



# TOWARDS GAMAGARA - TSANTSABANE REGIONAL ECONOMIC TRANSFORMATION

December 2025

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# 1. INTRODUCTION: COLLABORATION IN THE GAMAGARA - TSANTSABANE REGION

## 1.1 A REGION AT A TURNING POINT

The Gamagara-Tsantsabane region stands at a decisive moment in its development trajectory. Long recognised for its contribution to South Africa's mining economy, the region is now facing profound structural change – driven by expected mine closures, shifts in global commodity markets, and the parallel emergence of new opportunities in renewable energy, green industry, logistics, agriculture and tourism.

Responding to this moment requires more than individual projects or isolated investments. It requires a shared understanding of the region's challenges and opportunities, informed by evidence, shaped through inclusive planning processes, and advanced through collaboration across government, industry, communities and civil society.

This brochure provides an introduction to an emerging **regional vision and strategic pathway** for economic transition, diversification and post-mining resilience in the Gamagara-Tsantsabane region. The material presented here draws directly from ongoing **local statutory planning processes**, including the Spatial Development Frameworks (SDFs) and Local Economic Development (LED)

strategies of the two municipalities, as well as regional-scale analysis, scenario modelling and collaborative engagements undertaken with support from the Municipal Capability and Partnership Programme (MCPP).

Importantly, this is not a final plan, nor a closed proposition. It reflects work that is still **in formation**, being tested, refined and strengthened through Council processes, public participation, sector engagement and intergovernmental collaboration. The intent of this brochure is therefore not to prescribe outcomes, but to **create a shared point of reference** – one that helps stakeholders understand the direction of travel, the scale of opportunity, and the importance of coordinated action.

By articulating a coherent regional narrative – grounded in evidence and local planning, yet open to innovation and partnership – the brochure seeks to:

- raise awareness of the region's development context and urgency;
- signal emerging opportunities for investment and collaboration; and
- invite a broad range of role players to engage in shaping a resilient and inclusive regional future.

### Gamagara-Tsantsabane Compact Workshop



## 1.2 ECONOMIC IMPACTS OF MINE-CLOSURE

The region faces pressing developmental challenges and the unprecedented threat of multiple mine closures in the coming two decades, the likes of which have never been experienced before. Should the region not proactively and urgently begin to invest in a post mining future for the region the impact is likely to be catastrophic for the families and local businesses.

### GAMAGARA LOCAL MUNICIPALITY MINE CLOSURES

Job losses	26 359
Labour income losses	-R 6 081 million
Economic contraction	-R 20 163 million

- The Sishen iron ore mine, one of the largest in the world, may reach end-of-life by 2040.
- The Assmang Khumani iron ore mine will likely keep producing until 2048.

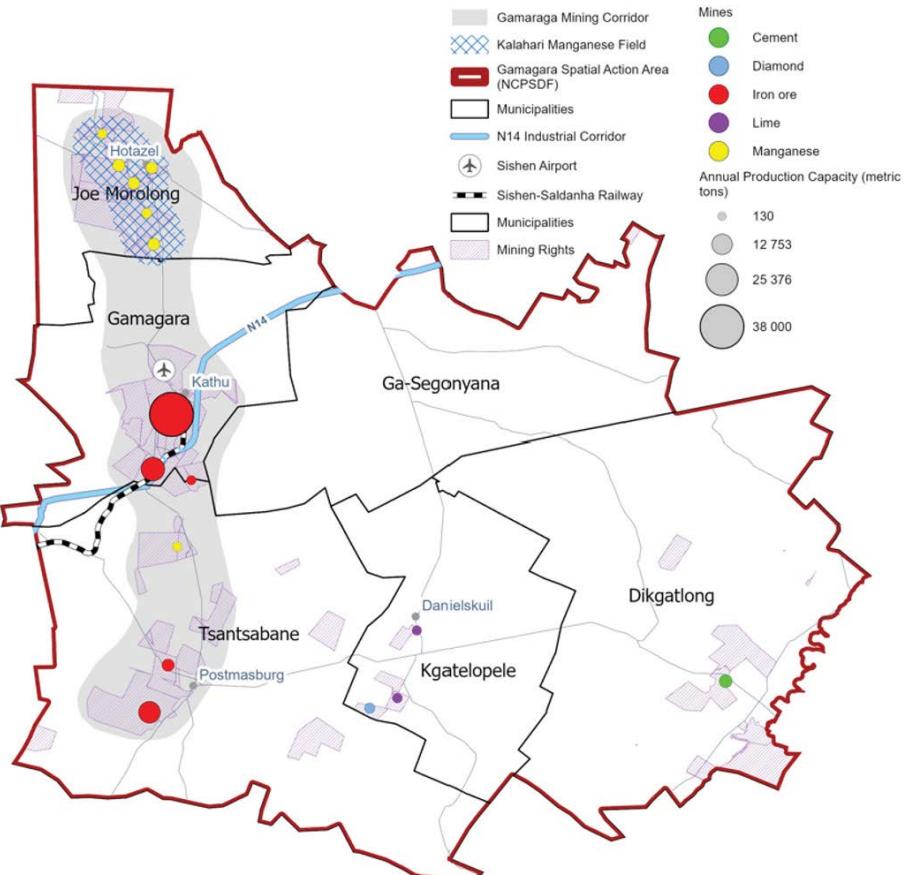
### TSANTSABANE LOCAL MUNICIPALITY MINE CLOSURES

Job losses	11 834
Labour income losses	-R 2 388 million
Economic contraction	-R 8 071 million

- The large iron ore mines will likely reach end-of-life by 2040 (Kolomela).
- Beeshoek closed in 2025.

### JOE MOROLONG & KGATELOPELE LOCAL MUNICIPALITIES MINE CLOSURES

- Joe Morolong: Sebilo Resources, Perth Mine may reach end of life by 2033, Kudumane Manganese Resources, Hotazel by 2034, Kudumane Manganses Resources, York Mine by 2034.
- Kgatelopele: Petra Diamonds Finch Mine, may reach end of life by 2040.



### Northern Cape Economic Impacts of Mine Closures

Job losses	38 193
Labour income losses	-R 9 022 million
Economic contraction	-R 28 234 million



### National Economic Impacts of Mine Closures

Job losses	90 730
Labour income losses	-R 29 479 million
Economic contraction	-R 48 963 million



## 1.3 COLLABORATIVE ACTION

To achieve the desired results no one organisation or sector can 'go it alone'. This level of ambition requires collaborative planning and implementation at regional scale and across spatial jurisdictions. A compact was established in 2023 to bring relevant stakeholders from government and industry together to transform fragmented efforts into coordinated, sustained partnerships - allowing critical regional actors to "get things done together" in ways none could achieve alone.

The compact is spearheaded by the Gamagara and Tsantsabane Municipalities, and the Office of the Premier Northern Cape.

The Compact is complimentary to all other existing multi-stakeholder engagement forums. It does not seek to replace any other developmental process or forum and is endorsed by an increasing number of participating organizations.

The Gamagara-Tsantsabane Regional Compact is beneficial for a number of reasons:

- It focuses squarely on the post-mining future
- It enables a functional regional view that cuts across multiple spatial jurisdictions
- It adopts a long-term developmental horizon
- It provides a platform for the relevant regional stakeholders to collaborate

To date the Compact has proven valuable in creating the platform for detailed scenario modelling along with integrated regional economic transition thinking to unfold, in a way that enables a prosperous future for the region.



## Scenario 1 Summary: From Mining Shovels to Mining Ashes and Dust in the Wind

Tsantsabane and Gamagara host large iron ore mines, which form the backbone of their economies and those of neighboring municipalities. Most of these mines are expected to reach the end of their operational life between 2030 and 2040.

Alongside the effects of climate change and deteriorating municipal infrastructure and finances, this situation is likely to lead to a perfect storm. As a result, the region could face significant economic collapse, major employment and labor income losses, failing municipal finances, and various social issues.

### Mine closures

Economic collapse with sharply declining GVA, job losses and labour income losses, depopulation/out-migration with associated social disruptions



### Deteriorating municipal infrastructure

Municipal infrastructure maintenance is consistently underfunded, which will likely result in significant deterioration of asset portfolios, service delivery failures, and the need for extensive capital renewal programs

### Strained municipal finances & likely reduction in grant allocations

Municipal revenues under pressure



Asset portfolios not configured to support municipal revenue capacity and financial sustainability



Difficulties in collecting municipal revenue



Unacceptably high water and electricity distribution losses



Limited borrowing capacity



Insufficient investment in growth prospects



### THE PERFECT STORM



### Climate change

Climate change will result in an increases in average temperatures, the number of very hot days and fire risks.

Climate change will likely result in heat stress, affecting human populations, ecosystems and agriculture, ecosystem changes and loss of biodiversity.

Human health will be affected, infrastructure systems stressed, and the cumulative impacts of climate change may result in economic and social disruptions.

