income	Categorisation	Richards Bay	CoU	KCDM
No Income	Very Low Income	11.9%	15.2%	13.5%
R1-R4 800		1.4%	4.4%	4.8%
R4 801-R9 600		2.7%	8.0%	9.2%
R9 601-R19 200		5.6%	13.7%	20.2%
R19 201-R38 400	Low Income	6.6%	15.5%	21.1%
R38 401-R76 800		9.0%	11.9%	11.5%
R76 801-R153 600		13.9%	11.1%	8.0%
R153 601-R307 200	Middle Income	20.9%	10.1%	6.0%
R307 201-R614 400		18.8%	7.2%	4.1%
R614 401-R1 228 800	High Income	7.0%	2.2%	1.2%
R1 228 801-R2 457 600		1.2%	0.5%	0.3%
R2 457 601 +		0.8%	0.3%	0.2%

Source: Quantec Standardised Regional Data (2025)

Richards Bay has a higher concentration of its population in the middle-to- high- income brackets, indicating greater wealth and economic stability. In contrast, the City of uMhlathuze and King Cetshwayo show higher proportions in the lower income brackets, with the City of uMhlathuze having the highest percentage in the lowest income category (zero income). This suggests that while Richards Bay enjoys relative affluence there is a need for economic upliftment and support in the broader municipality and district to address income inequalities.

The income levels highlight a need for more ways for people to earn money and earn a satisfactory living monthly income. Considering this, the proposed development could play a crucial role in boosting employment and, as a result, improving monthly incomes for people in these regions during and after the development of Berth 605.

4.4. Economic Size, Structure and Performance

4.4.1. Economic Size

This section aims to assess the economic characteristics of the zone of influence by examining the gross value added (GVA) contributions within the specified context. GVA is a metric that is used to assess the value of goods and services produced within a specific region, industry, or sector. It is calculated as the difference between output and intermediate consumption. GVA is a useful tool that can be used to evaluate the performance of a local or regional economy.

Table 10 shows the economic size of the economies within the zone of influence as indicated by the GVA at basic prices. The provincial GVA is provided for context.

Table 10: GVA (Rand millions) at basic prices (in constant 2015 terms), 2013 - 2023

	2013	2015	2017	2019	2021	2023	CAGR
KZN	R635 309	R655 416	R671 781	R683 040	R683 243	R694 447	0.9%
King Cetshwayo	R46 953	R48 468	R50 003	R50 293	R50 562	R51 038	0.8%
City of uMhlathuze	R33 223	R34 035	R34 774	R34 809	R34 510	R34 690	0.4%

Source: Quantec Standardised Regional Data (2025)

KZN has shown relatively modest economic growth over the 10-year period, with a compound annual growth rate (CAGR) of 0.9%. King Cetshwayo District saw a similar pattern with a CAGR of 0.8% over the same period. Although the district economic growth rate is slightly slower than that of KZN as a whole, it still indicates a slow but positive trajectory in regional economic performance. The City of uMhlathuze experienced slower economic growth, with a CAGR of 0.4%. The relatively low growth rate in uMhlathuze could reflect challenges such as industry-specific downturns, infrastructure bottlenecks or other regional constraints.

The economic trends observed in these regions, particularly the slower growth in the City of uMhlathuze and King Cetshwayo, underscore the potential importance of projects like the development of Berth 605 in stimulating economic activity.

4.4.2. Economic Structure and Performance

Figure 8 shows the economic structure by broad sectors of the zone of influence in GVA terms.

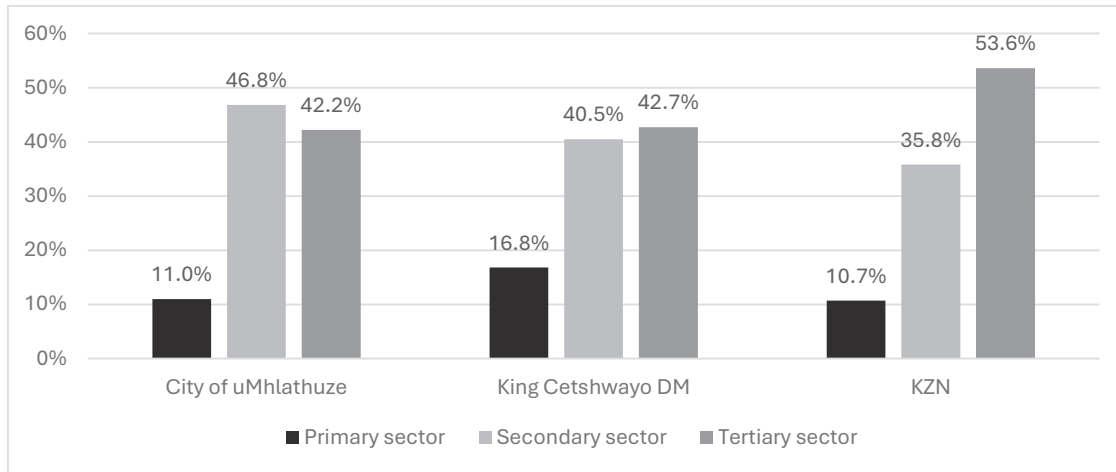


Figure 8: Relative Sector Size within the Zone of Influence

Source: Quantec Standardised Regional Data (2025)

While KZN's economy is predominantly driven by the tertiary sector, King Cetshwayo and City of uMhlathuze show a more balanced distribution across secondary and tertiary sectors.

Table 11 shows the economic structure by industry of the zone of influence in GVA terms. The district and province are provided for context.

Table 11: Economic structure in GVA terms by industry in the City of uMhlathuze, King Cetshwayo and KZN, 2022

	CoU	CAGR	KCDM	CAGR	KZN	CAGR
Agriculture, forestry and fishing	3.0%	4%	7.2%	3%	4.8%	4%
Mining and quarrying	1.8%	-3%	1.5%	-4%	0.8%	-3%
Manufacturing	19.6%	-2%	16.5%	-2%	14.9%	-1%
Electricity, gas and water	2.4%	-2%	2.2%	-3%	2.3%	-3%
Construction	3.2%	-3%	3.0%	-3%	2.8%	-4%
Wholesale and retail trade, catering and accommodation	12.6%	1%	11.6%	0%	12.7%	-1%
Transport, storage and communication	13.2%	0%	11.3%	-1%	10.4%	-1%
Finance, insurance, real estate and business services	18.2%	3%	16.7%	2%	20.6%	1%
General government	6.7%	1%	7.7%	1%	7.8%	1%
Community, social and personal services	19.4%	1%	22.3%	1%	22.8%	1%

Source: Quantec Standardised Regional Data (2025)

The industry composition across KZN King Cetshwayo and the City of uMhlathuze reveals distinct economic structures in each region. In KZN, the largest sector is community, social and personal services (22.8%), followed by finance, insurance, real estate and business services (20.6%) and wholesale and retail trade (12.7%). In King Cetshwayo, manufacturing (16.5%) and community, social and personal services (22.3%) are the dominant industries, with agriculture, forestry and fishing (7.2%) being a notable contributor. In contrast, the City of uMhlathuze is heavily reliant on manufacturing (19.6%) and transport, storage and communication (13.2%), reflecting the region's strong industrial base, particularly with its proximity to the Port of Richards Bay.

These industrial patterns highlight the need for targeted interventions to support key sectors in each region. For example, the Berth 605 development could significantly boost manufacturing, transportation and wholesale and retail trade in the City of uMhlathuze, helping to diversify and

strengthen the economy. With manufacturing being a primary driver of employment in the region, the Port development could improve infrastructure, facilitate increased trade and attract new industries, thus supporting higher employment and economic growth. The development could also help address challenges in King Cetshwayo by offering new opportunities in manufacturing and trade, diversifying the economy away from heavy reliance on agriculture and services.

The development of Berth 605 is expected to have a minimal impact on the fishing subsector, as it is situated in the Bayvue precinct, while fishing activities are primarily located in the Newark precinct. The fishing industry at the PoRB currently operates informally, without dedicated quay structures or facilities for cold storage. As such, the new development of Berth 605 is unlikely to disrupt existing operations, given the separation between the two precincts and the lack of infrastructure specific to the fishing subsector in the area.

4.4.2.1. Construction Subsector Analysis

Figure 9 shows the performance of the construction industry over a ten-year period from 2013 to 2023 in the City of uMhlathuze in Rand millions at constant 2015 prices.

