

**THE EFFECTS OF PUBLIC PROCUREMENT PLANNING WITHIN THE HOUSING
DEPARTMENT OF THE CITY OF JOHANNESBURG:
THE CASE OF ORANGE FARM EXTENSION 10 TJOVITJO INFORMAL
SETTLEMENT**

by

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DECLARATION


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The Effects of Public Procurement Planning within the Housing Department of the City of Johannesburg Metropolitan: The Case of Orange Farm Extension 10 Tjovitjo Informal Settlement

I declare that the above proposal is my own work and that all sources I have used or quoted have been indicated and acknowledged through complete references. I further declare that I have submitted the proposal to originality checking software and that it meets the accepted standards for originality. I declare that I have not previously submitted this work, or any part of it, for examination at Unisa for another qualification or at any other higher education institution.



_____25 September 2025_____

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DATE

DEDICATION

To my cherished daughter, Kutloano Sibongumusa Nyathi, and son, Pule Sinenjabulo Nyathi:

I dedicate this work to you, as my most esteemed source of inspiration and motivation.

This thesis stands as a testament to my resilience and the exemplary influence I want to demonstrate to you each day.

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ABSTRACT

This study provides an in-depth analysis of public procurement planning within the Housing Department of the City of Johannesburg Metropolitan Municipality (COJMM), with a specific focus on the Orange Farm Extension 10, Tjovitjo Informal Settlement. This research is contextualised within the broader challenges of housing delivery, particularly in addressing significant housing backlogs while aspiring to develop quality, sustainable communities.

The study adopted a comprehensive literature review and systematic data collection methodologies to assess the current procurement processes and planning frameworks that guide housing development within the COJMM. Utilising a qualitative research approach, this study scrutinises the dynamics of public procurement planning, specifically within the context of the Orange Farm Extension 10 Tjovitjo.

The study employed purposive and snowball sampling to identify key respondents, including officials from the COJMM Housing Department and representatives of local NGOs and NPOs. The literature examined in this study comprises relevant government policies, housing and procurement legislation, and additional insights from both national and international perspectives, presenting a well-rounded view of the complexities associated with procurement planning in housing development.

Key issues addressed in this research encompass the interaction between local municipalities and provincial authorities in housing projects, the critical role of community involvement, and the benefits derived from effective procurement planning for both project implementation and construction management. The study further identifies several challenges confronting the Housing Department in its procurement processes, including knowledge deficits among procurement practitioners, inadequate planning procedures, instances of regulatory non-compliance, and a pressing need for capacity building.

The findings underscored the importance of enhanced planning, management, and design practices, highlighting strategic interventions aimed at overcoming identified procurement challenges.

These recommendations aim not only to improve housing delivery but also to strengthen sustainable socio-economic development. The research emphasises the urgent need to integrate socio-economic policies to promote a more coordinated approach to procurement planning. The findings are particularly relevant for the City of Johannesburg Metropolitan Municipality's (COJMM) Housing Department, providing direction on refining procurement processes to secure more effective housing delivery outcomes.

A digital solution is proposed, which is a mobile platform inspired by research findings. This platform would connect residents with local service providers in real-time, empowering local tradespeople who are often excluded from formal tender processes, while enabling the municipality to implement a transparent, community-driven micro-procurement system. By directly addressing the procurement planning issues identified, this innovation enhances efficiency and encourages inclusive local economic development. The study recommends scaling up the proposed platform to a macro level, allowing the government to utilise it as a strategic tool for procurement planning across wider service delivery contexts.

Keywords: Housing development, sustainable housing, housing planning, procurement challenges, procurement planning, community participation, South African housing policies.

LIST OF ABBREVIATIONS AND ACRONYMS

AGSA	Auditor-General of South Africa
B-BBEE Empowerment	Broad-Based Black Economic
BNG	Breaking New Ground (Housing Strategy)
CIDB Act Act, 2000 (Act No. 38 of 2000)	Construction Industry Development Board
CFO	Chief Financial Officer
CCOSA	Competition Commission of South Africa
COTMM	City of Tshwane Metropolitan Municipality
COJMM Municipality	City of Johannesburg Metropolitan
SCM Policy	Supply Chain Management Policy
CPO	Chief Procurement Officer
CSDB	Central Supplier Database
DoRA	Division of Revenue Act (Annual)
GHCC	Gauteng Housing Crisis Committee
IDP	Integrated Development Planning
LAPA Act 2000 (Act No. 45 of 2000)	Landscape Architectural Profession Act,
LGSETA Training Authority	Local Government Sector Education and
MFMA (Act No. 56 of 2003)	Municipal Finance Management Act, 2003
Municipal Systems Act 2000)	Municipal Systems Act, 2000 (Act No. 32 of
NGO	Non-Governmental Organisation
NPO	Non-Profit Organisation
NPM	New Public Management
PAJA 2000 (Act No. 3 of 2000)	Promotion of Administrative Justice Act,
PAT	Principal-Agent Theory

PCMP Act	Project and Construction Management
Professions Act, 2000 (Act No. 48 of 2000)	
PFMA	Public Finance Management Act, 1999 (Act
No. 1 of 1999)	
PMAY	Pradhan Mantri Awas Yojana (India's
Housing for All Programme)	
PPRA	Property Practitioners Regulatory Authority
PPPFA	Preferential Procurement Policy Framework
Act, 2000 (Act No. 5 of 2000)	
RDP	Reconstruction and Development
Programme (Housing)	
WTO	World Trade Organization

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CHAPTER 1: GENERAL INTRODUCTION OF THE STUDY

1.1 INTRODUCTION

Procurement planning is essential for both government entities and private organisations. By utilising strategic procurement planning, governments can attain superior value for their investments by prioritising overall cost-effectiveness over simply selecting the cheapest option. Moreover, public procurement planning is defined as a detailed proposal for purchasing goods and services from various providers to ensure successful service delivery to the community (Khan, 2018:1). Section 217(1) of the Constitution of the Republic of South Africa (No. 108 of 1996) clarifies the need for good procurement planning and states that when spheres of government, or any other institution identified in national legislation, contracts for goods or services, it must do so following a system which is fair, equitable, transparent, competitive and cost-effective (Constitution, 1996). In support of the constitution, Mngomezulu (2021:181) points out that understanding the effects of poor procurement planning and developing strategies to improve it would enable municipalities to deliver services effectively. The Smart Procurement Report (2020:3) finds that difficulties regarding local government public procurement planning, for example, non-compliance with procurement and related legislation and policies, potentially lead to ineffective service delivery. An example is the significant backlog in affordable housing provision, leading to the proliferation of informal settlements in areas that lack basic infrastructure and services. In turn, this leads to social discontent, fuelled by the ongoing absence of essential services, which can lead to protests that may escalate into violence, resulting in economic disruption and putting a strain on community relations.

The study investigates public procurement planning for the Orange Farm Extension 10, Tjovitjo Informal Settlement by the COJMM. This report provides the background to the study, problem statement, research questions and objectives, and clarifies the key terms; thereafter follows the preliminary literature review, legislative imperative, research methodology and ethical implications; lastly, the report discusses the limitations and delimitations and significance of the study, and provides a chapter overview of the thesis.

1.2 BACKGROUND OF THE STUDY

The City of Johannesburg Metropolitan Municipality (COJMM) serves as the broader institutional demarcation for this research, within which this study is situated. The empirical scope is explicitly delimited to Region G and, more precisely, the Orange Farm Extension 10 Tjovitjo Informal Settlement. Although procurement planning occurs at the municipal level, the study's analysis will focus on this specific informal settlement, enabling an in-depth exploration of its distinct circumstances. By centering the study on this community, the aim is to gain insights into procurement planning practices within the municipality while minimising interferences from other regions. The strategic positioning of this community on the periphery of the metropolitan area presents persistent challenges in accessing essential services, notably in the government's management of national housing programs (Mazibuko, 2017:18).

According to a parliamentary report (2023), the land designated for residential and subsidised housing in and around Orange Farm is frequently encroached upon due to the ongoing growth of informal settlements. In collaboration with the private sector, the COJMM implemented several improvement projects. These initiatives comprised permanent housing units in the designated area, affordable housing options and on-site government offices, such as the Department of Human Settlements. Moreover, the 2022–2027 Draft Integrated Development Plan (IDP) for the COJMM contains a planned deliverable for the 2022/23 financial year to issue 300 title deeds in Orange Farm (City of Johannesburg, 2021).

The Southern region of Johannesburg, including Tjovitjo, may have been constructed on dolomite, which can dissolve and pose the risk of sinkholes. Constructing on dolomite is feasible under specific conditions, but often requires technical studies, causing delays in the establishment of townships. In Tjovitjo, with a population exceeding 4,500, residents are advocating for housing developments, municipal services, and infrastructure. However, the presence of dolomite means that geotechnical studies and subsequent development could be delayed for years (Parliament, 2023).

According to the parliamentary report by the Department of Public Works (Parliament, 2023), procuring building permission on dolomite indicates that a verified track record

of grouting subsurface cavities in dolomitic areas would be the only areas considered. Tenderers must provide comprehensive details of previous subsurface grouting experience in dolomitic areas and specify all previous experience, specifically mentioning previous projects, geological surveys, and individual consultants. This process necessitates extensive identification and consolidation of requirements and establishing the timelines for the procurement, which are crucial to ensure the availability of the necessary items when required. Therefore, a well-crafted procurement plan would outline the process of identifying and choosing suppliers, contractors, and consultants for this massive project to take place.

1.3 PROBLEM STATEMENT

South Africa is currently grappling with substantial challenges in providing adequate housing for its populace. Many communities are experiencing significant delays in accessing national housing initiatives. A pivotal factor contributing to these delays has been identified as ineffective procurement planning, which directly impacts the timely execution of housing projects by the Department of Housing at the City of Johannesburg Metropolitan Municipality (COJMM). The situation is exacerbated by a lack of alignment with existing public procurement legislation and the deployment of inappropriate methods and procedures during the design and planning phases. This mismanagement particularly affects the delivery of essential housing infrastructure, as seen in areas like Orange Farm Extension 10, Tjovitjo.

The consequences of these challenges include prolonged project timelines, budget overruns, and an inability to meet the specific needs of communities (Dorasamy & Fagbadebo, 2021). Despite ongoing national efforts to streamline housing delivery, inadequate procurement planning continues to impede the efficacy of housing programmes. Therefore, understanding the influence of procurement processes on housing delivery is imperative to enhance project outcomes and ensure that government resources effectively address the pressing housing demand in affected communities.

The appropriate legislation to address these challenges includes the following:

a) The Housing Act (1997)

This legislation outlines the primary national and provincial duties and designates a function to accredited municipalities. Accredited municipalities ensure that residents within their areas have access to suitable housing within the framework of national policy and provincial guidelines. They allocate, plan, and oversee land for housing and development per the housing priorities specified in their IDPs. In April 2002, the Department of Housing introduced a new housing development process that complies with the statutory requirements for the procurement of goods and services by state entities. Reflecting the role of municipalities as defined in the Housing Act, the new procurement-compliant housing delivery process places the responsibility for housing development on municipalities. Once officially accredited, municipalities have the authority to manage any national housing programme in their jurisdiction.

b) Construction Industry Development Board Act 38 of 2000

The Board is tasked with promoting and executing policies, programmes, and initiatives, including those focused on procurement reform, standardisation, and consistency in procurement paperwork, practices, and processes in line with the government's procurement policy.

This study is based on the observation that procurement planning at the local sphere of government is a necessity for research, and the research findings concerning the procurement legislature should be used by communities like Orange Farm (Wessels *et al.*, 2021: 270).

Other procurement processes causing delays in housing delivery:

a) Public notice

The case studies show that community conflicts arise due to a lack of information to alert citizens about governmental or government-related activities that might prompt citizens to take action, thereby significantly hindering housing provision. Emphasising community participation is crucial in housing delivery. Collaborative planning, design, coordination, and evaluation involving providers, beneficiaries, and the community is the most effective approach to addressing the complexities of housing projects. Collaboration leads to services that better meet locally identified needs. Increased involvement of beneficiaries and the community in housing projects is key because participation in decision-making processes is mutually beneficial.

b) Awarding the contract

The approved housing project has to be contractually committed. Therefore, a written agreement must exist between the municipality and the contractor. Approved projects that have been contractually committed but have only progressed to the planning stages are cancelled and regenerated afresh, thus causing delays.

1.4 RESEARCH QUESTIONS

The research questions set out below were developed to investigate the analysis of procurement planning:

- 1.4.1 What legislative requirements regarding public procurement planning affect the efficacy of administering national housing programmes at Orange Farm?
- 1.4.2 What is the economic impact of public procurement planning at COJMM?
- 1.4.3 How can the COJMM procurement policy be enhanced to conduct effective procurement planning in the Housing Department?
- 1.4.4 What recommendations can the study make to the COJMM for effective public procurement planning and the successful administration of national housing programmes?

1.5 RESEARCH OBJECTIVES

The research objectives in line with the research question are as follows;

- 1.5.1 To explore the legislative imperative on public procurement planning that influences the effectiveness of administering national housing programmes at Orange Farm.
- 1.5.2 To identify the economic impact of public procurement planning at COJMM.
- 1.5.3 To investigate how the COJMM procurement policy can be enhanced to conduct effective procurement planning in the Housing Department.
- 1.5.4 To make recommendations to the COJMM for effective public procurement planning and the successful administering of national housing programmes.

1.6 CLARIFICATION OF KEY CONCEPTS AND TERMS

According to Clarke *et al.* (2019:30), it is important to establish precise definitions for the key terms and concepts applied in a study. This step is crucial for preventing any

ambiguity about their meanings and ensuring a consistent understanding of the research.

1.6.1 Authority

The power attached to a certain appointment is making decisions, taking command or demanding action by others (MFMA, 2003).

1.6.2 Bid

A formal communication, per the guidelines of the City of Johannesburg, that invites tendering for the provision of goods, services, or works through a competitive bidding process (COJ SCM Policy, 2019).

1.6.3 Central Supplier Database

A database of qualified suppliers preserved by the National Treasury (National Treasury Regulations).

1.6.4 City

A metropolitan municipality duly established by Provincial Notice 6766 dated 1 October 2000, as amended, such as the City of Johannesburg Metropolitan Municipality (COJ SCM Policy, 2019).

1.6.5 City Manager

The City Manager is an official who acts as the Accounting Officer of the City as contemplated in the Act and defined in Section 54 (a) of the Municipal Systems Act (SA, 2000).

1.6.6 Delegated Authority

In terms of the Municipal Finance Management Act (MFMA, 2003), this is a responsibility delegated to authorised officials to take specific decisions.

1.6.7 Public Administration and public administration

Public Administration (capital letters) refers to the academic discipline in which public administration (lowercase), as a government activity, is studied (Wessels *et al.*, 2021)

1.6.8 Public Service

An area of government in which government activities, as outlined in Section 197 of the Constitution, public service is mandated to function under the laws of the country for promoting service delivery.

1.6.9 Public Sector

According to Shah (2018), the South African Public Sector considers the sphere of government activity in much broader terms than is described in the concept of public service above.

1.6.10 Procurement and Procurement Planning

The process of finding, purchasing, receiving, and inspecting by a government institute required to track is known as procurement. Therefore, the first phase in the process of procurement is identifying, collecting, and defining the timelines to acquire resources as and when needed, which constitutes procurement planning (Ambe, 2016).

1.6.11 Urban Poor

This refers to a designated group living in urban areas under extreme poverty (Khan, 2018).

1.7 PRELIMINARY LITERATURE REVIEW

Mhelembe and Mafini (2019:216) believe that public procurement planning by local government is integral to ensuring transparency and fairness, and providing equal opportunities for all citizens of South Africa. In addition, Lunga *et al.* (2019: 13–22) state that public procurement planning allows municipalities to decide what they buy, and when and where they get their resources, and usually benefits local people and small business enterprises (SMEs).

A study conducted by Mazibuko and Fourie (2017) indicates that housing projects in South Africa are one of the problems encountered in the country. Procurement tends to receive prominence because government officials benefit from the subsidies meant for the housing beneficiaries. Furthermore, the authors deem housing projects to be jeopardised by dubious contracts between contractors and government officials (Mazibuko & Fourie, 2017: 150).

According to the City of Johannesburg report (2021), persons living in shacks, not in backyards, live in overcrowded conditions, and those persons are noticeably younger than those in formal dwellings under the age of 35. According to Statistics South Africa, 32% of the population in the City of Johannesburg live in informal dwellings. Orange Farm Extension, 10 Tjovitjo Informal Settlement, situated in Gauteng and falling under the COJMM, serves as a case study because this area is an underdeveloped informal

settlement within the COJMM. The population of Orange Farm Extension 10, Tjovitjo, lacks essential services and experiences limited engagement between the local government at the COJMM and community members (Stats SA, 2020:15). Most of the population has limited access to essential services, primarily due to its spatial, societal, and commercial disconnect from the COJMM (Orange Farm Human Rights Advice Centre, 2016).

This research is centred on the COJMM, situated in Gauteng Province, South Africa, which is recognised as the most economically influential urban centre in Africa. Therefore, procurement at the COJMM plays a crucial role in administering housing in Orange Farm Extension 10, Tjovitjo. The main issue with the COJMM housing department is the inadequate administration of houses to the urban poor (Kunene, 2021: 13–22).

The Public Finance Management Act No. 1 of 1999 (Act 1 of 1999), Municipal Finance Management Act 56 of 2003 (Act 56 of 2003), and the White Paper on Local Government issued in 1998 by the government outlined an ambitious strategy to enhance service delivery by effectively managing planning, budgeting, disbursement, procurement processes, reporting, and evaluation (Department of Cooperative Governance and Traditional Affairs, 1998).

Paragraph 217(1) of the Constitution of the Republic of South Africa (No. 108 of 1996) stipulates that the local government sphere, as outlined in national laws, must possess an efficient procurement system to deliver services effectively. Furthermore, procurement procedures are shaped by a legal framework, and a lack of such a framework would prevent government entities from making well-informed decisions regarding service delivery (Ambe, 2016: 281).

1.8 LEGISLATIVE IMPERATIVE

The Public Finance Management Act 1 of 1999, which regulates connections between local government and stakeholders at national and provincial ministries and supervises procurement processes, guides this study (Wessels *et al.*, 2021: 274). The research also bears the Municipal Finance Management Act 56 of 2003 (Act 56 of 2003) and the Constitution of South Africa in mind in determining if procurement procedures at the COJMM comply with the law.

Challender (2019) emphasises that political and economic improvements led to the South African procurement system being accorded constitutional legitimacy. This process is acknowledged as a way to remedy previous discriminatory behaviours and regulations.

Procurement planning in South Africa is governed by various legislative frameworks, as listed below:

1.8.1 Legislation in this Research

- a) Constitution of the Republic of South Africa, 1996 (Act No. 108 of 1996)
- b) Construction Industry Development Board Act, 2000 (Act No. 38 of 2000)
- c) Division of Revenue Act (Annual)
- d) Engineering Profession Act, 2000 (Act No. 46 of 2000)
- e) Landscape Architectural Profession Act, 2000 (Act No. 45 of 2000)
- f) Municipal Finance Management Act, (No. 56 of 2003)
- g) Local Government: Municipal Systems Act, 2000 (Act No. 32 Of 2000)
- h) Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000)
- i) Prevention and Combating of Corrupt Activities Act 12 of 2004
- j) Promotion of Administrative Justice Act 3 of 2000 m.
- k) Project and Construction Management Professions Act, 2000 (Act No. 48 of 2000)
- l) Public Finance Management Act, 1999 (Act No. 1 of 1999)

1.8.2 Regulations Implemented under the MFMA.

- a) The Municipal Supply Chain Management (SCM) Regulations.
- b) The Preferential Procurement Policy Framework (PPPFA) Regulations.

Accurately recording the current situation within the community is essential to investigating public procurement planning at the COJMM. The results and suggestions from this research could support the adoption of effective procurement planning, the improvement of housing administration, and the management of housing programmes and community development, ultimately contributing to COJMM progress.

1.8.3 Legal Administrative Duties

Clear guidance on the responsibilities and administrative tasks of accounting officers and the supervisory function of the council are provided by the MFMA. It establishes

the municipal council as the highest authority within the municipality and strengthens that authority by giving it significant approval and oversight powers.

The Municipal Finance Management Act (MFMA) separates the policy-making role of particular individuals from the implementation duties of municipal officials. This regulation means that councillors are prohibited from being part of a municipal bid committee or any other committee involved in evaluating or approving bids, quotations, contracts, or any other proposals. Moreover, they are not allowed to attend such meetings as observers (MFMA, 2003).

Sections 62 and 95 of the MFMA underscore the full responsibility and accountability of accounting officers for all expenditures related to SCM within their spheres of responsibility. All incurred expenses must conform to the accounting officers' requisite regulations, directives, and procedures. According to the Smart Procurement Report (2011), challenges are evident in South African public procurement practices, including non-compliance with procurement and SCM-related legislation and policies and irregularities in the planning process.

Furthermore, local government officials comprise municipal managers and their senior managers who are responsible for the administration and service delivery of the municipality. This group also encompasses the political leadership, including the mayor and council members, who oversee municipal operations and make crucial decisions. It also includes provincial leadership, consisting of the premier, members of the executive council, and heads of provincial departments that provide support to local government.

1.9 RESEARCH DESIGN AND METHODOLOGY

The upcoming section describes the research design, methodology, and data collection to ensure a systematic research process for the study.

1.9.1 Research approach and design

The study employed a qualitative research approach to investigate public procurement planning in the COJMM Housing Department, using Orange Farm Extension 10, Tjovitjo as a case study. The overall approach used to investigate the issue highlighted

in the study is determined by a research design. Methods for collecting data, such as qualitative studies, are part of the research design (Maree, 2019: 115). According to Maree and Pieterse (2019: 115), research methodology describes the theory underpinning the techniques utilised in conducting research, which allows the researcher to anticipate what research decisions and methods are appropriate to verify the final results. This study followed a case study design to explore existing public procurement planning in the COJMM, using the Orange Farm Township Extension 10, Tjovitjo as a case study.

1.9.2 Population and sampling

Maree (2019:69) states that studying a population refers to the complete set of individuals, objects, or measurements of interest. Maree (2019:65) further emphasises the importance of including all individuals from whom measurements are being taken.

Sampling refers to the method used to select a portion of a population for inclusion in a study. In this research, the sample included procurement professionals and officials from various directorates within the housing department. In addition, an NGO and an NPO representing the community were identified through purposive sampling and snowball sampling.

Purposive sampling involves selecting participants based on the researcher's judgement and predetermined criteria, in this case, the specific expertise and roles of the COJMM officials, while snowball sampling entails recruiting participants through referrals from the initial participants (Nieuwenhuis, 2019:10).

COJMM Officials dealing with procurement (8 participants)

- Regional Director's office – Subregion G (1)
- Manager of the office of Public Housing Stock Management (1)
- Supervisors at the office of The Public Housing Programme Director (2)
- Administrative staff dealing with housing procurement at the Office of Finance (2)
- Administrative staff at the Office of Business Management Support (2)

The NGO (Gauteng Housing Crisis Committee) NGO that advocates for housing in Tjovitjo Ext 10 (11 participants)

- Programme Manager and Spokesperson (1)

- Community workers in the NGO (10)

The NPO (Izandla Ziyagezana) NPO that advocates for housing and social justice in Tjovitjo Ext 10 (5 participants)

- Director and Coordinator (1)
- Officials (4)

These specific participants were chosen for their extensive knowledge of public procurement planning and the pertinent information essential for the success of the research.

1.9.3 Data Collection

To resolve research questions and reach study objectives, the method of gathering data selected for the study should ensure that sufficient information is collected to perform an analysis (Nieuwenhuis, 2019:30). I will be using a variety of data collection methods listed below for my research.

- ***Semi-Structured Interviews***

Semi-structured interviews were considered a valuable way to gain insight into the participant's perceptions, understanding and experience of public procurement planning within the COJMM, which can contribute significantly to in-depth data collection for this study. The structured interviews would assist in understanding the nature of the role of the municipality in Orange Farm in comparison to random sample surveys or a population census.

- ***Document Analysis***

The case study provided an opportunity for several documents to be scrutinised in obtaining the requisite data and its interpretation. The documents included academic research sources, such as academic books on *Google Scholar*, journal articles, government documents, and legislation.

Lastly, a variety of methods for data collection will ensure the triangulation, validity, reliability and trustworthiness of information to reduce researcher biases (Maree, 2019: 72–98).

1.9.4 Research Site

A research site refers to the place where the research takes place. Moreover, the location is under the control of the institution where the research is conducted. The research site was also selected with a view to relevance for the study of where (Maree, 2019: 20–95). In this study, the research location were the municipal offices of the COJMM Housing Department and the township of Orange Farm Extension 10, Tjovitjo. These research sites were utilised because of the possibility that solutions would emanate from there.

1.9.5 Data Analysis Strategy

The researcher employed thematic analysis for the qualitative data obtained through a semi-structured interview, and the data underwent careful examination to determine common themes for the collection of data, which can be broken down into different categories. Thereafter, the study arrived at an interpretation relevant to the investigation.

Data analysis is the reduction of a large quantity of data into manageable segments, which in qualitative data analysis involves grouping the data into different themes. This process allows the researcher to identify patterns, including the relationships between the variables (Nieuwenhuis, 2019: 19), thereby interpreting the data and drawing conclusions (Hsieh & Shannon, 2018: 21).

1.10 ETHICAL IMPLICATIONS

The researcher is expected to carry out the entire process using methods ensuring that ethical standards and values are respected in an academic study (Mouton, 2019:16). Thus, the researcher requested permission from the COJMM Housing Department to conduct the research by submitting a letter from their academic supervisor on behalf of the University of South Africa, thereby conforming to ethical principles for the protection of the employees and business of the Municipality. Furthermore, the study requested ethics approval to conduct qualitative research from the Department of Public Management and Administration Ethics Committee at the Faculty of Economic Management Science of the University of South Africa.

The researcher met with the chosen research participants and explained what the study required from them to ensure transparency. They were informed about,

attending an online workshop, and reporting on what they consider to be public procurement planning during the data collection phase. Thereafter the participants were informed about being interviewed individually online and that answering the questions would be anonymous to ensure adherence to the ethics confidentiality requirements, meaning that the responses could not be traced back to them.

The researcher emphasised the voluntary nature of participation and that they had the right to withdraw from research at any time without any risk to their autonomy. The participants were assured that they could ask questions at any time to address uncertainties or concerns. Lastly, the participants would be granted access to the results of the study, thereby ensuring the validity, reliability and trustworthiness of information provided during the interviews and questionnaires (Mouton, 2019: 18).

1.11 LIMITATIONS AND DELIMITATIONS OF THE STUDY

The study was geographically constrained by being restricted to officials directly or indirectly involved in procurement procedures within the COJMM Housing Department, excluding municipalities. A designated unit of the examination includes most participants prone to bias, as the research targeted the regional office of the Subregion G Director, Manager at the Office of Public Housing Stock Management, Supervisors at the office of the Public Housing Programme Director, Administrative staff dealing with housing procurement at the office of Finance, and administrative staff at the Office of Business Management Support.

According to Maree (2019: 68), a less general conclusion is expected from case studies, which may be a limitation of the study. Lastly, the diverse characteristics of the community representatives, such as their ethnic backgrounds and political and economic contexts, are another limitation (Moon, 2019: 69).

1.12 SIGNIFICANCE OF THE STUDY

The research might contribute to the knowledge of public procurement planning in the South African local government sector. Moreover, it could contribute to understanding public procurement planning in the COJMM, specifically in administering national housing programmes of services to the township of Orange Farm Extension 10, Tjovitjo.

The city and other municipalities are major consumers of goods and services. For this purpose, proactive metropolitan municipalities have chosen to take action planning for procurement due to physical, reputational, regulatory and financial risks associated with particular service delivery. Furthermore, to eliminate the culture of poor service delivery during their term of office, the municipal managers of the COJMM should be able to procure the goods and services needed by their community effectively. Moreover, the results of the studies could serve as a starting point for future research on procurement planning in municipalities.

The study provides explicit guidance to municipal managers in accurately understanding, assessing and implementing policies, such as the Local Government: Municipal Systems Act 32 of 2000 (Act 32 of 2000). Thus, the study might contribute to the professional training of municipal managers and communities involved in the procurement planning process.

1.13 SEQUENCE OF CHAPTERS

Chapter 1: General introduction to the study

The first chapter provided an overview of the literature review, problem statement, research questions, and objectives, explaining the research methodology, design, and data collection. Chapter 1 expounded on the clarification of concepts to be utilised in the study, the significance, research scope and purpose of the study, and the outline of the subsequent chapters.

Chapter 2: Literature Review -International best practices of procurement planning in local government housing

Chapter 2 offers an analysis of the literature reviewed for the research. The chapter provides a comprehensive overview of procurement planning, both in theory and in practical application, and also offers a detailed conceptual framework for the study. It also discusses the global perspective of government procurement planning and the challenges many countries face in this regard.

Chapter 3: The legal framework and role of procurement planning within the housing department in the city of Johannesburg Metro Municipality

Chapter 3 provides the historical background of procurement planning in South Africa, discussing the legislation and institutions that facilitate it and the Impact of the Department of Housing on local government.

Chapter 4: Research methodology

Chapter 4 presents, analyses, and synthesising data; ultimately, every study should offer solutions to its research inquiries.

Chapter 5: Presentation and analysis of the research data findings

Chapter 5 outlines and analyses the research findings to develop explanations to the research problem while linking it to the research questions and objectives.

Chapter 6: Summary of findings, recommendations and conclusions

Chapter 6 summarises the findings and provides recommendations and a conclusion to guide forthcoming research on procurement planning research and the assessment of its impact on local government in South Africa.

1.14 CHAPTER SUMMARY

Chapter 1 explored the relevant literature and public procurement planning. Public procurement is increasingly regarded as a vital factor in the efficient management of public funds. The primary objective of public procurement planning is to guarantee fairness, equality, openness, and cost-effectiveness. It can also be utilised to address secondary issues due to its significance. Given the substantial challenges faced by the South African housing department, particularly stemming from historical inequality in the nation, public procurement holds special significance and has been constitutionally acknowledged (Clark *et al.*, 2019: 89).

In this section, an assessment was conducted on COJMM implementation of procurement planning in the context of the Housing Department. The Housing Department is tasked with managing procurement processes effectively. COJMM Housing has the authority to manage programmes and projects within its jurisdiction. The study established the need for sustainable Human Settlements at Orange Farm

Extension 10, Tjovitjo, and the importance of accrediting metropolitan municipalities and their role as developers in their respective jurisdictions. A concerted effort at the procurement level is necessary to meet the housing demand and address the COJMM backlog arising from informal settlements (City of Johannesburg, 2021).

CHAPTER 2: LITERATURE REVIEW– INTERNATIONAL BEST PRACTICES OF PROCUREMENT PLANNING IN LOCAL GOVERNMENT HOUSING

2.1 INTRODUCTION

Chapter 2 builds upon the previous discussion regarding the background study of the effects of public procurement planning within the City of Johannesburg Metropolitan Housing Department, focusing specifically on the Orange Farm Extension 10, Tjovitjo Informal Settlement case. It reviews the literature on procurement planning, highlighting the international perspective of this practice at the local government level. Public procurement planning is key to public administration as it promotes transparency and predictability, establishing a solid foundation for effective monitoring and evaluation. It further enhances effective and efficient municipal management by aligning annual procurement activities with the needs and resources of the municipality.

The chapter examines the literature on procurement planning by various authors. Hermus *et al.* (2020: 21–48) argue that a literature review is shaped from a particular viewpoint that integrates information, ideas, data, and evidence. It defines the nature of the topic and describes the methodology for analysing it through the lens of prior writings, studies, and research. The literature about procurement planning comprises published and unpublished documents, dissertations, academic texts, and articles from scholarly journals.

The chapter begins by defining and explaining the literature review concept, followed by an exploration of public procurement planning and its implementation within municipalities. It further discusses various definitions and key procurement concepts to provide a comprehensive understanding of how they are applied. Chapter 2 presents a conceptual framework for the study and international perspectives on procurement planning at local government from countries, such as Rwanda, India, and Germany. Thereafter, it discusses current studies on procurement planning in South African municipalities, concluding with a summary of the chapter.

2.2 THE CONCEPT OF A LITERATURE REVIEW

Hermus *et al.* (2020: 36) state that a literature review is a systematic process to examine the existing body of literature to assess what has been written or presented within a particular research domain. Samuel (2017: 9) further explains that a thorough literature review evaluates literature on a topic and offers a cognitive perspective on the theories related to the topic, allowing researchers to gauge the consistency of the findings. Searching for as much relevant supplementary data as possible, including books, journal articles, conference papers, reports, archives, and publicly available statistics, is necessary to conduct a thorough literature review.

Gastel and Day (2022: 20) concur with Cooper *et al.* (2018: 14) that a robust literature review incorporates information from conference papers and government documents. They also emphasise the importance of citing quantitative and qualitative articles when compiling a literature review. Cooper *et al.* (2018: 12) elaborate on the interplay between research and theory, suggesting that research findings should be situated within the framework of existing theories to inspire new ideas. In addition, Ary *et al.* (2018: 63) highlight that a study does not contribute to the literature if it merely duplicates existing research. Therefore, a robust conceptual understanding of the literature review process is essential for contextualising the study, underscoring the need for a literature review on public procurement planning and related topics.