## Scenario 2 Summary: Hope Materialised

**A resilient alternative future is possible. Key elements of the strategic framework to realise this vision include:**

1. A sustained construction boom extending to 2040, generating approximately 124 000 employment opportunities across direct, indirect, and induced activities, and translating into 64 000 sustained permanent jobs, with strong multiplier effects across the regional economy.
2. A housing delivery programme that caters to different socio-economic needs, reverses economic leakage and strengthens municipal financial capacity and dependence on mining.
3. Comprehensive approach to the development of a circular economy that:
  - supports the Northern Cape Green Hydrogen Industrialisation Strategy,
  - invests in eco-industrial infrastructure capabilities, initially strongly focussed on mining, with an emerging and later dominant focus on renewable energy and green hydrogen-related capabilities,
  - develops green construction materials production capabilities from mining wastes,
  - enables climate change adaptation and resilience,
  - creates economic opportunities for local entrepreneurs and labour force,
  - supports medium and large businesses,
  - delivers more attractive, investor-friendly human settlements and a public realm. Encourage multiple diversification opportunities.
4. Position Kathu as a boutique town for activity-based tourism and as a specialised knowledge hub for focussed training, research and development related to mining, arid technologies and circular economy technologies.
5. Postmasburg serves as the strategic anchor for renewable energy and green production development, supported by a strengthened economic function, a revitalised urban core, and a high quality, attractive living environment.



## 1.4 AN EVIDENCE-LED AND COLLABORATIVE FOUNDATION

The regional vision and strategic pathways reflected in this brochure have not emerged in isolation. They are rooted in the ongoing statutory planning and development processes of the Gamagara and Tsantsabane Local Municipalities, supported by regional-scale analysis and collaborative engagement.

Both municipalities are at different stages in the development and approval of their Spatial Development Frameworks, with associated sector engagement, political oversight and public participation processes underway. In parallel, Local Economic Development strategies are being developed and refined to give effect to these spatial directions over time. These processes have provided the formal foundation through which development priorities, investment signals and spatial choices are being debated and shaped.

Alongside these municipal processes, regional analysis and scenario modelling have been undertaken to better understand economic linkages, infrastructure constraints, mine-closure risks and diversification opportunities across municipal boundaries. This work has helped highlight the interdependence of local economies in the region, and the importance of considering development pathways at a functional regional scale.

Crucially, proposed interventions, investment intentions and sector initiatives by government and the private sector have been progressively taken into account through these processes. This has enabled the emerging regional pathway to be informed by real projects and plans, while remaining sufficiently flexible to adapt as planning processes, market conditions and stakeholder inputs evolve.

## 1.5 COLLABORATION AS AN ENABLER OF REGIONAL TRANSITION

The scale and nature of transition facing the Gamagara-Tsantsabane region require collaboration that extends beyond individual mandates and jurisdictions. In recognition of this, an informal regional Compact has emerged as a space where municipalities, industry, provincial actors and other stakeholders can engage constructively around shared challenges and opportunities.

The Compact does not replace existing governance structures or statutory processes. Rather, it complements them by providing a platform for dialogue, alignment and joint sense-making – particularly in relation to long-term risks, sequencing of interventions and opportunities for coordinated action.

Experience to date has shown that such collaborative spaces are most effective when they remain adaptive, inclusive and focused on learning. They allow stakeholders to test assumptions, explore scenarios, and build trust across sectors, while respecting the roles and responsibilities of formal institutions.

As the region continues to navigate its planning, investment and transition journey, collaboration – both formal and informal – will remain a critical enabler. Maintaining momentum will depend on the willingness of stakeholders to stay engaged, contribute resources and ideas, and align efforts in ways that strengthen local decision-making and regional resilience over time.

## 2. TOWARDS A RESILIENT REGIONAL FUTURE

### 2.1 A SPATIAL ECONOMIC VISION

#### *Building a Resilient, Green and Inclusive Regional Economy*

Gamagara and Tsantsabane together form part of a dynamic, diversified and climate-smart regional economy that delivers sustainable growth, dignified livelihoods and a high quality of life for all residents. Powered by innovation, green industrialisation and responsible resource stewardship, the region strengthens environmental resilience and long-term prosperity. Vibrant urban centres, integrated and inclusive human settlements, a high-performance logistics and industrial corridor, and distinctive cultural and nature-based tourism landscapes position the region as competitive, investable and future-ready.

**This vision captures the four elements that matter most for the region:**

1. Economic diversification away from mining through innovation, green industry and new sectors.
2. Climate-smart, resource-efficient development linked to the Green & Circular Economy.
3. A spatial form built around strong urban centres and a high-performance corridor.
4. A people-centred future—dignified livelihoods, quality of life, inclusivity, and resilience.

### 2.2 ENABLING REGIONAL TRANSITION AT SCALE

To drive a coordinated transition to a diversified, climate-smart and opportunity-rich regional economy by unlocking strategic economic clusters, strengthening the region's logistics and industrial corridor, enabling competitive enterprises and SMMEs, investing in skills and innovation, and building resilient, well-serviced towns that support dignified livelihoods for all.

### 2.3 A PATHWAY FOR REGIONAL TRANSITION

The Gamagara-Tsantsabane economic transition pathway uses regional clustering, value-chain complementarity and spatial-economic integration to drive diversification, resilience and long-term prosperity. The proposed pathway entails:

1. Position the Gamagara-Tsantsabane sub-region as the Provincial Gamagara Spatial Action Area's industrial and logistics backbone, supporting manufacturing, green industry and investment attraction.
2. Develop a renewable energy and green hydrogen production cluster that anchors green industrialisation and regional energy competitiveness.
3. Modernise industrial parks and expand logistics, warehousing and transport infrastructure to support regional supply chains and value-added production.
4. Establish a functional circular economy, enabling waste valorisation, industrial symbiosis and resource efficiency.
5. Revitalise and scale agriculture, agro-processing and bio-based industries as complementary green growth sectors.
6. Grow tourism, cultural landscapes and nature-based experiences as distinctive regional economic assets.
7. Maintain a competitive and future-fit mining sector, while leveraging mining capabilities to drive broader diversification.
8. Invest in bulk infrastructure, serviced land and integrated human settlements to support growth and inclusion.
9. Build regional skills, innovation, digital and knowledge capabilities to compete in emerging industries.
10. Create a cohesive, investment-ready business environment through strong municipal governance and a vibrant SMME ecosystem, ensuring predictable processes, local enterprise development, and coordinated regional leadership.

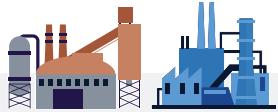
**Supporting this collective regional endeavour will require innovation-enabled collaboration, adaptive governance and long-term commitment from multiple actors.**



## 2.4 REGIONAL SPATIAL VISION

### KATHU: Regional Hub for Mining, Tourism, Retail & Industrial Development

Kathu functions as the region's primary hub for mining and renewable-energy engineering services, component manufacturing and servicing, and broader industrial development. The town is also the main commercial and hospitality centre, anchoring retail, business services, sports, education and events tourism. In addition, Kathu offers an attractive, high-quality urban environment with diverse housing options, rich amenities and strong lifestyle opportunities – supporting a liveable, competitive and vibrant regional centre.



#### Mining & Mineral Regional Hub

For a **modern, competitive and low-carbon mining economy** that drives beneficiation, engineering innovation and broader economic diversification.



#### POSTMASBURG: Renewable Energy & Green Production Development Anchor

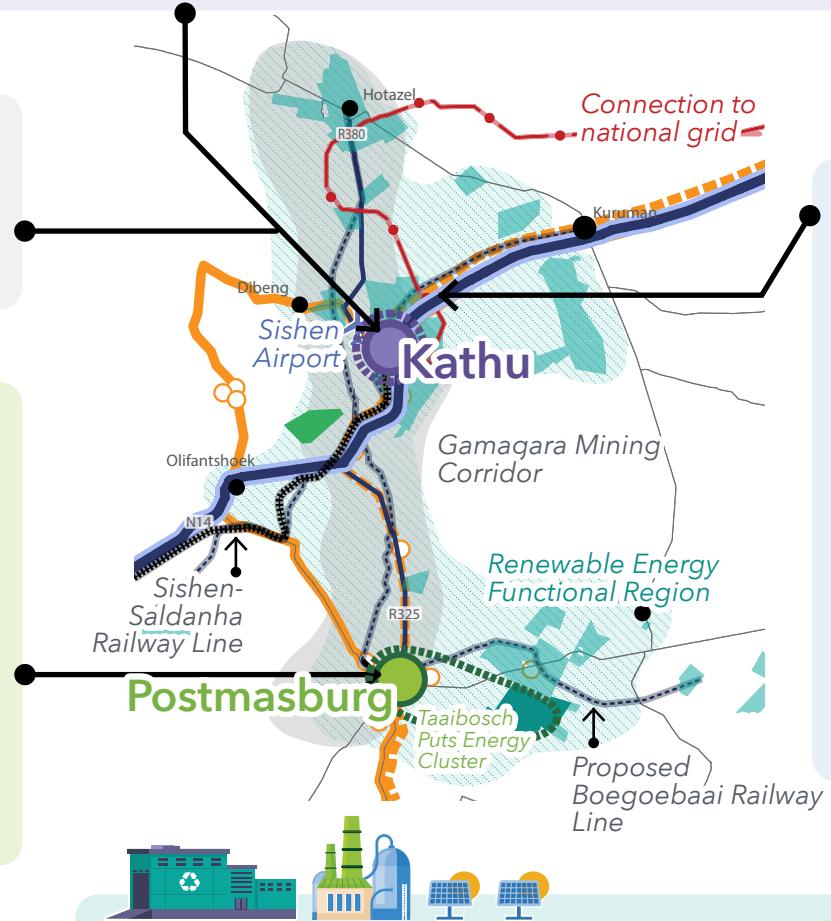
A regenerated Postmasburg emerges as the region's primary hub for bulk freight logistics and the expanding renewable energy and green hydrogen economy.