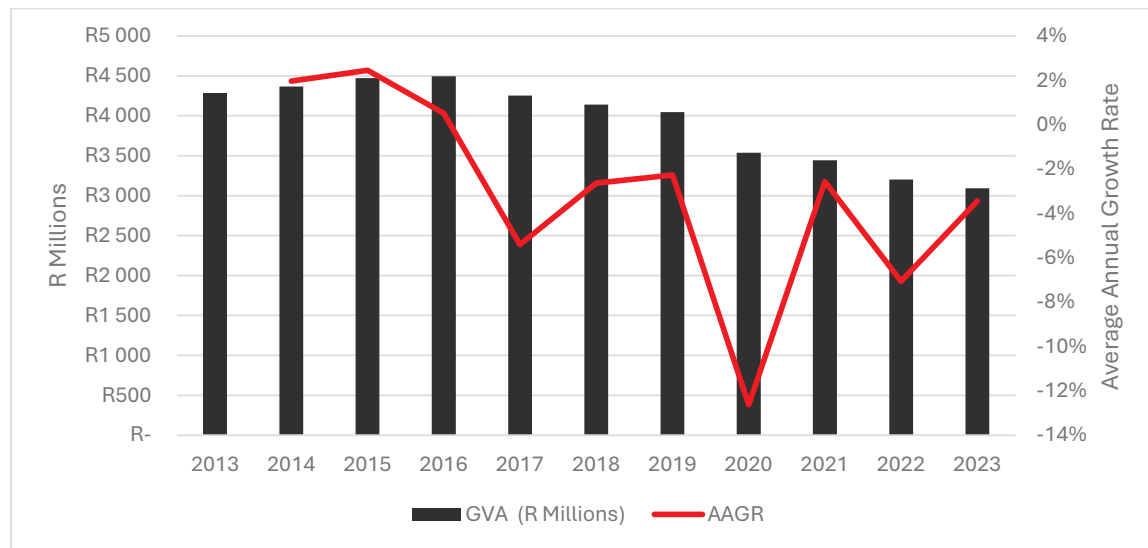


Figure 9: Construction Subsector's Performance in the City of uMhlathuze in Rand millions at constant 2015 prices, 2013 – 2023.

Source: Quantec Standardised Regional Data (2025)

The construction sector in KZN has experienced a sustained contraction over recent years, with a CAGR of -3.50%, reflecting a broader decline in infrastructure investment and sectoral activity. At the district level, King Cetshwayo also recorded a negative CAGR of -3.15%, while the City of uMhlathuze mirrored this trend with a decline of -3.20%. These figures highlight the persistent structural challenges facing the regional construction industry, including reduced public and private sector investment, sluggish industrial activity and broader economic headwinds.

In this context, the development of Berth 605 presents a critical opportunity to revitalise the local construction sector. The scale and complexity of the project are expected to generate substantial short-term demand for civil engineering services, construction labour and materials procurement. This will inject much-needed activity into a sector currently under pressure, stimulating job creation and supply chain engagement across the construction value chain.

Beyond immediate construction works, the project is likely to reinvigorate investor confidence, signalling a renewed commitment to infrastructure-led growth in the region. It could also catalyse additional developments linked to Port development, such as road upgrades, warehousing and utility connections creating further construction spin-offs. By directly contributing to sectoral output, the Berth 605 project has the potential to arrest the declining trend in construction, while also supporting the broader objectives of economic recovery, infrastructure development and job creation within uMhlatuze, King Cetshwayo and the wider KZN province.

4.4.2.2. Transport (Logistics) Subsector Analysis

Figure 10 shows the performance of the transport subsector industry over a ten-year period between 2013 to 2023 in the City of uMhlatuze in Rand millions at constant 2015 prices.

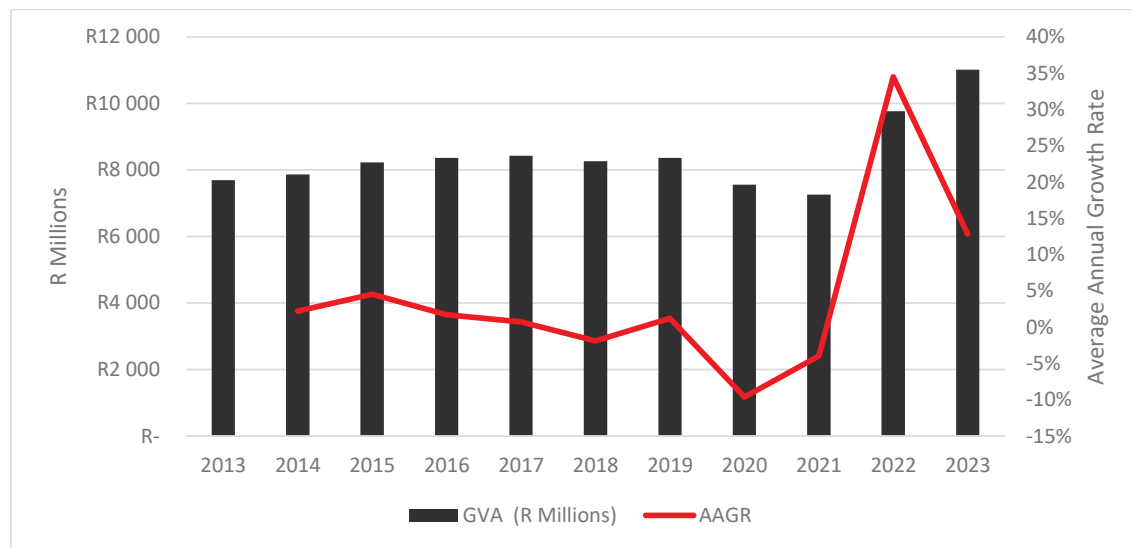


Figure 10: Transport Performance in the City of uMhlatuze in Rand millions at constant 2015 prices, 2013 – 2023.

Source: Quantec Standardised Regional Data (2025)

KZN's transport sector has demonstrated resilient growth over the past decade, with a CAGR of 3.39%. This upward trend reflects sustained investment in infrastructure and logistics capabilities, alongside broader industrial recovery particularly notable in 2022 and 2023. At the district level, King Cetshwayo experienced a similarly positive trajectory with a CAGR of 3.47%, driven by improving connectivity, logistics support to industrial areas and increased freight activity.

The City of uMhlatuze recorded the strongest performance, with the transport sector growing from R7.7 billion in 2013 to R11.0 billion in 2023, representing a CAGR of 3.66%. This growth underscores the City's strategic role as a key logistics and manufacturing hub, heavily influenced by its proximity to the Port of Richards Bay and its integration into regional and national trade networks.

In this context, the Berth 605 development is expected to further accelerate growth in the transport sector by expanding the PoRB's container handling capacity and enhancing its ability to accommodate larger vessels. This infrastructure investment will improve Port efficiency, reduce congestion and support more reliable logistics flows which are critical enablers for trade-intensive sectors such as manufacturing, mining and agro-processing. The construction of Berth 605 is also likely to have knock-on effects across the transport value chain, stimulating activity in freight services, warehousing, distribution and intermodal connections. This will not only generate employment and local business

opportunities but also strengthen the region's competitive position as a gateway for domestic and international trade.

Overall, the project will reinforce and build upon existing momentum in the transport sector, positioning both uMhlathuze and King Cetshwayo for sustained economic growth through enhanced logistics capacity, trade facilitation and investment attraction.

5. Economic Impact Assessment

In this section, the anticipated economic effects resulting from the proposed Project will be examined. The identified impacts will be assessed based on specific criteria. The potential economic impacts stem from both the construction and operational phases of the proposed development. As such, impacts during the relevant construction and operational phases will be assessed.

5.1. Impact Rating Methodology

Economic issues and potential impacts will be assessed using a recognised qualitative impact assessment methodology. The objective of the assessment of impacts is to identify and assess all the significant impacts that may arise from the activity. The process of evaluating the impacts of the project encompasses the following four activities:

1. Identification and assessment of potential impacts
2. Prediction of the nature, magnitude, extent and duration of potentially significant impacts
3. Identification of mitigation measures that could be implemented to reduce the severity or significance of the impacts of the activity
4. Evaluation of the significance of the impact after the mitigation measures have been implemented i.e. the significance of the residual impact.

An overview of the assessment criteria used for the assessment of the identified impacts is presented in Table 12.

Table 12: Criteria Used to Determine the Consequence of the Impact

Based on impact significance criteria determined by DEAT, 1998					
CRITERIA	SCORE 1	SCORE 2	SCORE 3	SCORE 4	SCORE 5
Impact Magnitude (M) The degree of alteration of the affected environmental receptor	Very low	Low	Medium	High	Very high
Impact Extent (E) The geographical extent of the impact on a given environmental receptor	Site: Site only	Local: Inside activity area	Regional: Outside activity area	National: National scope or level	International: Across borders or boundaries
Impact Reversibility (R) The ability of the environmental receptor to rehabilitate or restore after the activity has caused environmental change	Reversible: Recovery without rehabilitation		Recoverable: Recovery with rehabilitation		Irreversible: Not possible despite action
Impact Duration (D) The length of permanence of the impact on the environmental receptor	Immediate: On impact	Short term: 0-5 years	Medium term: 5-15 years	Long term: Project life	Permanent: Indefinite
Probability of Occurrence (P)	Improbable	Low Probability	Probable	Highly Probably	Definite

Based on impact significance criteria determined by DEAT, 1998					
CRITERIA	SCORE 1	SCORE 2	SCORE 3	SCORE 4	SCORE 5
The likelihood of an impact occurring in the absence of pertinent environmental management measures or mitigation					
ENVIRONMENTAL SIGNIFICANCE = (MAGNITUDE + EXTENT + REVERSIBILITY + DURATION) x PROBABILITY					
TOTAL SCORE	4 to 15	16 to 30	31 to 60	61 to 80	81 to 100
ENVIRONMENTAL SIGNIFICANCE RATING	Very low	Low	Moderate	High	Very High

The Impact Rating Model Overview outlines the key criteria used to evaluate the significance of impacts arising from a proposed activity. Each criterion is described as follows:

- **Impact Magnitude (M):** This measures the degree of change caused by an activity, either to the physical environment or the Economic context. It ranges from *Very Low*, which signifies minor alterations with negligible consequences, to *Very High*, indicating substantial disruptions or transformative effects.
- **Impact Extent (E):** This criterion assesses the geographical reach of the impact. Impacts can be limited to the immediate site of activity (*Site only*), extend locally, affect a wider regional area, have national implications, or even reach an *international* scope across borders.
- **Impact Reversibility (R):** This evaluates whether the area or context affected by the activity can recover over time. Recovery may occur naturally (*Reversible*), require interventions such as rehabilitation (*Recoverable*), or be deemed *Irreversible* if restoration is not possible, leading to permanent consequences.
- **Impact Duration (D):** The time frame over which an impact persists is considered under this criterion. It ranges from *Immediate* (occurring only at the moment of the activity), *Short-term* (up to 5 years), *Medium-term* (5–15 years) and *Long-term* (the duration of the project lifecycle), to *Permanent* impacts that indefinitely affect the receptor.
- **Probability of Occurrence (P):** This criterion measures the likelihood of an impact occurring. The scale spans from *Improbable* (unlikely to occur) to *Definite* (certain to happen without intervention).