2.3. UNDERSTANDING PUBLIC PROCUREMENT PLANNING

Public procurement planning involves identifying and consolidating requirements and determining procurement timeframes to ensure that essential items are available when needed. An effective procurement plan should clearly outline the process for identifying and selecting suppliers, contractors, and consultants (Faris, 2020: 50–65).

Louw (2018) asserts that public procurement planning is a significant aspect of government programme planning. The fundamental premise of procurement is that advanced planning and scheduling lead to cost savings, effectively fulfil operational requirements, and enhance value for money. Mkhize (2019: 112–125) adds that the public sector is expected to leverage procurement planning to evaluate the entire procurement process, thereby facilitating informed judgments and sound decision-

making that contribute to the successful implementation of projects involving procuring goods, works, and services.

It is both a best practice and a legal obligation for procuring entities to formulate and develop procurement plans (Nyawose, 2021: 77–91). For instance, in Zambia, the Public Procurement Act No. 12 of 2008 mandates that every procuring entity meticulously plan its procurement activities. The Act underscores the importance of consolidating requirements wherever possible, both within an entity and across various entities, to ensure cost-effectiveness and achieve value for money. It additionally advocates for using rate or running contracts when appropriate, as they provide an efficient, cost-effective, and flexible means of procuring goods, works, and services that are needed continuously or regularly over a specified period, as observed by the Zambia Institute of Purchasing and Supply (ZIPS, 2020). Entities must align expenditure programmes with procurement plans to prevent fragmentation of procurement and circumvention of appropriate procurement methods. Under Section 42 (2) of the Act, procuring entities must submit their procurement plans to the Zambia Public Procurement Authority (ZPPA, 2021).

Procurement planning is necessary for various reasons, one of which is successfully executing projects and preventing deviations from established procurement procedures. Moreover, effective planning enhances transparency and predictability, provides a robust framework for monitoring, and facilitates efficient treasury management by aligning annual procurement activities with available resources and requirements (Van der Waldt, 2015).

Louw (2018) emphasises that deficiencies in procurement planning can lead to project implementation delays, inappropriate procurements, and inflated packaging costs. It is essential to integrate annual planning with relevant budget processes and base it on indicative or approved budgets. Thus, the government should revise and update its procurement plans annually or as needed. According to Ijeoma (2014), good planning accounts for approximately 80% of task completion, while inadequate or non-existent planning can result in inefficiencies within the procurement function.

2.3.1 Role and responsibilities in the South African procurement planning

Public procurement planning is a complex process that involves many agencies and departments within a ministry, and entities across the broader public sector. This collaboration is adaptable, depending on the distinct types and nature of the procurement. Each stakeholder plays a crucial role, and understanding their responsibilities is vital to the success of the procurement process (Nyoni, 2020: 100).

Kruger (2017) stresses that the Procurement Unit is at the heart of this endeavour, entrusted with planning, managing, and meticulously documenting the procurement of goods, works, and services. This process ensures that all efforts align seamlessly with programme requirements and organisational goals (Nyoni, 2020: 100). The stakeholders selected for procurement activities must possess thorough knowledge of governmental procurement policy and procurement laws, updated standard bidding documents, current regulations, and accompanying guidelines (Ijeoma, 2014).

Fostering effective coordination, especially during the approval and no-objection processes, requires the Procurement Unit to delineate its roles and responsibilities while also considering the functions of all other procurement-related entities. This clarity promotes transparency and efficiency throughout the procurement lifecycle (Ambe, 2019: 652–667).

The National Treasury Office of the Chief Procurement Officer (OCPO) is integral to overseeing tender processes and awards, ensuring they adhere to transparency and fairness. The OCPO diligently enforces compliance with national procurement policies and relevant legislation, thereby safeguarding the integrity of the procurement system overall (Steyn, 2016).

Procurement planning in South Africa is a collaborative effort among various government levels. The OCPO regulates compliance with established legal standards, including the Public Finance Management Act (PFMA) and the Municipal Finance Management Act (MFMA). The primary aim is to ensure that procurement activities are transparent and competitive and deliver value for money while contributing to socio-economic progress, including sustainable development (Steyn, 2016).

2.3.1.1 Government departments

Nyawose (2021: 77–91) points out that the planning process commences at the departmental level, where each department conducts a needs assessment. Johnson

et al. (2010: 178) reiterate that the initial step involves identifying the goods and services required to fulfil the primary objective. After the department has completed the needs assessment, budget allocations ensure that procurement plans align with the approved budget. The department must devise a comprehensive procurement plan for the financial year, detailing the timing and strategies for acquiring the necessary goods (Nyoni, 2020: 115). Furthermore, the department must clearly define the specifications and scope of the required items, which is essential for attracting qualified bidders and securing the best value for money (Nyoni, 2020: 115).

2.3.1.2 The Chief Procurement Officer (CPO)

The Chief Procurement Officer primarily provides oversight and regulatory guidance in procurement planning (Ambe, 2019: 660). This is achieved by establishing and disseminating procurement guidelines and policies to ensure compliance with the statutory and mandatory framework governing procurement in South Africa. The office also monitors and evaluates procurement activities. Mdewu (2013) highlights the importance of executing procurement plans in alignment with regulatory frameworks by assessing the effectiveness of these plans and their impact on service delivery.

2.3.1.3 Specification of bid committees

Governmental departments establish bid specification committees as part of the procurement planning process to identify and manage risks while developing mitigation strategies. In addition, the committees help create precise specifications for tenders, ensuring that bidders fully understand the process (Ambe, 2019: 660).

2.3.1.4 The office of the Chief Financial Officer (CFO)

This office consists of financial managers and accountants. Their primary responsibility is to endorse the procurement plans and guarantee that they correspond with departmental strategic goals and leadership. This is achieved by maintaining compliance and overseeing contracts to ensure they are timely, high-quality, and cost-effective (Steytler, 2005).

2.3.1.5 Provincial and local government (Municipal Procurement)

This section is crucial as it establishes the foundation of the study. The Municipality Financial Management Act (MFMA) governs procurement at the municipal level, ensuring municipalities align their plans with the IDP. Alignment helps meet local procurement needs while addressing broader social goals and guarantees that

procurement processes remain transparent and engage the public, which is essential for upholding democratic principles (Mkhize, 2019: 112–125).

Mkhize (2019: 112–125) explains that municipal procurement in South Africa is regulated by a detailed legal framework designed to promote efficiency, transparency, and accountability. Municipalities are responsible for managing procurement processes at the local level. However, they must adhere to national standards, implement preferential procurement principles, and align their procurement activities with local development goals (Kalonda & Govender, 2021: 1–26). Ongoing challenges, such as capacity constraints, fraud, and issues with service delivery are significant concerns. Despite these challenges, the system is structured to encourage improvements through greater transparency, oversight, and compliance with regulatory requirements (Kalonda & Govender, 2021: 1–26).

2.3.1.6 The Public Procurement Regulatory Authority (PPRA)

As the South African government increasingly moves towards innovative public service models, the Public Procurement Regulatory Authority (PPRA) would become pivotal, as proposed in the forthcoming Public Procurement Bill. This authority is designed to serve as a comprehensive regulatory body that will oversee and standardise procurement activities across all levels of government, ensuring consistency and clarity in processes (Van der Waldt, 2015).

Once operational, the PPRA will provide detailed guidelines and best practices for procurement, aiming to streamline operations and enhance accountability in public spending. Moreover, the authority will establish a framework for ethical procurement and be mandated to conduct thorough investigations into procurement activities (Nyawose, 2021). Examples of how effectively the regulatory body functions include improved compliance, transparency and accountability, capacity building, and prompt dispute resolution. Notable weaknesses include Lack of Enforcement, Corruption, Lack of Accountability, and delays in project implementation (Public Procurement Regulatory Authority, 2020).

2.3.2 Ethics in Public procurement planning

Robinson (2014: 78–89) argues that ethics involves the moral standards and principles guiding officials in all their responsibilities. Ethical behaviour reflects honesty, integrity, purity, diligence, fairness, trust, and respect. Regarding the procurement process, the

government must maintain the integrity of government contracting and ensure that bidders and contractors are treated justly (Taylor, 2018: 65–82). Ngumo (2020: 125–146) states that confidential information could impact a contract bid or the awarding process in procurement. Disclosing such protected information without authorisation violates ethical standards and can lead to bid disputes or lessen public trust in the procurement system, disrupting procurement planning in the abovementioned roles and responsibilities (Koutsou, 2017: 45–67).

The Financial Times (2025) reports that ethical predicaments in municipalities are often precipitated by issues such as corruption in local government contracts. Moreover, unfair distribution of resources, including funding for schools or healthcare, can impact deprived communities. The Financial Times (2025) further states that procurement professionals may have private business interests that could influence their decision-making. Moreover, approving construction projects in protected areas such as national parks, heritage sites, and wilderness areas raises ethical questions (Department of Environmental Affairs, 2025).

2.3.3 Challenges in Public Procurement in South Africa

Public procurement in South Africa is essential for providing public services, developing infrastructure, and driving economic transformation. Nevertheless, despite its importance, the system encounters various challenges that impede its effectiveness and efficiency. These obstacles affect the overall standard of public service delivery, infrastructure development, and socio-economic advancement (O’Kane, 2018: 215–229). The upcoming sections discuss some of the key challenges facing public procurement in South Africa.

2.3.3.1 Corruption in the procurement process

Corruption is a challenge in public procurement. The tender process is often marred by bribery and fraudulent activities, and some public officials and contractors engage in corrupt practices. Inflated contract prices and the use of substandard materials or services also result in corruption, which results in wasteful expenditure of public funds and negative impacts on service delivery (Mkhize, 2019: 55–75).

2.3.3.2 Project delays

According to Peters (2016: 105–120), the procurement process in South Africa is often a lengthy approval process, with excessive paperwork and administrative delays resulting in significant delays in project execution. These delays affect the timely delivery of public services and infrastructure, contributing to frustration among stakeholders. The complexity of procurement regulations and procedures can slow down decision-making. Navigating complicated laws and regulations often delays contract awarding or project implementation. Sometimes, the inability to expedite procurement can hinder urgent service delivery (Pottie, 2018: 77–90).

2.3.3.3 Skills and capacity shortage

Public procurement requires a skilled workforce capable of managing complex contracts, ensuring compliance with procurement laws, and assessing tender bids. However, many government departments and entities struggle with a skills shortage in procurement professionals. This lack of expertise contributes to inefficiency, poor contract management, and an inability to execute large-scale projects. Many public procurement bodies face capacity constraints, especially at the municipal level (Thomas, 2019: 60–80). Limited resources, inadequate training, and low staff morale hinder effective procurement management, resulting in mismanagement and failure to meet project goals (Ferguson, 2019: 200–215).

2.3.3.4. Political influence

Political interference poses a significant challenge in the South African procurement landscape. Sometimes, political actors sway procurement decisions to benefit themselves or a political party rather than serve the public interest (Goodspeed, 2018: 34). Such interference results in contracts being awarded to politically connected firms or individuals who might lack the necessary expertise or resources to complete the project effectively. Indeed, using public procurement to establish political patronage networks is prevalent. Contracts are typically awarded to companies that maintain loyalty to the political elite, irrespective of their qualifications and undermines competition and hinders the optimal allocation of public funds (Goodspeed, 2018: 34).

2.3.3.5 Broad-Based Black Economic Empowerment (B-BBEE)

The aim of the B-BBEE (Broad-Based Black Economic Empowerment) policy of the South African Government is to promote economic transformation by enabling black-owned businesses to participate in public procurement (Khumalo, 2019: 22–37). However, Radebe (2018: 98–115) states that the procurement challenge in some cases is that B-BBEE policies might not be implemented effectively. For example, large, established firms might bypass the spirit of the policy by partnering with small black-owned businesses in name only while still controlling the profits and decision-making of the project.

2.3.3.6 Legal and regulatory difficulties

Public procurement in South Africa is regulated by a complicated set of laws and regulations, including the Public Finance Management Act (PFMA), Municipal Finance Management Act (MFMA), and the PPPFA. These regulations promote transparency, fairness, and equity in procurement activities (Pottie, 2018: 25–40). However, Smith (2016: 110–125) argues that intricacy can pose challenges to efficient procurement, resulting in prolonged decision-making and delays in project execution. For example, tender decisions are frequently subject to legal challenges, which can lead to additional delays in the procurement process. Legal conflicts among suppliers, contractors, and governmental entities impede critical infrastructure projects, resulting in postponed service delivery to the public.

2.3.3.7 Budget limitations

Limiting the amount of money available for projects is a persistent issue in public procurement (Smith, 2020: 121–136), leading to essential projects being scaled down. Inadequate funds compel the government to secure additional financing through private sector involvement, which introduces other complexities (Nxumalo, 2018: 45–58).

Dlamini (2017: 105–118) states that the public procurement system in South Africa faces significant challenges that hinder the effective delivery of essential services and infrastructure. Corruption, bureaucratic delays, capacity issues, political interference, and legal complexities all contribute to inefficiencies in the procurement process.

However, there have been efforts to address these challenges through reforms, including introducing e-procurement systems, anti-corruption measures, and greater emphasis on transparency and accountability. Overcoming these challenges requires political will, effective governance, better training, and a commitment to integrity in public procurement processes (Dlamini, 2017: 105–118).

2.4. UNDERSTANDING MUNICIPAL PROCUREMENT PLANNING AND BASIC SERVICE DELIVERY

Kruyen and Genugten (2017: 585) describe local government as the level of government closest to the population, offering many vital services to the community. Steytler (2005: 139) emphasises that policies in South Africa are explicit, particularly in local municipalities, and are responsive to localised challenges. Kruyen and Genugten (2017: 585) highlight several critical elements that influence procurement planning in municipality service delivery:

2.4.1 Ward committees

Mutangili (2022) explains that a ward is a geographic area within a local municipality, and a ward committee is a democratically elected group that represents a wide array of interests within the community. The city may establish a ward committee; if so, all wards within its jurisdiction must be formed (Hoadley 2018: 5–15). Hoadley (2018: 12–15) asserts that ward committees are necessary for advising the municipal council on local issues, particularly those that impact the ward, including infrastructure needs, service delivery, and local development priorities. In the context of procurement planning, these committees can significantly influence local governance by ensuring that procurement processes are conducted transparently, fairly, and aligned with the community's needs (World Bank, 2021). Rao (2000: 78) finds that this aspect fosters greater community involvement and enhances democratic governance, ultimately leading to improved alignment between municipal procurement and local development objectives. Similarly, the World Bank (2021) states that promoting community engagement through ward committees in municipalities can improve procurement planning effectiveness, resulting in better service delivery and increased public trust in local governance.

2.4.2 Integrated development planning

Van Staden, Fourie, and Holtzhausen (2022) define an IDP as a strategic five-year roadmap developed by local municipalities in South Africa to outline their developmental goals and priorities. The author highlights that the legal framework of the IDP is established by the Municipal Systems Act, 2000 (Act No. 32 of 2000), which mandates municipalities to create and adopt an IDP. Wampler (2007) further emphasises the importance of the IDP in procurement planning, noting that it clarifies the proposed objectives, whereas procurement planning translates them into precise procurement actions. For example, if the IDP focuses on developing new housing infrastructure, procurement planning would ensure the acquisition of appropriate contractors, goods, and services necessary for implementing the project. Moreover, procurement planning is closely linked to budget approval based on the IDP; the procurement plan reflects community priorities and includes tenders for service providers for meeting these needs (Mutangili, 2022). Therefore, the IIDP is vital in procurement planning, enabling South African local municipalities to achieve developmental objectives through the long-term vision and key priorities of the municipality. Procurement planning operationalises these objectives by securing essential resources, goods, and services to address community needs (Mutangili, 2022).

2.4.3 Municipal budgets and finance

Municipal budgets are projected financial plans that local governments create for the upcoming fiscal year, detailing anticipated revenues and expenditures. In contrast, municipal finance focuses on local government decisions regarding income and spending, which encompass various revenue sources, such as taxes (Municipality Demarcation Board, 2013). The World Bank (2020) states that a municipality-level procurement plan is designed to align with the municipal budget, ensuring that procurement activities are consistent with available funding. Similarly, the Organisation for Economic Co-operation and Development (2015) advises that procurement planning within municipal budgeting involves anticipating potential risks, such as price fluctuations or project delays, which could lead to unexpected financial challenges. Mikesell (2017: 210) stresses that, without careful procurement and financial planning coordination, significant projects might exceed their budgets or encounter delays.

For example, when a municipality designates a portion of its budget to building new homes, integrating procurement planning into municipal budgets becomes essential. The Johannesburg Development Agency (JDA) reported that the COJMM budget for 2023 to 2024 included a R7.6 billion capital expenditure plan. The JDA significantly contributed to implementing this budget by focusing on infrastructure development and urban renewal projects, which serve as a strategy for embedding procurement planning within the budget (JDA, 2023).

The procurement strategy identifies the most effective methods for securing the construction services, materials, and labour for the project, thereby ensuring adherence to budget constraints. As a result, the procurement team is tasked with sourcing contractors, suppliers, and equipment. If costs exceed the budget during the procurement planning process, the finance team would need to adjust funding or revise the project scope to remain within financial limits.

Overall, integrating municipal budgets, finance, and procurement planning is vital for ensuring that public resources are managed effectively and efficiently to provide services and infrastructure to the community (Mikesell, 2017: 210).

2.4.4 Municipal service delivery

Given that the municipality is the level of government closest to its citizens, elected leaders represent it and ensure that services are delivered to the communities. Thus, municipal services encompass services at the local governance level, regulated by law. This study identifies the influence of procurement planning on local government service delivery as a significant problem. Procurement planning is a crucial process affecting how efficiently local governments provide services to communities (GAO, 2017). Basheka (2008: 389) categorises procurement planning for municipality service delivery into four stages: the procurement planning process, procedures, departments, and value. The presence of these elements in procurement plans would ensure effective local governance management.

Kalonda and Govender (2021: 24) affirm that procurement planning is crucial to municipal service delivery because it ensures that the efficient, timeous, and budget-aligned work and resources meet the community's needs. It is also directly linked to municipal service delivery because it ensures that municipalities are responsible for

the quality and efficiency of services and have sufficient resources and management capacity for appropriate service provision (Kalonda & Govender, 2021: 24).

2.5. GLOBAL PUBLIC PROCUREMENT PLANNING THEORIES AND PRACTICES

Public procurement has experienced substantial changes since the late 20th century with the emergence of globalisation, innovative public sector technology advancements, legislation, and global sustainability (Sutherland, 2014). Foundational work by Williamsom (1975, 1985) has equipped scholars to improve and broaden their comprehension, identify crucial empirical gaps in procurement planning, and deepen their theoretical understanding of government functions. Spalding (2019: 19) provides an essential view on the significance of procurement in the public sector that is relevant to both developing and developed countries, emphasising that public administration has progressed significantly. Smith (2012) points to the increased focus on procurement due to its effect at all governmental levels. Ben (2015: 20) finds notable enhancement of procurement processes within public administration as part of initiatives to innovate service delivery, thereby allowing governments to offer services more efficiently and effectively. Five core theories guide this investigation on public procurement planning: principal-agent theory, public choice theory, contract theory, new public management, and the emerging ideas of sustainable procurement and social procurement theory.

2.5.1 Principle-Agent Theory (PAT)

Principal-agent theory (PAT) provides a valuable context for understanding the nuances of public procurement processes. The connection between the "principal", often represented by the government, and the "agent", the entity responsible for executing procurement activities on the government's behalf, is central to this theory (Eisenhardt, 1989: 57–74). Both Eisenhardt (1989) and Yukins (2010) find that PAT emphasises the dynamics of this relationship, highlighting the necessity for accountability and risk mitigation.

Eisenhardt (1989: 57–74) argues that contracts facilitate interaction between principals and agents in public procurement, creating a structured environment wherein the government can specify its needs and agents can respond accordingly.

However, delegating authority to agents can lead to challenges in aligning interests; hence, when agents are incentivised primarily by the benefits to themselves rather than those of the principal, it can cause a misalignment of goals. Notably, Soudry (2006) observes that if the agent perceives their efforts will not yield rewards commensurate with their work, they might decrease effort, ultimately undermining the procurement process.

In this context, Eisenhardt (1989: 57–74) explains that implementing the principles of PAT involves establishing robust accountability mechanisms, such as regular audits and transparent performance metrics, to ensure agents remain aligned with governmental objectives. Addressing barriers within public procurement planning through this theoretical lens can enhance transparency and efficiency. By fostering a collaborative environment that emphasises shared goals, PAT can significantly improve the effectiveness of public resource utilisation, thus benefiting society.

The present research suggests that as global procurement evolves, principal-agent theory emerges as an essential framework for understanding the complexities of public procurement. By applying this theory, policymakers can develop procurement systems that align the goals of both the principal and the agent, minimise agency costs, and enhance the efficient and effective use of resources.

2.5.2 Public Choice Theory

According to McGuire (2006), Buchanan and Tollison (1989) contributed substantially to public choice theory, particularly by recognising the complexities of political decision-making, including procurement choices. McGuire (2006) explains that Buchanan's work highlights how political and economic considerations intersect with governmental economic strategies, examining not only the actions of politicians but also non-economic factors that influence these strategies.

Buchanan and Tollison (1989) assert that public choice theory is an economic framework for analysing decision-making outside market environments. It posits that individual decision-makers operate within a complex system, ultimately leading to various political outcomes. In procurement planning, this theory applies economic analysis to political decision-making, suggesting that public servants often act based on self-interest (Buchanan & Tollison, 1989).

In terms of procurement processes, such self-interest can manifest in ways that compromise efficiency and integrity. Buchanan and Tollison (1989) support the argument that decision-making can be influenced. In the context of this study, an example would be administrators favouring specific suppliers who offer personal incentives, such as bribes, which can lead to biased decisions. Elected officials might also champion procurement projects to bolster their political careers, often prioritising contracts for preferred businesses over the best value propositions for taxpayers. This behaviour illustrates how politicians leverage procurement planning to enhance political influence and pursue short-term goals, such as re-election.

However, through a comprehensive analysis of public choice theory, Trebilcock (2003) stresses the importance of institutional checks and balances. This measure could involve increasing transparency and promoting accountability in procurement planning, such as making procurement plans publicly accessible and conducting independent audits. The involvement of independent agencies and regulators can help mitigate the impact of political pressures, ensuring that procurement processes remain objective.

Skeel (1997) notes that public choice theory emerged partly due to frustrations among economists and political scientists with traditional political science approaches during the mid-twentieth century. This theory provides valuable insights into how the incentives and behaviours of individuals involved in procurement influence decision-making and outcomes. By acknowledging such self-interest, rent-seeking, and political pressures, governments can create more effective procurement systems that reduce inefficiency and corruption while fostering competition and transparency.

The above-mentioned elucidation confirms that public choice theory has significantly altered government understanding of political decision-making. Thus, the theory would aid governments in better understanding the underlying incentives and behaviours of political actors and bureaucrats that influence procurement decisions. Moreover, incorporating public choice theory principles would benefit the public.

2.5.3 Contract Theory

According to Flynn (2008), contract theory posits that humans should consent to behavioural norms essential for establishing and maintaining social order. Hobbes

(1998) argues that in governmental procurement planning, contract theory can be explained in a way that establishes the foundational principles that help design and manage procurement processes to ensure efficiency, transparency, fairness, and accountability.

Flynn (2008) argues that humans willingly relinquish certain individual rights to facilitate cooperation by creating larger social groups. By viewing science as an institution that relies on specific norms of behaviour, Hobbesian theory underpins principles such as communalism and disinterestedness. Thus, contract theory implies that planning should involve careful risk assessment and appropriate risk-sharing strategies; for example, procurement planning should ensure fair risk allocation and incentivise contractors to perform well while protecting public interests (Flynn, 2008).

Contract theory offers important perspectives on creating and implementing contracts within the procurement process. By comprehending the impact of incentives and risks on the actions of the parties involved in a contract, public sector organisations can effectively structure agreements to align interests and achieve successful results. To reinforce this point, Rogerson (2003) suggests that by utilising the principles of contract theory, public procurement can aid governments in crafting contracts that optimise value for money while mitigating the risks linked to engaging with private firms.

2.5.4 New Public Management (NPM)

New public management (NPM) is a concept that promotes the adoption of private-sector practices within public administration, particularly in areas like procurement and the fostering of an innovative public sector (Mojaki, Tuyikeze, and Ndlovu 2024). Within the NPM framework, the centralisation of public procurement planning highlights a focus on performance-driven management.

This literature review illuminates NPM as a governance initiative. NPM development arose from ongoing debates in the academic and political spheres about the various inefficiencies and ineffectiveness observed in public administration (Bekkers, 2011: 10).

As a result, NPM is regarded as the driving force behind numerous procurement management reforms enacted in public service since the 1980s, introducing what was considered a modern approach to coordinating public service delivery (Osborne & Brown, 2013: 16).

Hood (1991), the theorist behind NPM, points out its capability to support governments, such as in procurement planning (Hood, 1991: 4–5), while other NPM supporters emphasise different elements of the doctrine. Hood (1991) asserts that NPM seeks to incorporate the efficiency, flexibility, and customer-focused mindset of the private sector into public administration.

Efficient procurement planning guarantees effective, outcome-oriented, competitive, and transparent public procurement. By implementing these principles, public sector procurement can secure better value for money, improve service delivery, and more effectively address the needs of the citizens it serves. Therefore, NPM can act as a foundational model for transforming procurement processes into more efficient, customer-oriented, and performance-based functions (Hood, 1991).

2.5.5 Sustainable and Social Procurement Theory

Smith and Taylor (2020: 3–19) define social procurement as a process that involves the government meeting community needs from the start of planning while ensuring value for money and promoting social improvement. This strategy strives to drive economic growth while reducing environmental impact. Moreover, sustainable procurement incorporates principles of social responsibility into procurement processes and decisions, ensuring stakeholder needs are addressed.

Bowers (1997: 173–205) states that procurement should include specifications, requirements, and standards that support the protection of the environment and society. The dedication to sustainable procurement in the public sector would ensure that sustainability values are maintained throughout the entire lifecycle of its products and services. By adopting sustainable procurement practices, the government can manage risks effectively, help identify problematic suppliers, and address vulnerabilities in supply chains that might result in service delivery protests and unsatisfactory service delivery (Bowers, 1997: 173–205).

Smith and Taylor (2020: 3–19) concur with the sentiments above and add that sustainable procurement provides opportunities for differentiation by inspiring an innovative public sector to create more inventive and sustainable products.

Bowers (1997: 39) finds that in an increasingly technologically advanced and globalised public sector, incorporating sustainable and social procurement into planning is essential for minimising environmental impact, improving social results, and ensuring long-term success. By integrating sustainability and social responsibility criteria into the planning process, the government showcases its proactive stance towards nurturing an innovative public sector capable of making informed decisions that align with strategic objectives while positively influencing society and the environment.

In summary, this study selected NPM theory, which represents a public administration approach that incorporates and emphasises performance-oriented management in the public sector rather than a focus on policies. This study identifies three key strategies within NPM to improve governance, such as reorganising public administration, decentralising partnerships and networks, and fostering innovation in procurement (Hood, 1991).

2.6. CONCEPTUAL FRAMEWORK

The previous section elucidated on various theories related to public procurement planning relevant to this research. Section 2.6 outlines the conceptual framework underpinning the study. This framework serves as a foundation for analysing the interactions and dynamics within procurement planning, aiming to establish a clear conceptual lens within the broader context of public administration.

2.6.1 Housing Challenges in Johannesburg

Informal settlements in South Africa must be understood because they have been part of the national landscape for many years and are likely to persist in future, despite governmental focus on housing through various delivery strategies. A study by Wilcox *et al.* (2024) shows that informal settlements offer shelter to many impoverished urban residents. Despite extensive research on informal settlements, there is a dearth of

literature on the differences between these settlements within the South African context and procurement planning.

The research recognises multiple definitions of informal settlements and different terms synonymous with this kind of housing. The phrase "informal settlement" mainly denotes "a settlement of the urban poor developed through the unauthorised occupation of land" (Huchzermeyer, 2014: vii).

Housing departments at the national, provincial, and local levels have acknowledged the need for a new strategy to address the informal settlement issue in South Africa, including relocations (HDA, 2014).

Moreover, the HDA (2014: 5) claims that the shift towards a more rapid, participative and broad-based response would lead (in most instances) to providing essential services to informal settlements. The provision of low-income housing would only form a minor part of the response to informal settlements due to the lengthy timeframes and high costs. Consequently, the new upgrading approach and response to informal settlements by the government is incremental and infrastructure-focused (HDA, 2014). However, since the goal is to prioritise interim services and include all informal settlements in service delivery programmes, formalisation might not be achievable.

Sefotho and Du Plessis (2018:21) provide an overview of Johannesburg's housing situation, focusing on informal settlements. The authors state that informal settlements are characterised by swift expansion and insufficient infrastructure. Various government policies and initiatives have been launched to address housing shortages and enhance living conditions, namely the Reconstruction and Development Programme (RDP) and the People's Housing Process (PHP). Nonetheless, the rapid urbanisation and economic difficulties have impeded the success of these efforts. The growing number of informal settlements emphasises the necessity for thorough urban planning and sustainable development approaches (Wits Vuvuzela, 2023).

2.6.2 Procurement Planning in Housing Development

Effective procurement planning in the housing department is necessary to guarantee housing projects are executed on time and within budget. This stage of the procurement process is crucial, as it identifies and consolidates the requirements and timelines (Smith, 2015). The fundamental principle of procurement involves strategic

planning, which results in cost efficiencies. Taylor (2018: 145) advises that the public sector must employ procurement planning to evaluate and reassess the procedure. This approach ensures that informed decisions and sound judgment facilitate the successful implementation of the overall project aimed at obtaining goods, services, and works. Section 2.6.2.1 details the case studies that support the preceding sections.

2.6.2.1 Case studies of public procurement in South Africa and global housing projects

Jones (2020) believes public procurement is crucial for governments to deliver affordable housing, facilitate development, and address the challenges linked to urbanisation. The case studies below originated in South Africa and other countries, illustrating various approaches to public procurement in housing development.

- **South Africa: The reconstruction and development housing programme (RDP) (1994)**

Following Apartheid, the South African government initiated the RDP, primarily aimed at ameliorating the severe housing shortage that low-income and disadvantaged families endured under Apartheid (Petersen, 2003). This programme sought to construct affordable homes for the impoverished. The government opted for a procurement plan of directly contracting construction firms to build houses in pursuit of this aim. The different provincial and municipal departments were tasked with executing the RDP housing projects (Tissington, 2011: 1013–1030). (Habib, 2005: 34–56) explains that a key procurement activity for the RDP was forming partnerships with the private sector, including collaborations between the government and private developers and construction companies to accelerate housing development.

Mohlakoana (2016) recounts that the RDP encountered significant obstacles, encompassing construction costs, inflation, and project delays. Consequently, procurement plans are key to delivering housing units on budget and scale while maintaining quality. The success achieved was the social goal of fostering community participation to enhance economic development by using local labour and materials.

- **South Africa: The breaking new ground (BNG) housing strategy**

In 2004, the government introduced an extension of its housing delivery strategy, aiming to develop sustainable communities through the BNG programme (The South African Department of Human Settlements, 2004). The procurement strategy promoted partnerships between public and private entities to expedite quality housing delivery.

The government provided land, financing, and infrastructure. This initiative also represented an innovative approach in the public sector, with the procurement framework encouraging innovative construction methods and technologies. Procurement challenges the BNG has faced include funding constraints and concerns related to sustainability, such as maintaining infrastructure, public services, and long-term community involvement due to limited resources (Pieterse, 2008: 97–115).

- **United States: New York City affordable housing programme (2014)**

Internationally, Cohen (2015) describes the long-running initiative to offer affordable housing to low-income families in New York City. The affordable housing crisis was addressed primarily through the Housing New York Plan to create and preserve 300,000 affordable housing units by 2026 (Cohen, 2015).

The procurement planning involved selecting developers whose bids were associated with zoning modifications, and incorporating private sector partnerships where developers are charged with constructing large-scale housing projects. The plan emphasised sustainability, particularly environmental sustainability. The procurement plans prioritised community consultation to align with community needs. Procuring challenges included rising material and labour costs, which affected the overall affordability of projects (Schill & Glaeser, 2013: 107–118).

- **India: Pradhan Mantri Awas Yojana (PMAY)(2015)**

The Ministry of Housing and Urban Affairs, Government of India (2020) launched the Pradhan Mantri Awas Yojana (PMAY), an Indian governmental initiative to provide affordable housing to all impoverished urban and rural residents by 2022. The procurement planning occurs at the state level, with local governments overseeing implementation. The strategy additionally engages private sector collaboration,

utilising private sector capacity to construct at scale (Verma, 2018: 89–102). Verma (2018: 89–102) reports that a slow and often complicated land acquisition process is a procurement challenge in PMAY. Corruption and inefficiencies in executing the scheme have postponed many housing projects. Despite government subsidies, financial issues remain a primary concern for adequately executing the project.

Hence, public procurement in housing development is a multifaceted process that varies by country. The examples above underscore the significance of collaboration between the public and private sectors, the necessity for efficient procurement management, and the importance of transparent and inclusive procurement practices.