Tsantsabane will be home to the region's flagship green-industrial complex at the Taibosch Puts Energy Cluster, comprising large-scale solar, wind and hydrogen facilities that anchor new investment and industrial activity. Targeted urban renewal strengthens Postmasburg's commercial core—unlocking stronger retail performance while supporting expanded residential development and an emerging manufacturing base.



#### Agriculture, Food Security and Agro-Processing

The sub-region is developing a **coordinated, multi-layered agricultural system** that integrates community-level food security initiatives with scalable arid-zone farming and a growing agro-processing economy.



#### Green & Circular Economy

The sub-region is advancing a **resilient green and circular economy anchored in large-scale renewable energy generation and industrial symbiosis across mining, manufacturing and agriculture**. Emerging circular value chains—ranging from biomass utilisation and waste-to-energy to materials recovery and water reuse—reduce ecological pressure while creating new enterprise and job opportunities. Together, these systems position Gamagara and Tsantsabane as a leading low-carbon production zone, driving resource efficiency, industrial innovation, and long-term climate-smart competitiveness.

## 2.5 KEY ECONOMIC FOCUS SECTORS

Eminating from the Tsantsabane and Gamagara Local Spatial-Economic Development Strategy studies, processes and frameworks, the following Key Economic Focus Sectors will drive the region's long-term economic vision and transition to a diversified, resilient green economy:

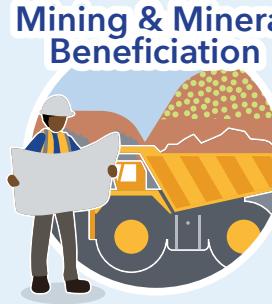
### KEY ECONOMIC FOCUS SECTORS



Position the region as a leading producer of renewable energy, green hydrogen and value-added materials by scaling solar and wind generation, and expanding circular-economy value chains, and advancing green manufacturing anchored in the Taaibosch Puts Energy Cluster.



Develop world-class eco-industrial zones and efficient transport corridors that drive competitive manufacturing and support mining, renewable energy, agriculture and regional logistics.



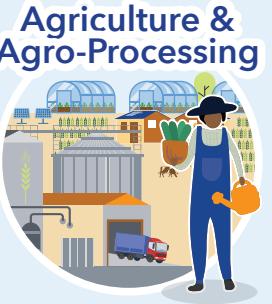
Strengthen the Kathu's role as a modern, low-carbon mining regional hub by expanding local beneficiation, decarbonising the industrial support base and value chains, and building thriving, inclusive communities that attract and retain top talent in mining towns.



Position Kathu as the regional retail hub of choice and the primary wholesale and distribution centre for the sub-region, while enabling Postmasburg to fully meet daily retail needs through urban renewal and precinct development.



Build a vibrant, year-round tourism system by expanding events-based, sports, education and activity-based tourism, strengthening regional partnerships, and enhancing visitor experiences rooted in the region's landscapes, culture and innovation.



Develop a multi-layered, climate-smart agricultural system by scaling arid-zone production, expanding agro-processing capacity, and strengthening food security through coordinated farmer support units and emerging biomass and livestock value chains.

## 2.5.1 GREEN, CIRCULAR ECONOMY

### VISION:

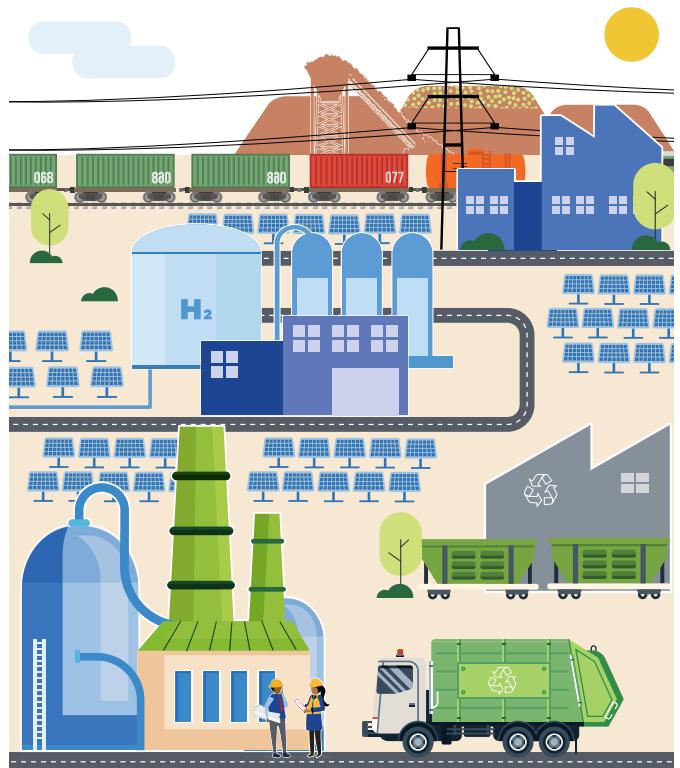
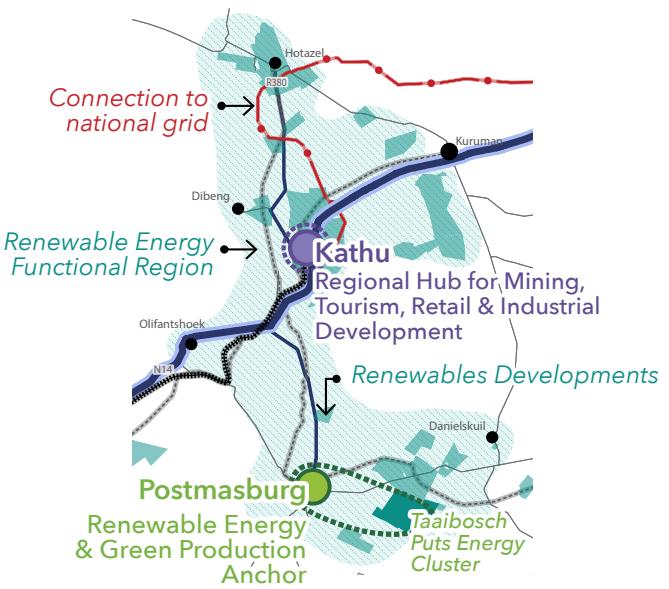
By 2035, the region is recognised as a leading centre for renewable-energy production, green hydrogen readiness, and circular-economy innovation – where solar, wind, materials recovery and green manufacturing form an integrated low-carbon industrial ecosystem. The Taibosch Puts Energy Cluster anchors large-scale renewable generation and energy-linked industry, while centralised circular-economy facilities in Kathu and Postmasburg convert waste, biomass and industrial by-products into economic value, supported by distributed feedstock stockyards across the region.

### ACHIEVED THROUGH:

-  Scaling up solar and wind energy production
-  Enabling connection to the national grid
-  Promoting hybrid micro-grids in settlement and industrial areas not fully serviced by Eskom
-  Advancing circular-economy initiatives that convert solid waste, mining waste and biomass into value-added materials
-  Facilitating green hydrogen production
-  Fostering green-industry enterprise development through incubation, training and localisation

### STRATEGIC SYNERGIES

-  **Manufacturing, Transport & Logistics:** Provides industrial platforms for green manufacturing, component refurbishment and materials recovery, supported by strong road-rail logistics along the N14, R380, R325 and regional freight corridors.
-  **Mining & Mineral Beneficiation:** Supplies recoverable waste streams and benefits from circular services such as remediation, refurbishment and materials recovery that reduce the carbon intensity of mining operations.
-  **Green & Circular Economy:** Expands markets for green products and supports cleaner, more attractive commercial precincts.
-  **Agriculture & Agro-Processing:** Generates biomass and organic feedstock (e.g., Prosopis, agricultural residues) for bio-products, biochar and circular-material inputs processed at centralised circular-economy facilities.
-  **Tourism, Sports & Events Economy:** Gains new eco- and industrial tourism opportunities through renewable-energy demonstration sites, circular-economy showcases and landscape rehabilitation linked to sustainability, innovation and environmental stewardship.
-  **Wholesale & Retail Trade:** Benefits from new green product streams, including refurbished goods, recycled materials and bio-based products, while helping develop local consumer markets for circular-economy outputs.



# GREEN, CIRCULAR ECONOMY IMPLEMENTATION PHASING FRAMEWORK



## PHASE 1: FOUNDATION AND FEEDSTOCK READINESS 2026 - 2028

- Secure land-access agreements for invasive species clearance (Prosopis, Swarthaak).
- Train and equip SMMEs for biomass clearing and conveyance.
- Establish distributed feedstock stockyards for biomass and organic waste.
- Launch biochar pilots, mini waste transfer stations and sorting facilities.
- Formalise waste picker programmes and identify sites for the R380 Reclamation Facility.
- Secure grid connections and complete Taaibosch Puts precinct planning.



## PHASE 2: CIRCULAR PROCESSING & INDUSTRIAL INTEGRATION 2027 - 2030

- Construct the R380 Solid Waste Reclamation & Materials Handling Facility.
- Establish centralised circular-processing plants in Kathu and Postmasburg (recycling, refurbishment, materials recovery).
- Expand biochar and begin constructing biomass-to-energy/product facilities.
- Develop renewable-energy demonstration centres and component repair/refurbishment hubs.
- Integrate circular value chains with mining, manufacturing and agro-processing.