Table 13: Impact Rating Scoring

Criteria	Number of Points to Score				
	Score 1	Score 2	Score 3	Score 4	Score 5
Impact Magnitude (M)	Very low	Low	Medium	High	Very high
Impact Extent (E)	Site only	Local	Regional	National	International
Impact Reversibility (R)	Reversible		Recoverable		Irreversible
Impact Duration (D)	Immediate	Short Term	Medium term	Long term	Permanent
Probability of Occurrence (P)	Improbable	Low	Medium	High	Definite

Each criterion in the impact assessment model is assigned a numeric score based on its level, ranging from 1 for the lowest severity (e.g., *Very Low*) to 5 for the highest severity (e.g., *Very High*). These scores for the criteria—*Impact Magnitude (M)*, *Impact Extent (E)*, *Impact Reversibility (R)* and *Impact Duration (D)*—are summed together. The total is then multiplied by the score for *Probability of Occurrence (P)* to calculate the Significance (S) score.

For instance, if a project is assessed with a *Medium Magnitude* (score of 3), *Regional Extent* (score of 3), *Recoverable Reversibility* (score of 2), *Medium-term Duration* (score of 3) and a *High Probability* (score of 4), the calculation is as follows:

$$S = (3+3+2+3) \times 4 = 44$$

This score of 44 places the impact in the **Moderate** category, indicating a significant effect that requires attention but may still be manageable with mitigation measures.

Table 14 uses a colour-coded system to visually represent impact severity, differentiating between **negative** and **positive** impacts.

Table 14: Impact Rating Scores Colour Codes

Negative			Positive		
N1	N1 - Very Low	4-15	P1	P1 - Very Low	4-15
N2	N2 - Low	16-30	P2	P2 - Low	16-30
N3	N3 - Moderate	31-60	P3	P3 - Moderate	31-60
N4	N4 - High	61-80	P4	P4 - High	61-80
N5	N5 - Very High	81-100	P5	P5 - Very High	81-100

Scores are categorised into five ranges:

- o **Very Low (4-15):** Minimal impact
- o **Low (16-30):** Manageable impact
- o **Moderate (31-60):** Significant but manageable
- o **High (61-80):** Serious impacts requiring robust mitigation
- o **Very High (81-100):** Severe impacts, possibly unacceptable

Each range has a corresponding colour for easy identification, which helps in communicating the results effectively.

5.2. Economic Modelling Methodology

The economic impacts of the Project will be evaluated using a recognised qualitative impact assessment framework namely a Social Accounting Matrix (SAM) to quantify the scale and distribution of these impacts. The model incorporates the capital expenditure (CAPEX) for the development of the Project. It is important to note that this economic impact assessment methodology focuses on expenditures within South Africa, excluding any costs related to imported materials or equipment, as the economic benefits from these imports will accrue to the exporting countries.

To quantify the effects of the most likely economic impacts of the proposed project, three types of economic impact can be measured, namely, direct, indirect and induced (multiplicative) impacts. The SAM model thus provides a comprehensive view of how the Project influences the broader economy over time.

The **direct impacts** are the changes in the economy occurring as a direct result or consequence of public or private sector capital expenditure, in this case relating to the proposed Berth 605 development. Direct impacts relate to the initial investment and employment generated by the Project itself. This impact would be experienced by first-round contractors (first-round suppliers).

The multiplicative effects can be grouped into two distinct categories, indirect and induced.

The **indirect impacts** occur when the suppliers of new goods and services (first-round suppliers) experience larger markets and the potential to expand. Thus, indirect impacts capture economic activity generated along the supply chain, such as spending on construction materials, transport and services.

Induced impacts results in the impacts on goods and services demanded due to increased expenditure by households from income earned due to the development of the proposed manufacturing plant. Induced impacts reflect increased household consumption from wages earned in both direct and indirect activities leading to further economic stimulation across various sectors. Examples include the income of employees, as well as the income arising through the backwards linkages of this spending in the economy.

Four different impacts can be measured in this analysis, as described below.

Production Effect (business output), which indicates the number of additional sales or transactions which occur directly because of the assessed factor. This includes new sales by businesses, new sales by linked businesses as a result, new sales by businesses linked to these and all new business sales continually as a result.

Gross Domestic Product (GDP) Effect, which provides a measure of the total sectoral economic activity happening on an annual basis within a particular area. It reflects the market value in Rands of all final goods and services produced and sold within the economy.

Employment Effect, which measures the number of full-time equivalent employment (FTE) opportunities created from the impacting factor. Where this is calculated through the SAM model it is based on a typical average number of jobs created in each sector because of every Rand spent in the applicable sectors. These could be casual, part-time, temporary or permanent opportunities, although, for CAPEX, the jobs created tend to represent short-term employment opportunities only available during the construction phase whereas for OPEX, the jobs created tend to present more long-term employment opportunities as these reflect ongoing operations.

Employment impacts are calculated in terms of FTE employment positions, which is the same as an FTE job or one man-year of work. This does not directly translate into the headcount of people employed or in new job opportunities. Generally, one FTE man-year is equivalent to one person working 40 hours per week for approximately 50 weeks per year; however, this can vary depending on the industry. An FTE man-year means that if one person worked only 20 hours per week for 50 weeks in a year, its FTE equivalent would be 0.5; if two people worked for 20 hours per week for 50 weeks in a year, the combined workload would be estimated as one FTE man-year or one FTE job. In the short term, an increase in FTE employment positions could be absorbed by the existing workforce, either by working overtime or if the labour resources are underutilised in the industry. As presented in the previous sections, unemployment is a key challenge in the area of impact and employment opportunities remain a key priority.

Income Effect, which tabulates the total income increase as a result of the capital and operating expenditure on the businesses and households that receive either employment opportunities or benefit from the increased business sales stimulation. Direct income is the total income generated because of expenditure in the supplying businesses and indirect income reflects secondary income generated by the secondary expenditure of households and businesses has benefited from the proposed development's capital and operational expenditure.

5.2.1. Economic Modelling Inputs

5.2.1.1. CAPEX

The proposed Project is expected to generate a total CAPEX of approximately R4.4 billion. For the purposes of the SAM modelling, however, Value Added Tax (VAT), escalations and contingencies are excluded. On this basis, the CAPEX input amounts to approximately R3.1 billion. Table 15 provides a detailed breakdown of this investment.

Table 15: CAPEX input for modelling

Cost Item	Amount
Dredging	R 1 680 469 860.24
Quay Wall	R 911 270 450.01
Rail Siding	R 94 931 901.21
Access Road	R 42 563 175.69
Bulk Electrical Supply	R 14 545 227.35
Bulk Infrastructure	R 10 975 962.40
Owners Cost	R 206 612 799.16
Engineering, Procurement & Construction Management (EPCM)	R 165 290 239.33
TOTAL CAPEX for Modelling	R 3 126 659 615.39

Source: WSP, 2025

5.2.1.2. OPEX

In addition to the capital investment, the operational expenditure (OPEX) of the proposed Berth 605 Project has been estimated to capture its ongoing economic contribution. The Project is expected to incur an initial annual operating cost of approximately R55 million, with a projected escalation of 5% per year. Over a 20-year period, the total OPEX is therefore projected at roughly R1.8 billion. This figure forms the basis for modelling the operational economic impacts of the Project using the SAM. Table 16 provides a detailed breakdown of the annual OPEX projections over the assessment period.

Table 16: Annual expected operator expenditure

Year	Annual expected operator expenditure
Year 1	R 55 000 000.00
Year 2	R 57 750 000.00
Year 3	R 60 637 500.00
Year 4	R 63 669 375.00
Year 5	R 66 852 843.75
Year 6	R 70 195 485.94
Year 7	R 73 705 260.23
Year 8	R 77 390 523.25
Year 9	R 81 260 049.41

Year	Annual expected operator expenditure
Year 10	R 85 323 051.88
Year 11	R 89 589 204.47
Year 12	R 94 068 664.70
Year 13	R 98 772 097.93
Year 14	R 103 710 702.83
Year 15	R 108 896 237.97
Year 16	R 114 341 049.87
Year 17	R 120 058 102.36
Year 18	R 126 061 007.48
Year 19	R 132 364 057.85
Year 20	R 138 982 260.75
TOTAL OPEX OVER 20 YEARS	R 1 818 627 475.66

Source: WSP, 2025

5.2.2. Economic Modelling Results

Table 17 to Table 20 present the outputs of the economic modelling exercise which estimates the macroeconomic impacts resulting from the expenditure associated with the Project. These impacts are subsequently unpacked in greater detail in the impact assessment section that follows.