2.6.3 The Orange Farm Tjovitjo Informal Settlement

Orange Farm Extension 10 (Tjovitjo) is a section of the larger Orange Farm area. Established in 1990, Orange Farm is situated in the southern part of Johannesburg and is recognised as one of the largest informal settlements in Gauteng province (Maharaj, 2016). Consequently, extensions such as Tjovitjo in Orange Farm have developed in the settlement. Tissington (2012: 357–372) finds that residents of Tjovitjo have constructed houses densely together and unplanned. The area has insufficient essential services, including water, sanitation, electricity, and road access. The South African Government (2015) notes that Tjovitjo is located on land not designated for residential purposes, resulting in land tenure issues for its inhabitants. Due to the absence of formal infrastructure, residents often encounter difficulties accessing municipal services, including waste management, law enforcement, and healthcare from the City of Johannesburg Metropolitan Municipality (COJMM, 2020).

Numerous local government interventions, non-governmental organisations (NGOs), and community groups have attempted to improve living conditions in Tjovitjo. However, advancements have been gradual due to financial limitations, bureaucratic obstacles, and inadequate resources (Huchzermeyer, 2014: 215–234).

According to Mokoena (2017: 89–105), the population of Orange Farm, which includes Extension 10 (Tjovitjo), exceeds 200,000 individuals. Nonetheless, the population of Tjovitjo is not precisely known, since it is considered part of the broader Orange Farm settlement.

The City of Johannesburg (2020) states that the housing situation in Orange Farm Extension 10 (Tjovitjo) is predominantly informal, characterised by overcrowded shacks, many of which lack adequate sanitation, clean water, or electricity. Furthermore, the settlement has experienced significant population growth due to economic migration from other provinces, contributing to the expansion of informal settlements, which continue to suffer complexities, such as high population growth and insufficient infrastructure (COJMM, 2020).

- **Housing needs in Tjovitjo**

As highlighted by the Department of Human Settlements Annual Report (2018), housing demands in Tjovitjo are urgent, reflecting broader issues of urbanisation, poverty, and housing inequality in South Africa. The Department of Human Settlement (2018) further asserts that the residents require well-constructed homes to ensure their safety and access to clean, reliable water. Many inhabitants of Tjovitjo rely on communal taps that are often situated far from their homes. Moreover, many households use pit latrines or shared public toilets, which are unhygienic and pose health risks (DHS, 2018).

Mokoena (2015: 98–112) states that safe and legal electricity connections are crucial to improving living conditions, mitigating health and safety hazards, and promoting development. Furthermore, most of the land in Tjovitjo is not formally designated for residential purposes, which raises the residents' risk of eviction or displacement, should the government decide to formalise or rezone the area (COJMM, 2020).

In contrast, Robinson (2017: 145–162) finds that housing initiatives in other parts of Orange Farm have progressed significantly in recent years and remain a key priority for local and national governments. Therefore, residents would not be displaced should the government rezone the area.

The City of Johannesburg (2020) aims to address the housing deficit and improve residents' living standards through programmes like RDP housing and BNG initiatives. However, effective procurement processes are crucial for ensuring the timely and successful delivery of these projects.

2.7 AN INTERNATIONAL PERSPECTIVE ON PROCUREMENT PLANNING AT THE LOCAL GOVERNMENT LEVEL

This section provides the international perspective on procurement planning at the local level in three countries to learn about best practices for procurement planning in South African municipalities. According to Parker and Liddle (2023), procurement planning happens worldwide and thus affects many countries globally. Moreover, Basheka (2009) explains that local government procurement planning varies significantly depending on geographical and economic factors. Developing countries have less sophisticated procurement planning systems supported by technology and a strong legal framework, compared to developed countries (Basheka, 2009). Parker and Liddle (2023) add that developing countries are actively working to improve procurement capabilities. International frameworks and reforms that seek to enhance accountability, promote sustainable practices, and improve capacity are crucial for advancing procurement planning at the local government level worldwide. Accordingly, this section discusses international perspectives on procurement planning in local governments from Rwanda, India, and Germany.

2.7.1. Rwanda

In a study focused on public procurement in Rwanda, Hatangimana (2021: 595) examined the effects of procurement planning and procedures on public administration performance. Although this study was conducted in Rwanda, it investigated issues related to the impact of procurement planning on the budget losses by the Government of Rwanda resulting from ineffective procurement strategies, which is relevant to this research.

The study assessed how procurement planning influences the effectiveness of government administration by investigating the efficiency of procurement planning and ethical practices in Rwanda and determining if selected public procurement bodies operate optimally. That study randomly selected four individuals from 30 districts in Rwanda, including the procurement, finance, and customer service departments. The findings revealed that the primary issue stems from non-compliance with public procurement practices, such as planning, and a lack of ethical considerations in contract awards, leading to financial losses for the Government of Rwanda (Hatangimana, 2021).

Hatangimana (2021: 603) employed a descriptive survey research method to gather data from a defined population and developed questionnaires and measurement tools to assess the status of various variables within this population (Hatangimana, 2021: 604).

Thereafter, Hatangimana (2021: 614) connected the collected data to the research questions. The regression analysis of the hypotheses of the study findings contributes to the existing literature on adherence to public procurement planning, ethical conduct, and tender outcomes.

The research by Hatangimana (2021: 614) highlights the effect of procurement planning on the performance of public contracting authorities in Rwanda. The findings indicate that the participants mostly agreed that procurement planning had a considerable impact on the efficacy of public purchasing authorities.

Hatangimana (2021: 614) asserts that contracting authorities must adhere to the guidelines outlined in the prevailing laws and regulations to achieve value for money in terms of competition, transparency, efficiency, and fairness in awarding public service contracts.

The scholar recommends considering several aspects to understand procurement planning and its effect on service delivery comprehensively (Hatangimana, 2021: 615).

- Communities should identify necessary items to ensure high-quality goods meet client satisfaction.
- Priority items should be designated to prevent unused items from accumulating.
- Estimate the procurement budget accurately to mitigate the risk of insufficient funds during contract execution.
- The procurement timeline must be well-organised, with precise dates to prevent potential delays in the delivery of purchased goods .

Hatangimana (2021: 615) concludes that performance changes are affected by procurement planning and governmental participation in this process. Hence, procurement planning significantly influences the performance of public procurements in service delivery.

The results confirm that procurement planning and government operations in Rwanda are interconnected with the observed indicators and the performance of public procurement entities.

2.7.2 India

The World Bank (2006) notes that India had implemented important reforms to improve procurement planning in local governments, aiming to increase efficiency, transparency, and inclusiveness.

The Government e-Marketplace (GeM, 2016) reports that India launched an online platform in 2016 to streamline public procurement processes. Regarding public procurement planning in local government, the platform offers a transparent and efficient marketplace for government buyers and sellers, facilitating the procurement of goods and services.

Public procurement in India is regulated by an array of orders and regulations, such as the Public Procurement Order and the General Financial Rules (CSIS, 2017), thereby establishing the connection between public procurement planning in local government and the Indian government. These regulations promote fair practices, foster competition, and stimulate innovation in procurement processes.

According to a report by the World Bank (2006), community-based procurement practices in India emphasise completed community-driven development subprojects and local government contracts. These strategies have proven effective at the grassroots level. The World Bank (2006) further mentions that the Indian government has made great strides in encouraging the participation of small businesses in government procurement. A white paper by the Centre for Strategic and International Studies outlines best practices and recommendations for Indian states to enhance the involvement of micro, small, and medium enterprises (MSMEs) in public procurement (CSIS, 2017).

These efforts demonstrate dedication to updating procurement strategies at the local government level in India that are consistent with global standards and promote a more inclusive and efficient procurement landscape.

2.7.3 Germany

The Federal Ministry for Economic Affairs and Energy (2022), procurement planning at the local government tier in Germany focuses on efficiency, transparency, and adherence to national and European Union regulations.

The Germany Action Plan Review (2023) emphasises that the Public Procurement Act establishes the foundation for procurement planning in Germany. This legislation regulates public procurement in Germany, guaranteeing that the procurement procedures happen fairly and transparently. The procurement process in Germany demands local governments to plan procurement activities carefully to utilise public funds effectively, which requires identifying needs, defining specifications, and estimating costs (GAPR, 2023).

The Organisation for Economic Cooperation and Development (2019) indicates that in Germany, procurement processes are competitive, open, and impartial, ensuring equal opportunities for all suppliers. These elements encompass advertising tenders and offering clear evaluation criteria. Contracts are granted based on established criteria, which usually emphasise the most economically beneficial proposal to guarantee both value for money and quality.

The Organisation for Economic Co-operation and Development report provides a comprehensive understanding of German procurement planning at the local government level, offering detailed insights into strategies in the public sector as a model for innovative public service. Strategies include eProcurement, whereby electronic procurement systems were implemented in Germany to enhance efficiency and transparency. These systems facilitate the entire procurement process, from planning to contract management, and are mandatory for many public procurement procedures.

In their book *Strategic Procurement Planning in the Public Sector*, McCue and Johnson (2010: 115) assert that procurement planning should be considered a fundamental value that can be effectively realised for it to become integral to governmental strategic planning and budgeting processes. McCue and Johnson (2010: 118) point out that the effectiveness of strategic procurement planning depends

on how local government classifies its strategic plan as an agency. The authors reflect on operational realities to promote strategic procurement planning and extend beyond essential planning and budgeting. This reality further underlines the importance of identifying client needs, collaborating with suppliers, ensuring sustainable government success, achieving customer satisfaction, and managing staff appropriately, which includes developing human resources and governance. Therefore, international best practices include procurement planning, governance, and management. Valuable frameworks, strategies, and guidelines have proven effective across different regions and sectors in the abovementioned countries.

2.8 REVIEW OF CURRENT STUDIES ON PROCUREMENT PLANNING IN SOUTH AFRICAN AND SADC MUNICIPALITIES

Johnson *et al.* (2010: 178) believe public procurement by local government is vital to growing the economy, ensuring transparency and fairness, and providing equal opportunities for all citizens. The planning phase is an important step in the public procurement process. Because the municipality decides in the planning stage which goods, services or works should be purchased. Public procurement planning defines a budget for planned purchases and prepares all necessary tender documents and technical specifications applicable to the procurement process (Basheka, 2008: 31).

Basheka (2008: 30) further states that planning public procurement is an essential step in the evolution of public procurement, as it permits municipalities to decide what they buy, and when and where they obtain resources. It also allows procurement planners to determine if expectations are realistic and provides an opportunity for all stakeholders, including civil society. The municipality allows civil society and interested parties to meaningfully participate in the needs assessment phase of the procurement planning process. Public consultation (*Lekgotla*), a meeting called by the government, facilitates discussion about strategy planning and written consultations. This process can help advance the procurement process by allowing citizens to inform the municipality of their preferences regarding the goods or services being procured (Rammala, 2021: 26).

In an article on procurement planning and its effect on service delivery in uMshwathi Municipality, Lunga, Lubbe and Meyer (2019:10) state that municipal procurement planning and essential service delivery had changed in the 2000s. The changes have

revealed that procurement planning is an integral part of financial management in the South African Public Sector; Section 195 of the Constitution (South Africa, 1996) supports this finding. The authors mention that despite legislation, as well as treasury rules and regulations, municipal officials experience significant hurdles in municipal procurement planning processes, including a lack of transparency and failure to comply with public procurement policies. Lunga, Lubbe and Meyer (2019: 10) add that procurement planning is integral to helping municipalities understand their collective service delivery responsibilities.

Yevgenia, Kadyrov and Prokhorov (2021: 3) believe that some tools and techniques can assist public entities and spheres of government with procurement planning for efficiency in service delivery. Matrix analysis is a widely used tool in procurement planning, used to assess the cost-benefit of purchasing decisions. Another technique is plotting a graph against expenditures on various goods or services, and then categorising the goods or services into four quadrants on the graph to determine which is cost-effective. The combinations of these tools and techniques assist the government with effective procurement planning.

Mdemu (2013) contributed to the public procurement planning field in South African municipalities to understand the effectiveness of procurement planning in service delivery. In a study titled *Effectiveness of Procurement Planning on Services Delivery in Public Sector: A Case Study of Tanga City Council*, Mdemu (2013) assessed the effectiveness and efficiency of procurement procedures and service delivery. The study claims that the ministries, agencies, and local government offices require yearly procurement planning. However, despite considerable funding allocated to local governments for purchasing goods, governments cannot achieve their development objectives because they have not prepared procurement plans promptly at municipal offices. The study by Mdemu (2013) was a descriptive case study that employed interviews, questionnaires, and a review of secondary sources, including reports, memos, and charters. The findings answered the following questions:

- What role do the various interested parties play in procurement planning?
- What aspects disturb procurement planning on service delivery?
- What is the connection between procurement planning and service delivery?

The study found that the Tanga City Council has difficulty managing its working policies and personnel, including procurement-related policies, as senior officials do not execute these policies consistently or approve procurement planning requests on time. Moreover, the preparation and implementation of a procurement plan and senior officials' timeliness in providing accurate specifications and quantities, as requested by the contracting authorities, are not sufficiently monitored. Mdemu (2013) concludes that the necessity to plan and deliver public services is essential in local government because it facilitates the timely delivery of requirements and several procurement methods that comply with legislation. The researcher further advises that a seminar with qualified procurement and supply officers on the importance of procurement planning should be organised in Tanga City Council to improve service provision.

According to Mathenjwa (2018: 8), the three spheres of government must assist and support each other. The national and provincial spheres of government act as oversight bodies of the local sphere of government. They must moderate the relationship between the local government management and the procurement committee, thus impacting service delivery. Mathenjwa (2018: 8) indicates that service delivery is the dependent variable, reliant on the management of the procurement system in local government, including procurement planning. In addition to development planning and administration, South Africa has measures aimed at decentralising government, which became popular in the 1990s (Steyler, 2005: 187). The decentralisation of service delivery from the national sphere of government can be justified on several grounds, such as the post-Apartheid democratic government. The literature suggests that improving service delivery has been a common factor (Steyler, 2005: 187).

Kalonda and Govender (2021: 7) argue that many of the difficulties in local governments, e.g., a lack of necessary administrative capacity, have prevented decentralisation in South Africa from benefitting from effective service delivery. In this debate, public procurement systems continue to play a quiet role. However, these systems are increasingly recognised as key instruments in ensuring effective corruption prevention and management of government resources (Kalonda & Govender, 2021: 19).

2.9 CHAPTER SUMMARY

This chapter provided an overview of the literature on the theoretical aspects of procurement planning. The literature review examined existing research by various scholars on the theoretical framework for procurement planning. The literature review was derived from dissertations in academic institutions, local and international books, and journal articles. The chapter emphasised that effective procurement planning is the only way to improve public service provision in local government.

CHAPTER 3: THE LEGAL FRAMEWORK AND ROLE OF PROCUREMENT PLANNING WITHIN THE HOUSING DEPARTMENT IN THE CITY OF JOHANNESBURG METRO MUNICIPALITY

3.1 INTRODUCTION

The preceding chapter focused on the effects of public procurement planning within the COJMM Housing Department and the international perspective of procurement planning at the local government level. Chapter 3 contextualises the significance of the procurement framework in procurement planning within the housing department, particularly in the COJMM. It specifically addresses the legal framework regulating procurement and the role of procurement planning in the housing department.

This chapter examines the laws and policies governing procurement in South Africa at the national, provincial, and local levels of governance. It also compares the procurement landscape within the City of Johannesburg Metropolitan Municipality (COJMM) with that of the City of Tshwane Metropolitan Municipality (COTMM), with examples from the contributions of procurement planning in COTMM. This investigation illuminates specific procurement planning policies that affect Orange Farm Extension 10, Tjovitjo.

Chapter 3 also provides an overview of the legislation and institutions that facilitate procurement planning in South Africa. It highlights the context of the green paper on public sector procurement reform, the Municipality Financial Management Act 56 of 2003 (MFMA), and the Broad-Based Black Economic Empowerment (BBBEE) Act 53 of 2003. The chapter also includes key legislative instruments, such as the Constitution of the Republic of South Africa, 1996, the Preferential Procurement Policy Framework Act 5 of 2000, and the Public Finance Management Amendment Act 1 of 1999 (PFMA). Furthermore, the chapter emphasises the role of municipalities in advancing procurement planning within the housing department, underscoring the vital importance of procurement and housing policies in achieving specific objectives.

3.2 NATIONAL PROCUREMENT POLICIES IN SOUTH AFRICA

In 1996, the South African government established the principles of the RDP in public procurement to ensure that the primary beneficiaries of these reforms were previously marginalised groups (Raga & Taylor, 2010: 9). As discussed in Chapter 1, public procurement has undergone significant reform after-Apartheid era to address historical imbalances by introducing five principles of good governance: accountability, the rule of law, effectiveness, transparency, and responsiveness, in striving to establish a framework for public rights and accountability (RSA, 1996).

According to Raga and Taylor (2010: 9), the primary legislation governing public procurement is the Constitution of the Republic of South Africa. The Constitution stipulates in Section 217 that when an organ of state engages in contracts for goods and services, it must adhere to fairness, equity, transparency, competitiveness, and cost-effectiveness (RSA, 1996). This constitutional requirement is further reinforced in Section 51(1)(a) of the Public Finance Management Act 1 of 1999 (PFMA), which mandates that an accounting authority for a specific sphere of government must ensure that the respective department or entity within that sphere maintains an appropriate procurement and provisioning system that is fair, equitable, transparent, competitive, and cost-effective (RSA, 1999).

In a bid to rectify historical injustices, the Constitution (1996) allows state organs, such as government departments and public entities, to adopt policies to uplift individuals disadvantaged by past unfair discrimination. Section 217(3) of the Constitution mandates the enactment of legislation that establishes a framework within which this policy should be implemented (RSA, 1996).

The National Treasury (2024) highlights that the apartheid period in South Africa was marked by major shortcomings in procurement legislation. Ambe and Badenhorst-Weiss (2012: 242–261) note that most government departments and public entities create and oversee their procurement systems in accordance with regulatory standards. Although some provincial regions have dedicated procurement offices, the core principles of administrative justice mainly guide public procurement (Ambe & Badenhorst-Weiss, 2012: 242–261). Consequently, procurement in South Africa is governed by the following regulations;

3.2.1 Green Paper: Public Sector Procurement

The Green Paper on Public Sector Procurement Reform in South Africa acknowledges that the government can leverage public sector procurement to achieve economic objectives, including specific socio-economic goals (RSA, 1997: 32). Brunette and Klaaren (2020) assert that the Green Paper laid the groundwork for the procurement reform process and subsequent development of policies and procedures. The authors state that the White Paper has not replaced the Green Paper in the realm of public sector procurement; however, proposals from the Green Paper have been enacted, such as those for social care (Brunette & Klaaren, 2020). In addition, Raga and Nano (2011: 130–147) emphasise the recognition in the Green Paper that a robust and efficient procurement system would enable state entities to deliver the quality and quantity of services demanded by their new constituents, aligning with the policies outlined in the RDP.

The Green Paper is linked to procurement planning by emphasising procurement to fulfil socio-economic aims, including poverty alleviation (Ambe & Badenhorst-Weiss, 2012: 242). Consequently, procurement planning within government entities now encompasses efficiency, cost-effectiveness, and the strategic objective of fostering socio-economic transformation. This scope necessitates that public procurement planners incorporate affirmative procurement principles into their strategies, ensuring tenders benefit historically marginalised populations. Ambe and Badenhorst-Weiss (2012: 242) note that procurement planning, as dictated by the framework established by the Green Paper and the PPPFA, must ensure that tender processes remain accessible and not excessively intricate.

Maepa, Mpwanya and Phume (2023: 77–92) states that the Affirmative Procurement Policy (AP) promoted in the Green Paper was crucial in the procurement reform initiative. AP was designed to promote economic empowerment by directing procurement opportunities towards historically marginalised groups (Morgan, 2007: 242–261). The policy aim is reflected in the overarching strategic goals of procurement plans. This aspect signifies that procurement opportunities were evaluated not only on price and quality but also on whether the bidder aids in economic transformation, such as by creating jobs or empowering underrepresented communities (Maepa, Mpwanya & Phume, 2023: 77–92).

The reform recommendations in the Green Paper primarily aimed to expand the amount of work accessible to marginalised groups, particularly within sectors like engineering, construction, and other infrastructure domains (RSA, 1997). The intention was to ensure that public procurement contracts directly supported job creation and income-generation prospects for low-income and marginalised communities (RSA, 1997). Thus, procurement planning incorporates strategies to ensure that marginalised segments of society gain advantages from significant contracts. For example, planners in the construction sector are required to assess how much of the work would be distributed to firms owned or operated by individuals from historically disadvantaged backgrounds (Maepa, Mpanya & Phume, 2023: 77–92).

The Green Paper on Public Sector Procurement Reform has impacted procurement planning in South Africa, positioning procurement as a means for socio-economic change by highlighting fairness, transparency, and empowerment principles for historically marginalised groups. According to Zulu (2013), the implementation of affirmative procurement and its alignment with broader national objectives has transformed procurement methods, ensuring government expenditure assists in economic growth and creates opportunities for historically disadvantaged providers. Under the influence of the Green Paper, procurement planning guarantees that procurement processes fulfil operational targets and serve the nation's broader economic and social ambitions (The Presidency, 2009).

3.2.2 Preferential Procurement Policy Framework Act, 5 of 2000

The PPPFA No. 5 of 2000, is a significant legislative framework in South Africa. The Act focuses on government procurement practices that align with constitutional, economic development, transformation, and social equity mandates (RSA, 2000). This Act establishes protocols to ensure public sector contracts prioritise historically disadvantaged groups, particularly black Africans, women, youth, and persons with disabilities, thus promoting a more inclusive economic environment (RSA, 2000).

According to the South African Association of Consulting Engineers (SAACE) (2003), the PPPFA fundamentally shapes public procurement plans across various governmental bodies, functioning as both a legal guideline and a strategic tool in procurement planning. SAACE (2003) further states that the Act compels departments

to assess their procurement requirements systematically and devise strategies that fulfil these needs while supporting broader social and economic objectives, such as equity and development.

Furthermore, the South African Human Rights Commission (SAHRC) (2024) finds that procurement strategies influenced by the PPPFA align with the overarching goals of the RDP, ensuring that procurement processes focus on immediate economic needs and long-term social transformation. Section 2 of the Act mandates each state entity to develop its preferred procurement policy, incorporating preference point systems that align with specified guiding ratios, such as (80 black people / 20 white people) in developing procurement plans (SAHRC, 2024). This requirement underscores the necessity to integrate preference points that can affect total procurement costs, allowing the government to favour tenders that promise sustained economic advancement despite potentially higher initial expenditures, as part of a concerted effort to facilitate transformation (RSA, 2000).

Simone and Balasundharam (2023) confirm that procurement planners must adhere strictly to PPPFA stipulations, as failure to comply with its preferential procurement regulations could result in legal consequences, reputational damage, and sanctions. The Act provides a structured framework for monitoring procurement activities, safeguarding against fraud and non-compliance, thereby fostering accountability and integrity within public procurement processes (Simone & Balasundharam, 2023).

In summary, the PPPFA is an integral component of procurement planning in South Africa that significantly influences how government procurement frameworks are established to achieve constitutional and national development objectives. The Act highlights the vital role of procurement professionals in judiciously planning the distribution of public sector contracts, ensuring that procurement activities align with legal requirements and governmental social commitments (RSA, 2000).

3.2.3 Public Finance Management Act (PFMA) 1 of 1999

The Public Finance Management Act (PFMA) of 1999 establishes a framework for the financial management of state resources, including procurement. Sections 38 and 51 govern procurement within public entities and set forth the requirements for financial

accountability (PMFA, 1999). The Act facilitates well-structured procurement planning and promotes the practical and consistent application of procurement principles. However, applying procurement policies such as the PFMA across various levels of government can lead to challenges in achieving uniformity in policy- and decision-making (World Bank, 2019).

The PFMA created a solid foundation for procurement governance. Moreover, the constitutional right to just administrative action allows public contestation of procurement decisions if they breach due process (World Bank, 2019). The objectives outlined in the Public Finance Management Amendment Act, 29 of 1999, include regulating financial management within national and provincial governments, promoting the efficient and effective administration of revenue, expenditures, assets, and procurement, and defining the responsibilities of individuals tasked with financial management in these governmental bodies (RSA, 1999). Thus, when applying the PFMA to procurement planning, the accounting officer plays a crucial role in the external oversight process mandated by the PFMA Act, 29 of 1999.

3.2.4 Municipal Finance Management Act (MFMA) 56 of 2003

Procurement planning is essential for municipalities because it aligns with strategic objectives and ensures compliance with the pertinent laws and regulations, such as the Municipal Systems Act and the Municipal Finance Management Act (MFMA), along with SCM policy requirements (National Treasury 2007). The MFMA is particularly important in this context, as it delineates precise evaluation, approval, and contract management procedures, specifically in Sections 113 to 116 (RSA, 2003). The National Treasury (2007) confirms that the procurement planning process must adhere to the approved municipal budget, guaranteeing that all procurement decisions are financially sound and within the allocated budget. The Municipal Finance Management Act, No. 56 of 2003 (MFMA), similarly enforces principles for municipalities (RSA, 2003), and the Treasury plays a significant role in shaping the financial policies of public institutions (National Treasury, 2007).

3.2.4.1 Role of procurement planning, the MFMA, and public–private partnerships

As previously highlighted, the Municipal Finance Management Act (MFMA) serves as a legislative framework to regulate financial management at the local government level (Van Staden, Fourie, & Holtzhausen, 2022). Furthermore, the Act significantly impacts procurement planning and SCM in municipalities (Van Staden, Fourie, & Holtzhausen, 2022). The MFMA ensures that procurement practices and decisions align with municipal budgetary constraints, establishing frameworks for financial accountability. This linkage between procurement planning and budget forecasts guarantees that expenditures do not exceed budget limits without appropriate oversight and approval (Van Staden, Fourie, & Holtzhausen, 2022).

Chapter 10 of the MFMA provides thorough guidance on the financial management aspects of procurement planning. According to the regulations, these provisions complement the SCM regulations by outlining specific procurement procedures, which encompass the delegation of powers, expenditure control, and reporting requirements (Venter, 2007). According to Van Staden, Fourie, and Holtzhausen (2022), alignment between procurement planning at the governmental level and treasury guidelines to maintain financial compliance and effective oversight must be ensured. Thus, the MFMA mandates municipalities to establish internal controls and reporting mechanisms corresponding to procurement planning. Moreover, the Act underscores the importance of risk management in mitigating the potential for mismanagement during procurement processes (RSA, 2003).

According to Venter (2007), the MFMA significantly impacts public–private partnership (PPP) procurement planning. For instance, Section 120 of the SCM regulations mandates municipalities to conduct feasibility studies before entering into PPP agreements. This requirement aligns with the emphasis of the MFMA on financial feasibility and risk management before municipalities engage in multi-year contracts or partnerships, as outlined in Section 33 of the MFMA (RSA, 2003).

In addition, MFMA underscores the importance of ethical conduct by incorporating specific provisions to prevent fraud and corruption in procurement planning. For example, the MFMA requires municipal officials to adhere to ethical standards and imposes penalties for corruption and the mismanagement of funds (RSA, 2003).

The MFMA policy strives to improve municipal financial management in procurement processes. Thoughtful procurement planning, guided by the MFMA framework, enables municipalities to act responsibly while meeting the service delivery obligations (RSA, 2003).

3.2.5 Broad-Based Black Economic Empowerment (B-BBEE) Act 53 of 2003

The enactment of equality legislation in South Africa, specifically the Broad-Based Black Economic Empowerment Act 53 of 2003 (B-BBEEA), represents a pivotal move towards rectifying the socio-economic disparities entrenched by the Apartheid regime (Balshaw & Goldberg, 2014). B-BBEE is designed to foster economic transformation and promote the active participation of black individuals in the economy. As defined by Balshaw and Goldberg (2014), B-BBEE is a government policy to enhance economic engagement by black South Africans, thus facilitating a more inclusive economic landscape.

Public Procurement & Innovation, report (2020), elaborates on the importance of B-BBEE in procurement, highlighting its role in advancing socio-economic transformation by prioritising previously disadvantaged groups. This legislative approach is crucial in reinforcing ethical procurement practices, emphasising inclusivity and fairness, particularly within the public sector (Public Procurement & Innovation, report 2020).

Within their respective departments, procurement professionals are authorised to clarify and guide the implementation of the Act periodically through the Government Gazette, ensuring ongoing relevance and alignment with current socio-economic needs in the procurement planning.

The preamble of the Act acknowledges the constitutional right to equality and fosters broad-based economic participation (RSA, 2003). The B-BBEEA ultimately aims to alter the racial composition of ownership and management within enterprises (Ncwadi, Onceya & Siswana, 2014). According to Sibanda (2015), the Act seeks to address systemic disparities in the procurement process, yet challenges persist in realising its objectives.

Smith (2019) states that the B-BBEE Act significantly influences procurement planning by encouraging organisations to align their procurement strategies with broader

economic empowerment goals. This Act leads to preferential procurement for B-BBEE-compliant suppliers, particularly black-owned businesses, to meet regulatory requirements and raise B-BBEE ratings (Smith, 2019).

3.3 CONSTITUTIONAL MANDATE FOR HOUSING

The SAHRC (2024) indicates that the constitutional mandate for housing has grown significantly since 1994. Section 26 of the Constitution states that everyone has a right to access adequate housing, given that constitutionalising government procurement and the commitment to democratic values are enshrined in Section 217 of the Constitution of the Republic of South Africa Act 108 of 1996 (RSA, 1996).

According to the COJMM (2019), all public procurement related to housing needs must adhere to constitutional principles. This factor aims to ensure that government procurement serves as a tool for public service delivery, economic empowerment, and social justice. Incorporating empowerment criteria, such as affirmative action measures, into procurement processes seeks to redress past inequalities by providing opportunities to historically disadvantaged individuals and communities.

In the Apartheid era, procurement was primarily governed by a framework that emphasised efficiency, with the price of goods and services the primary determinant of success (ANC, 2012). However, with subsequent legislative reforms post-1994, procurement became more multifaceted; hence, procurement processes have become more complex, with significant attention to the legal frameworks that govern them (Ambe, 2016: 277–288). Furthermore, in addition to these procurement reforms, specific legislation, like the Black Communities Development Act No. 4 of 1984 and the Housing Act No. 107 of 1997, addresses key development areas (RSA, 1984; 1997). For instance, the Housing Act emphasises prioritising the needs of the economically disadvantaged in housing development and ensuring transparency, good governance, and sustainability (Zuma, 2010).

Given these complexities, any challenge to a government procurement decision can now be based on alleged violations of the principles set out in the Constitution (Chenwi, 2015: 68–87). For example, if a procurement procedure is not transparent,

equitable, or competitive, it might be subject to legal scrutiny, and remedies sought to ensure the process complies with constitutional requirements (Chenwi, 2015: 68–87).

Hence, public procurement in South Africa has undergone a profound transformation since the advent of constitutional democracy in 1994, reflecting the broader socio-political changes within the country. The process is no longer viewed simply as a mechanism for acquiring goods and services, but as a critical instrument for advancing the ideals of fairness, social justice, and economic transformation (Malaza, Todes & Williamson, 2009).

According to Noyoo (2015), the intersection between Sections 25 and 26 allows the state to navigate the balance between land and socio-economic rights progressively to satisfy both. Noyoo (2015) believes it is essential to consider the significant connections between Sections 25(5) and 25(6) and between Sections 26(1) and 25(6), as part of the constitutional framework that governs the relationship between property and housing rights. In addition, Section 217(1) of the Constitution, 1996 provides the basis for procurement and determines that Section 217(3) of the Constitution obligates national legislation to prescribe a framework providing for preferential procurement to address the social and economic imbalances of the past (RSA, 1996). Section 26 of the Constitution provides for the constitutional obligation of the government to provide housing and create an environment where all South Africans can live, indicating the significance of the relationship between Section 26 and Section 217 (1) (Oldfield & Greyling, 2015: 1100).

3.3.1 Integration of Procurement with Socio-Economic Policies

Procurement is viewed as a tool for achieving socio-economic transformation; therefore, the government must attain economic and social objectives through public procurement. Advocates of interventions in public procurement have argued that the PPPFA and the B-BBEE Act are key to ensuring that public procurement serves broader developmental objectives, particularly in the housing sector (Patel, 2015).

According to Patel (2015), economic and social policies are inextricably linked when a country attempts to achieve economic development and transformation. Patel (2015) notes that economic growth and transformation cannot be attained without the

integration of procurement with socio-economic policies, such as the BNG Policy (2004), RDP, Upgrading of Informal Settlements (UISP), and land reform and housing to achieve socio-economic objectives without compromising on the primary purpose of value for money (Turok, 2014).

According to Basheka (2008: 1–32), procurement planning for housing projects should consider the immediate requirements for affordable housing and long-term socio-economic benefits. It should include the following provisions:

- *Creating employment opportunities in the construction sector.*
- *Enhancing skills in construction professions.*
- *Awarding contracts to local companies and supporting underrepresented communities.*

Given the need to integrate policies for redress and equality, procurement planning ensures that affordable housing reaches the most disadvantaged communities, particularly the historically marginalised (Mathapo, 2010).

3.3.2 WTO Commitments and Procurement in South Africa

According to the South African Institute of International Affairs (SAIIA) (2008), the World Trade Organisation has undertaken diverse initiatives to foster African trade growth over the past decade. WTO members, such as the South African government, have leveraged various entities within the organisation and the WTO Secretariat, implementing a comprehensive array of agreements, decisions, and technical assistance programmes ranging from trade facilitation to regulations on government procurement (SAIIA, 2008).