## PHASE 3: INDUSTRIAL MATURITY AND EXPORT DEVELOPMENT 2029 - 2036

- Operationalise biomass-to-energy facilities with stabilised feedstock supply.
- Expand advanced circular processes (solar panel recycling, tyre recovery, mining-waste valorisation).
- Grow bio-based products (biochar, pellets, soil enhancers).
- Strengthen circular exports and link into hydrogen and low-carbon industrial value chains.

## 2.5.2 MANUFACTURING, TRANSPORT AND LOGISTICS

### VISION:

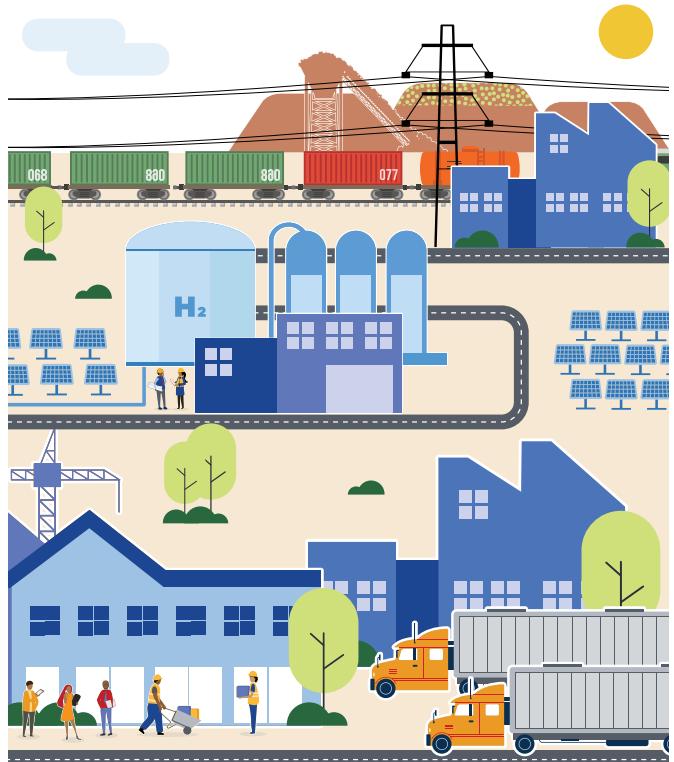
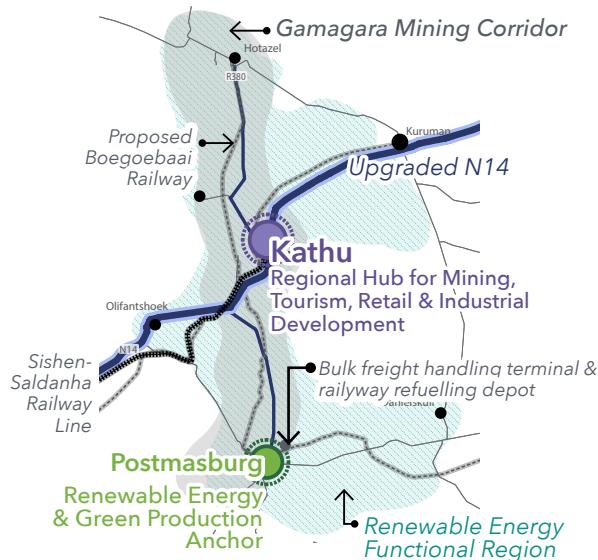
By 2035, the Gamagara-Tsantsabane Region is a smart, connected and competitive manufacturing centre anchored in Kathu and Postmasburg, supporting mining, energy and agriculture through modern, circular and low-carbon industrial systems. With Kathu as the industrial heart of the Gamagara Mining Corridor and the region's hub for warehousing, distribution and road-based logistics, and Postmasburg as the key node for bulk rail freight logistics and green manufacturing, the two towns together drive regional trade, investment and inclusive enterprise development, while contributing to the wider industrial aspirations of the Northern Cape Province.

### ACHIEVED THROUGH:

-  Developing eco-industrial parks and modern precincts
-  Strengthening N14, R380, R325 and rail corridor development
-  Expanding green and circular manufacturing capacity
-  Securing anchor tenants and off-take agreements
-  Advancing supplier development and localisation
-  Improving digital freight and rail-road integration
-  Building industrial skills and enterprise capacity

### STRATEGIC SYNERGIES

-  **Mining & Mineral Beneficiation:** Shared supplier base and logistics infrastructure underpin continuity of employment and industrial demand
-  **Green & Circular Economy:** Industrial symbiosis, waste-recovery and renewable-component manufacturing create direct operational linkages
-  **Agriculture & Agro-Processing:** Agro-logistics, cold-chain and packaging facilities anchor downstream value addition
-  **Tourism, Sports & Events Economy:** Improved corridor connectivity enhances visitor access and regional service industries



# MANUFACTURING, TRANSPORT AND LOGISTICS IMPLEMENTATION PHASING FRAMEWORK



**PHASE 1:**  
**FOUNDATION & REGULATORY  
PREPAREDNESS**  
**2025 - 2027**

Establish enabling conditions, secure infrastructure, and complete statutory planning requirements.

Complete **corridor-scale precinct planning**: R380-Kathu Corridor; N14-Kathu/Bestwood Corridor.

Undertake **eco-industrial precinct planning**, township/lay-out planning and zoning approvals for **Farm 736, Kathu Industrial Park (KIP), Bestwood, and Taaibosch Puts Energy Cluster**.

Finalise bulk infrastructure planning and early enabling upgrades for industrial sites.

Initiate **foundational skills development and supplier-readiness programmes** with TVET institutions, mines, SETAs and industry bodies.

Prepare investor engagement packages and **prospectus materials** for anchor tenants.

Complete early agreements with Transnet and Eskom for **rail-served and energy-intensive industrial users**.



**PHASE 2:**  
**FIRST INDUSTRIAL DEVELOPMENTS &  
TENANT ATTRACTION**  
**2027 - 2030**

Operationalise initial industrial nodes and secure anchor tenants, enabling true incubation and localisation:

Develop and operationalise **first eco-industrial platforms** in Kathu (Farm 736, KIP) and Postmasburg (green manufacturing).

Conduct **structured investor roadshows** and negotiate long-term tenancy agreements for manufacturing, component assembly, repair/refurbishment and logistics tenants.

Secure **anchor off-take agreements** between manufacturers, renewable energy developers, mines and agro-processing operators.

Deploy **tenant-led supplier development, enterprise incubation and partnering programmes** linked to anchor investors.

Initiate **digital freight-management systems**, e-mobility charging corridors, and first-mile logistics improvements.

Strengthen rail-based bulk freight logistics capacity with Transnet.



**PHASE 3:**  
**INDUSTRIAL INTEGRATION, AGRO-  
PROCESSING & CIRCULAR EXPANSION**  
**2030 - 2035**

Embed low-carbon manufacturing, agro-processing and circular-economy value chains across the region:

Expand renewable-energy component manufacturing, repair, remanufacturing and circular-materials processing.

Commission agro-processing platforms (nuts, meat/hide, bio-products) **based on verified feedstock build-up**.

Establish **distributed feedstock supply yards** in areas such as **Olifantshoek, Dibeng and rural nodes** to consolidate biomass, agricultural produce and industrial by-products **without occupying high-value industrial land**.

Scale circular-economy initiatives including biomass conversion, tyre recycling, industrial refurbishing and mining-waste valorisation.

Strengthen integration between agro-logistics, cold chain, and regional N14/R380 transport systems.

Align all industrial clusters with low-carbon standards, digital systems and clean technologies.



**PHASE 4:**  
**INDUSTRIAL MATURITY & REGIONAL  
CONSOLIDATION**  
**2035 - 2040**

Achieve full operational maturity, regional integration and long-term economic resilience:

Fully operational, financially sustainable **eco-industrial precincts** in Kathu, Bestwood, Postmasburg and Taaibosch Puts.

Mature manufacturing ecosystems supplying mining, renewable energy, agriculture and regional logistics networks.

Established **long-term off-take ecosystems** linking multiple sectors (mining, agriculture, hydrogen, green manufacturing).

High-performing regional logistics system integrating smart freight management, railroad intermodality and e-mobility.

Institutionalised enterprise ecosystem providing stable demand for SMMEs, co-ops and local suppliers.

Integrated monitoring and governance platform supporting continued decarbonisation, competitiveness and investment attraction.

## 2.5.3 MINING AND MINERAL BENEFICIATION

### VISION:

The region is recognised as a centre of modern, low-carbon mining excellence where inclusive, thriving communities and diversified beneficiation industries anchor long-term resilience. Gamagara functions as the primary mining and industrial-services hub, while Tsantsabane strengthens the system through bulk freight handling and rail-linked logistics that support efficient mineral flows and regional beneficiation. Together, the two municipalities drive a sustainable transition from mining dependency to a resilient, diversified regional economy.

### ACHIEVED THROUGH:



Expanding local beneficiation and supplier participation across mining and green value chains.



Decarbonising mining's support ecosystem and industrial supply chains through circular-economy services, materials recovery and eco-industrial parks.



Repurposing mine land for productive post-mining uses in agriculture, energy, tourism and industry.



Strengthening skills, partnerships and community development to build thriving, attractive towns.



Enhancing rail and road logistics to improve ore, material and component flows.

### STRATEGIC SYNERGIES



#### Mining & Mineral Beneficiation:

Growing the industrial foundation before mine closures to diversify the economic base and ensure infrastructure and enterprises remain productive into the post-mining period.