5.2.2.1. CAPEX Impact

Table 17: Construction Phase Economic Impacts (Rand Millions)

	Direct	Indirect	Induced	Total
Production	R 3 126.65	R 3 563.80	R 1 675.56	R 8 366.00
GDP	R 699.33	R 1 239.00	R 640.25	R 2 578.58
Employment (FTE)	1 648	6 103	2 388	10 139
Income	R 407.43	R 553.96	R 256.37	R 1 217.75

Source: Urban-Econ Modelling, 2025

Table 18: Skill Level Distribution of FTE Construction phase employment impact

Skill Level	Distribution
Skilled	40.1%
Semi-skilled	45.0%
Unskilled	14.9%

Source: Urban-Econ Modelling, 2025

5.2.2.2. OPEX Impact

Table 19: Operation Phase Economic Impacts (Rand Millions)

	Direct	Indirect	Induced	Total
Production	R 1 818.63	R 1 561.40	R 1 030.48	R 4 410.51
GDP	R 722.96	R 639.62	R 393.35	R 1 755.93
Employment (FTE)	930	2 544	1 466	4 940
Income	R 279.75	R 276.62	R 157.51	R 713.89

Source: Urban-Econ Modelling, 2025

Table 20: Skill Level Distribution of FTE Operation phase employment impact

Skill Level	Distribution
Skilled	49.2%
Semi-skilled	43.4%
Unskilled	7.4%

Source: *Urban-Econ Modelling, 2025*

5.3. Economic Impacts During the Construction Phase

This subsection discusses the economic impacts during the construction phase of the proposed project.

5.3.1. Temporary Disruption of Business Activities at the PoRB

The temporary disruption of business activities at the Ports' berth during the development will primarily affect businesses that rely on surrounding berths for cargo handling, storage and logistical operations. The disruption may occur as construction activities may necessitate the partial or full closure of certain facilities, leading to delays in loading and unloading processes, reduced storage capacity and potential logistical bottlenecks. Stakeholders directly impacted may include shipping companies, freight forwarders and ancillary service providers such as transport and warehousing firms.

Stage	Character	Ease of Mitigation	Pre-Mitigation							Post-Mitigation						
			(M+	E+	R+	D)x	P=	S	Rating	(M+	E+	R+	D)x	P=	S	Rating
Construction	Negative	High	3	1	1	2	4	28	N2 - Low	3	1	1	2	3	21	N2 - Low

Mitigations:

- **Phased Construction Scheduling:** Design the construction plan to occur in phases, allowing some berths or sections to remain operational while others undergo upgrades. This minimises the extent of disruptions at any given time.
- **Stakeholder Engagement and Communication:** Stakeholders should be regularly informed through meetings and updates. This keeps everyone aware of progress and expected impacts. Concerns can be raised and addressed early.
- **Temporary Alternative Arrangements:** Establish temporary operational facilities or utilise other berths within the Port of Richards Bay to accommodate displaced activities. This could include reallocating vessels or redirecting cargo to nearby functional berths.
- **Extended Operational Hours:** Offer extended hours of operation during less active periods to handle backlogged activities and mitigate delays caused by construction.

5.3.2. Temporary Stimulation of the Regional and Local Economy

The construction activities associated with the Berth 605 project are projected to generate a temporary but significant boost to the economy of the City of uMhlathuze and to a lesser extent the broader King Cetshwayo District. The economic modelling results indicate that the Project will contribute an estimated

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R2 578.58 million to GDP during the construction phase. Of this, approximately R699.33 million arises directly from the Project's activities, R1 239.00 million from indirect impacts through the supply chain and R640.25 million from induced effects linked to household spending.

This injection reflects the multiplier effects of increased spending on construction materials, labour and services, with benefits extending to businesses supplying goods and services to the Project. Although temporary in nature, the stimulation holds the potential for longer-term benefits if procurement opportunities are extended to local businesses particularly SMMEs, thereby enhancing regional economic resilience.

Stage	Character	Ease of Enhancement	Pre-Enhancement							Post- Enhancement						
			(M+	E+	R+	D)x	P=	S	Rating	(M+	E+	R+	D)x	P=	S	Rating
Construction	Positive	Moderate	3	3	1	2	5	45	P3 - Moderate	4	3	1	2	5	50	P3 - Moderate

Enhancements:

- Prioritising Local Procurement: Actively engaging with local suppliers for construction materials, equipment and services to ensure that a portion of the expenditure remains within the City of uMhlathuze and King Cetshwayo. This helps to bolster the capacity of regional businesses.
- Integrating SMMEs into the Project supply chain: Establishing partnerships with local SMMEs to integrate them into the Project supply chain. This can include mentoring and providing support to help these businesses meet the project's quality and capacity requirements.

5.3.3. Temporary Increase in Production

The construction phase of the Berth 605 project is anticipated to create a substantial surge in production activity across multiple sectors. The economic modelling results estimate a total production impact of R8 366.00 million, comprising R3 126.65 million in direct output, R3 563.80 million in indirect supply chain effects and R1 675.56 million in induced activity generated through household spending.

This heightened demand will primarily benefit industries supplying construction materials, machinery and specialised services, with local manufacturers and suppliers in Richards Bay and the wider City of uMhlathuze expected to see significant opportunities to expand output. The impact will also cascade to logistics providers, transportation companies and ancillary businesses supporting construction operations. While temporary, this R8.37 billion boost will drive increased business revenues, expand production capacity and stimulate broader economic activity across the regional economy.

Stage	Character	Ease of Enhancement	Pre-Enhancement							Post- Enhancement						
			(M+	E+	R+	D)x	P=	S	Rating	(M+	E+	R+	D)x	P=	S	Rating
Construction	Positive	Moderate	3	3	1	2	5	45	P3 Moderate	4	3	1	2	5	50	P3 Moderate

Enhancements:

- Prioritise Local Procurement: Source construction materials, machinery and equipment from local suppliers to boost production within the City of uMhlathuze local economy thereby maximising regional economic benefits.
- Support SMMEs: Engage local SMMEs in the supply chain by providing technical assistance, contract opportunities and capacity-building initiatives to enable their participation in the Project.

5.3.4. Temporary Employment Creation

The construction phase is expected to generate significant temporary employment opportunities measured in FTE jobs. The economic modelling results indicate a total of 10 139 FTE jobs created during the construction phase, comprising 1 648 direct jobs, 6 103 indirect jobs within the supply chain and 2 388 induced jobs supported by household spending.

These opportunities will likely primarily benefit residents of the City of uMhlathuze and to a lesser extent the wider King Cetshwayo District, where unemployment levels remain high, particularly among youth and low-skilled individuals. The employment impact will extend beyond construction to supporting sectors such as logistics, catering and accommodation, creating further local income streams.

Importantly, the skills distribution of these jobs highlights the developmental significance of the Project. Approximately 40.1% of jobs are skilled, 45.0% semi-skilled and 14.9% unskilled, demonstrating that while the Project will provide opportunities for professional and technical roles, the majority of employment will be accessible to semi- and low-skilled workers. This balance is especially relevant given the labour market profile of the region, where large segments of the population are best positioned to take up such opportunities.

Stage	Character	Ease of Enhancement	Pre-Enhancement							Post- Enhancement						
			(M+	E+	R+	D)x	P=	S	Rating	(M+	E+	R+	D)x	P=	S	Rating
Construction	Positive	Moderate	4	3	1	2	5	50	P3 Moderate	5	3	1	2	5	55	P3 - Moderate

Enhancements:

- Local Hiring Policies: Establish and enforce policies that prioritise hiring from the local community, ensuring that residents directly benefit from the employment opportunities.
- Skills Development Programs: Introduce training initiatives to upskill the local workforce, particularly in construction-related trades. This enhances employability beyond the construction phase and contributes to long-term economic development

- Incentives for Contractors: Require contractors to allocate a percentage of their workforce to local hires as part of their contractual obligations, incentivising them to integrate local labour into their operations.
- Support for Indirect Employment: Facilitate the growth of ancillary businesses, such as catering, transportation and equipment supply, by providing information and access to contracts related to the project.
- Skills Training Initiatives: Provide pre-construction training programs for local workers to increase their employability, enabling them to secure higher-paying positions within the project and beyond.

5.3.5. Temporary Increase in Household Income

The Berth 605 project is expected to generate a temporary but meaningful uplift in household income during the construction phase. Economic modelling estimates a total household income impact of R1 217.75 million, of which R407.43 million is earned directly by workers on-site, R553.96 million accrues to employees in supply chain industries and R256.37 million arises from induced activity through household spending.

These wages will benefit workers and their families within the City of uMhlathuze and King Cetshwayo, improving financial stability and supporting local consumption. The income gains will extend beyond construction workers to individuals indirectly employed in sectors such as logistics, catering and equipment supply. While the increase is temporary, the injection of over R1.2 billion into households represents an important short-term stimulus to the regional economy and offers a valuable opportunity for income circulation within communities characterised by high unemployment and limited earning potential.

Stage	Character	Ease of Enhancement	Pre-Enhancement							Post- Enhancement						
			(M+	E+	R+	D)x	P=	S	Rating	(M+	E+	R+	D)x	P=	S	Rating
Construction	Positive	Low	3	3	1	2	5	45	P3 Moderate	3	3	1	2	5	45	P3 Moderate

Enhancements:

- Local Recruitment Policies: Prioritise hiring from the surrounding communities within the City of uMhlathuze to ensure that economic benefits remain localised, directly uplifting the households most in need.
- Fair Compensation Standards: Ensure that wages meet or exceed industry standards to maximise the financial benefits for workers and their households.