South Africa must adhere to specific international procurement practices, including those stipulated by the WTO Agreement on Government Procurement (GPA), albeit with some reservations (SAIIA, 2008). SAIIA (2008) asserts that housing procurement is valuable, granting the government greater flexibility in applying local policies, such as preferential procurement measures.

The South African WTO obligations and constitutional commitment to providing housing are inherently linked to its public procurement processes (SAIIA, 2008).

Because procurement is the primary mechanism through which the government fulfils its housing mandate, it is paramount to ensure effective resource allocation, empower historically disadvantaged groups, and foster socio-economic development (Shaj & Thompson, 2004). By aligning procurement practices with constitutional and socio-economic goals, the government meets its constitutional duty to provide adequate housing, and leverages procurement for broader societal transformation (Soudry, 2007: 432–451). Moreover, South African participation in international trade agreements, such as the WTO GPA, illustrates a careful balancing act between upholding domestic empowerment policies and adherence to global procurement standards (SAIIA, 2008).

3.4 LEGAL STRUCTURE FOR PROCUREMENT IN THE CITY OF JOHANNESBURG

Procurement within the COJMM adheres to a comprehensive legal framework that aligns with national standards and local regulations, promoting the efficient use of resources, transparency, and advancing social and economic transformation (Quinot & Arrowsmith, 2013). The constitution ensures that the COJMM conducts its procurement processes to allow citizens access to information and participation in decision-making bodies (Quinot & Arrowsmith, 2013).

The MFMA is specific to the COJMM because it governs municipal financial management (Aydın, 2020). Section 111 of the MFMA, 56 of 2003, mandates that each municipality and municipal entity establish and implement a SCM policy to comply with the requirements outlined in the MFMA (RSA, 2003).

Furthermore, the PPPFA No. 5 of 2000 requires departments to formulate their preferred procurement policy and adhere to the prescribed framework (RSA, 2000). In line with these legislative requirements, the COJMM must ensure that it can combat fraud, corruption, favouritism, and irregular practices within procurement practices (Quinot & Arrowsmith, 2013).

Procurement in the COJMM involves various committees, such as the COJMM Bid Adjudication, to assist the city in evaluating contracts and ensuring that procurement processes align with national legislation and city policies (Quinot & Arrowsmith, 2013).

The most significant of these is the COJMM Procurement Policy, which is tailored to the procurement processes of the city. It assists in implementing a SCM system under Section 217 of the Constitution of the Republic of South Africa, Act 108 of 1996 (“Constitution”), ensuring adherence to the principles of goods and service procurement. In addition, the policy mandates consistency with other relevant legislation and regulations (Quinot & Arrowsmith, 2013).

3.4.1 Municipalities and Municipal Entities

The implementation of a decentralised governance system in South Africa began in 1994, primarily addressing the service delivery challenges rooted in the Apartheid legacy (Rogerson, 2018). The introduction of the Municipal Systems Act in 2000 facilitated increased political engagement at the local government level, allowing municipal councillors to influence the appointment of municipal managers and their directorial teams. Reddy (2016) posits that this approach ensures the alignment between municipal leadership and its vision for local development. As Olver (2016) notes, political factors currently play a significant role in steering municipal operations during procurement processes.

According to Gumede (2017), municipalities can establish municipal entities as legal entities under municipal ownership or control. These entities are recognised as organs of state and, similar to municipalities, must adhere to constitutional procurement principles. The existing legislative framework does not explicitly compel municipal entities to comply with the PPPFA; however, they must still conform to the procurement principles stipulated in Section 217 of the Constitution (RSA, 1996).

Chapter 8 of the Municipal Systems Act addresses the provision of municipal services, delineating various delivery mechanisms in Section 76 (RSA, 2000). Internal delivery mechanisms refer to processes managed by municipal departments, administrative units, or specially created business units (Gumede, 2017). In contrast, external delivery mechanisms include municipal entities, partnerships with other municipalities, state organs, community-based organisations (CBOs), and non-governmental organisations (NGOs) (Reddy, 2016). Section F of the 1998 White Paper on Local Government presents alternative arrangements to bolster service delivery and promote socio-economic development (Aydin, 2020). This differentiation is significant,

since municipalities are mandated to adopt preferential procurement policies, although the municipal entities responsible for specific functions retain the discretion to implement such policies. Nonetheless, it is important to highlight that these entities are not prohibited from adopting preferential procurement practices, allowing for the potential incorporation of such policies into their operations (Reddy, 2016).

3.4.2 Local Government Procurement and Service Delivery

Municipalities are essential to delivering community services, often relying on private sector companies. In a developing country like South Africa, with a substantial portion of the population living in poverty and significant social disparities, the demand for efficient service delivery is markedly heightened compared to developed nations, where many individuals can sustain themselves independently (Booyesen, 2007: 34). Therefore, the Municipal Systems Act (2000) provides critical guidelines for municipalities in these determinations. It stipulates a procedural framework that mandates a competitive bidding process for service delivery decisions, with exceptions applied under certain circumstances (Booyesen, 2007: 23).

The Government Technical Advisory Centre (GTAC) (2022) notes that poor local government service delivery is often rooted in inadequate sanitation, water, electricity, and housing provisions, compounded by corruption that adversely affects the quality and accessibility of essential services. When municipalities enter into contracts with external entities for service provision, they are legally bound to adhere to constitutional procurement principles, ensuring that the procurement process is just, equitable, transparent, competitive, and cost-efficient (Booyesen, 2007: 23). This compliance requirement aligns with both the Systems Act and the PPPFA. Although the legal framework allows for some flexibility, permitting municipalities to bypass the competitive procurement processes in specific situations, these exemptions must still meet stringent criteria. Ultimately, municipalities must uphold the constitutional mandates of fairness and transparency in all their procurement actions (Booyesen, 2007: 23).

3.4.3 Developmental Role of Municipalities in Procurement Planning

The study of local government effectiveness often highlights the multifaceted challenges surrounding service delivery, particularly with essential services such as sanitation, water supply, electricity, and housing. As Booyesen (2007) points out, inadequate provisions in these areas can be worsened significantly by corruption, which detrimentally affects the quality and accessibility of vital services. Local municipalities are bound by constitutional procurement principles when engaging external service providers. This legal framework aligns with the Systems Act and the PPPFA, creating a guideline for municipalities to follow, although some exemptions exist under stringent criteria.

The GTAC (2022) characterises mobilising community resources to capitalise on competitive advantages within specific regions as a vital concept in developmental local governance, which ultimately empowers marginalised groups to access various opportunities. The collaborative nature of procurement planning involves city authorities, community organisations, civic groups, and private sector entities working in unison to manage resources effectively, driving job creation and economic activity while prioritising local control and resource leverage (GTAC, 2022).

Bennett (1988: 179–189) notes that the constitution delineates a critical developmental role for municipalities, stipulating their responsibilities in promoting social and economic progress. Section 152 of the Constitution articulates key objectives for local government, including fostering democratic governance, encouraging community engagement, and ensuring a healthy environment. Therefore, when coupled with community and private sector collaboration, municipal intervention is a more effective alternative to relying on effective procurement processes for local economic development (GTAC, 2022).

Municipalities fulfil their developmental mandate by employing procurement processes strategically to advance social equity and economic development. The White Paper on Local Government (1998) highlights the attributes of developmental local government, namely maximising growth and social development, integrating service delivery, promoting community engagement, and fostering a culture of continuous improvement (GTAC, 2022).

As previously mentioned, these principles underline that municipalities serve not only as service providers but also as pivotal actors in transforming local economies and enhancing community well-being through strategic procurement alignment with constitutional objectives, thereby improving the quality of life for their residents. Moreover, these principles ensure that the contracting process remains fair, equitable, transparent, competitive, and cost-effective (Booyesen, 2007).

3.4.4 Municipal Procurement Regulations: Specific Procurement Regulations Governing Local Government in COJMM

As discussed in the previous chapters, South Africa has made significant strides in the procurement sector. Procurement policies illustrate governmental commitment to public procurement in addressing historical imbalances. Thus, local legislation is developed to eliminate inconsistencies in current procurement practices and combat the prevalence of fronting specific to a municipality (De Rebus, 2024). Raga and Nano (2011: 131–139) indicated that procurement officials recognise the importance of bylaws for socioeconomic development.

3.4.4.1 Johannesburg-specific bylaws

According to Chapter 5 of the COJMM bylaws, the Council may establish written agreements to facilitate public open spaces in collaboration with any state organ, local community, or organisation (Raga & Nano, 2011: 131–139). The bylaws emphasise the importance of aligning these agreements with the developmental goals of the City. The shared interest of strategic alignment, monitoring, and collaboration constitutes the connection between bylaws and procurement planning. Bylaws are designed to foster cooperative development, management, and regulation of human activities in public spaces. Therefore, the COJMM must acquire goods and services to meet public demand in a way that aligns with these bylaws (Raga & Nano, 2011: 131–139).

According to the South African Local Government Association and the South African Research Chair in Cities, Law and Environmental Sustainability Report (SALGA & CLE, 2020:17-49), the Council shall not agree to any subsection unless it reasonably believes that such an agreement will further the identified objectives. This provision grants the Council the authority to terminate procurement agreements if they are

deemed ineffective or fail to achieve their goals. Furthermore, in the procurement process, it is essential to consider environmental impacts, social benefits, and long-term value, in keeping with the emphasis of the bylaws on responsible regulation of human activities in public spaces (SALGA & CLES, 2020:17-49).

The COJMM bylaws provide a legal framework for structuring, monitoring, and managing agreements, including procurement contracts, to meet public and organisational objectives. Utilising bylaws in procurement ensures that the acquisition of goods, services, and works complies with legal standards and supports broader goals of sustainable development, public welfare, and resource management (SALGA & CLES, 2020:17-49).

3.4.4.2 Supply chain management (SCM) policy

The SCM policy outlines a structured framework for acquisition management in a municipal context. It delineates the City Manager's responsibilities and establishes guidelines for procuring goods and services, emphasising compliance, transparency, and accountability (Fezile Dabi District Municipality, 2020: 10).

Fezile Dabi District Municipality (2020: 21–22) states that the City Manager executes the acquisition management system, ensuring adherence to authorised procurement procedures, budget alignment, and compliance with established laws and guidelines.

Any procurement under specific regulations must be publicly announced to facilitate participatory governance, detailing the types of goods or services and the name of the supplier, ensuring transparency in government spending (Fezile Dabi District Municipality, 2020: 21–33). In the procurement planning process, the policy prohibits dividing procurements into smaller parts to bypass existing requirements, thereby promoting integrity in the procurement process (Fezile Dabi District Municipality, 2020: 10). Each section is designed to reinforce ethical procurement practices and establish a transparent, accountable process that aligns with broader legislative and regulatory frameworks (SCM). This structured approach optimises resource allocation and enhances service delivery within the municipality and the (IDP) in Johannesburg, and how it guides procurement processes (Fezile Dabi District Municipality, 2020: 10).

3.4.4.3 Integrated development plan (IDP) in Johannesburg

The White Paper on Local Government advocates for a transformative model for municipal operations, aiming to achieve the objectives of developmental local government (RSA, 1998a). The establishment of IDPs is a key element of this transformation, recognised as an essential tool for fulfilling these goals (DPLG, 2000: 19). The White Paper outlines several rationales for adopting integrated development planning, emphasising the necessity for municipalities to address the many challenges facing communities effectively.

The rationale for integrated development planning is the recognition of the complex obstacles local communities encounter. Vaz and Dorado (2002) affirm that Section 24 of the Municipal Systems Act guides the formulation of IDPs. Therefore, by using the IDP as a framework for procurement, the COJMM ensures that its procurement activities support and contribute to the long-term development agenda of the City. This act requires a collaborative approach across various tiers of government. It mandates synchronising municipal IDPs among municipalities within a district and coordination with other government entities.

The COJMM IDPs have a lifespan of five years; they are legally recognised as the primary plan, taking precedence over sector-specific plans (DPLG, 2000: 20). The primary aim is to offer comprehensive guidance and align the procurement processes with the strategic objectives and priorities of the City. COJMM IDPs synthesise the outcomes of diverse planning processes into a unified, coherent document that illustrates the interconnections and overlaps among these processes (Vaz & Dorado, 200). COJMM IDPs also articulate the financial implications associated with the various plans and policies in place. Therefore, by integrating the COJMM IDP into procurement planning, the COJMM ensures efficient usage of public resources, the achievement of development goals, and service delivery for the benefit of all citizens (DPLG, 2000: 19).

3.5 REGULATORY BODIES AND OVERSIGHT INSTITUTIONS

Regulatory bodies and oversight institutions are crucial to the effective functioning of the procurement process in South Africa. Their primary objective is to safeguard the rights and welfare of citizens while ensuring the delivery of public goods and services

(Ally & Konstant, 2020). They are also responsible for ensuring compliance with regulations. These entities serve as a platform for citizens to voice their concerns about delays in government service provision to communities. Regulatory bodies and oversight institutions must strive to align their activities with achieving policy objectives (Ally & Konstant, 2020). The section below describes these bodies and institutions:

3.5.1 National Treasury

The South African Reserve Bank (2025) states that the primary objective of the National Treasury is to establish a robust and effective regulatory framework for the financial sector. This initiative addresses the need to provide access for households and businesses that are often excluded from the financial system, and instil a sense of stability and confidence in the sector. A regulatory impact assessment function has been developed and implemented in collaboration with the Presidency to enhance oversight of laws and regulations (Ally & Konstant, 2020). This function enables the National Treasury to create and disseminate procurement policies and guidelines that direct procurement planning across all government agencies, thereby ensuring alignment with national priorities, fiscal responsibility, and economic transformation (South African Reserve Bank, 2025).

Ally and Konstant (2020) state that while the quality of audit reports from various public entities has improved, significant financial management and governance challenges remain. The Central Supplier Database (CSD) of the National Treasury ensures that procurement planning incorporates registered, compliant suppliers who meet legal and regulatory standards to combat such challenges (Ally & Konstant, 2020). The Treasury also offers guidance on multi-year procurement plans to ensure that public procurement aligns with broader financial planning goals, directing support to areas of most urgent need (South African Reserve Bank, 2025).

3.5.2 Office of the Chief Procurement Officer

The Office of the Chief Procurement Officer (OCPO) was initiated with a clear mission to modernise and oversee the South African public procurement system. This proactive approach ensures that goods, services, and construction projects are acquired in alignment with the Constitution and relevant legislation (Ally & Konstant, 2020). Furthermore, the OCPO facilitates the standardisation of procurement planning across government entities by providing templates, procedures, and frameworks that

departments can utilise when developing their procurement plans (Ally & Konstant, 2020). This emphasis on modernisation should instil a sense of optimism about the future of the public procurement system.

According to the South African Reserve Bank (2025), the OCPO does not engage directly in procurement activities; it oversees procurement reforms to ensure that planning accords with national procurement regulations. The OCPO maintains the overall integrity of the procurement system and offers technical support and guidance to government agencies in creating procurement plans that align with their available budgets (Ally & Konstant, 2020). Furthermore, it manages the relationship between the government and the private sector, advising entities on integrating risk management into procurement planning to identify potential risks effectively. This facet includes fostering partnerships with private suppliers, negotiating contracts, and ensuring that the interests of the private sector are considered in the procurement process (Ally & Konstant, 2020).

3.5.3 Auditor-General of South Africa

The Auditor-General of South Africa (AGSA) operates under a constitutional mandate aimed at enhancing democracy. By fostering oversight and accountability through rigorous auditing practices, the AGSA plays a crucial role in nurturing public trust in governmental operations (Auditor-General South Africa, 2025). The AGSA conducts regularity audits across a broad spectrum of entities, including national and provincial government departments, designated public entities, municipalities, and municipal entities, collectively called auditees (Auditor-General South Africa, 2025). The emphasis on enhancing democracy underscores the importance of the work.

AGSA not only conducts standard audits but also discretionary audits, which involve scrutinising public entities' procurement plans to ensure alignment with budget allocations, adherence to established procurement regulations, and the effective deployment of public resources (RSA, 2025). The outcomes of these audits are meticulously documented and presented to various legislative bodies, including Parliament and provincial legislatures, reinforcing the principle of accountability (RSA, 2025).

A concerted auditing effort is pivotal in advancing sound financial governance in South Africa. It identifies weaknesses in procurement processes, such as unrealistic timelines, imprecise cost estimates, and insufficient supplier vetting, and provides actionable recommendations for improvement (RSA, 2025).

According to Auditor-General South Africa (2025), by offering independent assurance regarding the financial management of public funds, AGSA enables legislatures to hold executive authorities, accounting officers, and public entities accountable through sound financial practices and applicable legal standards. This oversight empowers citizens to demand accountability from those entrusted with state resources.

AGSA reports to the National Assembly, submitting an annual report that encompasses its activities and the effectiveness of its operations, along with key accountability documents, including its strategic plan and budget. The insights derived from AGSA audit reports often catalyse refining future procurement strategies and enhancing planning and decision-making processes for effective governance and accountability (Auditor-General South Africa, 2025).

3.5.4 Public Procurement Tribunal and Appeal Mechanisms

According to Quinot (2014), public procurement rules are enforced through various legal mechanisms distributed throughout the administration and through remedies implemented in regular courts. The public procurement tribunal, appeal mechanisms, and effective procurement planning are essential elements of a transparent and efficient procurement framework (Bolton, 2013). The Procurement Bill provides for a dispute resolution mechanism by establishing the Public Procurement Tribunal (Tribunal). The Tribunal is responsible for assessing decisions made by procuring entities, such as the decision to debar a bidder or supplier. Acting as an impartial body, it guarantees fair and lawful procurement practices, with its decisions binding for the parties involved (Manko, 2024).

Manko (2024) reports that establishing a tribunal and the accompanying standstill provisions requires close observation in practice, as they could either prolong the already lengthy procurement process or significantly shorten it. These provisions might contribute to additional delays in public procurement as they introduce another layer to an already intricate system (Bolton, 2013). Manko (2024) points out the possibility

of an increase in reconsiderations and reviews before the Tribunal, which could lead to misuse of the process. Quinot (2014) argues that the ability of the Tribunal to issue cost orders incurred by the other party in extraordinary circumstances during review proceedings is intended to mitigate that concern.

The Procurement Bill grants the Tribunal extensive powers, which include issuing orders that prevent a procuring institution from making an award, cancelling an award made under review, directing that procurement proceedings be concluded, and requiring compensation for any reasonable costs incurred by a bidder due to an act, decision, or procedure of the procuring institution (Quinot, 2014). These powers assist the procurement process significantly.

3.5.5 Competition Commission of South Africa

The Competition Commission of South Africa (Commission) (CCSA) is one of three independent statutory entities established under the Competition Act, No. 89 of 1998 (the Act) to oversee competition among firms in the marketplace (Moodaliyar & Roberts, 2012). The Commission ensures that procurement planning, especially in the public sector, fosters fair competition and prevents anti-competitive practices that can distort market outcomes (Lewis, 2013). The role of the Commission in procurement planning is to promote transparency, efficiency, and fairness in the procurement process (Andreoni *et al.*, 2021).

The Commission is the investigative and prosecuting body within the competition framework, while the Tribunal acts as the court. The CCSA creates an environment where procurement offers value for money, promotes innovation, and supports economic growth. Ensuring competitive procurement processes ultimately benefits the government and the broader economy (Quinot, 2014).

3.5.6 Parliamentary Committees

According to The Parliamentary Monitoring Group (PMG) (2025), the primary function of parliamentary committees is to launch inquiries and perform tasks for which the National Assembly and the National Council of Provinces are not equipped to deal with. Typically, these committees constitute senior Members of Parliament. The Rules Committee and its subcommittees are responsible for managing House rules, the House budget, Member support, internal arrangements, and members' powers and privileges (Andreoni *et al.*, 2021).

The essential objective of parliamentary procurement committees, including the Public Accounts Committee (PAC) and the Standing Committee on Finance, is consequential. The task of these committees is to oversee public procurement processes thoroughly, ensuring that procurement planning complies with laws, regulations, and standards. This oversight enhances the volume of work that can be accomplished and allows for more in-depth discussions on procurement issues than is possible in plenary sessions (Parliamentary Monitoring Group, 2025). Importantly, the committees are not limited to governmental matters; they can explore any public interest issue under their jurisdiction (Parliamentary Monitoring Group, 2025).

The National Council of Provinces (NCOP) exercises its powers by appointing many select committees from its permanent members. These committees monitor the activities of various national government departments and deal with bills (Parliamentary Monitoring Group, 2025). The National Assembly Standing Committee on Public Accounts serves as a parliamentary oversight body regarding the expenditure of taxpayers' money by the Executive. The Auditor-General annually reports on the accounts and financial management of different government departments and state institutions (Parliamentary Monitoring Group, 2025). This mechanism allows the Committee to maintain checks and balances for procurement, as it routinely summons heads of government departments and institutions to report and justify their expenditures (Quinot, 2014).

3.5.7 Municipal Oversight Bodies

Oversight committees and officials within local government are essential to developing and strengthening democratic institutions by ensuring appropriate, transparent, and accountable oversight of public finances and government programmes (LGSETA, 2023). The legal and regulatory framework establishes various tiers of oversight at the national, provincial, and local levels. Internal and external auditing processes also help bolster public trust in the democratic system (LGSETA, 2023). Municipal Public Accounts Committees (MPACs) are modelled after the Standing Committee on Public Accounts (SCOPA), but have distinct differences in their legislative framework, widely recognised in the national and provincial legislatures of South Africa (HSRC, 2025).

According to the Auditor-General, MPACs perform and manage similar functions and responsibilities for municipalities as SCOPA. However, they differ significantly in their

authorities and duties, as detailed in the MFMA, MSA, and accompanying guidelines (HSRC, 2025). In light of recent transitions and changes to municipal boundaries, municipalities have begun establishing MPACs because of the numerous adjustments in institutional, functional, and operational requirements within the procurement systems in municipalities.

MPACs also conduct oversight but as a finance committee with the primary aim to perform several functions, such as acting transparently and accountably when considering and evaluating inputs on the budget and related policies to create a credible budget, and providing political guidance on the municipality's financial matters, including the budget development process and the priorities that should guide preparation of the budget according to MFMA (SALGA, 2025).

The most important role of municipal committees in procurement is to review service delivery targets for budget allocations, and to examine reports on previous and current performance regarding expenditures, purchases, and other liabilities, as specified in MFMA Sections 15–31 and 33. They also review policies to ensure that procurement processes are fair, equitable, transparent, competitive, and cost-effective, as specified in MFMA, Section 112 (SALGA, 2025: 13–45).

3.6 ROLE OF PROCUREMENT PLANNING IN THE HOUSING DEPARTMENT

In providing housing to the community as part of service delivery, the government acquires the materials, construction services, and skilled labour required for home construction (Reddy, 2016: 209–225). The government has devised procurement policies that align with the national policy goals to ensure that historically disadvantaged individuals and communities benefit from public housing efforts (Olver, 2016: 123–135). Ambe and Badenhorst-Weiss (2012: 242–261) state that by prioritising businesses owned by marginalised groups, procurement policies can foster economic empowerment and address historical inequities. Housing procurement strategies focus on these enterprises, thereby contributing to realising the right to housing and broader socio-economic growth (Gumede, 2017). Therefore, as Section 217(2) of the Constitution outlines, the government can adopt privileged procurement policies to improve disadvantaged populations. Regarding housing, this could mean a preference for contractors who hire individuals from previously disadvantaged backgrounds or who concentrate on constructing homes in underprivileged

communities (Gumede, 2017). In emphasising the above-mentioned legislation, the housing procurement process follows the stages explicated below.

3.6.1 Stages of Procurement Planning: An Outline of the Key Stages within the Housing Department

As discussed in previous chapters, effective planning is essential for successfully executing the sourcing strategy. The procurement plan aims to enhance the efficiency, effectiveness, and transparency of the procurement process. The plan outlines how goods or services are acquired, detailing the preferred procurement methods and the timing of the procurement process based on the spending threshold as articulated by Zulu (2013). Governmental procurement planning begins with annual plans, budgets, and timelines for operational or capital projects (Zulu, 2013).

Maepa, Mpwanyana & Phume (2023:77–92) believe that adequate procurement planning is vital for fulfilling the annual planning needs of any public entity, as it helps estimate anticipated procurement expenses. Brunette and Klaaren (2020) assert that procurement planning within the housing department is necessary to prevent delays and assist with budget approvals. Morgan Maepa, Mpwanyana & Phume (2023:77–92) further describes a procurement plan as a tool to encourage a proactive stance towards procurement, helping avoid unnecessary crises or deviations due to last-minute challenges. The stages of a procurement plan clarify the responsibilities of the procurement process (Zulu, 2013).

3.6.1.1 Needs assessment and planning

According to Taylor and Devine (2020), the needs assessment involves collecting data and surveying stakeholders to understand gaps in the community. The procurement guide elaborates that, as part of the procurement planning process, the reason for services such as housing must be defined and planning for associated risks established (Taylor & Devine, 2020).

The Department of Human Settlements Annual Report (2024) states that appropriate development planning is necessary to establish adequate, sustainable, integrated, and affordable housing settlements. According to the Second Edition Environmental

Implementation Plan (EIP) (2009: 19), the Minister of Housing determines the national policy on national norms and standards concerning housing development. Therefore, when developing a new housing programme or reviewing an existing project, it is essential to ascertain community needs and the resources available to the department (Taylor & Devine, 2020). Therefore, a community needs assessment should be performed; it can inform and improve a procurement plan (Taylor & Devine, 2020).

According to the Department of Environmental Affairs (DEA) (2009), a housing department needs assessment systematically identifies the needs or deficiencies in the service delivery of a neighbourhood, town, city, or state and the resources and strengths available to meet those needs. Gumede (2017) believes that to assist the procurement process, a community needs assessment can help the department understand the culture, social structure, deficiencies, and strengths in the community to serve its citizens better.

Government efforts to prioritise programmes and resources when undertaking a needs analysis, specifically in the planning stages of procurement, such as adding value, must be prepared. The needs analysis must consider value and how best to achieve it (DEA, 2009). The needs assessment assists governmental procurement professionals in onboarding stakeholders and developing impactful initiatives. Thus, it can also help secure the success of governmental initiatives (DEA 2009).

In summary, Taylor and Devine (2020) explain that municipalities identify informal settlements within their jurisdictions to upgrade and subsequently apply to the Provincial Housing Department for funding projects under this programme. This process is undertaken in collaboration with the relevant communities.

3.6.1.2 Procurement budgeting and financial planning

Procurement budgeting refers to the strategic planning, allocation, and control of financial resources to procure goods and services for organisational operations (RSA, 2015b). The governmental budgeting process ensures that spending aligns with departmental goals and economic capabilities, facilitating cost control and maximising operational efficiency. By setting limits and prioritising spending, a procurement budget helps organisations forecast future needs and prepare for market fluctuations (Mutangili, 2022).

Procurement budgeting and financial planning in the housing department involve a comprehensive review of what goods or services are essential, the timing for their procurement, and the importance of achieving national objectives (Dzuke & Naude, 2015). The municipality assumes the developer role and applies for funding from the MEC, and the City undertakes all planning and project activities (Klaaren & Watermeyer, 2022).

Various stakeholders, including department heads and finance teams, are engaged to align the procurement strategy with broader housing goals. In developing a detailed procurement plan, the department outlines the expected expenditures and timeline for the development (Klaaren & Watermeyer, 2022).

3.6.1.3 Market research and supplier identification

The needs assessment and budget planning establish criteria that identify specifications, quality standards, delivery requirements, and budget (Burgi, 2012). The government considers the risks and opportunities associated with the supply market, such as demand fluctuations, price changes, regulations, and innovations (Dobie & Xinwa, 2015). Therefore, market research and identifying potential suppliers assist the government in focusing on those who match its criteria (Van Staden, Fourie, & Holtzhausen, 2022).

The Chartered Institute of Purchasing & Supply (CIPS) and the National Institute of Government Purchasing (NIGP) (2012) indicate that the next step in market research for housing departments at the local government level is to gather information and data about the supply market. The European Bank for Reconstruction and Development (EBRD) (2010) report suggests that this market research accesses various sources, such as industry reports, governmental online databases, supplier directories, and social media.

Market research is performed for households that fulfil the qualification criteria of the programme (Mazibuko, 2021). This approach promotes inclusivity and facilitates supplier identification, aiming to develop a diverse pool of potential suppliers. Following best practices guidelines and templates outlined by the government further refines the process of identifying suitable suppliers (Mazibuko, 2021).

The next step involves comparing and ranking potential suppliers based on the results of the market analysis. According to the Government Accountability Office (2006), the department employs various techniques, such as scoring, weighting, and benchmarking, to assign values and priorities to the factors influencing lead times and then shortlist the most suitable candidates for further evaluation and negotiation.

3.6.1.4 Bidding and tendering processes

An open and competitive tender process is the method most likely to comply with the requirements outlined in Section 217 of the Constitution. However, depending on the specific situation, it is not legally mandated (Hill, 2010). The Supreme Court of Appeal has indicated that fairness is a fundamental aspect of an open and competitive tender process, aiming to ensure both cost-effectiveness and transparency in competitiveness (Holzer & Schwester, 2011).

The National Treasury has published Treasury Regulation 16A, which governs SCM and applies to national and provincial departments, constitutional institutions, and public entities listed in Schedules 3A and 3C of the PFMA. In addition, the National Treasury has released Practice Note No 8 of 2007/2008, which applies to all departments, constitutional entities, and public enterprises, including the housing department at the COJMM, which is pertinent to the present study (National Treasury, 2001).

The PPPFA Regulations outline a three-stage process whereby attention initially focuses on verifying bids for formal adherence to the tender specifications and conditions detailed in the tender documents (Horn & Raga, 2012). Once a tender is deemed acceptable and evaluated based on identifying the key objectives of the Housing Department, such as increasing affordable housing, improving housing infrastructure, and upgrading informal settlements, it is determined whether or not it meets the specified requirements (Horn & Raga, 2012). If a bid achieves the minimum qualifying score for functionality, it would then be assessed based on price and preference, according to the preferential procurement points system, and followed by any prescribed objective criteria. Subsequently, the procurement team collaborates with technical experts in the Housing Department to draft tender documents that clearly define the scope of the work, deliverables, and timelines for housing-related

projects. The government must ensure that all housing-related tenders prioritise projects essential for reaching departmental goals (Kuhn & Sherman, 2014).

As mentioned, the standard procedure is an open and competitive tender process, which would likely align with constitutional standards. However, deviations from the standard approach are warranted under extraordinary circumstances. Any deviation must adhere to constitutional principles and relevant legislation (Mazibuko, 2021). In line with COJMM development goals, awarding a contract directly should represent the promotion of local contractors and suppliers in housing projects. This approach helps foster regional economic development and aligns with local content policies (McNamee, 2016). According to the Department of Human Settlements Report (2024), the courts must justify competitive tendering procedures.

Housing-related tenders, particularly those affecting informal settlements or low-income housing developments, align with the Constitution and ensure a mechanism for community consultation and stakeholder involvement (Hill, 2010). This facet could be integrated into the evaluation process to ensure that community needs are reflected in the final awarding of contracts (Hill, 2010).

The Public Procurement Policy Framework Act (PPPFA) Regulations outline a three-phase evaluation process for tenders. Initially, bids are assessed for compliance with tender specifications. Acceptable tenders are then evaluated based on functionality. The tendering and bidding processes are regularly reviewed to ensure alignment with the changing priorities, budget constraints, and project performance of the Housing Department (DHS, 2005). Implementing a feedback loop that gathers insights from previous tenders can improve future processes, such as identifying common congestion in housing project delivery and determining whether or not the technical requirements are being met (DHS, 2005). If a tender meets the minimum functionality score, the Department assesses price and preferential points. The scoring system awards points based on the contract value and the bidder's BEE status, with higher weightings typically assigned to price.

While the open competitive tender process is preferred in alignment with constitutional mandates, deviations can be justified under exceptional circumstances, provided they adhere to constitutional principles and the relevant laws (National Treasury, 2001).

3.7 THE ALIGNMENT OF PROCUREMENT PLANNING WITH HOUSING NEEDS

According to Managa (2012: 25), it is the constitutional responsibility of both national and provincial governments to assign the administration of matters such as housing to municipalities. The Housing Act, No. 107 of 1997, states that every municipality should take all possible and necessary steps to ensure that the inhabitants within its jurisdiction have access to satisfactory housing. This mandate should be fulfilled within the relevant framework of national and provincial housing legislation and policies as part of the IDP process (Makamu, 2010: 91).

Managa (2012: 21) further points out that Section 154 of the Constitution requires national and provincial governments to aid municipalities in managing their affairs. However, in some cases, provincial authorities have reduced the authority of the local municipality by accepting responsibility for housing delivery, thereby commandeering most of the power to influence the process. Section 156 of the Constitution further stipulates that municipalities must perform the roles assigned to them by national or provincial legislation, reinforcing the subordinate role of the City in housing delivery. Accordingly, the municipality may administer housing programmes within provincial and national frameworks to a limited extent (Tomlinson, 2011: 2).

Examining how procurement planning aligns with the housing demands of city residents and facilitates the provision of affordable housing is particularly relevant to this study. The Housing Act No. 107 of 1997, SA Constitution expands municipal departments as part of the procurement process.