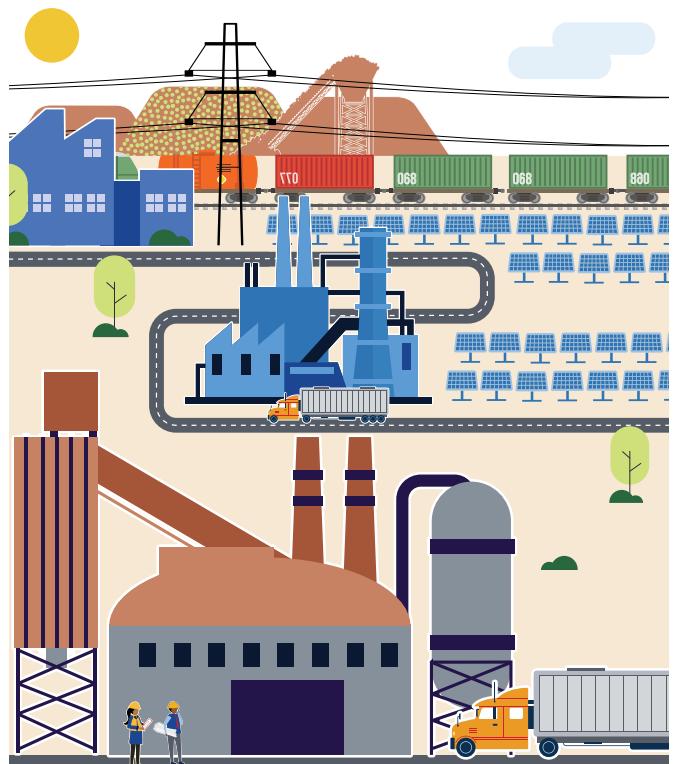
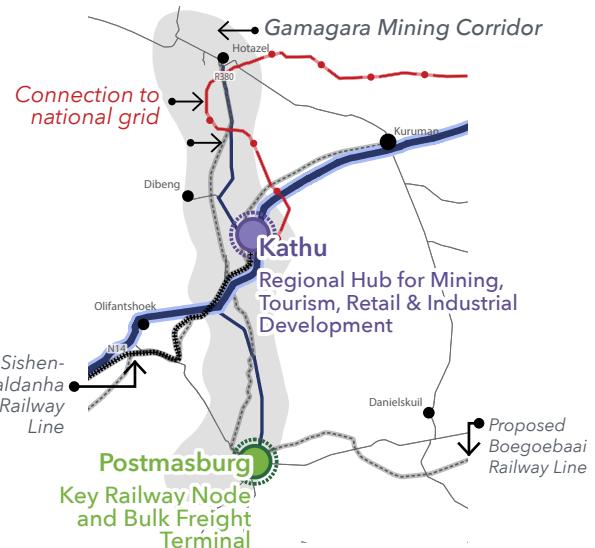
#### Green & Circular Economy:

Localise green-industrial and circular-economy services, e.g. mine-land remediation, equipment refurbishment and tyre granulation.



#### Agriculture & Agro-Processing:

Beneficiation activities and land rehabilitation supports expansion of agriculture and agro-processing.



# MINING AND MINERAL BENEFICIATION IMPLEMENTATION PHASING FRAMEWORK



## PHASE 1: FOUNDATION: LEVERAGING THE MINING WINDOW 2025 - 2030

Consolidate mining-sector stability and establish the enabling environment:

Implement and monitor the Kumba UHDMS Project, ensuring local procurement and supplier-development benefits.

Integrate mine-land-remediation priorities into the MSDF and LED Strategy.

Prepare feasibility studies for beneficiation (iron-ore smelter, green-steel pellets) and circular mining initiatives (tailings reprocessing).

Formalise data-sharing, ESG-reporting and social-closure coordination mechanisms with mining houses.

Begin renewable-energy integration through the Ferrum-Moodhoki 400 kV connection and embedded-generation pilots.

Institutionalise long-term social-closure partnerships between mining houses, municipalities and communities.

Establish skills-development partnerships (SIVOS, NCR TVET, Sol Plaatje University) focused on metallurgy, automation and green technology.



## PHASE 2: GROWTH: INDUSTRIAL CONSOLIDATION AND BENEFICIATION INTEGRATION 2030 - 2037

Accelerate beneficiation, localisation and circular-economy linkages:

Construct and commission the iron-ore smelter and/or green-steel pelletisation facility, subject to feasibility.

Expand supplier-development and SMME participation across mining and industrial parks.

Operationalise tailings-reprocessing and industrial-waste-valorisation initiatives.

Strengthen ESG and carbon-management frameworks to meet global disclosure standards.



## PHASE 3: MATURITY: TRANSITION AND REGENERATION 2037 - 2044

Manage post-mining transition and consolidate Gamagara's role as regional industrial and service hub:

Implement integrated mine-closure and land-reuse plans, guided by the MSDF and Regional Transition Framework.

Scale post-closure industries—bio-products, aggregates, renewable-energy manufacturing, tourism facilities.

Monitor environmental recovery and economic diversification through a regional dashboard aligned with the Regional Just Transition Monitoring Framework.

## 2.5.4 TOURISM, SPORTS AND EVENTS

### VISION:

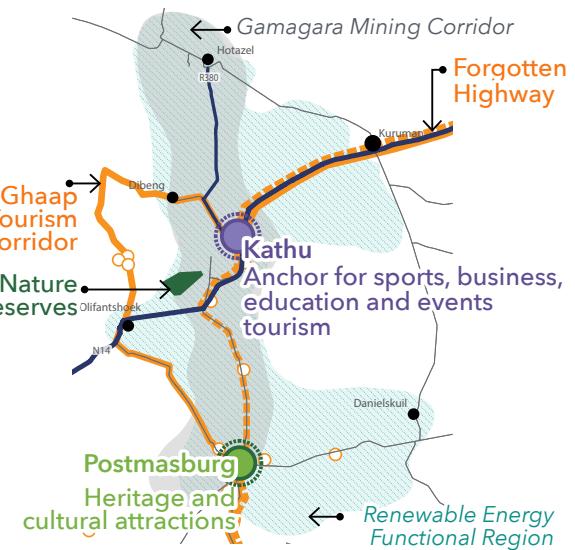
By 2035, the region is a vibrant, year-round destination that draws visitors, talent and investment through its distinctive Kalahari landscapes, rich heritage, outdoor adventure and a dynamic programme of signature events. A shared commitment to environmental stewardship and high-quality amenities strengthens community pride, while integrated routes and diverse experiences across Gamagara and Tsantsabane position the region as an active, welcoming and competitive tourism hub.

### ACHIEVED THROUGH:

-  Expanding outdoor and activity-based tourism
-  Developing signature events and sports festivals
-  Enhancing heritage and industrial tourism sites
-  Upgrading visitor facilities and urban amenities
-  Creating regional tourism routes and themes
-  Building sport-association partnerships and compliance
-  Growing community and SMME tourism enterprises

### STRATEGIC SYNERGIES

-  **Manufacturing, Transport & Logistics:** Business and industrial tourism stimulate visitor demand for local manufacturing and trade, while logistics improvements enhance destination accessibility.
-  **Mining & Mineral Beneficiation:** Mining heritage and innovation links the region's industrial legacy and its post-mining tourism future.
-  **Green & Circular Economy:** Industrial and eco-tourism promotes public understanding of renewable energy, mine rehabilitation and sustainability.
-  **Agriculture & Agro-Processing:** Training and agri-tourism initiatives links farmers and processors to local food markets and events.



# TOURISM, SPORTS AND EVENTS IMPLEMENTATION PHASING FRAMEWORK



## PHASE 1: FOUNDATIONS, EVENTS ACTIVATION & VISITOR-READY IMPROVEMENTS

2026 - 2028

- Upgrade signage, trails, gateway precincts and public spaces.
- Establish the Tourism & Events Facility.
- Formalise and strengthen tourism and sports SMMEs and community tourism groups.
- Activate the year-round events and sports calendar.
- Undertake detailed planning for multi-event rollout.
- Secure strategic partnerships and sponsorships with sporting associations, cultural institutions, hospitality partners and major regional anchors.
- Prepare mining heritage sites and secure access agreements for guided tours and visitor experiences.
- Complete concept design and planning for key sports facilities.
- Form formal partnership agreements with sporting associations.
- Launch unified destination marketing and regional tourism branding platforms.



## PHASE 2: ROUTE DEVELOPMENT, EVENTS GROWTH & FACILITY COMMISSIONING

2028 - 2032

- Establish regional tourism and sport route.
- Expand accommodation, hospitality and conferencing capacity in partnership with the private sector.
- Scale the annual signature events calendar.
- Commission new sports facilities, achieving code compliance.
- Integrate Tourism & Events Facility operations with event logistics, accreditation systems, route management and visitor servicing.
- Strengthen tourism logistics: mobility services, shuttle networks and event transport management.
- Expand mining heritage tourism, guided experiences and interpretation centres linked to Sishen and Kolomela operations.
- Grow community and SMME participation in events, outdoor activities, hospitality, food, craft and cultural experiences.