5.4. Operational Phase

During the operation phase of Berth 605, several impacts are likely to arise. These impacts are discussed and assessed below.

5.4.1. Regional Economic Development

Sustained regional economic development during the operational phase of the Berth 605 project will stem from the enhanced cargo-handling capacity at the PoRB. As throughput increases, related activities such as warehousing, logistics, distribution and customs services are expected to expand. The economic modelling results show that operational expenditure will stimulate a total of R4 410.51 million in production activity and contribute approximately R1 755.93 million to GDP over the 20-year operational horizon.

These impacts will create a ripple effect across the province, benefiting businesses directly engaged in Port operations as well as those indirectly linked through supply chains. Beyond the immediate financial stimulus, the Project will strengthen the competitiveness of the region by supporting local enterprises, attracting new investment and reinforcing its role as a strategic trade gateway.

Stage	Character	Ease of Enhancement	Pre-Enhancement							Post- Enhancement						
			(M+	E+	R+	D)x	P=	S	Rating	(M+	E+	R+	D)x	P=	S	Rating
Operation	Positive	Low	2	3	5	4	4	56	P3 - Moderate	3	3	5	4	4	60	P3 - Moderate

Enhancements:

- Facilitating Local Enterprise Participation: Establish mechanisms to ensure local logistics providers, warehousing companies and distribution firms are integrated into long-term Port operations.
- Strengthening Trade and Investment Linkages: Work with trade promotion agencies to leverage the enhanced capacity to attract new exporters and importers to Richards Bay, thereby diversifying the economic base.

5.4.2. Improved Trade Competitiveness

Improved trade competitiveness in the operational phase of the development of Berth 605 will arise from the enhanced infrastructure, which is expected to improve the efficiency of cargo handling at the PoRB. The new developments will streamline operations by reducing turnaround times for ships, improving the speed and reliability of cargo processing and enabling better logistics and transportation flow. As a result, the PoRB will become more competitive in regional and global markets, attracting both local and international trade.

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Stage	Character	Ease of Enhancement	Pre-Enhancement							Post- Enhancement						
			(M+	E+	R+	D)x	P=	S	Rating	(M+	E+	R+	D)x	P=	S	Rating
Operation	Positive	Moderate	4	4	3	4	4	60	P3 - Moderate	4	4	4	4	4	64	P4 - High

Enhancements:

- **Infrastructure Optimisation:** Accelerate the completion of integrated transportation networks, including efficient rail systems and expanded roadways, to handle increased cargo volumes seamlessly. Establish multimodal logistics hubs to improve connectivity between ports, dry ports and industrial zones.
- **Technology Integration:** Invest in advanced Port and logistics technologies, such as automated cargo handling systems, digital inventory management and real-time tracking solutions, to streamline operations.

5.4.3. Employment Creation

The operational phase of the Berth 605 project is projected to generate sustained employment opportunities linked to the day-to-day functioning of the berth. Economic modelling estimates a total of 4 940 FTE jobs, comprising 930 direct positions at the Port, 2 544 indirect jobs within the supply chain and 1 466 induced jobs supported through household spending. These jobs will arise from the increased scale and complexity of Port activities, with additional staff required for cargo handling, logistics coordination and facility maintenance. Indirect employment will also be supported in related sectors such as warehousing, transportation and trade services.

The skills profile of these jobs reflects a greater emphasis on high-value employment compared to the construction phase. Approximately 49.2% of jobs are skilled, 43.4% semi-skilled and 7.4% unskilled, demonstrating the Project's potential to strengthen the skilled labour base while still providing opportunities for semi-skilled workers. Given the high levels of unemployment in the City of uMhlathuze and the broader King Cetshwayo District, prioritising local residents for these roles could significantly enhance the developmental impact of the Project.

Stage	Character	Ease of Enhancement	Pre-Enhancement							Post- Enhancement						
			(M+	E+	R+	D)x	P=	S	Rating	(M+	E+	R+	D)x	P=	S	Rating
Operation	Positive	Moderate	3	3	4	4	5	70	P4 - High	3	3	4	4	5	70	P4 - High

Enhancements:

- **Local Hiring Framework:** Establish clear targets or quotas for employing local residents of the City of uMhlathuze and King Cetshwayo where feasible, ensuring measurable local participation in Port operations.

- **Supplier Workforce Development:** Encourage service providers (security, catering, maintenance, transport) to prioritise local recruitment, expanding the employment footprint beyond direct Port staff.

5.4.4. Government Revenue Increase

The operational phase of Berth 605 development is expected to contribute positively to government revenue through multiple channels. As employment opportunities increase, individuals will contribute more to income tax through their wages, while businesses benefiting from the Port's enhanced operations will generate higher corporate tax revenues. The expanded economic activities will also stimulate consumer spending, which will lead to greater value-added tax (VAT) collections. Additionally, businesses involved in the Port's operations will contribute to other forms of taxation, including excise duties and property taxes, further boosting government income. The overall increase in economic activity driven by the upgraded infrastructure is likely to provide fiscal benefits to local and national government entities.

Stage	Character	Ease of Enhancement	Pre-Enhancement							Post- Enhancement						
			(M+	E+	R+	D)x	P=	S	Rating	(M+	E+	R+	D)x	P=	S	Rating
Operation	Positive	Low	2	3	4	4	3	39	P3 Moderate	2	3	4	4	4	52	P3 - Moderate

5.5. Cumulative Impacts

The assessment of cumulative impacts is a critical component of environmental analysis, as required by the Department of Environmental Affairs (DEA). Cumulative Impact refers to the combined effect of past, present and reasonably foreseeable future activities associated with a project, including similar or diverse activities that may not individually appear significant but, when combined, can lead to a considerable overall impact. The cumulative impact assessment methodology aims to evaluate whether adding the proposed project to the specified location will elevate the area's overall environmental impact.

This assessment examines if the construction and operation of the proposed development of Berth 605 will result in:

- An unacceptable risk to the environment or surrounding communities.
- An unacceptable loss of environmental quality, resources, or biodiversity.
- Complete or large-scale changes to the environment or the community's sense of place.
- An unacceptable increase in overall impact levels in the area.

The cumulative impact assessment results, presented below, illustrate the proposed project's combined effects alongside existing and anticipated activities in the vicinity.

5.5.1. Enhanced Trade Competitiveness

The combined developments in the PoRB, are anticipated to enhance the region's trade competitiveness by improving logistical infrastructure. These improvements will facilitate faster and more efficient cargo handling and distribution, reducing operational bottlenecks and minimising transit delays. As a result, businesses operating within the logistics, export and manufacturing sectors will benefit from reduced supply chain costs and enhanced reliability. This transformation is expected to position KZN as a prominent trade hub in regional and international markets, attracting new investments and enabling businesses to expand their market reach.

Stage	Character	Ease of Enhancement	Pre-Enhancement							Post- Enhancement						
			(M+	E+	R+	D)x	P=	S	Rating	(M+	E+	R+	D)x	P=	S	Rating
Cumulative	Positive	Moderate	4	4	4	5	4	68	P4 - High	4	5	4	5	4	72	P4 - High

Enhancements:

- Marketing and Positioning: Work with trade promotion agencies to actively market KZN as a global trade hub through targeted investment campaigns highlighting its enhanced logistical capabilities.
- Sustainability Practices: Incorporate energy-efficient and eco-friendly practices in all logistics and Port operations to meet international trade standards and attract environmentally conscious investors.

5.5.2. Strengthened Supply Chain Networks

The combined developments in the PoRB are expected to strengthen and increase supply chains, integrating multiple logistical and industrial facilities. This will create a robust and interconnected supply chain network. This synergy can attract additional investments, lower operational costs for businesses and establish KZN as a key logistics and industrial hub in Southern Africa

Stage	Character	Ease of Enhancement	Pre-Enhancement							Post- Enhancement						
			(M+	E+	R+	D)x	P=	S	Rating	(M+	E+	R+	D)x	P=	S	Rating
Cumulative	Positive	Low	4	4	4	4	3	48	P3 Moderate	4	4	4	4	3	48	P4 - High

Enhancements:

- Development of Integrated Infrastructure: Establish seamless connectivity between different logistical hubs such as ports, dry ports, industrial zones and transport networks. This can include dedicated cargo rail links, upgraded road systems and intermodal facilities that streamline goods movement

across regions the development of smart infrastructure such as automated ports and digital supply chain management systems that improve cargo tracking, reduce operational bottlenecks and increase overall efficiency.

- Implement smart solutions such as Internet of Things (IoT) devices, big data analytics and artificial intelligence (AI) to optimise supply chain operations, predict demand and reduce transit times. These technologies can help enhance efficiency, lower operational costs and create a more competitive supply chain network

6. Need and Desirability Assessment

The need and desirability of the proposed development must be assessed in relation to relevant strategic planning instruments such as the IDP and other government frameworks. This assessment helps determine whether the project aligns with broader policy objectives and contributes meaningfully to sustainable development.

The evaluation goes beyond private viability and considers the public interest, weighing the project's potential social and economic impacts. This includes analysing whether the development supports the long-term needs of the community, promotes equitable growth and upholds the principles of justifiable economic development as set out in the Constitution.