Ndlovu (2006) opines that optimal service delivery requires working internal processes and systems to function optimally. When this does not happen, as is common in SA, delivery is hampered. Combatting this would entail appointing competent managers and leaders in authoritative positions, and ensuring that the role of housing deliverer is clearly defined, with a distinct delimitation between local and provincial authorities. Planning happens promptly and efficiently to ensure that the state disburses resources to meet its objectives and satisfy beneficiaries.

The procurement planning process would result in the delivery of units in an accountable and timely manner. However, Matamong (2014) finds that the current approach, which places the provincial authority in charge of approving the final list of

housing developments, causes a mismatch between what is truly needed and what is delivered. Hence, the quality of delivered housing reflects how contractors were procured. The Municipal Financial Management Act for local governments sets out an SCM system. Local authorities must follow guidelines around the tender specifications, evaluation, and adjudication of housing project managers and contractor procurement (Meth, 2013).

The SCM and subsequent guidelines may prove effective, as local municipalities can appoint contractors and consultants, which should ensure equitable and transparent hiring processes (Meth, 2013).

Meyer (2014: 78) finds that South Africa and its provinces experience considerable skills shortages. This problem is amplified at the municipal level, where shortages extend to proficiencies such as tendering and procurement, municipal management, engineering, and urban and regional planning. In reaction to the shortage of capacity and technical expertise at the local level, most governmental departments, including housing departments, oppose municipalities accepting responsibility for housing provision (Newton, 2013).

According to Roy (2010: 163), more than half of South African municipalities have no designated department or official to administrate issues such as public housing delivery. Statistics South Africa (2011) determines that of 283 local authorities, approximately 50 individual municipalities have a dedicated housing department. Metropolitan municipalities are often well-staffed, yet secondary cities are poorly capacitated. Technical housing capacity at both the provincial and municipal levels is restricted, meaning these spheres are unable to fulfil their functions as housing developers efficiently. Consequently, insufficient technical and administrative capacity for and inadequate monitoring and evaluation of housing projects persist (Newton, 2013).

Roy (2010: 218) further reports that the National Department of Housing has provided guidelines to municipalities regarding the planning of housing competencies and how the role of various stakeholders can be clarified and enforced. In this regard, provincial authorities fulfil the role of the overseers of municipal goals under the IDP. Hence, the assumption could be that the importance of the local authority as a housing deliverer and the capacity restraints experienced at the local level are recognised by the

relevant policy framework. Roy (2010: 169) confirms that municipalities must function within the national and provincial legislative framework to provide public housing.

According to the BNG initiative (RSA, 2004), a key requirement for improved delivery is the determination of a clear definition of the roles and responsibilities of all spheres of government. Ndlovu (2006: 1) states that a clear division between the roles and responsibilities within housing delivery is often absent, resulting in undefined mandates for both the provincial and local spheres.

Roy (2010: 258) argues that accreditation implies that municipalities with proven competency in capacity and financial administration should be granted full authority to deliver and administrate housing delivery in their jurisdictions, without provincial or national interference.

According to the South African Cities Network (2011), the Department of Human Settlements has assigned housing responsibilities to several cities and municipalities to decentralise and improve housing delivery. In the City of Johannesburg, the City of Ekurhuleni, and the City of Tshwane, national and provincial governments are committed to supporting and strengthening local government, thus enabling local authorities to perform their constitutional role effectively and efficiently (Managa, 2012: 2).

Municipalities execute community-based planning processes, which culminate in construction. In procurement, provincial housing departments have generally seized control of the responsibilities around procuring service providers, including project managers and contractors (Gumede, 2017). This takeover happened to “rescue” housing provision, given the low success levels associated with past delivery. Gumede (2017) states that this intervention has not dramatically improved delivery processes; it is unclear whether the provinces follow proper tender processes themselves or simply appoint project managers and contractors.

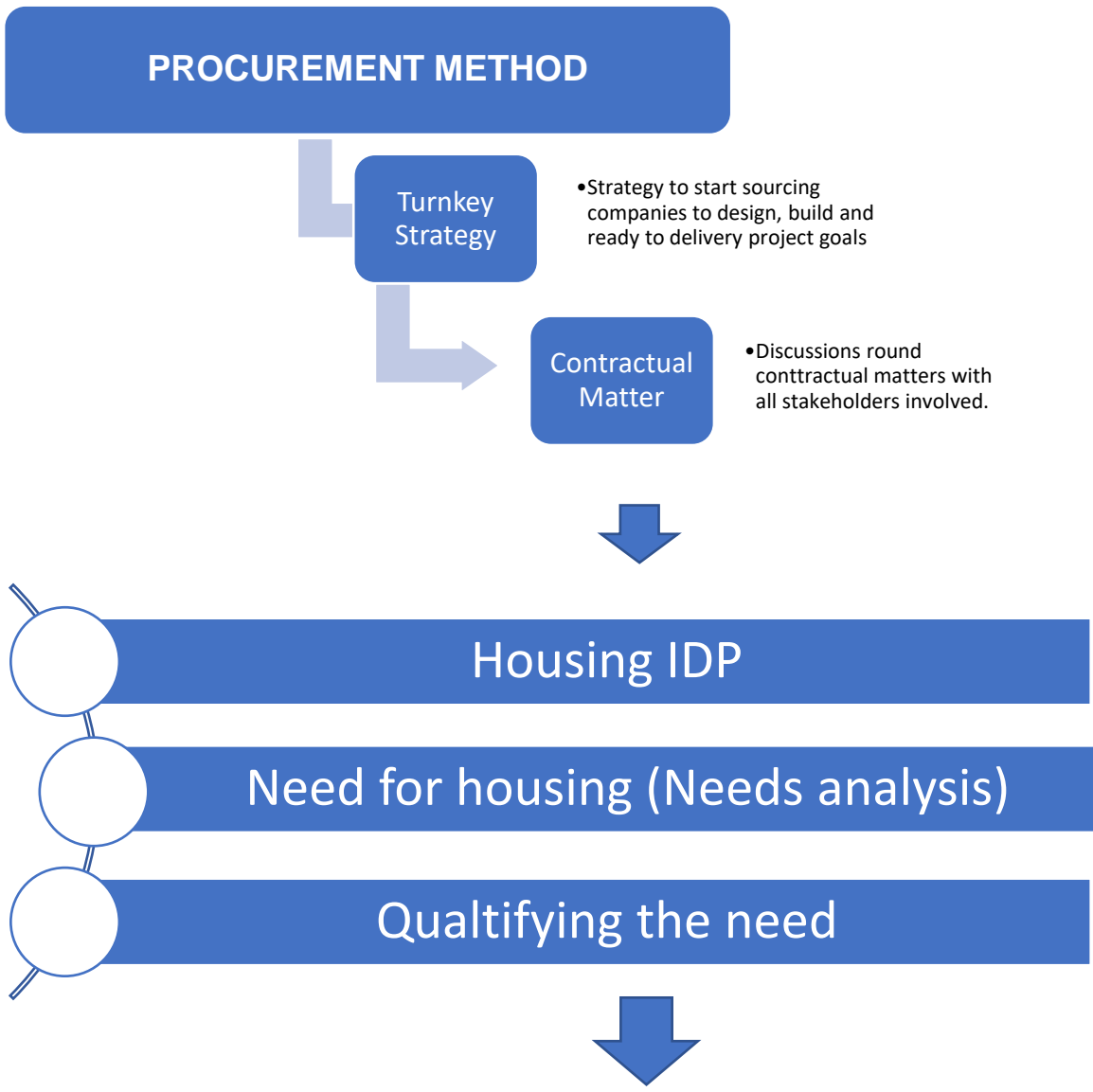
The South African Cities Network (2011) believe that provincial authorities rarely consult municipalities regarding what should be included and stipulated in tender documents. Therefore, a lack of consultation with local authorities often leads to scenarios where project managers and contractors are appointed due to their political connections (Managa, 2012: 2). In turn, this leads to community tension due to a lack of local empowerment and economic opportunity.

Ndlovu (2006) points out that optimal service delivery requires well-functioning internal processes and systems. In South Africa, this is often not the case and impacts delivery timelines. Competent managers and leaders must be appointed to influential positions, and the role of the housing provider and the responsibilities of local and provincial authorities must be clearly defined to counter this dilemma.

Table 3.7: The Main Stages and Associated Responsibilities of Local Municipalities, Highlighting Challenges Related to Planning, Procurement, and Project Management

Category	Description
IDP Planning	<p>Timeous and effective planning is essential to ensure resource allocation aligns with objectives and effectively reaches beneficiaries. Municipalities should spearhead the evaluation of housing demands and choose sites that support spatial restructuring. The assortment of housing types must correspond with the demand derived from spatial and transport planning. Transparency is vital in the planning process. Enhancing the involvement of local authorities in housing delivery would facilitate a truly integrated planning approach, leading to accountability and timely unit availability delivery.</p> <p>The reliance on provincial authorities to approve final housing projects creates a disconnect between actual needs and delivered projects.</p>
Procurement	<p>Methods for selecting contractors impact the quality of housing construction. Under the Municipal Financial Management Act, local governments utilise an SCM system. Local authorities follow specified tender requirements and contractor selection criteria for housing project managers. However, the province often selects contractors and consultants from outside the community, which may hinder local economic growth. When municipalities choose their own contractors and consultants, effective SCM practices that promote fair and transparent hiring processes could emerge.</p>
Project Management	<p>Successful project management is key to achieving project goals. The housing industry struggles due to inadequate financial and human resources. South Africa has significant skills gaps, particularly within municipal areas, which affect fields like tendering, procurement, management, engineering, and urban planning. Many government divisions,</p>

	<p>including housing, hesitate to delegate housing provision duties to municipalities due to concerns about their capacity. More than half of the municipalities in South Africa do not have a dedicated department for public management.</p>
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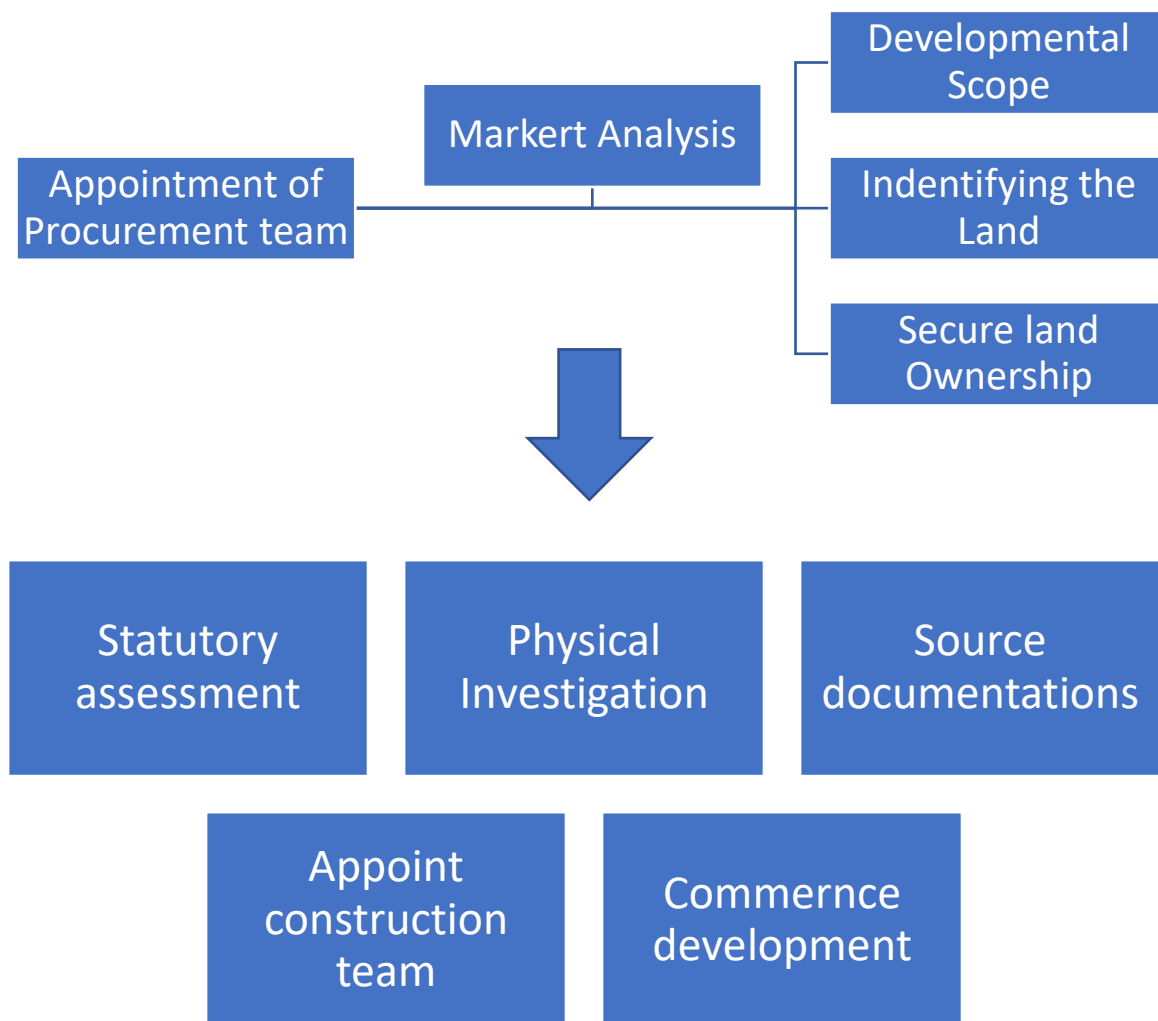


Figure 3.7: Summary of the role procurement planning of the local municipality in housing delivery (upgrading of informal settlements) (Source: Department of Human Settlements: 2009 Housing project guide)

3.8 FRAMEWORK AND REGULATIONS IMPACTING ORANGE FARM EXTENSION 10, TJOVITJO

The South African government has recognised the strategic importance of procurement for effective and efficient service delivery. As discussed in previous sections, the government has begun introducing regulatory mechanisms for securing goods and services for communities. The decentralisation of power from the national government to local levels was one of the key components of the state reform strategy

(Gumede, 2017). In promoting this objective, the government appointed committees to investigate a new local government system for South Africa (South African Cities Network, 2011).

Orange Farm Extension 10, Tjovitjo, can be considered a community development project to address housing and service delivery needs in one of the historically marginalised areas in South Africa. The success of this project depends largely on how effectively the procurement system is applied in line with national regulations and frameworks that promote inclusivity, sustainability, and the empowerment of historically disadvantaged individuals (Brunette, 2014: 11).

3.8.1 Procurement Frameworks and Regulations Impacting Tjovitjo

As previously mentioned, following the end of Apartheid, South Africa implemented several procurement frameworks and regulations to address historical injustices and promote socio-economic development, particularly in marginalised communities (Dobie & Xinwa, 2015). In an attempt to initiate development in Tjovitjo, the procurement process must adhere to these principles as outlined in Section 217 of the Constitution, ensuring that local suppliers, small businesses, and historically disadvantaged individuals are afforded fair opportunities to engage in the project (Dobie & Xinwa, 2015).

The PPPFA (2000) allows for preferential procurement to promote economic transformation. Therefore, procurement planning can utilise this framework to ensure that local communities, including those in Orange Farm, benefit from development and service delivery initiatives (Van Staden, Fourie, & Holtzhausen, 2022).

The MFMA governs procurement processes at the local government level, requiring municipalities, such as Johannesburg (which oversees Orange Farm), to ensure transparency, competitiveness, and alignment with its financial management strategies (Gumede, 2017). This legislation ensures that Orange Farm Extension 10 adheres to proper procurement procedures and that funds allocated for the development are utilised efficiently and effectively (Van Staden, Fourie, & Holtzhausen, 2022).

The BBBEE Act (2003) encourages the participation of previously disadvantaged individuals in economic activities. In the context of Tjovitjo, this would ensure that companies engaged in construction, the supply of goods, and service delivery comply with BBBEE criteria (Van Staden, Fourie, & Holtzhausen, 2022).

3.8.2 Housing Frameworks: The Post-1994 South African Landscape

After 1994, South Africa introduced various housing policies and procurement frameworks to redress the housing imbalances caused by Apartheid and ensure equitable access to housing for all South Africans, particularly the poor and historically disadvantaged communities (Makamu, 2010). The Housing Act (No. 107 of 1997) serves as the primary legislative framework guiding housing development in South Africa. It mandates the provision of affordable housing to low-income communities and aims to address the housing backlog (Gumede, 2017). The Act also aligns with the Constitution by ensuring fairness, equity, and accessibility in housing development (Roy, 2010).

National Housing Subsidy Scheme: This initiative was established to fund affordable housing for qualifying individuals or households who cannot afford private housing. The Tjovitjo development could leverage this scheme to provide houses to the residents of Orange Farm, particularly those without the financial capacity to afford home ownership in the private sector (Makamu, 2010).

The Spatial Planning and Land Use Management Act (No. 16 of 2013) supports proper spatial planning and the integration of previously marginalised communities into the broader urban framework. Ensuring the inclusion of housing in the municipal planning process is essential for a housing project in Tjovitjo, as it governs land-use approvals, zoning, and building regulations (Roy, 2010). The National Development Plan (NDP) for 2030 highlights housing as a key aspect of the developmental goals for the country. The plan envisions the creation of inclusive, affordable, and environmentally sustainable human settlements. It emphasises the role of local government and the private sector in providing adequate housing, which aligns with procurement regulations that promote economic participation. Thus, Tjovitjo housing in Orange Farm Extension 10 is directly impacted by the NDP and the regulations that guide the allocation of resources for construction, service delivery, and housing development

(Ndlovu, 2006). Housing procurement involves not only the physical construction of homes but also the provision of the necessary infrastructure and services, such as roads, water, sanitation, and electricity. The MFMA (Municipality Finance Management Act) governs how municipalities manage procurement for these services at the local level (Ndlovu, 2006).

Therefore, the COJMM Housing Department must follow transparent procurement processes for Tjovitjo to ensure the delivery of quality infrastructure and services alongside housing, which is essential for creating sustainable communities (Roy, 2010). According to The State of South African Cities Report (2011), the housing sector in South Africa is deeply intertwined with procurement frameworks that aim to deliver inclusive, equitable, and sustainable development. Should development commence, these procurement policies must be applied to Orange Farm Extension 10, Tjovitjo, and adhere to the legal requirements for fair procurement and economic transformation, thereby ensuring that local businesses and residents benefit (Ndlovu, 2006).

3.9 COMPARATIVE STUDY BETWEEN COTMM AND COJMM: GAP ANALYSIS OF PROCUREMENT PLANNING AND HOUSING FRAMEWORK

The City of Tshwane Metropolitan Municipality (COTMM) and the City of Johannesburg Metropolitan Municipality (COJMM) are two major urban centres in South Africa. Both municipalities have the responsibility to deliver public services, including housing and procurement planning, to meet the needs of their respective constituents (Municipalities of South Africa, 2025). Despite sharing similar legislative and regulatory frameworks, significant discrepancies exist between the established legal frameworks and the actual procurement and housing delivery practices in these cities.

This comparative study concentrates on procurement planning and housing delivery, specifically emphasising procurement planning within the housing sector. It identifies discrepancies between the legal requirements and practical implementation in the COTMM and COJMM.

3.9.1 Adherence to Legal Standards in Procurement Planning

The COTMM and COJMM are legally obliged to comply with the PFMA, MFMA, and PPPFA in their procurement processes, as indicated by the Public Enterprises Committee (PEC) (2014). According to the same committee, the PEC (2014) states that the COTMM has encountered challenges in procurement planning due to delayed infrastructure delivery, often arising from internal procurement inefficiencies. Bureaucratic obstacles, a shortage of skilled personnel, and protracted tender processes contribute to the delays in executing procurement plans for housing and infrastructure projects (Antonites & Truter, 2010). Conversely, the COJMM has generally been more adept at streamlining its procurement practices; however, issues such as corruption, non-compliance with procurement regulations, and vendor favouritism have been reported (Antonites & Truter, 2010).

The Housing Act requires both municipalities to provide affordable housing and adhere to the National Housing Subsidy Scheme. They must also ensure that housing development aligns with the National Development Plan (NDP), which advocates for sustainable human settlements and improved living conditions for marginalised communities (Antonites & Truter, 2010). COTMM has faced difficulties related to the backlog in housing delivery due to limited budget allocations and administrative congestion. This backlog is particularly pronounced in peri-urban areas, such as Atteridgeville (Mshengu Informal Settlement), where the procurement processes for new housing developments are sluggish (Antonites & Truter, 2010). While COJMM has achieved success in some urban renewal projects, the increasing demand for housing in informal settlements, such as Orange Farm Extension 10, Tjovitjo, remains a pressing concern (Antonites & Truter, 2010).

Table 3.9: Gap Analysis: Procurement and Housing Delivery Deficiencies (Source: Municipalities of South Africa (2025): Gauteng Municipalities in the Gauteng Province)

Area	COTMM	COJMM	Identified Deficiencies
Procurement Effectiveness	Delays in project implementation and tendering processes	Generally, more efficient procurement	In both municipalities, bureaucratic delays affect

		systems, but with problems.	procurement timelines, leading to delayed housing delivery.
BEE and Transformation	Limited success in implementing BBEE in procurement	Better BBEE compliance, but issues with vendor favouritism.	
Transparency and Accountability	Transparency issues with procurement, especially in sub-contracting.	Relatively better governance in procurement.	Both municipalities face challenges ensuring full accountability and transparency, leading to inefficiencies.
Housing Backlog	Large backlog, especially in peri-urban areas	There is a high demand for affordable housing, especially in informal settlements.	Both municipalities face a significant housing backlog in their communities, impacting service delivery.
Affordable Housing Allocation	Slow allocation and building of subsidised houses	More streamlined delivery, but still struggling with land and infrastructure issues.	COTMM lags in delivering affordable housing due to resource constraints, whereas COJMM faces space constraints.
Community Engagement	Limited community involvement in housing projects	Stronger engagement and consultation with communities.	Gaps in community involvement during planning and decision-making processes, particularly in COTMM.

The discrepancies between the legal frameworks and the practical implementation of procurement and housing in the COTMM and COJMM reveal systemic issues that hinder the effective delivery of services. Both municipalities face challenges related to procurement inefficiencies, housing backlogs, and financial limitations. However, the COJMM performs better in procurement efficiency and community engagement, while

the COTMM struggles more with delivery timelines and transformation in procurement (Municipalities of South Africa, 2025).

3.10 CHAPTER SUMMARY

Since April 1994, South Africa has made significant advancements in the procurement sector. Section 217 of the Constitution of the Republic of South Africa (1996) and various legislative frameworks underscore the commitment of the new government to utilise public sector procurement to rectify historical inequities. The regulations aim to align contemporary procurement laws with established best practice guidelines. The study indicated that procurement officials recognise the importance of South African regulations for the socio-economic advancement of the nation. Furthermore, the research connects procurement legislation and housing regulations to support historically disadvantaged individuals (HDIs).

In South Africa, the issues related to insufficient low-cost housing are extensively documented. Generally, the delivery of low-cost housing has been approached in a manner that prioritises alleviating housing backlogs over promoting quality living environments and sustainable communities. A thorough, comprehensive analysis was conducted to assess the current state of affairs in South Africa and address these deficiencies in low-cost residential development.

This chapter presented government documents, policies, legislation, and contributions from oversight bodies, highlighting the intricate nature and implications of housing development and procurement planning. Chapter 3 provided the foundation for the subsequent conclusions.

CHAPTER 4: RESEARCH METHODOLOGY

4.1 INTRODUCTION

The preceding chapter provided a comprehensive review of legislation and frameworks, particularly focusing on South African procurement policy, the regulatory bodies and oversight institutions, the role of procurement planning in the housing department, the alignment of procurement planning with housing needs, and a comparative study of the COTMM and COJMM—a gap analysis of procurement planning and housing framework. Chapter 4 outlines the research methodology, detailing the data collection and analysis methods, the overall study approach, sampling strategy, and analytical processes. The chapter further addresses the ethical considerations adhered to throughout the research, encompassing all data collection stages.

4.2 STUDY RESEARCH APPROACH

The study utilised qualitative research through a case study. Van Thiel (2014: 56) states that these approaches are designed to reveal fundamental factors and determinants influencing the subject matter; they uncover prevailing trends in viewpoints and perceptions while thoroughly exploring the issue under investigation. Rassel *et al.* (2020) note that an advantage of qualitative research is its ability to facilitate a more comprehensive examination of events and pertinent questions, while a case study facilitates a thorough analysis of a specific phenomenon, offering rich and insightful perspectives of the context under study. McNabb (2017: 550) argues that these methodologies permit researchers to analyse issues from diverse viewpoints, thereby enabling an extensive understanding of the various dimensions associated with the situation.

The study utilised two main research methodologies to accomplish the research objectives. First, qualitative research explored and contextualised the various phenomena related to procurement planning. Second, case study research specifically targeted procurement planning at Orange Farm Extension 10, Tjovitjo, addressing the challenges in the COJMM Housing Department. Figure 4.1 below summarises the two primary methodologies.

4.2.1 Qualitative Study

This study opted for qualitative research, which Johnson (2015) considers best suited to describing organisations such as the COJMM in a social context. Singh (2006) asserts that qualitative research is characterised by its focus on exploring and explaining phenomena related to the research problem. Therefore, a qualitative method is appropriate for this study as it aims to contextualise, explain, and understand the diverse phenomena associated with procurement planning (McNabb, 2017: 620).

4.2.2 Case study approach

Because the study adopted a qualitative case study approach, it employed a case study research approach, since case studies facilitate in-depth exploration of specific processes or phenomena within a bounded context (UNISA Press, 2014). This method is particularly suited to social science research fields, such as public administration and urban development. As defined by Barzelay (2019), case studies focus on a particular activity or group over a specific time period, using multiple sources and methods of data collection.

The case study in this research centres around procurement planning within the Housing Department of the COJMM, specifically relating to the Orange Farm Extension 10, Tjovitjo Informal Settlement. The study examines the planning process from the policy implementation, institutional capacity, and stakeholder engagement viewpoints.

The following aspects outline why a case study research approach was suitable for this research;

- The research encompasses a diverse array of stakeholders, regulatory frameworks, and socio-economic variables. As a result, a case study allows for a comprehensive analysis of the interactions among stakeholders and the context-specific complexities inherent to Orange Farm Extension 10, Tjovitjo.
- The study focused on a single case rather than generalising across multiple instances. This approach enabled a thorough understanding of the critical challenges, decision-making processes, and outcomes associated with

procurement planning in the specific context of Orange Farm Extension 10, Tjovitjo.

- According to Barzelay (2019), case study research is ideal for examining real-life situations, particularly contemporary challenges and ongoing issues affecting housing delivery in the COJMM.

4.3 DATA COLLECTION

Luton (2015) believes that a key strength of qualitative research is its capacity to facilitate intricate observations and articulate textual nuances derived from individuals' experiences of specific research topics. This approach has proven effective for interpreting real-life situations that research participants describe.

4.3.1 Semi-Structured Interviews

The study employed semi-structured interviews to gain comprehensive insights into the participants' perceptions, allowing the researcher a degree of flexibility (Galletta, 2013). The researcher interviewed 19 participants to investigate the effects of public procurement planning within the Housing Department of the City of Johannesburg Metropolitan, specifically in the context of the Orange Farm Extension 10, Tjovitjo Informal Settlement. Each participant completed an information questionnaire (see Appendices A1 and A2) and signed a consent form acknowledging their understanding of the study and the voluntary nature of their involvement (see Appendix B).

The consent form requested approval for conducting the interviews (see Appendix B). The study utilised transparent methods for data collection, and the interviews took place in settings selected by the participants to ensure their comfort and convenience. Nine interviews were conducted at the participants' workplaces (COJMM), reflecting their preference for familiar environments, and eleven interviews were conducted in Tjovitjo Extension 10 (public park area). The researcher took detailed notes and made observations during the interviews, which each lasted between 30 and 45 minutes.

Galletta (2013) notes that the goal of research interviews is to explore individuals' views, experiences, beliefs, or motivations regarding specific topics. The participants were permitted to select the language they preferred for the interviews. The questionnaires were initially created in English, but most interview questions were

translated into isiZulu and Sesotho, as the participants felt most at ease using those languages.

4.3.2 Document Analysis

The study also conducted a comprehensive document analysis, meticulously examining and evaluating documents in alignment with the relevant literature pertaining to the study. The purpose of this document analysis was to gather data on procurement planning at both global and national levels and offer recommendations to COJMM regarding housing development in informal settlements. The information extracted from the documents was analysed and framed within the context of the legislative framework governing procurement planning in the COJMM Housing Department.

The findings from the document analysis provided an in-depth description of procurement practices within the COJMM housing department. The guiding research question for this section was: What legislative requirements regarding public procurement planning affect the efficacy of administering national housing programmes at Orange Farm? The study gathered additional data to present an overview of the documents utilised for data collection, as outlined below.

The primary method to investigate housing policy implementation in practice included the collection and review of the following types of documents:

- Government policy documents and white papers on housing, as detailed in Chapter 3.
- Municipal reports outlining housing projects, budget allocations, and implementation schedules.
- Audit reports and monitoring and evaluation (M&E) documents.
- Reports from NGOs and journal articles that provide alternative viewpoints or critiques.

4.3.2.1 *Criteria for document eligibility*

The criteria for this study centred on literature examining the impacts of public procurement planning within the Housing Department of the City of Johannesburg Metropolitan, specifically regarding the Orange Farm Extension 10, Tjovitjo Informal Settlement. The study considered only reputable publications, journals, and articles

and excluded government literature published in languages other than English. Consequently, the literature search was restricted to sources available in English, as outlined in Chapter 3. The literature comprised peer-reviewed journals and published articles, excluding works published before 2016. In accordance with the research objectives, literature pertinent to the national context was acquired from the COTMM. All titles, articles, and their contents conformed to these eligibility standards; minutes from city council meetings addressing housing matters were omitted from the study.

4.3.2.2 Search engines

The document analysis involved an online search in *Google Scholar* for articles published between 2016 and 2021. The search strategy utilised key terms, specifically incorporating the following phrases:

- Procurement planning
- Housing Department at COJMM and Orange Farm
- South African procurement policies
- International procurement practices
- COTMM procurement planning
- Local government procurement planning
- SCM and Orange Farm strategic housing plans.

Through *Google Scholar*, the study sourced peer-reviewed journal articles on procurement practices from *Taylor & Francis Online*, the *Research Journal of Business and Management*, *Springer*, and *ResearchGate*. Furthermore, the researcher collected data for the document analysis from international studies, analysed newspaper articles, government websites and electronic books accessible at the Unisa Library, the institutional repository of the University of Pretoria, and *Google Books*.

4.3.2.3 Textual information

The collection of books containing textual information found in the Unisa and University of Pretoria libraries included the following documents:

- COJMM Developmental Plans
- Integrated Development Plans
- Annual Reports

- Budget and Implementation Plans.

In addition, reports from the COJMM Housing Department offered valuable insights into the daily procurement operations of COJMM and COTMM. Using information obtained from government websites, the study performed a comprehensive review of the South African legislative framework.

4.4 DATA COLLECTION TOOLS

The study employed several tools: a semi-structured interview questionnaire, telephonic audio recordings, and field notes. The interview questionnaire featured open-ended questions aligned with the research objectives, drawn from a literature review of similar research by other scholars. The questionnaire enabled the researcher to gather the necessary information on the effects of public procurement planning within the Housing Department of the City of Johannesburg Metropolitan, specifically within the Orange Farm Extension 10, Tjovitjo Informal Settlement.

Audio recording: the interviews were audio recorded and transcribed verbatim. Audio recordings provide a comprehensive and enduring record of the spoken dialogue, allowing verification by other researchers.

Field notes: Throughout the interviews and the study duration, the researcher documented written notes on non-verbal signals, thoughts, and reflections relevant to the study, which complemented the information gathered over 40 minutes.

Several key points emerged from the interviews, and the researcher also employed an observational strategy. The respondents were very open, connecting their responses to past experiences and reflecting on what occurred, why it happened, and their current feelings, along with the factors that helped them move forward. Charalabidis *et al.* (2018: 73) define observation as a fundamental research method of systematically and meaningfully gathering data through the senses, particularly through sight and sound. While observing participants during the interviews, the researcher noted their non-verbal cues, thoughts, and reflections relevant to the study, thereby enriching the collected information and illustrating how their environment influenced their living conditions. The researcher also observed various challenges participants faced when examining their surroundings.

4.5 SAMPLE PROCEDURE

This study employed both purposive and snowball sampling techniques to select participants based on specific criteria, thus ensuring they had the relevant knowledge for the research area. Nishishiba, Jones, and Kraner (2013: 88) explain that purposive sampling focuses on particular community attributes of shared interest.

Salmons (2015) defines purposive sampling as identifying individuals or groups with expertise or experience related to a specific phenomenon. This study required participants who were directly engaged in procurement at the housing department and individuals impacted by housing procurement.

A semi-structured interview questionnaire guided the face-to-face interviews conducted for data collection. With the participants' consent, some interviews were audio-recorded to create a more comprehensive record. Thematic content analysis was employed to analyse the data, identifying, organising, and interpreting various emerging themes to derive meaning.