## PHASE 3: MATURITY, NATIONAL PLATFORMING & POST-MINING DESTINATION DEVELOPMENT

2032 - 2036

- Position the region as a leading Kalahari adventure, sports and events destination.
- Host major regional and national sporting events.
- Fully integrate rehabilitated mine land into outdoor tourism – including trails, adventure routes, viewing sites, eco-education experiences and nature-restoration attractions.
- Expand eco-tourism, industrial tourism and renewable-energy tourism linked to circular economy and green-energy demonstration sites.
- Consolidate multi-day visitor itineraries and structured travel packages.
- Strengthen long-term community enterprises and local supply chains supporting.
- Position the region in national adventure/sports circuits, linking to Northern Cape and Kalahari-wide tourism platforms.

## 2.5.5 WHOLESALE AND RETAIL TRADE

### VISION:

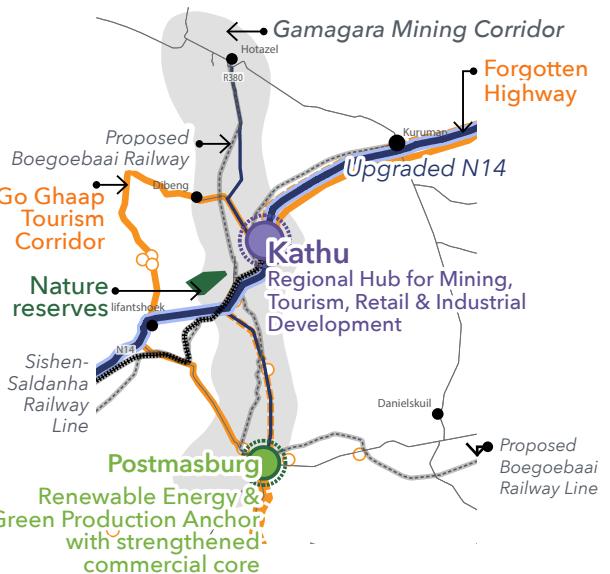
By 2035, the region has a modern, accessible and diverse retail and wholesale ecosystem that supports residents, travellers and local enterprises. Kathu is firmly established as the regional retail hub of choice and the primary wholesale and distribution node, while Postmasburg provides a vibrant daily-needs centre for surrounding communities. High-quality amenities, strong local sourcing and well-managed commercial precincts contribute to a welcoming, competitive and resilient regional economy.

### ACHIEVED THROUGH:

-  Positioning Kathu as regional retail hub
-  Strengthening Postmasburg's daily-needs retail offer
-  Upgrading precincts, public spaces and amenities
-  Expanding local sourcing and market access
-  Enhancing retail safety, management and services
-  Supporting informal traders and micro-enterprises
-  Linking retail with tourism and events

### STRATEGIC SYNERGIES

-  **Manufacturing, Transport & Logistics:** Improves supply chains, freight movement and distribution for wholesale and retail, and strengthens logistics nodes on the N14/R380/R325 corridors.
-  **Mining & Mineral Beneficiation:** Provides a stable consumer base, stimulates demand for services, and supports local procurement for goods, equipment and daily consumption.
-  **Green & Circular Economy:** Expands markets for green products and supports cleaner, more attractive commercial precincts.
-  **Agriculture & Agro-Processing:** Supplies fresh produce and processed foods to regional retailers and enables local-sourcing programmes, farmers' markets and food festivals.
-  **Tourism, Sports & Events Economy:** Increases visitor spending in retail, food, craft, outdoor gear and hospitality, supporting vibrant commercial nodes and event-linked retail activation.



# WHOLESALE AND RETAIL TRADE IMPLEMENTATION PHASING FRAMEWORK



**PHASE 1:**  
**PRECINCT PLANNING, EARLY IMPLEMENTATION & MARKET READINESS**  
**2026 - 2028**

- Prepare high-priority mixed-use commercial precinct plans.  
Postmasburg CBD Precinct Plan.
- Commence implementation of the Kathu CBD Precinct Plan.
- Support development of new retail centres in Postmasburg and Dibeng.
- Upgrade high-priority commercial areas in Kathu and Postmasburg.
- Strengthen centre management, informal trade governance and market operations across key nodes.  
Develop a local sourcing and market-linkage framework connecting retailers with agro-processors, farmers, circular-economy producers, and SMMEs.
- Improve access to commercial areas via N14, R380, R325 and municipal collector routes.
- Support township retail and community markets in Sesheng, Mapoteng and Postdene.
- Launch a Business Retention & Expansion (BRE) programme with retailers, wholesalers and logistics operators.



**PHASE 2:**  
**DISTRIBUTION CONSOLIDATION, RETAIL EXPANSION & PRECINCT IMPLEMENTATION**  
**2028 - 2032**

- Implement high-priority mixed-use precinct plans.
- Consolidate Kathu's role as the regional wholesale and distribution hub.
- Strengthen Postmasburg's role as a high-quality daily-needs centre.
- Support the construction and operationalisation of new retail centres in Postmasburg and Dibeng.
- Introduce coordinated branding and marketing for retail and commercial precincts.
- Expand local producer shelves, craft markets, food markets and seasonal commercial activations within retail centres and public spaces.
- Strengthen informal trade nodes through shelter, services, trading bays and management systems.
- Enhance commercial access through improvements to the N14, R380, R325 and municipal link roads, supporting retail-logistics integration.



**PHASE 3:**  
**REGIONAL RETAIL CONSOLIDATION & LONG-TERM COMMERCIAL SUSTAINABILITY**  
**2032 - 2036**

- Position Kathu as the Northern Cape's leading non-metropolitan retail destination.
- Expand regional distribution capacity around green products, agro-processed goods and circular-economy materials.
- Strengthen Postmasburg as a thriving, accessible, and fully serviced commercial centre.
- Consolidate multi-day visitor itineraries that link events, tourism routes and retail precincts.
- Develop long-term centre management and partnership models for commercial precincts.
- Support the evolution of township retail nodes into vibrant mixed-use neighbourhood centres.
- Expand local supply chains and enterprise development, ensuring retailers source from local agro-processors, SMMEs and green-product manufacturers.
- Build sustained regional competitiveness through investment promotion, market intelligence and collaboration.

## 2.5.6 AGRICULTURE AND AGRO-PROCESSING

### VISION:

By 2035, the region hosts a diverse, climate-smart and inclusive agricultural economy that transforms rehabilitated and under-utilised land into productive assets, builds strong agro-processing value chains, and enables communities to prosper through innovation, environmental stewardship and market access. Agriculture becomes a fully fledged economic engine supporting food security, jobs and post-mining resilience.

### ACHIEVED THROUGH:



Promoting high-value, water-efficient and regenerative production systems suited to the semi-arid environment



Developing integrated agro-processing, packaging and logistics value chains



Empowering smallholders, cooperatives, women and youth through access to land, finance, training and technology



Advancing circular-economy initiatives that convert biomass and waste into productive inputs and renewable energy



Fostering collaboration among government, industry and communities



Establishing FPSUs for training and aggregation



Converting rehabilitated mine land into productive post-mining uses

### STRATEGIC SYNERGIES

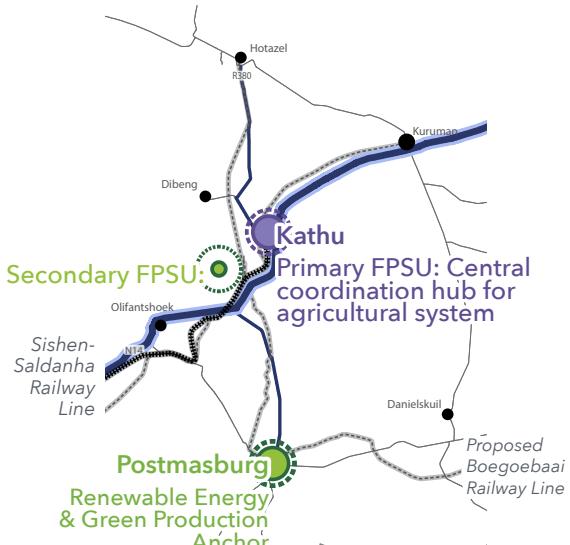
**Manufacturing, Transport & Logistics:** Supports agro-processing, packaging and cold-chain systems through logistics platforms, industrial facilities and regional transport corridors (N14, R380, R325 and rail).

**Mining & Mineral Beneficiation:** Provides rehabilitated and under-utilised land for agricultural expansion and feedstock production, while creating demand for bio-products and soil enhancers used in mine-land restoration.

**Green & Circular Economy:** Uses agricultural biomass and Prosopis residues as feedstock for biochar, bioproducts and renewable-energy inputs.

**Wholesale & Retail Trade:** Expands regional markets for fresh produce and processed goods, improving local demand and shortening supply chains for farmers and processors.

**Tourism, Sports & Events Economy:** Strengthens agri-tourism offerings (orchards, tasting events, farm experiences) and supports local sourcing for hospitality, food festivals and events tourism.



# AGRICULTURE AND AGRO-PROCESSING IMPLEMENTATION PHASING FRAMEWORK



## PHASE 1: FOUNDATION & FEEDSTOCK BUILD-UP 2026 - 2028

- Establish FPSUs for coordination, aggregation and training.
- Launch Prosopis and invasive-species clearing with SMMEs and land-access agreements.
- Develop distributed feedstock stockyards (e.g., Olifantshoek, Dibeng) for biomass consolidation.
- Initiate early agro-processing pilots (sorting, grading, drying, small-scale biochar).
- Begin rehabilitation of mine and municipal land for productive agriculture.
- Strengthen farmer training, extension services and market-readiness programmes.