In this context, the Berth 605 project is benchmarked against the strategic objectives of the City of uMhlathuze as well as findings from the economic impact assessment. The goal is to ensure that the development contributes not only to economic growth and job creation, but also to environmental sustainability, social equity and responsible resource use. Ultimately, determining need and desirability involves a balanced judgment: whether the proposed development advances the public good while minimising negative impacts and whether it supports socially, economically and environmentally sustainable development.

Table 21 shows the need and desirability assessment for the proposed PoRB Berth 605.

Table 21: Need and Desirability Assessment

No.	Aspect	Comment
1.	Economic context of the area based on strategic documents.	The development of Berth 605 supports the goals of the IDP by boosting trade, helping industries grow and improving access to global markets and thus contributing to local economic development and job creation. It will modernize the Port, make operations more efficient and help keep Richards Bay competitive, while also supporting sustainable development and the city's long-term plans for economic growth.
2.	Spatial Priorities	The upgrade enhances the Richards Bay logistics corridor and supports the PGDS. It aligns with regional development plans by increasing the Port's capacity to handle bulk and breakbulk cargo, strengthening Richards Bay's position as a key hub for logistics, mining and industrial activity.
3.	Equitable impacts in the short and long term, as well as economically sustainable considerations	In the short term, construction activities will provide temporary job opportunities and stimulate local procurement. Long-term, the project will create permanent roles in Port operations, logistics and support services. By maximising the use of existing industrial zones and infrastructure, the project promotes compact, efficient and sustainable urban growth.
4.	Creation of temporary employment opportunities nearby or	The construction phase will create a range of short-term jobs, particularly targeting local unskilled and semi-skilled labour. This provides much-needed income for historically disadvantaged

No.	Aspect	Comment
	amongst the different communities.	communities in and around City of Umhlathuze, while also offering on-the-job training to improve future employability.
5.	Complimenting other uses in the area	The proposed Berth 605 complements existing Port activities and supports broader industrial initiatives in the RBIDZ. It will strengthen synergies between the Port and nearby manufacturing, mining and export-oriented industries, thereby consolidating Richards Bay's role as an integrated logistics and industrial hub.
6.	Consideration of locational factors that might favour the specific location	The Port of Richards Bay is strategically located with direct rail and road connections to major inland markets and resource areas. The availability of space, existing Port infrastructure and proximity to bulk exporters make the proposed Berth 605 site an ideal location to expand capacity and support increased trade volumes.
7.	Impact on the sense of history, sense of place and heritage of the area and the socio-cultural and cultural-historic characteristics and sensitivities of the area	The proposed berth is situated within an established industrial and port precinct with limited heritage sensitivities. While the area does not have major cultural or historical assets at risk, community consultation will help identify and mitigate any socio-cultural concerns that may arise.
8.	Availability of labour relevant to take up the job opportunities from the development of the project	With the unemployment rate and a large portion of the working-age population being economically inactive in the city of uMhlathuze (40.7%), there is a significant pool of local labour within the King Cetshwayo District, particularly among unskilled and semi-skilled workers. Proximity to uMhlathuze and neighbouring towns ensures a ready supply of labour, while skills development programmes can support specialised workforce needs.
9.	What potential tourism benefits and disbenefits will the project result in locally, regionally and nationally?	As a trade and logistics infrastructure project, Berth 605 is not directly tourism focused. However, improved Port efficiency and increased business travel may indirectly support the hospitality and accommodation sectors in Richards Bay. Any potential negative visual or traffic impacts will be managed to avoid interference with the coastal tourism economy.
10.	The location of job opportunities versus the location of impacts	Job opportunities will be concentrated within Richards Bay and surrounding communities, ensuring local benefit. Broader economic impacts, such as enhanced trade and investment, will extend across the district and province, supporting regional development beyond the immediate site.
11.	Socio-economic impacts of the development	The project will contribute to job creation, improved logistics efficiency and industrial competitiveness. It supports key socio-economic development objectives by addressing

No.	Aspect	Comment
	based on the socio-economic context	unemployment, enabling inclusive economic growth and supporting the export capacity of critical sectors like mining, forestry and energy.
12.	Based on the economic context, what will the benefits be to society in general and to the local communities?	<p>The construction of Berth 605 will create temporary jobs across skill levels, with a focus on local hiring, boosting incomes and local demand. In the long term, the operational phase will generate permanent employment in cargo handling, logistics and support services. The project will expand the Port of Richards Bay's capacity and efficiency, strengthen South Africa's export competitiveness and attracting further investment. This will stimulate local value-added industries and support broader economic resilience. Small businesses in sectors like security, maintenance, catering and transport will benefit from increased demand, driving entrepreneurship and local enterprise growth. By creating economic opportunities for previously disadvantaged groups, the project promotes inclusive development and contributes to poverty reduction.</p> <p>Overall, Berth 605 is a strategic investment in South Africa's trade infrastructure, offering some economic benefits at local, regional and national levels.</p>

7. Conclusion and Reasoned Opinion

The development of Berth 605 at the PoRB is a strategic infrastructure investment aimed at enhancing the Port's capacity, improving operational efficiency and supporting the growing demands of national and regional trade. The proposed development of Berth 605 will deliver a clear net-positive economic outcome for the City of uMhlathuze, King Cetshwayo and KZN.

During the construction phase, the project is expected to generate moderate economic benefits, primarily through the creation of temporary employment opportunities. This will offer short-term economic relief to local communities and stimulate demand within the regional supply chain, contributing to business income and GDP. While some temporary disruptions to Port activity may occur during construction, these can be effectively managed through appropriate mitigation and stakeholder engagement. By contrast, all other economic impacts are positive and rated moderate to high in significance, supported by both qualitative assessment and quantitative modelling.

In the operational phase, Berth 605 will play a critical role in reinforcing the PoRB as a key logistics and export hub. The improved infrastructure will enhance trade efficiency and strengthen the Port's competitiveness in global markets. This will have far-reaching economic benefits, including the creation of sustained employment opportunities in cargo handling, logistics and support services, while also promoting investment and growth in value-added industries across KZN.

The development also aligns with municipal, provincial and national economic strategies and supports inclusive and sustainable growth. It will help address spatial inequality by extending opportunities to previously disadvantaged groups and contribute to long-term poverty reduction through increased economic participation.

Cumulatively the Project strengthens export logistics, deepens supply-chain linkages and supports policy goals across national, provincial and local frameworks that prioritise infrastructure-led growth, industrial competitiveness and trade facilitation. With standard construction controls in place, the temporary adverse effects are contained while the long-run benefits are durable. Its potential to drive economic resilience, create meaningful employment and support regional development makes Berth 605 a valuable contribution to the future of the PoRB and the broader national economy.

A summary of the economic impacts of the proposed Berth 605 project is presented in Table 22.

Table 22: Summary of Economic Impact Assessment

Phase	Economic Impacts	Character	Significance Before Mitigation/Enhancement	Significance After Mitigation/Enhancement
Construction Phase	Temporary disruption of business activities at the Port of Richards Bay	-	Low 28	Low 21
	Temporary Stimulation of the Regional and Local Economy	+	Moderate 45	Moderate 50
	Temporary Increase in Production	+	Moderate 45	Moderate 50
	Temporary Employment Creation	+	Moderate 56	Moderate 60
	Temporary Increase in Household Income	+	Moderate 45	Moderate 45

Phase	Economic Impacts	Character	Significance Before Mitigation/Enhancement	Significance After Mitigation/Enhancement
Operation Phase	Regional Economic Development	+	Moderate 56	Moderate 60
	Improved Trade Competitiveness	+	Moderate 60	High 64
	Employment Creation	+	High 70	High 70
	Increase in government revenues	+	Moderate 39	Moderate 52
Cumulative Impacts	Enhanced Trade Competitiveness	+	High 68	High 72
	Strengthened Supply Chain Networks	+	Moderate 48	High 64

7.1. Reasoned Opinion

The economic impact assessment finds that there are no significantly adverse or unacceptable economic impacts of the proposed development. It is expected that the Project will deliver a clear net-positive economic outcome for the City of uMhlathuze, King Cetshwayo and KZN. With standard construction controls in place, the temporary adverse effects are contained while the long-run benefits are durable. On the strength of the assessment the proposed Berth 605 development is economically acceptable and desirable and should be authorised, subject to specific conditions that secure mitigation during construction and maximise inclusive benefits in operation.