Accordingly, 24 participants who were actively involved in procurement planning within the study area were selected through purposive sampling. The researcher engaged these individuals with the assistance of a ward councillor residing in Ward 131 in Orange Farm, who possessed substantial knowledge of the local context and its residents. The councillor's involvement facilitated the sampling process, as participants recognised and trusted the councillor, which in turn enabled the researcher to establish rapport more effectively. Prior to data collection, the researcher liaised with the ward councillor and relevant community leaders, providing a formal introduction and outlining the purpose and procedures of the study. Following this briefing, the leaders granted permission to access and approach potential participants.

The researcher clarified the purpose of the study to the participants and gave them the consent forms. The researcher's knowledge of the subject matter made the sampling process less complicated since it was easier to connect with both the environment and the participants. The study also employed snowball sampling to enhance the purposive sampling by depending on the current participants to help identify more individuals. This strategy involved asking those who were already part of the study or had been interviewed to refer others who might meet the selection

criteria (Daniel, 2012). Shapiro (2016) explains that the snowball sampling method is utilised in situations where the study population is not well-defined, compelling the researcher to depend on referrals. Consequently, the researcher requested that participants identify other individuals involved in their projects, and they were enthusiastic about helping. Suter (2012) characterises snowball sampling as a method for uncovering valuable insights from key informants by approaching a few potential respondents and inquiring whether they know anyone with the desired traits for the study.

Table 4.5: The desired Individuals for the study;

CLASSIFICATION	NO. OF PARTICIPANTS	AREA
COJMM Officials dealing with procurement		
Regional Director offices (Sub-Region G)	1	COJMM Offices
Manager from the Office of Public Housing Stock Management	1	COJMM Offices
Supervisors at the office of the Public Housing Programme Director	2	COJMM Offices
Administrative staff dealing with housing procurement at the Office of Finance	2	COJMM Offices
Administrative staff at the office of Business Management Support	2	COJMM Offices
The NGO (Gauteng Housing Crisis Committee) that advocates for housing in Ext 10, Tjovitjo		
Programme Manager and Spokesperson	1	Orange Farm

Community workers in the NGO	10	Orange Farm
The NGO (Izandla Ziyagezana) that advocates for housing and social justice in Ext 10, Tjovitjo		
Director and Coordinator	1	Orange Farm
Officials	4	Orange Farm

4.6 DATA ANALYSIS

This study employed thematic data analysis, a method highlighted by Steif (2021: 49) for identifying, analysing, and reporting patterns (themes) within data. This technique is highly regarded for its ability to organise, analyse, and interpret raw data in greater depth. According to Giventer (2011), this approach provides valuable insights that effectively address research questions. The technique was particularly suitable for this study due to the small sample size, allowing for a thorough analysis of the findings. The analysis process followed the steps outlined by Steif (2021), as detailed below. The thematic content analysis was applied to the interview data through five stages: transcription, checking and editing, analysis and interpretation, and verification (Giventer, 2011).

4.6.1 Transcribing

The researcher transcribed the audio recordings manually and reread the transcripts to gain an understanding of the data. This process was necessary for the researcher to gain a comprehensive overview of the collected information. Considerable time was dedicated to this step, thus ensuring that the transcriptions accurately reflected the participants' original expressions.

4.6.2 Coding

Guest, MacQueen and Namey (2011: 21) propose that after thoroughly reviewing data, generating initial codes is the next step. These codes can then be organised into grouped topics to form overarching themes. Guest, MacQueen and Namey (2011: 27) emphasise that coding aids in retrieving and categorising segments of text according to specific themes, enabling the identification and highlighting of noteworthy elements

within the data. For example, shared experiences among participants were marked with the same colour, which helped organise fragmented data by allowing for comparisons of similar sections in the transcripts, each indexed with distinct codes.

4.6.3 Categorising Themes

The theme induction phase shifts the analysis from a focus on individual codes to a broader thematic level (Guest, MacQueen & Namey, 2011: 49–57). The themes identified for this study emerged directly from the interview data, aligning closely with the research aims and objectives. This approach enabled a comprehensive analysis and interpretation of the data.

4.6.4 Examination and Editing Themes

During this phase, the collected extracts for each theme were thoroughly examined to identify coherent patterns. The data were organised into smaller, meaningful units by analysing each paragraph and noting its prevalent themes. Similar themes were consolidated to form related units, all identified themes were aligned, and any that did not fit were refined. This process was integral to developing an appropriate thematic map, facilitating the interpretation of the collected data. At the conclusion of this stage, the researcher had gained a clear understanding of the themes and their interconnections, unveiling the overarching narrative conveyed by the data (Guest, MacQueen & Namey, 2011: 49–78).

4.7 CREDIBILITY

Steif (2021) defines credibility as the accuracy of research findings and the true representation of participants' meanings. In this study, credibility was established by cultivating understanding with the participants to ensure their comfort and encourage honest responses. In addition, the study effectuated triangulation to enhance credibility by utilising various data collection techniques (Guest, MacQueen & Namey, 2011: 79). This study incorporated semi-structured interviews, document analyses, and observations to gather comprehensive data and enhance validity. The researcher ensured the data interpretation preserved the participants' meanings without alteration.

4.8 ETHICAL CONSIDERATIONS

This research adhered to the ethical standards established by the University of South Africa Ethics Committee. The researcher personally met with participants to explain each aspect of the study, prioritised their needs, and ensured the preservation of their dignity throughout the research process. The participants were informed that their involvement was entirely voluntary and that they would not be compelled to continue if they felt uncomfortable at any point in the investigation. They could also withdraw at any time without needing to provide a reason. The study upheld confidentiality and privacy, clearly outlining the usage, processing, storage, and disposal of their data. The informed consent form and information sheets were interpreted from English to the participants' local languages, utilising isiZulu, Sesotho, and English, according to their preferences. Most respondents felt more comfortable communicating in English at the COJMM and in their native language at Tjovitjo, which enhanced the quality of the interviews and discussions.

4.9 STUDY LIMITATIONS

Various distractions emerged during the interviews; for example, some participants asked for the process to be expedited due to impending meetings, while one participant was already late for a work commitment. Moreover, several interviews had to be conducted in secure locations to mitigate potential risks of robbery. Finding participants also posed challenges, as some NGO workers and residents were unable to adhere to their scheduled appointments due to other obligations. This situation necessitated the use of snowball sampling to identify more available participants. Fortunately, the referrals led to the recruitment of more individuals, who felt comfortable participating since they were familiar with the existing participants. Overall, the interviews proceeded smoothly, and most responses aligned well with the study objectives

4.10 CHAPTER SUMMARY

Chapter 4 detailed the research methodology employed throughout the study, illuminating the careful selection of participants, the systematic processes for gathering data, and the rigorous techniques used to analyse the findings. The chapter addressed the pivotal elements of research credibility, acknowledged the inherent

limitations of the study, and outlined the ethical considerations that guided the entire research process.

CHAPTER 5: PRESENTATION AND ANALYSIS OF THE RESEARCH DATA FINDINGS

5.1 INTRODUCTION

Chapter 5 presents and discusses the research findings regarding the effects of public procurement planning within the Housing Department of the City of Johannesburg Metropolitan. The study concentrated on Orange Farm Extension 10, Tjovitjo Informal Settlement, as represented by the semi-structured interviews and official documents. These interviews were conducted with a sample of 21 participants, including COJMM officials, Gauteng Housing Crisis Committee (NGO) workers, and Izandla Ziyagezana (NPO) officials involved in housing development during the research period. The collected data support the study findings.

The chapter first outlines the demographic information gathered from the COJMM, NGO, and NPO officials, as well as community activists in Orange Farm Extension 10, Tjovitjo. Thereafter, the findings are presented, followed by the analysis of official government documents, such as the Green Paper: Public Sector Procurement, Public Finance Management Act (PFMA) 1 of 1999, and Municipal Finance Management Act (MFMA) 56 of 2003.

The chapter concludes with a summary of the themes and sub-themes that emerged from the data, followed by a discussion of these themes in the summary and recommendations in Sections 5.6 and 5.7.

5.2 BACKGROUND INFORMATION OF PARTICIPANTS

This section explores how the participants' demographic information influenced the validity and reliability of the research findings. It includes a discussion on demographic factors such as age, gender, level of education, work experience and number of years living in Orange Farm.

5.2.1 Participants' Gender

At the start of the semi-structured interview, participants were prompted to indicate their genders, as shown in Figure 5.2.1 below.

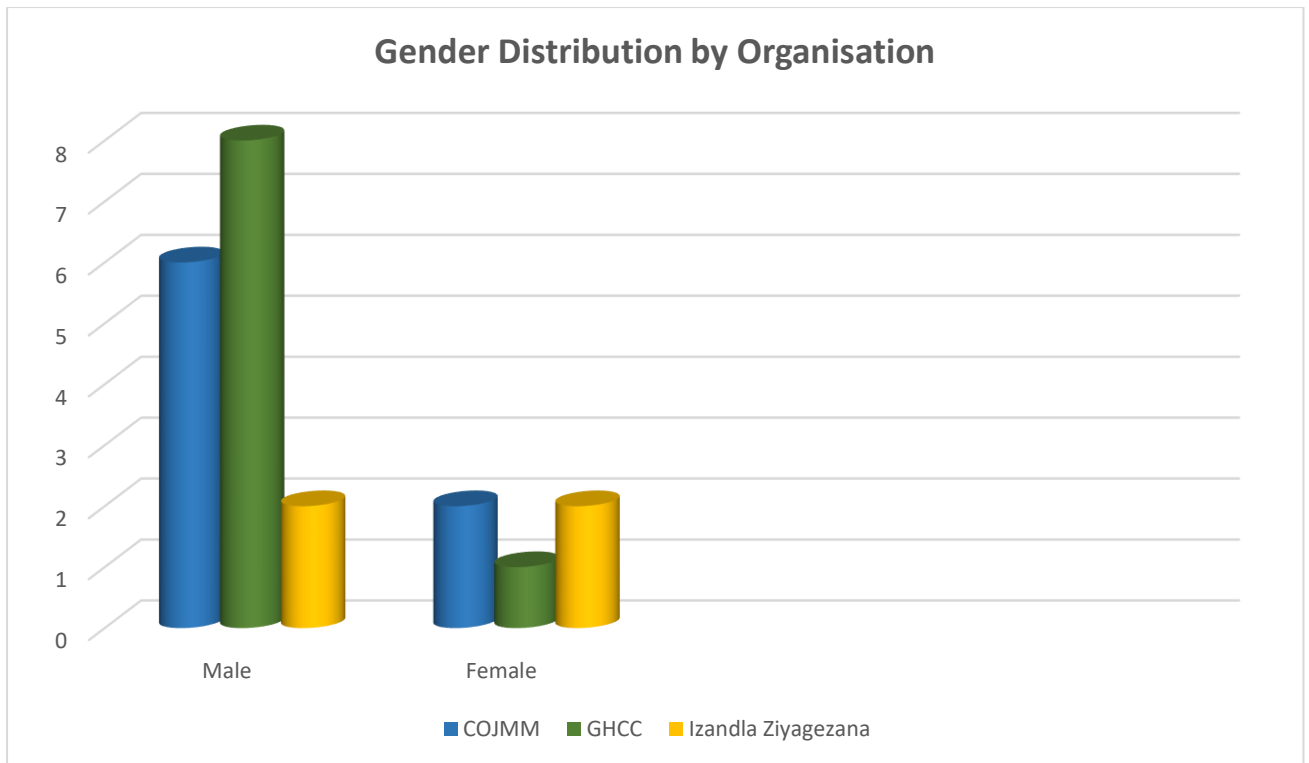


Figure 5.2.1: Participants' gender representation

This figure illustrates the gender distribution among the 21 participants. Among the eight COJMM officials, two were female and six were male. In the group of nine, two participants from the Gauteng Housing Crisis Committee NGO and community activists were female, and seven were male. The second NPO, *Izandla Ziyagezana*, comprised two male and two female participants. Overall, fifteen (28.6%) participants were male and six (71.4%) female.

5.2.2 Participants' Age Distribution

The participants were also asked to indicate their ages, as illustrated in Figure 5.2.2 below.

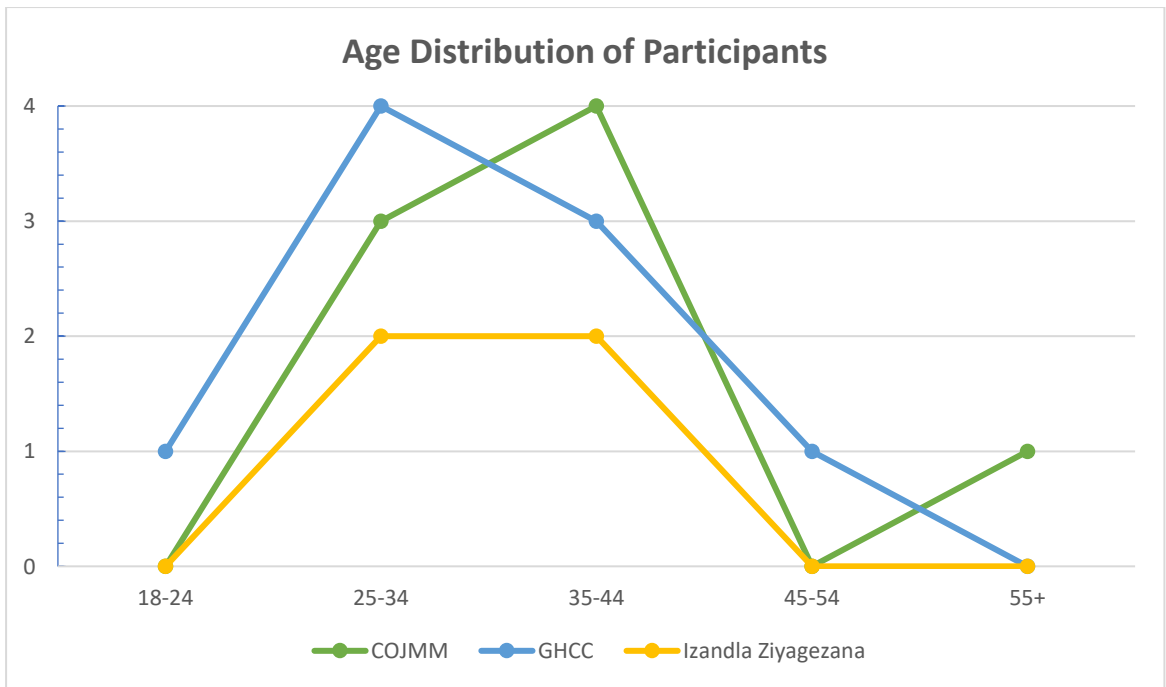


Figure 5.2.2: Illustration of the age distribution in the sample

Among the 21 participants, the majority (86%) were between 25 and 44 years old, with officials and NGO members predominantly within this age range. In contrast, very few participants were aged 18–24, 45–54 and 55+, indicating that leadership and participation in these organisations are primarily young to middle-aged adults.

5.2.3 Participants' Level of Education

The participants were asked to indicate their level of education, as displayed in Figure

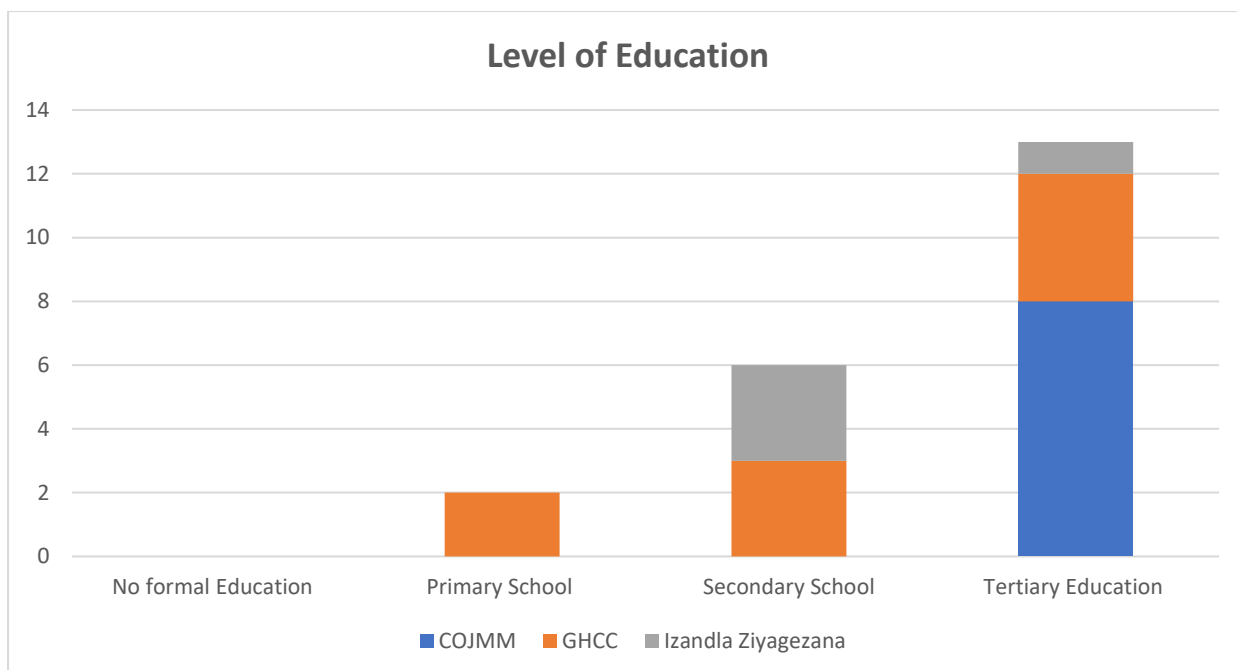


Figure 5.2.3: Participants' level of education

All participant groups included individuals with formal education, indicating that every participant had at least completed primary school. The Gauteng Housing Crisis Committee group consisted of two members with only primary education, while the COJMM and Izandla Ziyagezana had no participants at this level. The Gauteng Housing Crisis Committee group and Izandla Ziyagezana both had three participants with secondary education.

In contrast, the COJMM had none at this level, which suggests that its members had pursued higher education. The COJMM led with the highest number of participants (8) with tertiary education. The Gauteng Housing Crisis Committee group had four members with tertiary qualifications, and Izandla Ziyagezana had only one participant at this level.

The COJMM appeared to be the most educated group, with all members having attained tertiary education. The Gauteng Housing Crisis Committee group presented a mixed profile, with participants having reached primary, secondary, and tertiary education levels. Izandla Ziyagezana primarily consisted of individuals with secondary education, with very few achieving tertiary education and none at the primary level or below. Hence, education levels decreased from the COJMM to GHCC and Izandla Ziyagezana.

5.2.4 Participants' Work Experience (COJMM Officials)

The focus group participants from the COJMM were also asked to indicate their work experience, as illustrated in Figure 5.2.4 below.

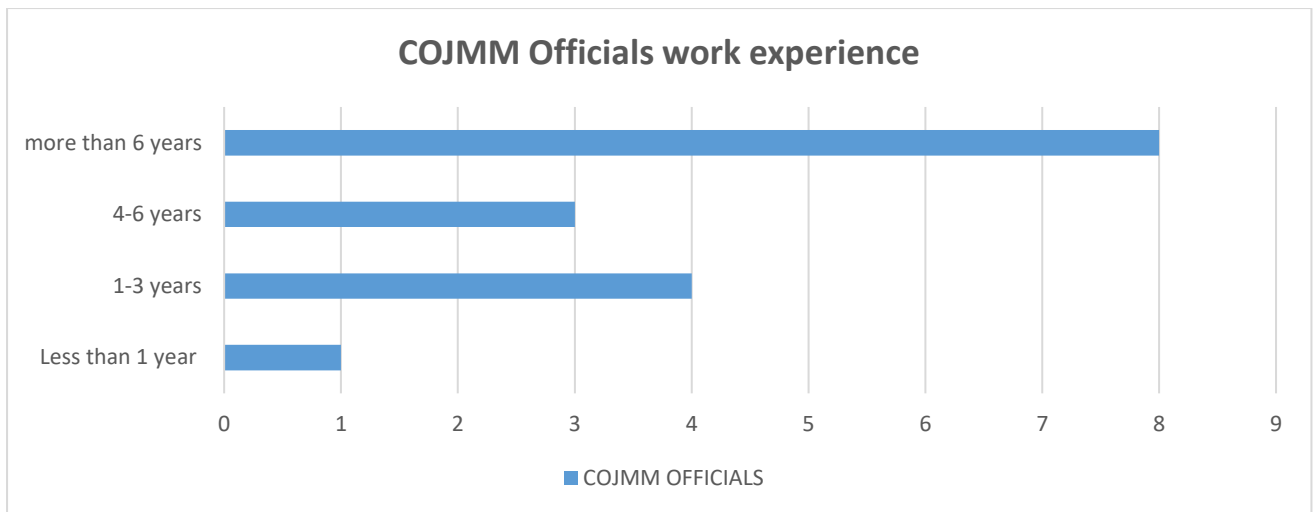


Figure 5.2.4: Participants' work experience (COJMM Officials)

A total of eight participants were included in this assessment. Among the eight COJMM officials, four had four to six years of experience (50%), three had more than six years (37.5%), and one had less than a year's experience (12.5%).

Overall, the majority of the officials had mid- to senior-level experience (more than four years), reflecting a relatively experienced team with very few novices.

5.2.5 Participants' Length of Stay in Orange Farm (NGO and NPO)

The focus group participants from the NGO and NPO were requested to indicate how many years they had resided in Orange Farm Extension 10, Tjovitjo, as seen in Figure 5.2.5 below.

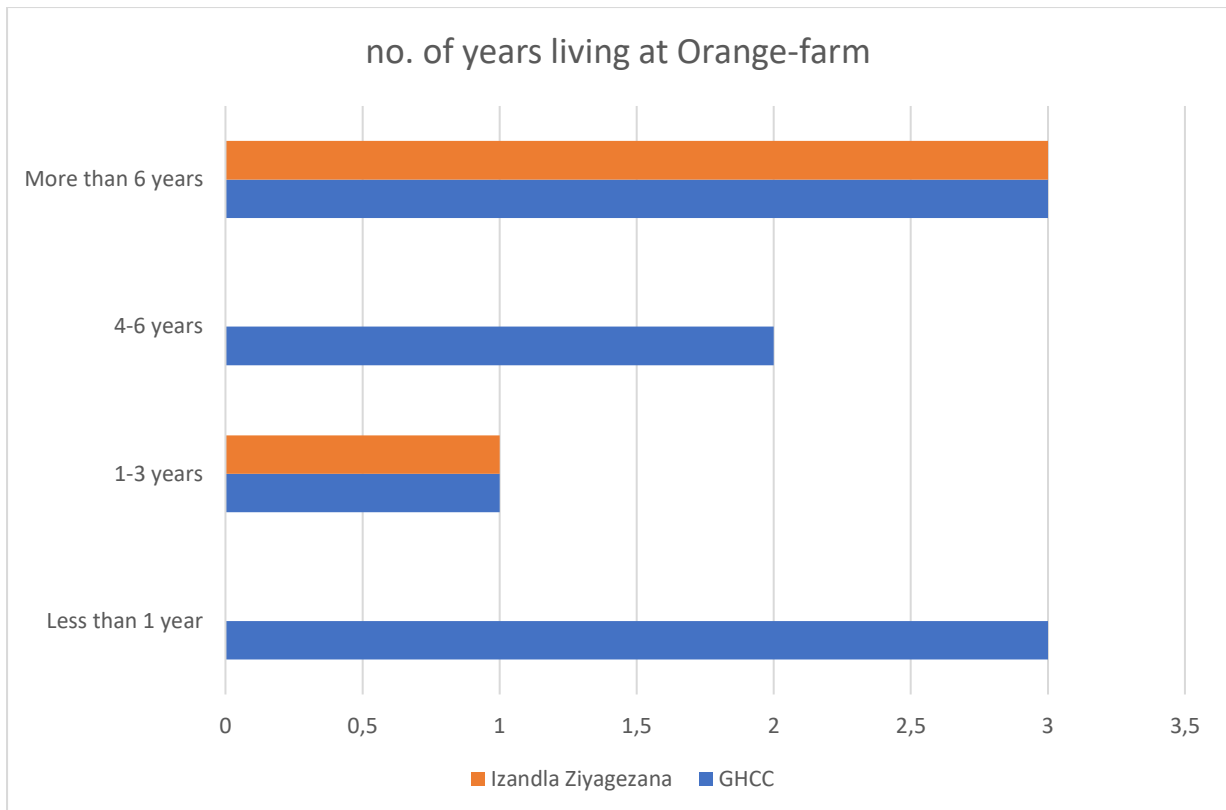


Figure 5.2.5: Number of years living in Orange Farm

The Gauteng Housing Crisis Committee reported that three participants had resided in Orange Farm Extension 10, Tjovitjo for less than a year, indicating that a significant portion were newcomers to the area; three participants had lived there for over six years, representing a core group of long-term residents; one participant had lived in the area for one to three years, and two for four to six. This data reveals a bimodal pattern, with both new and long-standing residents represented.

In Izandla Ziyagezana, three out of four participants had lived in the area for more than six years, and only one participant had lived there for one to three years, suggesting a stable and experienced local population.

In contrast, GHCC exhibits diversity in residency lengths, with some participants being newcomers and others long-standing residents, which may reflect recent migration trends or changes within the team. The predominance of long-term residents in Izandla Ziyagezana points to strong local ties and a likely deep understanding of the community.

5.3 DATA GATHERING

During data collection, the researcher successfully interviewed 21 participants. The interviews were scheduled via email and conducted via *Microsoft Teams* and *Google Meet* with the COJMM officials. The researcher also interviewed the Gauteng Housing Crisis Committee, the organisational spokesperson, and community activists within the NGO from Orange Farm Extension 10, Tjovitjo Informal Settlement. The COJMM officials were enthusiastic about participating in the study and shared their insights on housing development procurement processes, thus enabling the researcher to evaluate and understand such processes. The researcher took notes and used *executiveassistant@e.read.ai* after the interviews for a deeper understanding of the COJMM officials' experiences working on housing development procurement.

Only one of four Gauteng Housing Crisis Committee executives and eight community activists supporting the NGO were interviewed. The snowball sampling facilitated interviewing NPO managers from Izandla Ziyagezana, community activists advocating for housing development at Orange Farm Extension 10, Tjovitjo. The researcher also observed the Tjovitjo Informal Settlement. Interviews with the NGO and NPO participants provided valuable insights. At the end of each interview, most COJMM officials shared additional information the researcher did not anticipate, enriching the findings and helping the researcher articulate them more effectively.

5.4 PRESENTATION OF DATA FINDINGS

These findings are based on the research questions outlined in Chapter 1 of this dissertation. The questions correspond with the study objectives (see Sections 1.4 and 1.5), forming the basis for analysing procurement planning at the COJMM, exemplified through a case study of Orange Farm Extension 10, Tjovitjo Informal Settlement.

The questions formulated for the semi-structured interviews were based on the research questions, as outlined in Section 1.4. When presenting the findings, the research questions provided a framework for explaining the data, as follows:

Research questions

Question 1: What legislative requirements regarding public procurement planning affect the efficiency of administering national housing programmes at Orange Farm?

Question 2: What is the economic impact of public procurement planning at COJMM?

Question 3: How can the COJMM procurement policy be enhanced to conduct effective procurement planning in the housing department?

Question 4: What recommendations can the study make to the COJMM for effective public procurement planning and the successful administration of national housing programmes?

These findings pertain to the first group, officials from COJMM working in the offices of the Regional Director, Public Housing Stock Management, the Public Housing Programme Director, Finance, and Business Management Support. The second group included the Gauteng Housing Crisis Committee (NGO) and Izandla Ziyagezana (NPO). The verbatim quotations from interview responses highlight the research findings, identified by the participant's name followed by a number; for example, COJMM Official 1, GHCC NGO Contributor 1, Izandla Ziyagezana NPO Official 1, and so forth. The transcriptions are presented in italics to enable the reader to distinguish the research findings clearly.

First group: COJMM officials

Question 1: What legislative requirements regarding public procurement planning affect the efficacy of administering national housing programmes at Orange Farm?

Participants were inquired about their overall awareness and comprehension of public procurement procedures concerning housing projects, based on this research question.

COJMM Official 1 said that they were aware of procurement planning processes and that they aligned with the developmental programme and budgeting processes of the City:

Yes, because we are part of supply chain management. Procurement planning is part of the central programming of the city and also linked to the budget. [COJMM Official 1]

COJMM Official 2 was also aware of the procurement processes:

Procurement assists the city with economic development, and when done correctly, it fast-tracks the fourth industrial revolution. [COJMM Official 2]

COJMM Official 3 said that COJMM ensured that all processes were in place, and procurement planning was handled differently per department:

The city has different departments that handle different projects, so procurement works in all the departments, even the planning to procure services and advanced service delivery. [COJMM Official 3]

COJMM Official 4 asserted that procurement, in their understanding of procurement planning, did not truly aid housing development at the municipal level:

Procurement planning has not clearly supported housing delivery in Orange Farm. There is limited information and a lack of transparency. [COJMM Official 4]

COJMM Official 7 confirmed their awareness of procurement planning, but added that it did not fast-track housing delivery:

It is working, but there are delays in delivery because of timing from the city's side. [COJMM Official 7]

COJMM Official 8 understood the objective of procurement planning, which positively supports development and service delivery to benefit communities in the COJMM area, given the rationale for procurement planning:

Procurement process, such as planning at COJMM, aims to better align with housing needs and improve conditions within households and communities. [COJMM Official 8]

COJMM Official 6 added that planning was a multi-departmental approach, meeting the needs of local communities:

Procurement planning aims to ensure that citizens of the republic can find affordable housing in their local areas and support themselves. [COJMM Official 6]

Based on participant feedback, procurement planning is acknowledged as a legal and procedural necessity integrated into municipal budgeting and development frameworks. However, the execution of these plans is hindered by practical challenges, such as bureaucratic delays and insufficient transparency. Despite the process facilitating strategic alignment and potential for economic development, the officials recognise that implementation and efficiency shortcomings impede housing delivery in Orange Farm.

Furthermore, COJMM officials recognised significant challenges related to procurement planning. Some acknowledged that procurement planning did not achieve its goals in housing development at Orange Farm. These challenges were partly due to a lack of transparency, limited access to information, and timing problems by the City that delayed housing delivery.

The participants were asked whether they thought the procurement planning aligned with the broader housing strategy of the COJMM:

Yes, because we are part of supply chain management. Procurement planning is part of the central programming of the city and also linked to the budget. [COJMM Official1]

Procurement planning is recognised as a legal and procedural requirement embedded in municipal budgeting and developmental processes. [COJMM Official 2]

The process promotes strategic alignment and potential economic development, but gaps hamper housing delivery at Orange Farm in implementation and efficiency. [COJMM Official 4]

Procurement planning is seen as a way to align city budgets with community needs. [COJMM Official 6]

Question 2: What is the impact of public procurement planning at COJMM?

The participants were questioned about the impact of public procurement planning on housing delivery:

Procurement planning has not clearly supported housing delivery in Orange Farm. There is limited information and a lack of transparency. [COJMM Official 3]

Yes, procurement planning can be delayed, because if procurement is delayed, then delivery is also delayed. That's what affects housing delivery. [COJMM Official 8]

Aside from the impact of procurement planning, the participants were asked if they had experienced any delays in housing delivery due to procurement planning issues, and, if so, to describe the circumstances:

Yes, housing projects are delayed because procurement does not address community needs in time. [COJMM Official 7]

Yes, Procurement reflects compliance with the legislative imperative that procurement planning must integrate with municipal budgets and developmental goals, that is why we have delays in housing. [COJMM Official 1]

Yes, execution faces practical constraints, such as governmental delays and a lack of transparency. [COJMM Official 4]

No, the COJMM has strategic planning programmes and timelines in supporting community housing needs. [COJMM Official 2]

Officials at the COJMM were asked whether their communities were aware of procurement planning:

No, the transparency is limited when it comes to housing needs, but COJMM, through its initiatives, has improved communication with communities. [COJMM Official 6]

No, I don't think they know that there is such a thing. When I also interviewed some community activists, they didn't know. The only thing they know is when the budget is announced. They don't know about the procurement planning process before houses are built. The government doesn't really communicate with the community members about procurement. Maybe that is the reason why people don't know about the process. [COJMM Official 2]

Yes, because we know in the office when a project is starting, but that information is not coming to the community. They don't have access to those documents or to the planning process. [COJMM Official 4]

Yes, the COJMM, through its councillors, inform the community on processes that should take place before housing development commences. [COJMM Official 5]

No, there is a lack of transparency and limited information on procurement in general. [COJMM Official 3]

The participants were also asked whether the procurement planning was effective, and, if so, to describe how:

Public procurement is essential, but currently weak and ineffective in addressing informal settlement housing needs. [COJMM Official 6]

No, the department does not effectively use procurement to respond to urgent housing challenges. [COJMM Official 8]

The department should strengthen coordination with other departments to avoid duplication and delays. [COJMM Official 7]

These could be mitigated by simplifying processes, regular training, and better oversight. [COJMM Official 5]

Question 3: How can the COJMM procurement policy be enhanced to conduct effective procurement planning in the housing department?