## PHASE 2: AGRO-PROCESSING EXPANSION & VALUE- CHAIN INTEGRATION 2027 - 2031

- Scale climate-smart production: drought-resistant crops, orchards, horticulture and livestock systems.
- Commission medium-scale agro-processing facilities (nuts, meat/hide, bio-products) once feedstock is reliable.
- Integrate production areas with cold-chain and agro-logistics hubs.
- Expand biomass valorisation (wood chips, briquettes, biochar).
- Grow SMME participation in packaging, storage, logistics and farm services.



## PHASE 3: INDUSTRIAL MATURITY & MARKET CONSOLIDATION 2031 - 2035

- Operationalise full agro-processing platforms at Kathu Industrial Park and Farm 736.
- Strengthen export pathways for nuts, dried products, meat/hide goods and bio-products.
- Fully integrate circular-resource streams (biomass into energy or soil enhancers).
- Expand agri-tourism experiences and structured local-sourcing systems for events and hospitality.

## 2.6 CRITICAL ENABLERS

The following Critical Enablers are crucial for the successful development of the Key Economic Focus Sectors as discussed in the previous section:



### Bulk infrastructure development & protection

#### WHY THIS ENABLER MATTERS

Bulk infrastructure development and protection form the non-negotiable foundation for Gamagara and Tsantsabane's long-term economic transition. Reliable water supply, stable electricity, resilient wastewater systems and efficient bulk roads are essential prerequisites for all economic growth and diversification. Without these systems, the region's broader economic aspirations cannot be achieved.

#### HOW IT SUPPORTS ECONOMIC GROWTH & DIVERSIFICATION

Strategic investment in bulk infrastructure:

- Unlocks more than R30 billion in additional GVA and 64 000 jobs across emerging sectors.
- Enables green manufacturing, mining modernisation, agriculture, circular-economy facilities and new tourism hubs.
- Strengthens investor confidence and ensures industrial, tourism and housing precincts are viable.
- Reduces long-term service interruptions and improves the competitiveness of both towns.

#### CATALYTIC PROGRAMMES & PRIORITY ACTIONS

- Kathu-Sesheng Bulk Water Supply Scheme.
- GBIP: water, wastewater, electricity and roads upgrades.
- Postmasburg wastewater and bulk-water system upgrades.
- Precinct-based mobility improvements along N14, R380 and R325.

#### WHY THIS ENABLER MATTERS

Housing and human settlements are the foundation of a thriving, diversified post-mining economy. As the region expands into new industries, a well-located and diverse housing supply is vital to attract and retain the skilled workforce needed to grow the economy. High-quality neighbourhoods, amenities and public spaces strengthen community wellbeing and talent retention and prevent the leakage of the current R2.7 billion in household spending leaving the region each year.



### Housing & sustainable human settlements development

#### HOW IT SUPPORTS ECONOMIC GROWTH & DIVERSIFICATION

- Attracts and retains talent required for green industry, mining services, logistics and tourism.
- Boosts local retail demand and reduces economic leakage.
- Stabilises labour markets and supports employer-assisted housing.
- Improves liveability, social cohesion and investor appeal.
- Enables the densification needed to support cost-effective service delivery.

#### CATALYTIC PROGRAMMES & PRIORITY ACTIONS

- Kathu 5700 mixed-housing development.
- Sesheng and Mapoteng township regeneration.
- Mountain View and Greenfields Mixed Housing Typology Project.
- Precinct planning for new mixed-income settlement areas.
- Integration of housing with schools, transport, clinics and commercial nodes.



## Education, training, reskilling & finance

and emerging farmers can participate meaningfully in the evolving economy and supply chains.

### HOW IT SUPPORTS ECONOMIC GROWTH & DIVERSIFICATION

- Builds the technical and entrepreneurial capabilities required for green manufacturing, energy, logistics, agro-processing and circular-economy sectors
- Improves employability and reduces youth unemployment.
- Enables SMMEs and emerging enterprises to enter new markets and local procurement chains.
- Strengthens industrial competitiveness by ensuring a steady pipeline of skilled labour.
- Supports economic inclusion and broad-based participation in new growth areas.

### CATALYTIC PROGRAMMES & PRIORITY ACTIONS

- Proposed Sol Plaatjie University Campus in Postmasburg.
- Gamagara Schools Programme: strengthening foundational education, STEM exposure and career pathways.
- New Artisan TVET College: creating regional capacity for technical, mechanical, energy, and industrial skills.
- TECHTREK Gamagara - Youth Skills & Innovation Expo.
- TVET and university partnerships for industrial, renewable-energy, agro-processing and circular-economy skills.
- Transition and reskilling programmes for mine workers entering new economic sectors.
- Local enterprise finance partnerships (Small Enterprise Finance Agency, Small Enterprise Development Agency, National Empowerment Fund, banks).
- SMME capability-building for procurement readiness and technical compliance.
- Digital-skills training, artisan programmes, and incubators linked to industrial parks, FPSUs and tourism hubs.

## WHY THIS ENABLER MATTERS

A skilled workforce is essential for Gamagara and Tsantsabane's shift from a mining-dependent economy toward green industry, advanced manufacturing, logistics, agriculture, circular-economy enterprises and a year-round tourism/events economy. Without targeted skills development, reskilling and strong education pathways, the region will be unable to meet future labour-market requirements or attract high-value investment. Strengthening access to finance ensures that SMMEs, youth entrepreneurs



## Enhance municipal financial viability

## WHY THIS ENABLER MATTERS

A financially stable municipality is the single most critical enabler of economic growth and diversification. Without sustainable revenue, sound budgeting, cost recovery, and efficient financial management, the municipality cannot provide reliable services, maintain infrastructure, or support new industrial, commercial and housing developments. Strengthening municipal finances is essential to protect services during economic transition, reduce risks to investors, and ensure that the region remains functional, competitive and investment-ready.

### HOW IT SUPPORTS ECONOMIC GROWTH & DIVERSIFICATION

- Ensures reliable service delivery for businesses, households and new industries.
- Restores investor confidence and reduces the cost of doing business.
- Stabilises operations to support long-term planning and infrastructure maintenance.
- Strengthens the municipality's ability to co-fund catalytic projects and leverage external grants.
- Supports densification, housing delivery and precinct development.
- Mitigates transition-related revenue shocks as mining's footprint changes.

### CATALYTIC PROGRAMMES & PRIORITY ACTIONS

- Strengthen cost recovery, billing accuracy and revenue protection systems.
- Implement a long-term Financial Sustainability Plan aligned with the LED Strategy.
- Improve budgeting for maintenance, renewals and lifecycle asset management.
- Expand the municipal rates base through precinct development and densification.
- Advance municipal-private sector partnerships to reduce unfunded mandates.



## Spatially-enabled & economic governance, & investor-friendly environment

Without spatial governance, the region cannot diversify, cannot unlock new nodes, and cannot structure development in a way that reduces long-term service costs and strengthens liveability.

### HOW IT SUPPORTS ECONOMIC GROWTH & DIVERSIFICATION

- Directs investment to priority precincts and corridors (N14, R380, R325, rail).
- Lowers investor risk through clear, efficient land-use decisions and reduced turnaround times.
- Supports industrial development at Kathu Industrial Park (KIP)æ, Farm 736, Bestwood and Taaibosch Puts.
- Improves liveability, urban management and commercial precinct performance.
- Enables housing densification and mixed-use development around services
- Integrates mobility, logistics, services and land use for industrial and commercial competitiveness.
- Forms the foundation for sustainable, low-cost, well-functioning cities in a post-mining future.

### WHY THIS ENABLER MATTERS

A predictable, well-governed spatial environment is essential for attracting investment, reducing development risk and ensuring that catalytic projects can move from planning to implementation. Efficient land-use regulation, clear spatial priorities, corridor-based planning and strong development management give investors confidence, lower approval uncertainty and support coordinated infrastructure delivery.

### CATALYTIC PROGRAMMES & PRIORITY ACTIONS

- Implement the MSDF Spatial Proposals with clear development priorities.
- Develop and deliver high-priority precinct plans (N14-Kathu/ Bestwood, R380 Kathu/Sesheng, Postmasburg CBD, Postmasburg Industrial Precinct, Olifantshoek CBD, and Dibeng CBD).
- Review land use schemes, and improve zoning efficiency and development-application turnaround times.
- Establish coordinated urban-management systems for CBDs, mixed-use precincts and growth nodes.
- Align land-use decisions with catalytic projects (KIP, Farm 736, Bestwood, Taaibosch Puts Energy Cluster).
- Support township regeneration, walkability and safer public spaces.
- Strengthen investment-readiness through developer-contribution policies, processes and clear development charges.
- Develop an Investment Prospectus and host investment conferences to attract industrial, commercial and housing investment.
- Strengthen multi-party planning partnerships through the Compact.



## Political leadership and all-of-society collaboration

ownership, shared decision-making and sustained commitment. Without this alignment, catalytic programmes stall, planning loses credibility and investor confidence erodes. Effective collaboration is therefore the backbone of a successful, inclusive and resilient regional future.

## HOW IT SUPPORTS ECONOMIC GROWTH & DIVERSIFICATION

- Ensures clear, stable direction for investment and long-term planning.
- Strengthens governance, accountability and delivery confidence.
- Aligns planning and investment commitments across:
  - Mines' Social Labour Plans (SLPs)
  - Mines' SED/CSI programmes
  - Mine closure plans
  - Renewable energy SED investments
  - Public-sector plans and grant-funded infrastructure
- Enables coordinated execution of catalytic projects across economic sectors.
- Reduces duplication, builds trust and aligns municipal, private-sector and community priorities.
- Supports social cohesion and legitimacy in the transition to a post-mining economy.
- Empowers local leadership to champion inclusive development and ensure benefits reach communities.