8. References

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Annexure A: Specialist Report Checklist

Table 23: Specialist Report Checklist

A specialist report prepared in terms of the Environmental Impact Regulations of 2014 (as amended) must contain:	Relevant section in report
Details of the specialist who prepared the report	Pg i, Annexure B
The expertise of that person to compile a specialist report including a curriculum vitae	Pg i, Annexure B
A declaration that the person is independent in a form as may be specified by the competent authority	Pg i
An indication of the scope of and the purpose for which, the report was prepared	Section 1
An indication of the quality and age of base data used for the specialist report	Section 1
A description of existing impacts on the site, cumulative impacts of the proposed development and levels of acceptable change	Section 5
The duration, date and season of the site investigation and the relevance of the season to the outcome of the assessment	N/A
A description of the methodology adopted in preparing the report or carrying out the specialised process inclusive of equipment and modelling used	Section 1
Details of an assessment of the specific identified sensitivity of the site related to the proposed activity or activities and its associated structures and infrastructure, inclusive of a site plan identifying site alternative	N/A
An identification of any areas to be avoided, including buffers	N/A
A map superimposing the activity including the associated structures and infrastructure on the environmental sensitivities of the site including areas to be avoided, including buffers	N/A
A description of any assumptions made and any uncertainties or gaps in knowledge	Section 1
A description of the findings and potential implications of such findings on the impact of the proposed activity or activities	Section 5, 6 & Section 7
Any mitigation measures for inclusion in the EMPr	Section 5
Any conditions for inclusion in the environmental authorisation	N/A
Any monitoring requirements for inclusion in the EMPr or environmental authorisation	N/A
A reasoned opinion as to whether the proposed activity or portions thereof should be authorised	Section 7
Regarding the acceptability of the proposed activity or activities; and	Section 6 & 7
If the opinion is that the proposed activity or portions thereof should be authorised, any avoidance, management and mitigation measures that should be included in the EMPr and where applicable, the closure plan	Section 5
A description of any consultation process that was undertaken during the course of carrying out the study	N/A
A summary and copies if any comments that were received during any consultation process	N/A
Any other information requested by the competent authority.	N/A

Annexure B: Specialist CV's

Tinotenda Makoni

Education:			
Rhodes University - 2014		B Com Accounting and Economics	
Rhodes University – 2015		B Com (Hons) Economics	
Rhodes University - 2019		M Com Economics	
Professional Membership:			
Economic Society of South Africa (ESSA)			
Language Proficiency:	Reading	Writing	Speaking
English	Excellent	Excellent	Excellent

Work Experience:

Nov 2013 – Feb 2014	Clarity Eyecare Services LLC: General Clerk Intern (USA)
Nov 2015 – June 2018	Cotrace Freight Services (Pty) Ltd: Finance Intern (Zim)
Aug 2018 – Dec 2018	MMB Logistics (Pty) Ltd: Junior Financial Analyst (Zim)
April 2019 - Present	Urban-Econ Development Economists: Development Economist (SA)

Key Skills and Experience:

Tinotenda is a senior professional Development Economist at Urban-Econ since April 2019 and is currently the Branch Manager for KwaZulu Natal. She holds a Bachelor of Commerce degree in Accounting and Economics (majoring in economics) with Honours in Economics and a Master of Commerce in Economics from Rhodes University.

The combination of accounting and economics has allowed the development of a unique skill set including developing an analytical mindset and good problem-solving skills. Tinotenda has a high quantitative aptitude with the ability to handle and analyse complex data. The economic analysis techniques that Tinotenda is familiar with are economic impact assessment modelling, cost benefit analysis, input / output analysis, value-chain analysis and assessments in relation to economic sector analysis, socioeconomic, demographic and household surveys.

She also specializes in strategy formulation, market feasibility studies including baseline surveys and market surveys, socio-economic impact assessment studies as well as economic development within urban and rural areas.

A Selection of 2019 to date Project Experiences

Project:	Isandlwana Interpretative Centre Feasibility Study and Business Plan
Year:	2024
Location:	Isandlwana, Nquthu LM
Client:	Department of Sport, Art and Culture (DSAC)
Activities Performed:	Directed the feasibility study and business case, overseeing research, project coordination and stakeholder engagements to ensure a thorough and actionable outcome. Collaborating with a multidisciplinary team of experts, including architects, town planner, engineers and quantity surveyor, integrated technical and economic insights into comprehensive reports and a detailed business plan. Consolidated all project steps into a comprehensive final document. This unified report integrated technical, economic and

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	strategic insights, serving as the definitive blueprint for the IIC's development and ensuring alignment with long-term project objectives.
Project: Year: Location: Client: Activities Performed	Farm Nobamba Market Feasibility Study 2024 KZN Thobile Duma Urban-Econ Development Economists was commissioned to undertake a specialist study to assess the capacity of the market to potentially sustain a mixed-use development in Ulundi Local Municipality. The report included Market feasibility testing of the retail development concept, accommodation in the form of a guest lodge and petrol filling station. It then assessed the potential Socio-Economic Impact Assessment of the development concept and gave recommendations based on the findings, to allow informed decision making to occur regarding investment.
Project: Year: Client: Activities Performed	Ladysmith Hospital Market Demand Study 2024 Nicholani Investments (Pty)Ltd Urban-Econ Development Economists was appointed by Nicholani Investments PTY (LTD) to undertake an economic assessment of Ladysmith for a proposed 100-bed private day and sub-acute hospital development. The assessment included a detailed analysis of the market demand for additional private hospital activities in the delineated market area of Ladysmith, KwaZulu-Natal. It encompasses four main sections: the Macro-Economic Profile, the Socio-Economic Profile, the Health Market Overview and the Market Demand Analysis, each comprising several subsections to offer a comprehensive overview of the market conditions, healthcare needs and potential opportunities and challenges for the proposed development.
Project: Year: Location: Client: Activities performed:	NPC Simuma Facility Upgrades SEIA 2024 KwaZulu Natal SRK Consulting Urban -Econ Development Economists (Pty) Ltd was commissioned by SRK Consulting to conduct a Socio-economic impact assessment on the upgrade of the NPC Simuma Quarry in the Ray Nkonyeni Local Municipality. The report identified and assessed the anticipated social and economic impacts of the proposed upgrades. It then provided enhancement measures to enhance the positive impacts and mitigation measures that could mitigate negative impacts. It further provided a specialist opinion on the need and desirability of the proposed development.
Project: Year: Location: Client: Activities Performed:	Khoemacau Copper Mining Economic Impact Assessment 2023/24 Botswana Loci Environmental Evaluated the economic repercussions of housing mine workers in neighbouring villages. Examined both positive and negative economic impacts arising from the relocation of KCM's workforce to nearby villages. Identified and analysed the advantages and disadvantages of hosting mine workers in adjacent communities. Emphasised the benefits, including enhanced earning capacity, wealth accumulation and increased purchasing power, for the local communities.
Project: Year: Client: Activities Performed	Msunduzi LED Strategy Review 2023 Sivest Urban-Econ was appointed by SiVest to undertake a comprehensive review of the Local Economic Development (LED) Strategy for Msunduzi Local Municipality. The review encompasses an in-depth analysis divided into four main sections: the Macro-Economic Profile, the Socio-Economic Profile, the Economic Profile and the SWOT Analysis. Each section is comprised of various subsections to provide a holistic view of the municipality's

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	economic landscape, social demographics and developmental challenges. This review aimed to provide strategic insights and actionable recommendations to enhance the local economic development strategy of Msunduzi Municipality, fostering sustainable growth and improving the quality of life for its residents.
Project: Year: Location: Client: Activities Performed	Ntabamhlophe Tourism Development Plan 2023 KZN Tourism KwaZulu-Natal Urban-Econ was appointed by TKZN to conduct Tourism Development Plan for the rural community of Ntabamhlophe. The plan is investigating tourism development opportunities in the rural community of Ntabamhlophe to pursue integrated and sustainable tourism development projects and programmes to ignite economic activity.
Project: Year: Location: Client: Activities Performed	Port of Durban Economic Impact Assessment 2023 Durban Transnet National Port Authority Economic Impact Assessment Reviewing academic and industry literature pertaining to Port of Durban activities. Planning and executing interviews with key stakeholders. Utilising both statistical and qualitative tools to collect data relevant to the Port of Durban. Evaluating policies to assess their alignment with the operations of the Port of Durban.
Project: Year: Location: Client: Activities Performed	Socio Economic Impact Assessment of the Reconfiguration of Mhlathuze and Umgeni Water Boards 2023 Kwa-Zulu Natal BSRI A socio-economic impact assessment of the reconfiguration of the Mhlathuze and Umgeni Water Boards. The study involved a situational analysis and baseline profiling of all the Water Supply Areas of the two water boards in order to inform the potential impacts of the amalgamation of the water boards into a single board.
Project: Year: Location: Client: Activities Performed	Feasibility Study for Dube SEZ Bonded Warehouse 2023 KwaZulu Natal Dube Tradeport Determine the market feasibility and financial viability of a bonded warehouse establishment to be located at the Dube TradePort precinct in La Mercy, KwaZulu Natal. The assessment included a detailed analysis of the viability of a public bonded storage warehouse, customs compliance requirements and benefit of the bonded warehouse to both DTP and its tenants. Moreover, a high-level market potential assessment of the proposed bonded warehouse including demand and supply was undertaken.
Project: Year: Location: Client: Activities Performed	Durban ICC Business Plan 2023 KwaZulu Natal Durban ICC The Durban ICC commissioned Urban Econ to compile a comprehensive business plan, pertaining to the acquisition of a building. The Durban ICC intends to expand its footprint in the City of eThekweni through the development of the Durban ICC precinct. Therefore, purchasing this building would be the first step towards the expansion and development of the precinct. The business plan provided a comprehensive roadmap outlining the development concept, market feasibility and financial projections for the purchase of the building.
Project: Year: Location:	eThekweni ESD Business Plan 2023 KwaZulu Natal