This section focused on the participants' involvement and satisfaction with the housing development process:

From a public administrative perspective, it is working. I don't think there is a significant need to improve the process. Maybe communication with the community can be improved, but for us inside, the system is fine. [COJMM Official 3]

Overall, procurement planning is recognised as a legislative and strategic tool, but its practical effectiveness in supporting housing delivery is mixed. While it provides structure and alignment with developmental goals, gaps in execution, particularly around transparency and timeliness, reduce its impact on accelerating housing delivery in Orange Farm. [COJMM Official 5]

At a strategic level, procurement should be transparent, inclusive of community needs, and aligned with the city's housing strategy. The department should strengthen coordination with other departments to avoid duplication and delays. [COJMM Official 1]

We need to integrate procurement planning into our broader housing development strategy. This means aligning procurement cycles with project timelines and anticipated housing needs to avoid delays and cost overruns. [COJMM Official 4]

Our officials and procurement staff require continuous training on the latest public procurement regulations, project management tools, and forecasting techniques. Building internal capacity is key to better planning and execution. [COJMM Official 2]

Engaging suppliers and contractors early in the planning process can help us understand market capabilities, costs, and risks. This will make our procurement plans more realistic and achievable. [COJMM Official 5]

We aim to use data-driven methods to predict material, service, and contractor needs. Accurate forecasting reduces emergency purchases and ensures that resources are available when needed. [COJMM Official 7]

The current policy can be rigid. Introducing some flexibility for long-term housing projects, especially in multi-year contracts, would allow smoother procurement and reduce disruptions in project execution. [COJMM Official 8]

Question 4: What recommendations can the study make to the COJMM for effective public procurement planning and the successful administering of national housing programmes?

The participants were asked to provide role-specific feedback for the study to recommend to the COJMM for effective public procurement planning and the successful administration of national housing programmes:

The emphasis that recommendations must ensure procurement planning aligns with housing development timelines. [COJMM Official 5]

There should be a need for clear specifications and requirements to avoid delays in housing project implementation. [COJMM Official 4]

The participants were asked how they viewed the role of their department in improving procurement-related coordination with other departments:

We are having structured procurement planning frameworks and templates for early supplier engagement to assess market readiness and reduce procurement risk. I also suggest integrating e-procurement systems to improve transparency, monitoring, and reporting. [COJMM Official 9]

The department should strengthen coordination with other departments to avoid duplication and delays. [COJMM Official 2]

Another key interview question was: What challenges does your office encounter during procurement planning and implementation for housing projects, and how can these be addressed?. The participants replied:

Delays in approvals and project authorisations from other municipal departments. Misalignment between housing project timelines and

procurement cycles. Establish an integrated project approval workflow to speed up authorisations. Implement multi-year procurement planning aligned with housing project schedules. [COJMM Official 1]

A limited supplier base results in a lack of competition and higher costs, while the complexity of procurement regulations causes procedural delays. [COJMM Official 3]

Inaccurate budgeting and cost forecasting for housing projects. But the government needs to improve its financial forecasting models and integrate them into support prompt budget allocations and staggered payments for long-term initiatives. [COJMM Official 4]

Implement better procurement scheduling and foster cross-functional collaboration from project conception to implementation. [COJMM Official 8]

Embed risk assessment and legal review in the planning phase, also draft clear contracts with well-defined deliverables and penalties for delays. [COJMM Official 10]

Second group: The Gauteng Housing Committee Crisis NGO and Izandla Ziyagezana NPO

Question 1: What legislative requirements regarding public procurement planning affect the efficacy of administering national housing programmes at Orange Farm?

This question was based on the participants' understanding and awareness of procurement planning as ordinary community members:

Unfortunately, not yet, as I'm heading the portfolio of education but I can find out how it is planned and implemented. I only know procurement in a vast knowledge but in this regard I haven't heard how human settlement will deliver its services to the people. [GHCC NGO Contributor 1]

Official 2 was familiar with procurement planning:

Public procurement planning is the strategic process undertaken by public entities (governments, municipalities, state-owned enterprises) to acquire goods, services, and works from external sources. It involves a systematic

approach to identify needs, determine procurement methods, develop specifications, manage contracts, and ensure compliance with regulations and policies. [GHCC NGO Contributor 2]

My experience was destroyed as to how housing procurement was tabled in a direction that disabled the communities from stretching their participation. [Izandla Ziyagezana NPO Official 3]

No, I don't know how housing projects are planned and implemented in my area, and I have never heard of public procurement planning. [GHCC NGO Contributor 4]

No, I don't know how housing projects are planned and implemented. [Izandla Ziyagezana NPO Official 4]

No, I don't know how housing projects are planned and implemented...but yes, I have noticed delays in housing projects caused by corruption. [GHCC NGO Contributor 9]

No, I don't know how housing projects are planned and implemented. No, I have never heard of public procurement planning. [Izandla Ziyagezana NPO Official 1]

Question 2: What is the impact of public procurement planning at COJMM?

The participants were asked to elaborate if they had noticed any delays in housing projects:

There's a delay in housing due to the middlemen. The housing has the capacity to build houses independently. [GHCC NGO Contributor 7]

Implement clear, transparent procurement processes and hold officials accountable to prevent corruption and ensure fair allocation of resources. [GHCC NGO Contributor 6]

My experience was destroyed as to how housing procurement was tabled in a direction that disabled the communities from stretching their participation. [Izandla Ziyagezana NPO Official 4]

Delays are caused by poor planning and corruption. [GHCC NGO Contributor 8]

Bad; a typical talk show of politicians. [GHCC NGO Contributor 5]

Some housing issues are not being adequately addressed simply because there is corruption in the process of giving people houses. The officials become greedy and end up using their power to enrich themselves and suppress genuine concerns. The process of giving houses to people should be vetted to disallow unqualified people from receiving houses which don't belong to them. [Izandla Ziyagezana NPO Official 4]

Question 3: How can the COJMM procurement policy be enhanced to conduct effective procurement planning in the housing department?

This question enabled the researcher to understand how the COJMM procurement policy could be improved to include community participation and involvement in the procurement planning of the Housing Department.

The participants responded as follows:

Yes, community members are consulted before housing projects are planned and executed. [GHCC NGO Contributor 5]

Orange Farm remains a dormitory town, with most residents commuting to Johannesburg for work. Housing procurement does not incorporate economic development strategies, limiting sustainability. [GHCC NGO Contributor 6]

No consultation...the experience [at a forum] was poor—a typical talk show of politicians. [GHCC NGO Contributor 9]

Local government should focus on the living conditions of residents and engage the provincial government to assist in identifying available land for housing and developing formal human settlements. [Izandla Ziyagezana NPO Official 1]

More consultation and accountability and more community engagement are needed to improve transparency. [GHCC NGO Contributor 2]

Involve community members more actively, ensure open communication, and publish project details in advance. Procurement planning should be more

transparent, with regular public updates, accessible reports, and forums for community engagement. [GHCC NGO Contributor 1]

No, community members are not consulted. No, I have never attended a meeting where housing procurement was discussed. [Izandla Ziyagezana NPO Official 4]

Yes, community members are consulted... but no, I haven't attended a housing procurement meeting. [Izandla Ziyagezana NPO Official 3]

Question 4: What recommendations can the study make to the COJMM for effective public procurement planning and the successful administering of national housing programmes?

The participants were asked to recommend actions the local government could undertake and suggest improvements to the housing process:

Public procurement planning should be more transparent. This could be achieved through proper consultation from housing to the stakeholders, which is us, the residents. Local government as the closest entity to the people should, through its budget, ensure quality and beneficiary to the residents. [GHCC NGO Contributor 6]

The local government should oversee the administration of procurement. And they should demand feedback and results from administrators. [Izandla Ziyagezana NPO Official 4]

More consultation and accountability. Engage with the community to know community needs. The needs of people living with disabilities are not considered when planning. [GHCC NGO Contributor 2]

Community involvement and less corruption. [Izandla Ziyagezana NPO Official 2]

More consultation and accountability and more community engagement to improve transparency. [GHCC NGO Contributor 7]

Involve community members more actively, ensure open communication, and publish project details in advance. Procurement planning should be more

transparent, with regular public updates, accessible reports, and community engagement forums. [GHCC NGO Contributor 8]

Needs of people living with disabilities not considered and fairness in allocations and road access not adequately addressed. [GHCC NGO Contributor 6]

Ensure procurement planning directly benefits residents and fairness in allocations and road access not adequately addressed. [GHCC NGO Contributor 5]

5.5 DOCUMENT ANALYSIS

Mogan (2022:64–77) describes document analysis as ‘*The process of examining pre-existing texts, which allows researchers to conduct studies they might otherwise not be able to complete*’.

Mogan (2022:64–77) states that ‘*Document analysis is a useful research approach that has been employed for many years. It involves examining different kinds of documents such as books, newspaper articles, academic journal papers, and institutional reports*’.

Morgan (2022:64–77) highlights the importance of conducting document analysis, stating that ‘*Interviews and observations alone cannot fully understand the phenomenon, and secondary data analysis is essential for a thorough investigation*’. In this study, the researcher reviewed official reports and academic journals to determine how procurement planning impacts housing service delivery by the COJMM.

5.5.1 OFFICIAL GOVERNMENT REPORTS

The following official public documents were analysed to assess how procurement planning impacts housing service delivery by the COJMM.

5.5.1.1 COJMM Department of Human Settlements: Business Plan (2024/25)

The COJMM (2024: 31–45) states that metros should adopt standardised development indicators for planning, budgeting, and reporting. Procurement and project implementation are linked to capital expenditure (CAPEX) availability and land

acquisition resolutions by the Council. The document confirms that delays in the procurement process pose an obstacle to project delivery.

The document identifies Orange Farm as a key area for housing development. These areas are targeted for strategic investment through the Human Settlements Development Grant (HSDG) and the Urban Settlements Development Grant (USDG). Therefore, procurement activities in Orange Farm align with the PHDA policy, ensuring more coordinated budgets, land sourcing, and housing delivery (COJMM, 2024: 17).

The COJMM (2024: 18–30) recognises the need for a large-scale budget allocation of R299.6 million for 272.2 hectares in Orange Farm. However, the City has limited funds for land, housing services, and rehabilitation. The report indicates a shortage of professionals, such as engineers, which delays procurement planning. Consequently, procurement congestion prevents informal settlement upgrades, thereby prolonging poor living conditions.

The COJMM (2024: 36) indicates that 2,500 serviced sites are planned for the 2024/25 financial year, including Orange Farm. The City aims to develop mixed housing units, targeting 2,500 units, upgrade informal settlements, and 2,000 in-situ site developments for Roodepoort and Orange Farm. Achieving these goals depends on effective procurement planning, since delays in contracts, materials, or land servicing can hinder progress (COJMM, 2024: 40).

The COJMM (2024: 12–39) discusses implications for Orange Farm, Tjovitjo, as an informal settlement that falls under the Upgrading of the Informal Settlements Programme (UISP), detailed on pages 12 and 39 of the documents. A SWOT analysis finds weaknesses, like vacancies, inefficient procurement systems, and reliance on paper-based processes, all of which contribute to under-delivery in Orange Farm.

5.5.1.2 COJMM Integrated Development Plan (IDP)(2022-2027): Particularly the 2025–26 Draft IDP (Annexure A2)

The IDP (2024:52–54) outlines infrastructure and housing projects, including upgrading informal settlements that require the procurement of contractors, materials, and services. This indicates that the Housing Department needs to plan procurement activities ahead of time, considering specifications, schedules, and budgets.

Furthermore, the IDP (2024: 135) recognises revenue limitations, non-payments, and funding shortages that restrict which projects can be advanced. As a result, procurement plans must realistically align with available funds and procurement cycles to prevent overcommitment. The IDP (2024: 180) emphasises that procurement planning should incorporate constraints, such as schedule buffers and oversight mechanisms.

The IDP (2024: 98–100) defines key spatial development priorities. Accordingly, procurement planning for Orange Farm and Tjovitjo should align with these priorities to utilise resources effectively. The document also outlines mechanisms for public participation, transparency, and monitoring (IDP, 2024: 168).

The IDP (2024: 76) also emphasises sustainable infrastructure, climate resilience, and green standards, thus indicating that procurement activities must include sustainability criteria, such as materials, energy efficiency, and environmental impact considerations, in tender specifications.

5.5.1.3 Region G Profile and Regional Planning Document

The profile for Region G underscores Orange Farm as a high-demand area experiencing significant backlogs in bulk services and informal settlement upgrades. It highlights challenges such as limited revenue, capacity constraints, and issues with inter-entity coordination (COJMM Region G Profile, n.d.: 29–31).

The document emphasises the importance of upgrading informal settlements and identifies priority nodes. It also criticises procurement KPIs that overlook spatial considerations, which tend to favour politically visible yet lower-need projects (COJMM Region G Profile n.d.: 29–31).

It presents data comparing the proportion of housing capital allocated to priority wards versus others, alongside an analysis of procurement awards relative to spatial priority rankings (COJMM Region G Profile n.d., 29–31). The omission of resilience criteria, such as stormwater management and flood mitigation, in tender documentation could precipitate infrastructure failures, thereby escalating lifecycle costs for the City and its residents.

5.5.1.4 Gauteng Department of Human Settlements Annual Report (2023/24 / 2024)

The Gauteng Department of Human Settlements (2024: 89) states that ‘many housing and infrastructure projects are carried out by local municipalities or entities’.

The report further deconstructs programme expenditure by housing type, such as informal settlements, highlighting the role of the department in upgrading informal areas. In its oversight role, the report mentions that ‘a total of 62 projects were visited for site verification’ (Gauteng DHS, 2024: 57), demonstrating efforts to oversee municipal construction projects.

However, the department also reports substantial irregular, fruitless, and wasteful spending in its PFMA section (Gauteng DHS, 2024: 161), and notes contractual disputes with service providers (Gauteng DHS, 2024: 243), emphasising the risks associated with procurement planning and contract management.

5.5.1.5 Auditor-General (AGSA) Municipal Audit Report for City of Johannesburg (2022/23)

The AGSA (2023) conducted an independent review of municipal financial statements, performance reports, and compliance with key legislation.

The report identifies deficiencies in performance planning and reporting among critical high-impact auditees, especially in housing and infrastructure development. These shortcomings inhibit progress towards goals such as economic growth, job creation, and improved service delivery, as outlined in the Medium-Term Strategic Framework (AGSA, 2023).

The report highlights issues that could weaken the effectiveness of public procurement planning and the successful execution of housing projects. However, it also emphasises the importance of sound public procurement planning and financial management for the successful delivery of housing services. Implementing this would enable the City to strengthen its capacity to deliver quality housing and infrastructure, including to communities in informal settlements such as Orange Farm Extension 10, Tjovitjo (AGSA, 2023).

5.5.2 JOURNALS ON PROCUREMENT PLANNING AND HOUSING DELIVERY

Shai, Molefinyana, and Quinot (2019: 1–17) believe that analysing the South African situation can offer insights into how public procurement can advance broader societal goals beyond just transaction efficiency.

Fourie and Malan (2020: 1–13) argue that public procurement plays a vital role in the national economy and public spending, serving as a key indicator of government effectiveness because it is central to public service delivery. Fourie and Malan (2020: 1–13) further explain that public procurement involves a wide range of activities within government agencies focused on providing public services and goods. These activities exist to support social and political objectives, ranging from simple routine purchases to complex development and construction projects.

The authors point to current challenges, including poorly designed organisational structures and unqualified procurement officials, which weaken procurement capacity, and state that it is crucial to align procurement plans with the needs and goals of the

institution (Fourie & Malan, 2020: 1–13). Poorly developed strategic and annual performance plans can compromise procurement planning and execution.

Buthelezi, Onatu and Aigbavboa (2025: 1–12) note that poor procurement practices and inadequate control can lead to the procurement of inappropriate goods and services, inflated costs, and increased risks of abuse due to inadequate specifications and inaccurate costing.

‘The Constitution requires the state to take reasonable legislative and other measures to realise the right to housing progressively’ (Ramovha, 2024: 489–504). Since 1994, when democracy was established, the South African government has provided approximately five million subsidised houses and serviced sites for poor and low- to middle-income households through its housing delivery initiatives. Despite this progress, the housing deficit increased from about 1.2 million in 1994 to around 2.5 million households in 2020.

Huchzermeyer (2021:10) opines that ‘in South Africa, the law mandates that this intersection should be as non-disruptive as possible’. However, achieving this is challenging, as illustrated in Johannesburg.

Addressing issues related to informal settlements and planning is imperative (Georgiadou, 2024: 150–168). The author proposes alternative approaches to transforming planning and urban space in South Africa.

The South African public procurement system urgently requires reform to incorporate best practices from the private sector to enhance service delivery (Manyathi, 2021: 1). Currently, many public resources fail to provide value for money due to inflexible and inefficient procurement procedures.

This positions procurement planning as the key driver for transforming housing delivery while also seeking innovative ways to ensure efficient government functioning without delays in housing provision (Manyathi, 2021: 1).

5.6 DISCUSSION OF THEMES AND SUB-THEMES OF THE RESEARCH FINDINGS

The research findings led to the identification of the following themes and sub-themes based on their presentation:

THEME 1: AWARENESS AND UNDERSTANDING OF PROCUREMENT PLANNING

Sub-theme 1.1: Strong Awareness Among COJMM Officials

Sub-theme 1.2: Limited Awareness Among NGOs and Community

Sub-theme 1.3: Transparency and Information Gaps

THEME 2: IMPACT OF PROCUREMENT PLANNING ON HOUSING DELIVERY

Sub-theme 2.1: Delays in Housing Delivery

Sub-theme 2.2: Corruption and Mismanagement

Sub-theme 2.3: Limited Community Benefit

THEME 3: ENHANCING PROCUREMENT POLICY

Sub-theme 3.1: Strengthening Coordination

Sub-theme 3.2: Community Engagement

Sub-theme 3.3: Flexibility and Innovation

THEME 4: RECOMMENDATIONS FOR EFFECTIVE PROCUREMENT PLANNING

Sub-theme 4.1: Transparency and Accountability

Sub-theme 4.2: Capacity Building

Sub-theme 4.3: Early Supplier Engagement

The upcoming sections discuss these themes.

5.6.1 Awareness and Understanding of Procurement Planning

The Victoria state government (2024) explains that procurement planning involves identifying the anticipated procurement activities of an organisation over a set period. It offers government agencies, end-users, and potential suppliers a clear overview of upcoming procurement projects for service delivery. While procurement planning remains a debated research issue among scholars, its significance is the recognition that the procurement activity plan offers key information to synchronise funding, resources, and capabilities with intended procurement efforts. It also aids in prioritising procurement releases to capitalise on market conditions, as noted by the state government of Victoria (2024).

The research findings show that most COJMM officials are aware of procurement planning as a legislative and procedural requirement linked to municipal budgets and developmental goals. In contrast, some municipal officials, NGO and NPO participants displayed a very limited understanding of procurement planning.

The limited community awareness points to low public participation, despite the IDP (2024) requirement for public engagement. This deficit suggests that procurement planning remains predominantly top-down rather than inclusive, supporting the assertion by Huchzermeyer (2021) that planning often neglects the realities of informal settlements. The research findings show that the COJMM Business Plan (2024/25) and IDP (2025–26) need to ensure that procurement planning aligns with capital expenditure, housing priorities, and the Urban Settlements Development Grant (USDG) requirements.

To support this, procurement planning is recognised as legally mandated and essential for integrating housing delivery with city-wide strategic goals. This finding aligns with Fourie and Malan (2020), who argue that procurement plays a vital role in aligning public services with developmental objectives.

Several officials and NGOs noted that procurement processes lack transparency, which prevents communities from understanding or influencing housing delivery.

In confirmation, COJMM Official 6 stated:

Transparency is limited when it comes to housing needs. [COJMM Official 8]

The Auditor-General Report (2023) and the Gauteng DHS Annual Report (2024) confirm this by stating that irregular expenditure and weak procurement oversight further highlight these transparency concerns. Transparency is legally required under the Constitution and PFMA, but both institutional reports and participant feedback indicate significant shortcomings in practice.

5.6.2 Impact of Procurement Planning on Housing Delivery

The study established that procurement planning is essential for successful housing delivery because it ensures the timely, cost-effective, and high-quality acquisition of materials and services needed for construction, thereby minimising waste and maximising resource allocation. The officials and community members repeatedly cited delays in housing projects due to procurement inefficiencies:

If procurement is delayed, then delivery is also delayed. [COJMM Official 8]

Delays are caused by poor planning and corruption. [GHCC NGO Contributor 8]

The COJMM Business Plan (2024/25) highlights procurement delays as a major obstacle to meeting housing goals. The Region G Profile (n.d.: 29–31) attributes these delays to capacity issues and poor coordination between departments. This results in congestion due to poor scheduling and misaligned project timelines and procurement cycles. This observation aligns with Buthelezi et al. (2025) findings, who emphasise that inefficient procurement processes contribute to higher costs and project delays.

The NGO and community participants identified corruption as a significant factor preventing housing delivery:

Some housing issues are not being adequately addressed simply because there is corruption in the process of giving people houses. [Izandla Ziyagezana NPO Official 4]

The Gauteng DHS Annual Report (2024) details irregular, fruitless, and wasteful expenditures, and the AGSA Report (2023) points out weak performance planning and compliance issues. These reports suggest that corruption not only causes project delays but also undermines public trust, emphasising the importance of strong oversight and accountability measures.

Furthermore, even when procurement processes are successful, they often fail to meet local needs or promote economic development:

Housing procurement does not incorporate economic development strategies, limiting sustainability. [GHCC NGO Contributor 6]

The research found that housing delivery often emphasises output, such as the number of houses built, rather than improving livelihoods. This finding aligns with Shai *et al.* (2019), who claim that procurement should aim to fulfil broader socio-economic goals.

5.6.3 Enhancing Procurement Policy

The findings demonstrate that the government must create systems for sharing information, aligning activities, and ensuring clear communication among diverse actors to achieve common goals while promoting efficiency, avoiding duplication, and enhancing outcomes in areas such as housing development and finance. Several officials emphasised the need for better coordination across departments:

The department should strengthen coordination with other departments to avoid duplication and delays. [COJMM Official 2]

The Region G Profile identifies fragmented planning as a significant challenge; strengthening coordination requires governance at multiple levels, the adoption of integrated frameworks, and a multi-stakeholder approach involving all stakeholders (COJMM Region G Profile, n.d.: 29–31).

The government emphasises the importance of building collaborative relationships and partnerships between organisations and community members to address common issues, enhance the quality of life, and promote sustainable, positive change. These aspirations involve active communication, respectful dialogue, and joint efforts to make informed decisions, create meaningful outcomes, and increase local ownership, transparency, and accountability. The findings reveal that the NGO emphasises the importance of genuine community involvement in procurement processes:

Involve community members more actively, ensure open communication, and publish project details ahead of time. [GHCC NGO Contributor 1]

The finding aligns with the participatory planning principles in the IDP (2024) but also underscores a discrepancy between policy and actual practice.

The ability of the government to adapt and respond effectively to changing market demands and challenges is more important than ever.

The COJMM officials recommend making procurement policies more adaptable to long-term housing needs:

Allowing flexibility for multi- year contracts would reduce disruptions in project implementation. [COJMM Official 8]

Manyathi (2021) similarly advocates for modernising procurement practices by adopting private-sector best practices.

5.6.4 Recommendations for Effective Procurement Planning

The SPF Good Practice Guide on Procurement Planning supports the recommendations of the current study for effective procurement planning. It highlights the importance of early, structured, and proactive processes, emphasising the alignment of procurement with institutional strategies, budgets, and social priorities.

The guide focuses on social value, risk mitigation, and transparent decision-making for procurement to be strategic and outcome-oriented rather than purely administrative. Overall, these frameworks offer a practical, policy-driven approach to enhancing efficiency, accountability, and sustainability in public sector procurement (National Treasury, 2024).

Both officials and communities called for greater openness and monitoring:

Public procurement planning should be more transparent through proper consultation with stakeholders. [GHCC NGO Contributor 6]

AGSA and DHS reports emphasise the need for clear reporting systems and regular audits, identifying continuous training and skill development as critical for improving procurement:

Our officials and procurement staff require continuous training on regulations and project management tools. [COJMM Official 2]

Fourie and Malan (2020) support this by highlighting the link between procurement capacity and overall service delivery efficiency.

COJMM Official 5 proposed engaging suppliers early to improve planning and risk management:

Engaging suppliers early can help us understand market capabilities, costs, and risks. [COJMM Official 5]

The study finds that the call for early planning and market analysis supports the recommendation to engage suppliers early on, thereby enabling more strategic and informed procurement decisions, already in motion through the development of the National Treasury Integrated Procurement Plan template, as seen below in Figure 5.6.1 (National Treasury, 2024).

5.7 CHAPTER SUMMARY

Chapter 5 discussed the research findings derived from the semi-structured interviews with COJMM officials, including those in the offices of the Regional Director, Public Housing Stock Management, the Public Housing Programme Director, Finance, and Business Management Support. The chapter presented insights from the Gauteng Housing Crisis Committee (NGO) and Izandla Ziyagezana (NPO).

The study evaluated the effectiveness of procurement planning in housing delivery at Orange Farm Extension 10, Tjovitjo Informal Settlement, through an analysis of official government documents and academic journals. The findings were examined in relation to the research questions guiding this study and reveal a discrepancy between legislative intent and actual practice. COJMM officials regard procurement as a legal and strategic process, yet recognise operational issues, such as delays and poor coordination. The communities represented by the NGO and NPO perceive housing delivery as opaque, exclusionary, and sometimes corrupt.

Document analysis supports these observations, identifying systemic weaknesses in transparency, oversight, and capacity. The study suggests integrating community voices into decision-making, modernising systems through e-procurement and multi-year planning, strengthening accountability to prevent corruption and inefficiency, and building internal capacity via training and interdepartmental collaboration.

CHAPTER 6: SUMMARY OF FINDINGS, RECOMMENDATIONS AND CONCLUSIONS

6.1 INTRODUCTION

This study aimed to examine the impact of procurement planning within the housing department of the COJMM through a case study of the Tjovitjo Informal Settlement in Orange Farm Extension 10. The research sought to understand how COJMM facilitates housing provision through procurement planning and promotes sustainable livelihoods within the community.

The previous chapter summarised the research findings from semi-structured interviews and official document analysis, ending with a discussion of the main themes and sub-themes.

Chapter 6 revisits the study outline, summarises the key findings, offers recommendations for improving the COJMM, identifies areas for future research based on the findings, and presents the conclusions drawn from the study.

6.2 CHAPTER OUTLINE

Chapter 1 provided a comprehensive overview of the background and contextual foundation of the study, highlighting the historical and theoretical developments that shape current procurement processes. It articulates a problem statement that highlights an unresolved issue affecting both academic understanding of the topic and practical implications for various stakeholders. The study was guided by specific research questions designed to reveal new insights and clarify the subject matter. These questions aligned with the overarching goal set by the general objective, while the objectives specified measurable steps to achieve that objective. The chapter defined key concepts utilised throughout the study and outlined the research methodology, design, and data collection strategies. It also addressed the limitations and delimitations of the research, underlined its significance, and offered an outline for subsequent chapters along with a summary of their content.

Chapter 2 provided a comprehensive review of the existing literature relevant to procurement planning, establishing both the theoretical and conceptual frameworks for the study. It discussed the theoretical foundations of procurement planning, drawing on established models and principles from the field of public administration. The chapter defined procurement planning by outlining its objectives, processes, and expected outcomes, thereby providing a scholarly backdrop for understanding its role in enhancing service delivery and accountability. Furthermore, it examined procurement planning from a global perspective, emphasising the varied approaches adopted by governments across different regions, and highlighted the impact of institutional capacity, governance structures, and economic conditions on procurement practices. Lastly, the chapter addressed the worldwide challenges governments face, including corruption, limited capacity, political interference, and weak regulatory frameworks, emphasising the urgent need to improve procurement planning processes to enhance efficiency and accountability in public service delivery.

Chapter 3 examined the legal framework of procurement planning in South Africa, with a particular focus on the Department of Housing at the local government level. The chapter commenced with a historical analysis of the evolution of procurement systems in the country, tracing the shift from pre-democratic practices to post-apartheid reforms aimed at promoting equity, transparency, and efficiency. Thereafter, it examined the nature and scope of procurement planning within the Department of Housing, exploring how various policies, regulations, and practices have shaped its planning processes. The chapter situated procurement planning within the broader governance and service delivery frameworks operational at the municipal level.

Chapter 4 detailed the research design, methodology, and data collection strategies employed in the study. It presented the chosen research design, justifying its relevance for addressing the research questions and objectives. The chapter outlined the data collection methods, including interviews and document analysis, as well as the snowballing sampling technique and participant selection criteria. It also outlined the procedures for administering these instruments, detailing how the collected data would be processed, organised, and interpreted in accordance with the conceptual framework and research objectives. The chapter acknowledged the limitations of the research and discussed ethical considerations, including informed consent,

confidentiality, and adherence to research integrity, to preserve responsible conduct during the study.

Chapter 5 presented the study findings and discussed them in relation to the research problem, objectives, and conceptual framework. The results were systematically organised and analysed to highlight emerging trends, patterns, and themes from the data. The discussion interpreted these findings by linking them to the literature reviewed in Chapter 2 and the legal framework established in Chapter 3, demonstrating the contribution of the study to an understanding of procurement planning and its significance in local government, particularly within the Department of Housing in South Africa.

Chapter 6 concludes the dissertation by presenting solutions and recommendations based on the findings, addressing the identified challenges and suggesting improvements to procurement planning practices that can enhance service delivery. The chapter concludes with a summary of key findings relevant to the research objectives, effectively encapsulating the research contributions.

6.3 SUMMARY OF FINDINGS

In summarising the research study findings, the research objectives are outlined and re-visited to determine whether they have been achieved:

Research Objective 1: Explore the legislative imperative on public procurement planning that influences the effectiveness of administering national housing programmes at Orange Farm.

Finding 1 reveals that officials widely recognise procurement planning at the City of COJMM as a legislative requirement tied to municipal budgeting and developmental priorities. Officials demonstrated an awareness of the importance of procurement in aligning housing delivery with budget allocations and long-term strategic goals. However, they admitted that its implementation often falls short due to bureaucratic delays, lack of transparency, and weak interdepartmental coordination. Several officials emphasised that while compliance with legislation is achieved, procurement

planning has not translated into tangible improvements in housing delivery at Orange Farm.

Finding 2 reveals that most community representatives within the NGO and NPO had minimal awareness or knowledge of procurement planning processes, and what awareness existed was conceptual rather than practical. They described housing delivery as marred by corruption, poor consultation, and exclusion of community voices. Communities felt disempowered and disconnected from the decision-making processes that directly affected them.

Finding 3 is that policy documents and official reports confirm these perceptions. The COJMM Business Plan and Integrated Development Plan (IDP) emphasise the role of procurement in managing housing expenditure and aligning with national grants. However, audit reports from the Auditor-General of South Africa (AGSA) and the Gauteng Department of Human Settlements highlight irregular spending, poor oversight, and weak compliance, pointing to systemic inefficiencies. Academic literature further supports the view that while procurement planning is crucial for development, its effectiveness is undermined by capacity deficits, delays, and poor structures.

Research Objective 2: Identify the economic impact of public procurement planning at COJMM.

Finding 5 points out that procurement planning at COJMM is intended not only to manage resources but also to stimulate economic development. The officials recognised this dual role, noting that procurement has the potential to accelerate service delivery and improve housing provision. However, they also acknowledged that in practice, delays and inefficiencies in procurement processes increase costs, slow down housing projects, and reduce the economic benefits that should accrue from public investment.

Finding 6 shows that community representatives reinforced this view by highlighting that procurement planning does not adequately integrate with local economic development strategies. They described Orange Farm as a dormitory town that lacks sustainable economic opportunities, partly because procurement planning does not

address broader socio-economic integration. Corruption and mismanagement were seen as major contributors to wasteful spending, while unfair beneficiary selection in housing projects further eroded trust in the system and reduced equitable economic impact.

Research Objective 3: Investigate how the COJMM procurement policy can be enhanced to conduct effective procurement planning in the Housing Department.

Finding 7 reveals a broad consensus among stakeholders on the need to strengthen and reform procurement policy at COJMM. Officials emphasised the importance of improved coordination across departments to minimise duplication and delays. They also stressed the importance of ongoing staff training in procurement regulations, project management, and forecasting to enhance capacity and ensure compliance. Flexibility was another key recommendation, with officials calling for the adoption of longer-term contracts and adaptable scheduling to align better with project needs. Early supplier engagement was also highlighted as a way to assess market readiness and reduce risks associated with project implementation.

Finding 8 points out that, from the perspective of the NGOs and community organisations, the priority lies in strengthening transparency and accountability. They called for procurement planning to be more inclusive and participatory, with regular consultation and communication with affected communities. Many expressed frustration that procurement decisions were made without their input and urged the municipality to involve communities from the earliest stages of planning. They also stressed the importance of ensuring inclusivity, particularly for vulnerable groups such as people with disabilities, who are often overlooked in housing planning processes.

Finding 9 is that a document and literature analysis reinforces these recommendations. The Region G profile and COJMM IDP stressed the importance of integrated and multistakeholder frameworks for development. National and international literature also highlighted the value of adopting private-sector best practices, improving capacity, and aligning procurement more effectively with institutional goals.

Research Objective 4: Make recommendations to the COJMM for effective public procurement planning and the successful administration of national housing programmes

Finding 10 provides a set of clear recommendations for improving procurement planning in housing delivery. The officials recommended aligning procurement cycles with housing project timelines to prevent delays, strengthening coordination across municipal departments, and enhancing staff capacity through training and the use of project management tools. They also emphasised the need for greater flexibility in procurement systems, including the use of multi-year contracts and adaptable scheduling, as well as early supplier engagement to enhance market readiness and mitigate risks.