## WHY THIS ENABLER MATTERS

Strong political leadership and coordinated collaboration across government, mining houses, renewable energy producers, industry, communities and civil society are essential to drive the region's economic transition. The complexity of post-mining diversification, infrastructure delivery, township regeneration, skills development and industrial activation requires collective

## CATALYTIC PROGRAMMES & PRIORITY ACTIONS

- Expand and strengthen the Mine-Municipal Compact as a platform for joint decision-making and delivery, supported by a Regional Transition Facility operated by the MCPP to provide technical support, coordination and performance oversight.
- Develop a fully integrated Regional Transition Plan, building on the Gamagara and Tsantsabane MSDFs and LED Strategies.
- Establish a Regional Transition Dashboard to track progress against key commitments.
- Create multi-stakeholder transition workstreams for infrastructure, housing, skills, SMMEs and spatial governance.
- Deepen partnerships with mining companies, IPPs, industry associations, SMMEs and civil society.
- Promote transparent communication and community engagement to build trust and shared ownership.
- Align municipal, district, provincial and private-sector investments through coordinated planning and joint prioritisation.

## 2.7 MODELLED ECONOMIC IMPACTS OF THE REGIONAL GROWTH STRATEGY

The Gamagara-Tsantsabane Regional Economic Strategy is designed as a long-term, investment-led programme to stabilise, diversify and grow the regional economy as mining activity declines and new economic sectors are developed. The strategy is integrated in nature, combining targeted economic sector growth with enabling investments—such as infrastructure development, housing provision, and the expansion of education and training capacity—that create the foundational conditions for sustained economic activity and job creation. Importantly, these enabling interventions form part of the strategy itself and also directly contribute to economic output and employment.

Based on the current portfolio of prioritised projects and programmes, the strategy is expected to deliver substantial economic benefits across both municipalities during construction and long-term operations. During the construction phase, the strategy is estimated to generate a combined R41.7 billion in Gross Value Added (GVA), support approximately 124,000 job opportunities, and create R22.9 billion in labour income across Gamagara and Tsantsabane. Once projects are operational, the strategy is expected to sustain an estimated R30.8 billion in annual GVA, support more than 64,000 permanent jobs, and generate approximately R13.1 billion in annual labour income, strengthening household incomes, local spending power and municipal revenue bases.

The economic benefits described reflect the full potential of the currently identified project portfolio. Projects within this portfolio are at different stages of development, carry varying levels of implementation confidence, and will be delivered over different timeframes. As projects progress from concept through planning, funding and implementation, economic impact estimates are refined and updated. The figures presented in this brochure therefore reflect the status of the strategy and project pipeline as at November 2025, recognising the strategy as a living, evolving programme that is continuously strengthened as new opportunities are identified and existing initiatives mature.

### Summary of the Economic Impacts:

Municipality	Construction Period Benefits			Operational Benefits		
	Construction GVA (R million)	Construction Jobs (Number)	Construction Labour Income (R million)	Operations GVA (R million)	Operations Jobs (Number)	Operations Labour Income (R million)
Gamagara	20 065.94	67 743	11 564.22	20 914.84	38 908	8 560.99
Tsantsabane	21 646.78	56 251	11 368.39	9 908.66	25 345	4 551.14
<b>Totals</b>	<b>41 712.73</b>	<b>123 994</b>	<b>22 932.61</b>	<b>30 823.50</b>	<b>64 253</b>	<b>13 112.13</b>

## 3. GET INVOLVED

### 3.1 AN INVITATION TO ENGAGE AND CO-CREATE

The transition facing the Gamagara-Tsantsabane region cannot be delivered by any single institution, sector or programme. International experience shows that regions navigating large-scale economic transition succeed when they combine **clear local vision, credible evidence, and sustained collaboration** across public, private and civic actors.

Significant groundwork has already been laid in this region. Local municipalities are advancing their statutory planning instruments through Council and public processes. Sector departments and industry partners are aligning investments and exploring new development pathways. Scenario analysis and regional modelling have helped clarify both the risks of inaction and the opportunities that coordinated effort can unlock.

At the same time, the work ahead is complex and multi-year. It requires ongoing engagement, adaptive leadership, patient capital, and spaces where ideas, evidence and interests can be aligned without constraining innovation or local accountability.

This brochure therefore serves as an **open invitation**:

- **To investors and financiers:** to explore emerging opportunity areas, engage early with local planning processes, and help shape bankable, well-sequenced investment pipelines that are grounded in place and supported by capable institutions.
- **To government at all spheres:** to continue playing an enabling and coordinating role – aligning policy, infrastructure investment and regulatory processes in support of regional resilience.
- **To industry, communities and civil society:** to remain active participants in shaping a future that balances economic opportunity with social inclusion and environmental responsibility.
- **To innovation, research and development partners:** to contribute evidence, tools and learning that strengthen decision-making and implementation over time.

Engagement can take place through both **formal planning and governance processes** – such as SDFs, LEDs, capital investment frameworks and public participation platforms – as well as through **informal collaborative spaces**, including the evolving regional Compact, where stakeholders come together to align perspectives, test ideas and build shared momentum.

The future of the Gamagara-Tsantsabane region will be shaped not by a single document or decision, but by the collective choices and commitments made over time. This brochure is a starting point for that shared journey.

### 3.2 HOW TO ENGAGE

Regional transition at scale depends on broad, voluntary and sustained engagement. Organisations and institutions are encouraged to engage in ways that align with their mandates, interests and capacity – whether by aligning existing initiatives, contributing expertise or resources, or participating in collaborative dialogue over time.

Engagement does not require prior commitments and can begin at different levels of involvement.

## 1. EXPLORE ALIGNMENT AND POTENTIAL CONTRIBUTION

A useful starting point is to consider how your organisation's existing mandates, programmes, investments or capabilities could support regional transition objectives – directly or indirectly.

Stakeholders who wish to:

- better understand the regional context and emerging strategic direction,
- explore how existing or planned initiatives could align,
- request a briefing or engagement with their institution, or
- discuss potential forms of contribution (technical, financial, institutional or convening),

are invited to initiate an exploratory engagement.

For initial briefings and exploratory engagement:

**Dr Elsona van Huyssteen (CSIR – Municipal Capability and Partnership Programme):**

[evhuyssteen@csir.co.za](mailto:evhuyssteen@csir.co.za)

## 2. STAY INFORMED AND PARTICIPATE IN ONGOING COMPACTING

The Gamagara-Tsantsabane Regional Compact is an ongoing process of collaboration – not limited to formal workshops or events. Compacting happens through continued information-sharing, relationship-building, alignment discussions and periodic collective engagements.

The Compact provides a space for government, industry, communities and knowledge partners to stay informed, test ideas, share perspectives and contribute to coordinated regional thinking and action over time. Participation can range from receiving updates and engaging in dialogue, to more active involvement as interests and opportunities evolve.

For information, updates and participation in the Compact process:

**Somila Rozani (Compact facilitation and coordination):**

[srozani@csir.co.za](mailto:srozani@csir.co.za)

## 3. CONTRIBUTE AS AN INDUSTRY PARTNER

Industry actors are encouraged to engage beyond individual projects by contributing to collective regional work. This may include aligning existing initiatives, sharing insights, supporting municipal capability, or participating in joint problem-solving around regional challenges and opportunities.

This form of engagement focuses on active contribution to regional collaboration, rather than investment approvals or project negotiations.

For engagement as an industry partner contributing to regional collaboration:

**Musa Jack (Industry Lead - Municipal Capability and Partnership Programme, Anglo American):**

[musa.jack@angloamerican.com](mailto:musa.jack@angloamerican.com)

## 4. ENGAGE THROUGH MUNICIPAL PLANNING AND DEVELOPMENT PROCESSES

The Gamagara and Tsantsabane Local Municipalities are the custodians of local development priorities and statutory planning processes. Stakeholders are encouraged to engage through Spatial Development Framework (SDF) and Local Economic Development (LED) processes, including Council-led and public participation platforms.

For engagement with the municipalities:

**Gamagara Local Municipality - Municipal Manager:**

**Mr L Seetile:** [seetile@gamagara.gov.za](mailto:seetile@gamagara.gov.za)

**Tsantsabane Local Municipality - Municipal Manager:**

**Mr G Mathobela:** [mm@tsantsabane.gov.za](mailto:mm@tsantsabane.gov.za)

## 5. PROVINCIAL COORDINATION AND ALIGNMENT

Given the regional scale of transition and the involvement of multiple districts and sector departments, the Northern Cape Office of the Premier plays an important enabling and coordinating role in supporting alignment across spheres of government.

For provincial-level coordination and alignment:

**Northern Cape Office of the Premier:**

**Dr Gerrit Botha:** [gbothaotp1@gmail.com](mailto:gbothaotp1@gmail.com)

## 3.3 AN OPEN AND EVOLVING PROCESS

Regional transition is shaped over time through learning, alignment and collective action. Stakeholders may engage through one or more of the pathways above, and at different levels of intensity, as understanding deepens and opportunities evolve. Compacting is a shared journey – sustained not by events alone, but by continued commitment, dialogue and collaboration.

### Gamagara-Tsantsabane Compact Workshop