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Client: Activities Performed	eThekweni Municipality Urban-Econ Development Economists was commissioned by eThekweni Business Support, Tourism, Markets and Agribusiness Unit (BSTMABU) to develop a comprehensive business plan and budget for the proposed eThekweni Enterprise Supplier Development Fund (ESD) Management Entity. The development of the business plan includes a comprehensive budget plan as well as the establishment of proper monitoring and evaluation guideline for the proposed ESD Fund Management Entity
Project: Year: Location: Client: Activities Performed	KZN Cruise Tourism Strategy 2023 KwaZulu Natal Tourism KwaZulu-Natal (TKZN) Urban-Econ was appointed by Tourism KwaZulu-Natal (TKZN) to develop a Cruise Tourism Strategy for the province of KwaZulu-Natal (KZN). The purpose of the strategy was to identify opportunities to grow cruise tourism in KwaZulu-Natal, outline core activities that will deliver real outcomes from cruise tourism in KwaZulu-Natal and to signal to the cruise industry that KwaZulu-Natal is taking a proactive approach to cruise tourism development and encouraging growth. The Strategy was developed using the two main research techniques i.e., desktop literature review of relevant policies and documentation and primary research with key stakeholders through workshops, telephonic interviews and survey questionnaires.
Project: Year: Location: Client: Activities Performed	Paddock Macadamia SEIA 2023 KwaZulu Natal Mayo Macs Macadamia Urban-Econ Development Economists was commissioned by the Mayo Macs Macadamia Factory to undertake a socio-economic impact assessment (SEIA) relating to the expansion of the Mayo Macs Macadamia Factory located in the Paddock area of the Ray Nkonyeni Local Municipality on the south coast of KwaZulu-Natal. To proceed with the expansion process, Mayo Macs was required to submit a Basic Assessment (BA) socio-economic assessment (SEIA) as prescribed by the Environmental Impact Assessment (EIA) Regulations of 2014. Therefore, this study provided the Specialist socio-economic impact assessment as required by prescribed by the Environmental Impact Assessment (EIA) Regulations of 2014 to assess the potential impacts of this expansion.
Project: Year: Location: Client: Activities Performed	N2 Isipingo to Edwin Swales Interchange SIA 2023 KwaZulu Natal Terratest (Pty) Ltd/JG Afrika Urban-Econ Development Economists was commissioned by Terratest (Pty) Ltd on behalf of the South African Roads Agency SOC Ltd (SANRAL) to undertake a Social Impact Assessment (SIA) of the proposed upgrade of the N2 between the Isipingo and the Edwin Swales interchanges, which involves the addition of lanes from 3 to 5 lanes in both directions. The report identified and assessed the anticipated social impacts of the proposed development. It then provided enhancement measures to enhance the positive impacts and mitigation measures that could mitigate negative impacts. It further provided a specialist opinion on the need and desirability of the proposed development from a social perspective.
Project: Year: Location: Client: Activities Performed	Jindal Melmoth Iron Ore Mining SEIA 2023 KwaZulu Natal SLR Urban-Econ was appointed by SLR Consulting to conduct a specialist socio economic impact assessment study for the Jindal Melmoth Iron Ore Mine. An important component of the study included engagements with I&APs to establish the impact they envisaged as a result of the proposed mining development and recommending mitigation measures to

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	reduce impacts identified as being negative. The project made use of specialist economic modelling techniques including SAM Input/Output modelling to determine the economic impacts.
Project: Year: Location: Client: Activities Performed	uMgeni Water Lower Umkhomazi Bulk Water Supply System Cost Benefit Analysis 2023 KwaZulu Natal uMgeni water Urban-Econ was appointed by Umgeni Water to conduct a Cost Benefit Analysis on the Lower Umkhomazi Bulk Water Supply Scheme (LUBWSS) that meets the requirements of the BFI for a Cost Benefit Analysis. The objectives of the study were to undertake a social and economic analysis, including estimates of economic costs and benefits associated with the intervention and anticipated social and distributional impacts. The study made use of economic modelling techniques including an economic impact assessment SAM modelling and calculating NPV, IRR and BCR.
Project: Year: Location: Client: Activities Performed	Jozini Human Settlement Sector Plan 2023 KwaZulu Natal Jozini Local Municipality: Boxer Mpontshane Urban-Econ was commissioned by Jozini Local Municipality to review the existing Human Settlements Sector Plan (HSSP) and develop a new plan for the period of 2023-2028. The HSSP was prepared according to guidelines developed by the National Department of Human Settlements and reflects the mandate that is prescribed in the Constitution of the Republic of South Africa, the National Housing Act (Act No. 107 of 1997), the Housing Code (2009) as well as the Comprehensive Plan for the Creation of Sustainable Human Settlements (March 2000). Various other policy prescripts that deal with human settlements were also consulted. The HSSP has been developed to enable the municipality to strategically plan housing development within its area of jurisdiction. It also serves to ensure a strategic approach to housing that ultimately leads to a spatial rationale and sustainable housing development.
Project: Year: Location: Client: Activities Performed	KZN Film Research on Markets and Film Festivals 2023 KwaZulu Natal KZN Film Urban Econ was commissioned by KZN Film to conduct a study on the return on investment of film festivals and markets for the period 2014-2021. Using both Primary and secondary research, the return on investment was determined and a monitoring and evaluation tool was developed for KZN Film to keep records of their planned and actual performance and costs.
Project: Year: Location: Client: Activities Performed	uMkhomazi Water Project Phase 1 Cost Benefit Analysis 2022 Kwa-Zulu Natal TCTA A comprehensive Cost Benefit Analysis to the satisfaction of the requirements of the BFI. The study involved a comprehensive socio-economic Cost Benefit Analysis to ascertain the economic viability of the uMkhomazi Water Project. The analysis involved various economic modelling techniques including Economic Impact Assessment, Affordability Analysis and Sensitivity analysis to determine the net social welfare effect on society especially indigent households in the uMgeni Water Supply area.
Project: Year: Location: Client: Activities Performed	SASA Comprehensive Small-scale Sugarcane Growers Survey 2022 Kwa-Zulu Natal & Mpumalanga SASA

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	A comprehensive survey and baseline research of the small-scale sugarcane growers in KZN and Mpumalanga. Robust data collection on the challenges affecting small scale sugar growers to further the development of the Small-Scale Grower Master Plan.
Project: Year: Location: Client: Activities Performed	Economic Assessment of the Impact of Transnet's delays on PX Warehouse 2022 Durban, Kwa-Zulu Natal Newlyn Investments (PTY) LTD Objectively determine the business, economic and other socioeconomic impacts that the Newlyn Group, stakeholders and society suffered due to the delays caused by the actions of Transnet during 2021 on the development and commissioning of elements of the PX Warehouse facility. Used economic modelling and various financial accounting techniques
Project: Year: Location: Client: Activities Performed	Etham College Market Feasibility Study 2021 Hilton, Kwa-Zulu Natal EDINVEST Conducted a market analysis, market feasibility study and design for the proposed relocation of Etham College High School, a private school to be relocated in Hilton Pietermaritzburg from Nottingham Road in KZN. Applied various demand modelling techniques to determine demand and feasibility of the proposed school development.
Project: Year: Location: Client: Activities Performed	KZN Provincial Small-Town Socio-Economic Revitalization Strategy 2020 Durban, Kwa-Zulu Natal KZN COGTA Developed a detailed strategy to give guidance to the recovery and revitalization of small towns in KZN focusing on both social and economic opportunities needed to revive them. The drafting of the strategy included developing an extensive situational analysis using primary and secondary research, stakeholder engagements, on site data collection and scenario testing to guide strategy development.
Project: Year: Location: Client: Activities Performed	uShaka Marine World Socioeconomic Impact Assessment 2020 Durban, Kwa-Zulu Natal uShaka Marine World Quantified the socio-economic impact of uShaka Marine World as part of its annual reporting to eThekweni Municipality. The assessment employed economic impact modelling using Input Output modelling and other data analysis techniques to quantify the social and economic impacts of uShaka on the broader eThekweni economy.
Project: Year: Location: Client: Activities Performed	Windsor Park Golf Course Redevelopment Market Feasibility Study 2020 Durban, Kwa-Zulu Natal Acqumen Pty Ltd Developed a high-level market feasibility assessment for the proposed development through market assessment of existing trends and opportunities; assessment of the feasibility of the development capturing the required supporting markets by testing the development concept through demand modelling techniques.
Project: Year: Location: Client: Activities Performed	KZN Provincial Spatial Development Framework 2020 Durban, Kwa-Zulu Natal KZN COGTA Developed a detailed social and economic profile for the KZN province as part of the Provincial Spatial Development Framework through extensive data collection and applying various data analysis methods and GIS mapping to develop the profile.
Project: Year:	Kanzakana Shopping Centre Feasibility Study 2019

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Location: Client: Activities Performed	Kanzakana, Kwa-Zulu Natal Sibusiso Mncube Conducted a feasibility scoping for a proposed Kanzakana Shopping Centre. Developed a high-level market feasibility assessment for the proposed development through market assessment of existing trends and opportunities; assessment of the feasibility of the development capturing the required supporting markets by testing the development concept through demand modelling.
Project: Year: Location: Client: Activities Performed	eMondlo Commercial Centre Feasibility Study 2019 eMondlo, Kwa-Zulu Natal Ntokozo Kunene Developed a market feasibility assessment in terms of spatial and market catchment analysis; demographic and socio-economic profiling of the market catchment area; market segmentation; competitor supply analysis and potential Socio-Economic Impact assessment for a proposed commercial centre in eMondlo, KwaZulu Natal.
Project: Year: Location: Client: Activities Performed:	SAS Panamax Floating Dock Market Feasibility Study 2019 Durban, KwaZulu-Natal Southern African Shipyards (SAS) Compiled a comprehensively researched and analysed bankable feasibility study that reflects the commercial feasibility of a floating dock in the Durban Harbor to service Panamax vessels.

References:

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