The NGO and community representatives emphasised the need for transparency and accountability in procurement processes. They argued that housing delivery would only improve if corruption were eliminated and procurement information were openly shared with the public. The communities called for greater involvement in procurement planning through genuine consultation and forums, ensuring inclusion of their voices in the decision-making process. They also advocated for the municipality to ensure equitable allocation of housing benefits, with particular attention to vulnerable groups such as people with disabilities.

Finding 11 reveals that national and international policy documents reinforce the recommendations. The National Treasury guidelines highlight the importance of early planning, risk mitigation, and supplier engagement. Audit findings from AGSA point to the need for robust reporting systems and regular oversight to prevent financial irregularities. Academic literature further advocates for procurement reform that integrates socio-economic objectives, sustainability standards, and best practices from the private sector.

6.4 RECOMMENDATIONS EMANATING FROM THE STUDY

The study identified several challenges and opportunities in the implementation of procurement planning within the COJMM, particularly in relation to the delivery of national housing programmes in Orange Farm. The study proposes the following

recommendations based on the summary of findings and discussions to strengthen procurement outcomes and ensure efficiency, transparency, and accountability:

6.4.1 Implement Comprehensive Procurement Strategies

This research suggests that a broad range of procurement practices should be adopted, rather than relying solely on procurement planning. While planning is essential, it is not sufficient to ensure successful results. Effective outcomes are driven by the correct execution of procurement practices, including sourcing, evaluation, contract management, and monitoring. The COJMM should implement a comprehensive strategy that integrates procurement planning with execution, monitoring, and reporting, bolstered by a clear legal and institutional framework to attain value for money, efficiency, and adequate resource allocation.

6.4.2 Stakeholder Accountability

The study suggests enhancing accountability measures by empowering community members to serve as both recipients and monitors of procurement results. Communities should be equipped to utilise social accountability tools, such as public expenditure tracking surveys, participatory budgeting, and citizen scorecards. These tools will promote transparency and ensure that resources are allocated effectively, projects are completed promptly, and services are delivered to the intended beneficiaries. Furthermore, accountability should also apply to officials and contractors, with established repercussions for any instances of mismanagement or corruption.

6.4.3 Increase Funding and Capacity Development

The findings highlight that budget allocation and staff skills are key factors for effective procurement. Increased budgets directly stimulate procurement plan execution and enhance procurement staff skills through training, merit-based hiring, and continuous development, which improve efficiency and adherence to regulations.

Consequently, the COJMM should allocate sufficient funds specifically for procurement planning and implementation, especially for housing projects. Establishing dedicated procurement teams equipped with digital tools, such as e-

procurement systems, blockchain contract management, and transparent expenditure tracking, would enhance traceability, reduce fraud, and increase accountability.

At the same time, the COJMM should avoid political influence and strengthen anti-corruption agencies, oversight entities, and civil society to improve procurement monitoring. Making public procurement data accessible will enable citizens and the media to monitor performance. Lastly, adopting multi-year procurement budgets and expenditure controls can improve forecasting and ensure value for money. Integrating procurement reforms into the broader public financial management system would support lasting improvements and stronger fiscal oversight.

6.4.4 Enhance Transparency and Accountability

Both the City officials and community groups consistently highlighted concerns about the lack of transparency in procurement planning. Hence, the COJMM should develop clear, accessible reporting systems that include public disclosures of procurement plans, awarded contracts, and project updates. Implementing regular independent audits could help curb corruption and irregular spending. Furthermore, transparency could be strengthened by aligning COJMM practices with the Municipal Systems Act, which underscores the importance of openness and accountability to the public.

6.4.5 Enhance Community Participation and Consultation

Communities in Orange Farm have voiced their frustration over being excluded from procurement processes. Accordingly, procurement planning should incorporate structured community engagement methods, such as regular consultation forums, public hearings, and online feedback platforms, to ensure effective participation and informed decision-making. Vulnerable groups, including people with disabilities, should be prioritised to ensure housing programmes are inclusive and equitable. Integrating community input into procurement planning could enhance trust, legitimacy, and better meet local needs.

6.4.6 Enhance Collaboration between Municipal Departments

Housing delivery is hampered by duplication and misalignment among departments. The COJMM should implement integrated planning frameworks that promote

collaboration among the Housing Department, Finance, Infrastructure, and Development Planning. Forming a cross-departmental task force dedicated to procurement planning could enhance efficiency and help eliminate bureaucratic delays.

6.4.7 Implement Flexibility in Procurement Planning

Rigid procurement systems often cause delays and inefficiencies. The COJMM should implement more flexible contracting approaches, such as multi-year contracts for major housing initiatives, along with adaptable scheduling that aligns with procurement cycles and project timelines. This strategy would minimise disruptions and help housing delivery meet increasing community demand.

6.4.8 Improve Supplier Engagement and Reduce Risks

Engaging suppliers early could enhance forecasting, evaluate market readiness, and lower risks. COJMM should create supplier relationship strategies that foster long-term partnerships, promote competition, and lessen dependence on emergency procurement. These approaches would increase value for money and ensure the timely delivery of housing projects.

6.4.9. Integrate Socio-Economic and Sustainability Criteria

Procurement planning should serve as a tool for inclusive development. The COJMM should include socio-economic goals, such as creating jobs, boosting local economies, and developing skills, in procurement contracts. Furthermore, sustainability standards should be integrated into procurement planning to make housing projects more resilient, eco-friendly, and aligned with long-term urban development objectives.

6.4.10 Implement Best Practices Derived from International and Private-Sector Models

The study revealed that procurement planning at the COJMM is mainly driven by compliance rather than outcomes. Incorporating international best practices and private-sector strategies could help transition procurement to a more strategic function.

6.5 AREAS FOR FUTURE RESEARCH

This study suggests that additional focus and research should be directed towards the following areas:

6.5.1 Procurement Planning in Informal Settlement Upgrading

Current research indicates that preparing future government procurement professionals and assisting public managers in overcoming procurement planning challenges involves exploring how procurement could be integrated into upgrading informal settlements. Changalima, Mushi, and Mwaiseje (2021) emphasise the importance of procurement planning to ensure the success of upgrading projects in these areas. Future research should evaluate how procurement strategies align with community needs, project timelines, and budget constraints.

6.5.2 Encouraging Interdisciplinary Studies on Community Involvement and Incorporating Technology into Procurement Planning

Future studies should examine the extent and impact of community involvement in procurement decisions for housing projects. Understanding how participatory procurement impacts project outcomes, such as satisfaction and sustainability, could offer valuable insights into enhancing governance and accountability in informal settlements.

Exploring the role of technology, such as Building Information Modelling (BIM) and data analytics, would enhance procurement planning processes. Technological tools could improve accuracy, efficiency, and transparency in procurement activities.

Taghaddos, Mashayekhi, and Sherafat (2019) developed a model that transformed the construction industry. Its benefits for construction management are well-documented, yet many organisations struggle to use BIM efficiently; thus, there is a need for simplified models or user-friendly solutions.

Future research should improve construction management through procurement management by developing computer codes that automate construction estimation. This technology would help planners determine proper 3D work areas and estimate

the materials and labour needed for each location. The automated approach is compared with manual calculations and software results in specific cases.

6.6 A PRACTICAL IMPLICATION AND INNOVATION EMANATING FROM THE STUDY

The study established that procurement practices are essential for organisational success and suggests that further research on new ICT models that promote innovation in the public sector is needed. This study revealed that procurement planning inefficiencies at the COJMM Housing Department often delay basic service delivery in Orange Farm Extension 10. The current research prompted the development of a mobile platform to address this challenge, enabling residents to connect directly with local service providers in real time. The app empowers local tradespeople (often excluded from formal tenders), increases transparency, and provides the municipality with a community-driven micro-procurement system.

6.6.1 The Kutloano Community Digital App

This platform has already been developed and piloted at a local level by the researcher, demonstrating its potential to reduce delays, improve accountability, and promote inclusive local economic development. The study recommends that this app be further scaled to support government-wide procurement planning, integrating real-time data.

6.6.2 Screenshots, Workflow Diagrams, and a Brief Description of app Functionality

6.6.2.1 Practical innovation: micro-procurement mobile platform

In response to the inefficiencies identified in the COJMM housing procurement processes, this researcher developed a mobile platform to connect residents with local service providers in real time. The app functions as a micro-procurement system, enabling the following:

- Faster service allocation
- Community participation in identifying service needs
- Transparency in expenditure and service delivery

- Economic development in informal settlements

The platform has been successfully piloted in Orange Farm Extension 10. It can be adapted for larger-scale municipal or provincial deployment, providing a digital tool to enhance procurement planning and execution.

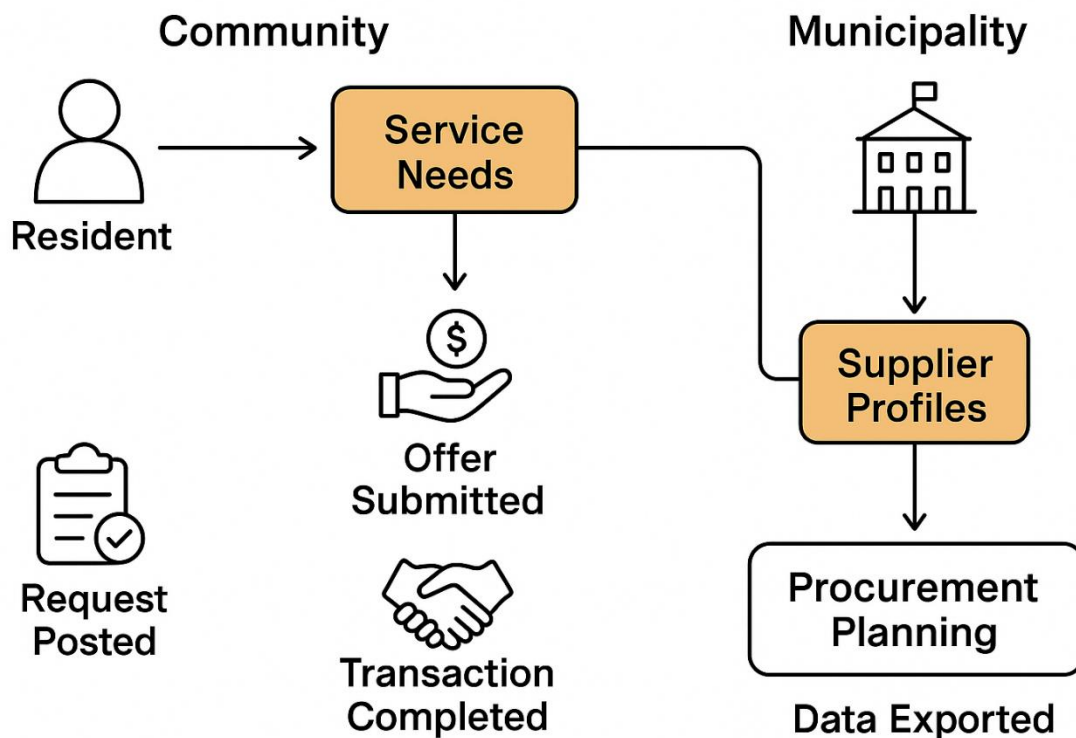


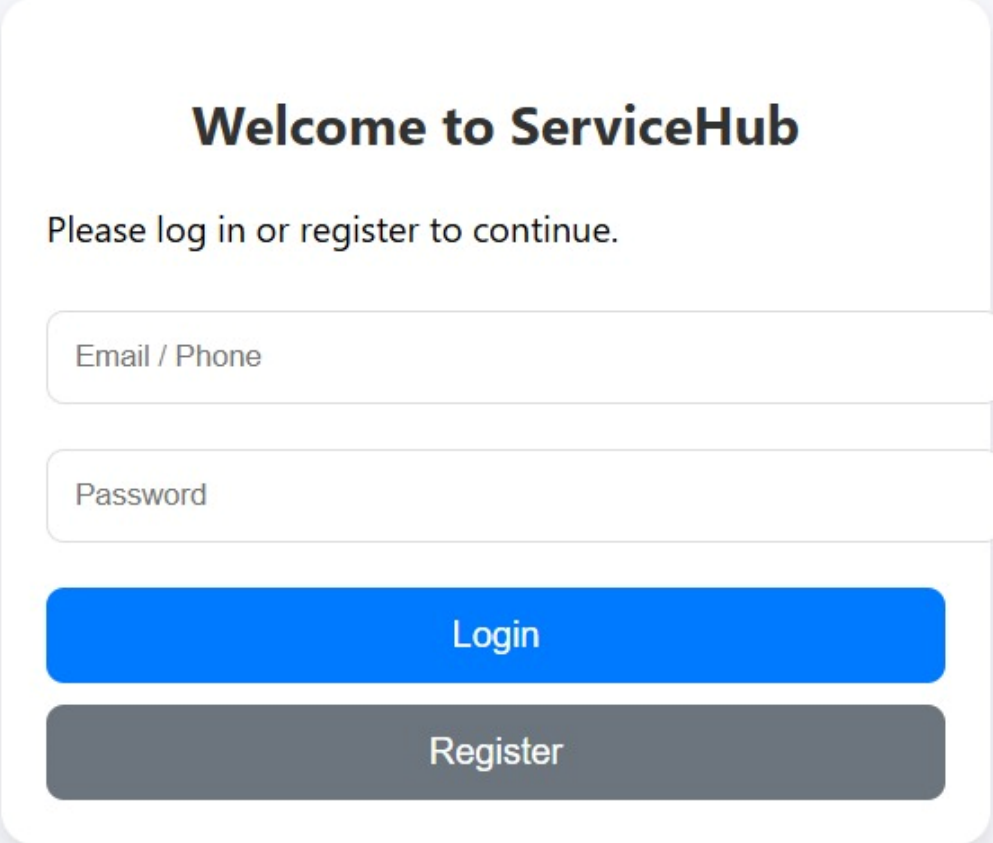
Figure 6.6.2.1: Practical innovation: micro-procurement mobile platform (Source: Author)

Although the platform enables micro-procurement between community members, aggregated data on service requests, supplier performance, and pricing can be exported to inform procurement planning in the COJMM, ensuring that formal plans reflect actual community priorities.

This micro-procurement platform was primarily designed for community members contracting with one another (rather than the municipality issuing contracts). It can support procurement planning, but in a slightly different way.

6.6.3 How it Works in a Community-to-Community Context

Residents post service needs (repairs, clean-ups, or small issues). Other residents/local micro-suppliers offer services and prices. The app records transactions, including who requested what, who supplied it, when, and at what cost.



Welcome to ServiceHub

Please log in or register to continue.

Email / Phone

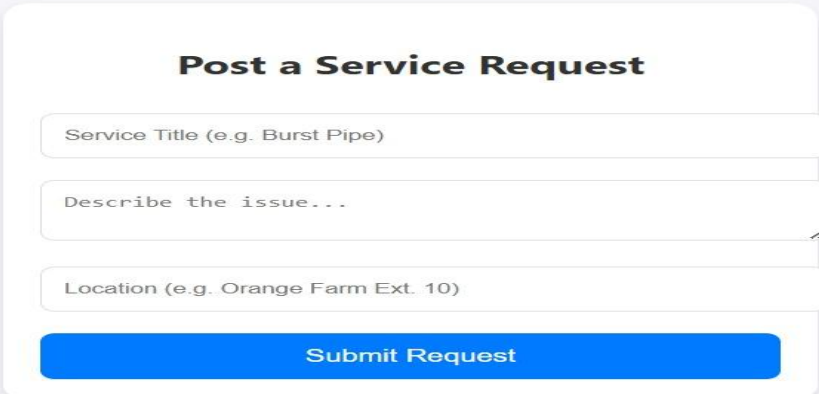
Password

Login

Register

The image shows a login form for 'ServiceHub'. It features a white rounded rectangle on a light blue background. At the top, it says 'Welcome to ServiceHub' in bold black text. Below that, it prompts the user to 'Please log in or register to continue.' There are two input fields: 'Email / Phone' and 'Password'. Below the input fields are two buttons: a blue 'Login' button and a grey 'Register' button.

Figure: 6.6.3.1: Login details (Source: Author)



Post a Service Request

Service Title (e.g. Burst Pipe)

Describe the issue...

Location (e.g. Orange Farm Ext. 10)

Submit Request

The image shows a form to 'Post a Service Request'. It features a white rounded rectangle on a light blue background. At the top, it says 'Post a Service Request' in bold black text. Below that are three input fields: 'Service Title (e.g. Burst Pipe)', 'Describe the issue...', and 'Location (e.g. Orange Farm Ext. 10)'. At the bottom is a blue 'Submit Request' button.

Figure 6.6.3.2: Service request (Source: Author)

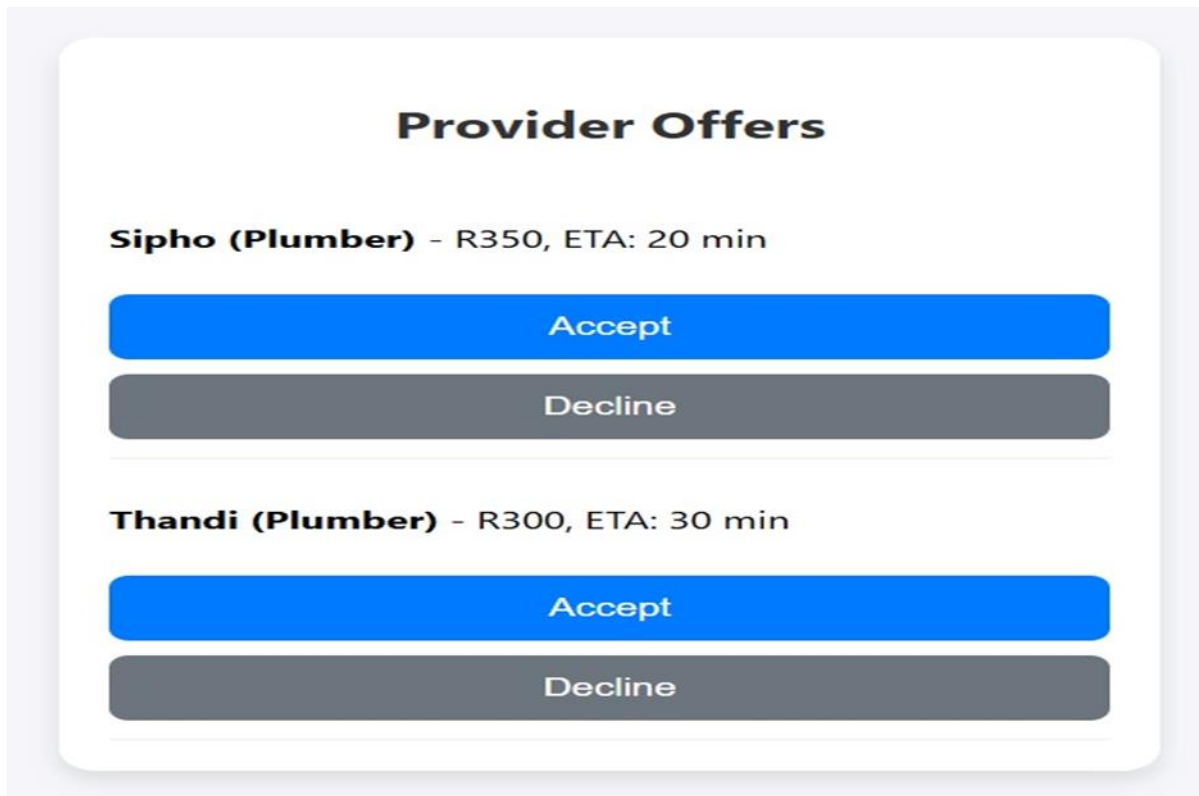


Figure 6.6.3.3: Provider offers (Source: Author)

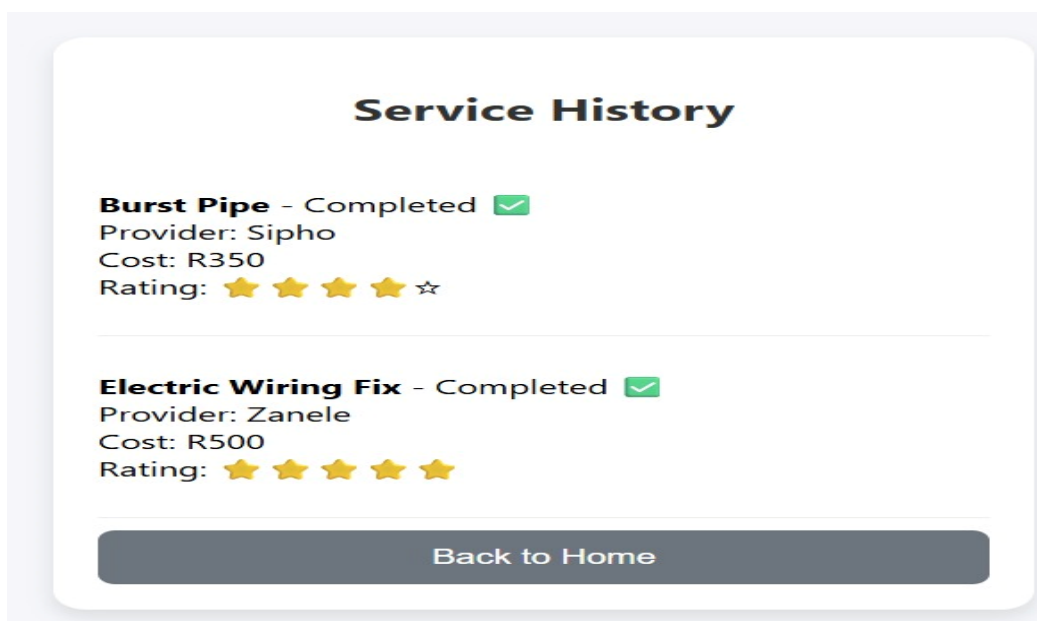


Figure 6.6.3.4: Service history (Source: Author)

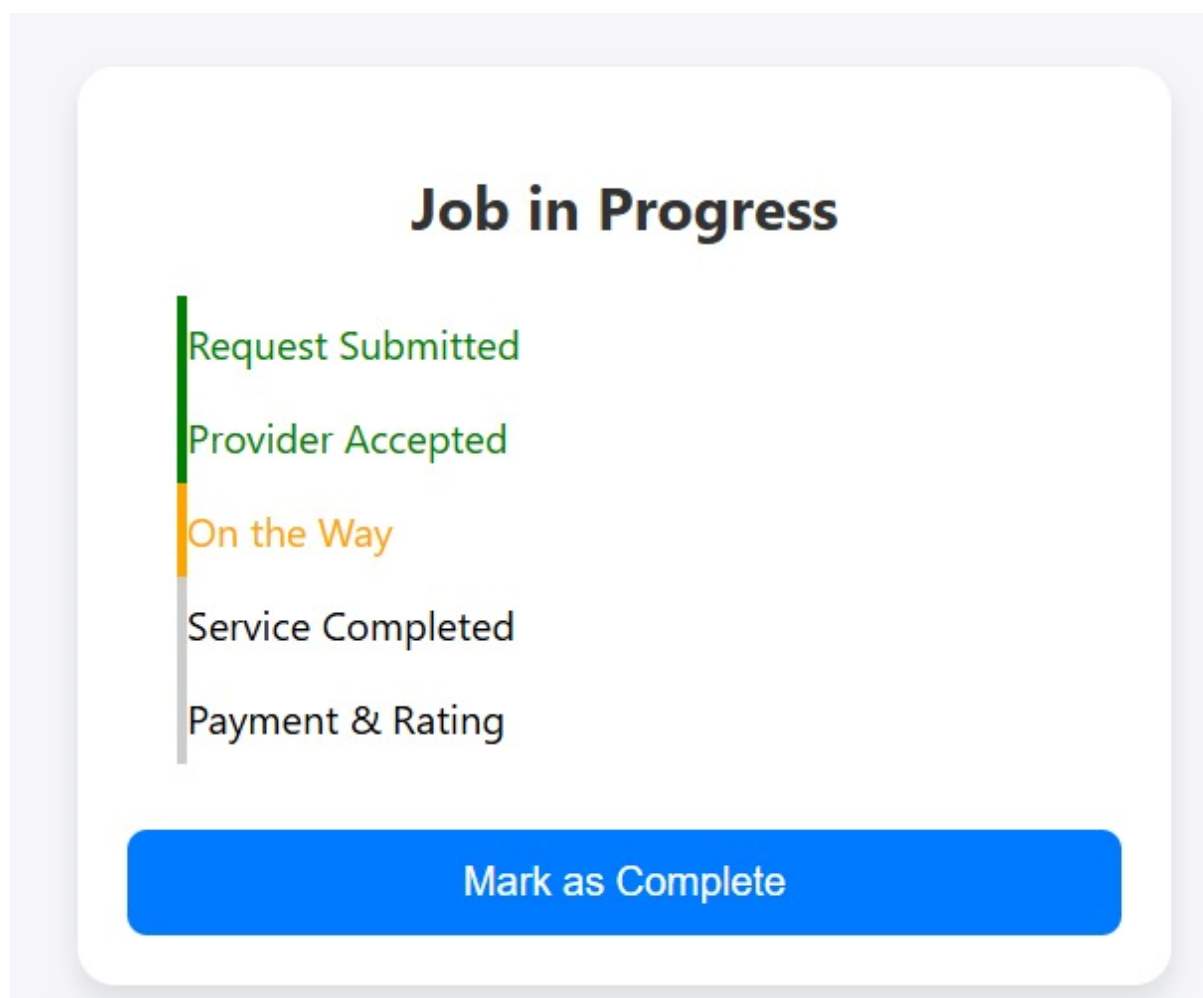


Figure 6.6.3.5: Provider view (Source: Author)

Table: 6.6.2 Connection to procurement planning

Aspect	Kutloano Community App (Community economic dev)	How it Informs Formal Planning at COJMM
Needs identification	Residents signal which services are most urgent	The Municipality / Housing Department can see aggregated demand patterns.
Supplier mapping	Local providers register and build profiles	Helps planners know who is locally available for future contracts.
Cost and time data	App tracks actual transaction costs	Gives planners benchmark prices and delivery times.

Participation	Direct peer-to-peer procurement builds trust	Strengthens evidence for participatory planning and budgeting.
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Thus, although the municipality might not be directly contracting, the data generated by community transactions become valuable input into the formal procurement plans of the city or department (i.e., which services to fund, which providers to shortlist, and how to allocate budgets).

These findings suggest that enhancing the COJMM procurement policy requires a twofold approach: strengthening internal systems through capacity-building, coordination, and flexibility, while simultaneously embedding external reforms that promote transparency, community involvement, and sustainability. In summary, the study recommends that the COJMM adopt a comprehensive reform approach that focuses on enhancing transparency, accountability, and capacity, while strengthening community participation and integrating sustainability criteria into procurement planning. By so doing, the municipality can transform procurement from a compliance exercise into a strategic driver of effective housing delivery in Orange Farm.

6.7 CONCLUSION

This chapter detailed its structure, summarised key research findings, and presented the study conclusions. The summary of the findings aligns with the research objectives outlined in Chapter 1. It also explains the purpose of the study, highlights main recommendations, identifies areas for future research based on the findings, and discusses practical implications and innovations, notably the *Kutloano Community App*.

The study revealed that procurement planning is constitutionally mandated and strategically crucial for housing delivery. However, in Orange Farm, its effectiveness is hindered by implementation issues, a lack of transparency, and limited community participation, which impede the intended developmental outcomes.

Lastly, the findings indicate that despite the general procurement aim to stimulate local economic growth, current shortcomings at the COJMM, such as inefficiencies, corruption, and misalignment with community needs, limit its positive economic

impact. Instead of promoting growth, procurement practices have led to unnecessary expenses and delayed housing delivery in Orange Farm.

Furthermore, the study recommends that improving the COJMM procurement policy requires a two-pronged approach: strengthening internal systems through capacity-building, better coordination, and increased flexibility, while implementing external reforms to enhance transparency, community involvement, and sustainability.

In conclusion, the study recommends that the COJMM adopt a comprehensive reform strategy centred on enhancing transparency, accountability, and capacity, while promoting greater community engagement and integrating sustainability standards into procurement planning. This approach can transform procurement from a mere compliance task into a strategic tool for effective housing delivery in Orange Farm.

Chapter 6 further recommends that the Municipality or Housing Department utilise the app developed during the study to promote public service innovation. By analysing the data, the department can identify aggregated demand patterns, better understand the composition of the local population for future contracts, and access benchmark prices and delivery times. These insights additionally provide more robust evidence in support of participatory planning and budgeting, ultimately improving the efficiency and responsiveness of local public services.

In summary, the study recommends that the COJMM adopt a comprehensive reform approach that focuses on enhancing transparency, accountability, and capacity, while strengthening community participation and integrating sustainability criteria into procurement planning. By so doing, the municipality can transform procurement from a compliance exercise into a strategic driver of effective housing delivery in Orange Farm.

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LIST OF APPENDICES

Appendix 1: Semi-Structured Interview Questions for community organisation managers and residents of the Orange Farm Extension 10 Tjovitjo Informal Settlement

SECTION A: PARTICIPANT INFORMATION SHEET

THE EFFECTS OF PUBLIC PROCUREMENT PLANNING WITHIN THE HOUSING DEPARTMENT OF THE CITY OF JOHANNESBURG METROPOLITAN: THE CASE OF ORANGE FARM EXTENSION 10 TJOVITJO INFORMAL SETTLEMENT

PROSPECTIVE PARTICIPANT

My name is Tholakele Nyathi, and I am a Master's degree student at the Department of Public Administration and Management at the College of Economics and Management Sciences at UNISA. I invite you to participate in a study on the effects of public procurement planning within the housing department of the city of Johannesburg metropolitan area: The case of the Orange Farm Extension 10 Tjovitjo Informal Settlement. The findings of this research will be presented in a dissertation and will be made available in the UNISA library after graduation.

You are invited to participate in the study because of your extensive experience with the topic. Your insights would assist me in generating a comprehensive picture of the experiences of community organisations advocating for housing development in the Orange Farm Extension 10 Tjovitjo Informal Settlement.

This study is voluntary, and you are under no obligation to consent to participate. If you choose to take part, you will receive this information sheet to keep and will be asked to sign a written consent form. You are free to withdraw at any time without providing a reason.

You will be required to participate in an interview that will last no longer than 60 minutes or to complete a questionnaire that may take 30 to 45 minutes.

Your privacy will be respected throughout the research by ensuring that no pressure is placed on you to participate in the study or to disclose your private information. No one will be able to connect you to the responses provided. Soft copies of the data will be stored by the researcher on a password-protected computer, while hard copies will be locked in the researcher's office cabinet. Future use of the data will be subject to Research Ethics Review and approval, if applicable. All information will be permanently destroyed after three years through shredding documents and deleting electronic information from the computer's hard drive.

You will not receive any payment or reward, financial or otherwise. The study will not incur undue costs for you.

This study has received written approval from the Research Ethics Review Committee of the College of Economic and Management Sciences, UNISA. A copy of the approval letter can be obtained from the researcher if you wish. Should you require any further

information or would like to contact the researcher about any aspect of this study, please contact Miss Tholakele Nyathi at 074 999 9173 or 062 471 3199. The email address is tholakelenyathi79@gmail.com. Thank you for taking the time to read this information sheet and for participating in this study.

The following participants will be interviewed

- Residents of Orange Farm Extension 10 Tjovitjo (10)
 - Community Organisations dealing with housing at Orange Farm (2)
-

Dear Participant,

INSTRUCTIONS FOR COMPLETING THIS QUESTIONNAIRE:

Please do not write your name, surname, or other personal details or identifiers on this interview.

The interview will not take more than 40 minutes to complete.

There is only one answer permitted per question.

Kindly note that the information you provide in this section will remain confidential and solely be used for research purposes.

PLEASE TICK THE BOX BELOW IF YOU CONSENT TO PARTICIPATE:

I hereby consent and understand that my participation is voluntary and anonymous and that the information will be confidential.

This questionnaire explores the Effects of Public Procurement Planning within the City of Johannesburg Metropolitan Housing Department, explicitly focusing on Orange Farm-Extension 10, Tjovitjo Informal Settlement.

SECTION A: DEMOGRAPHIC INFORMATION

This section helps to collect basic information about the respondents.

Gender:

Male

Female

Other

Age:

18–24 years

25–34 years

35–44 years

45–54 years

55 and above

Level of Education:

No formal education

Primary school

Secondary school

Tertiary education

Other (please specify): _____

How long have you stayed at Orange Farm Ext 10 Tjovitjo?

Less than 1 year

1–3 years

4–6 years

More than 6 years

Section B: Awareness and Understanding of Public Procurement Planning

This section focuses on your awareness and understanding of public procurement processes related to housing projects.

Do you know how housing projects are planned and implemented in your area?

Yes

No

Have you ever heard of public procurement planning? If yes, how would you describe it?

Yes

No

How do you receive information about housing projects and related developments in at Tjovitjo?

Community meetings

Local radio/TV

Social media

Other (please specify) _____

Section C: Effects of Public Procurement Planning on Housing Development

Have you noticed any delays in housing projects?

Yes

No

What do you think causes these delays? (Tick all that apply)

Administrative issues

Corruption

Lack of funds

Poor planning

Other (please specify): _____

Do you believe the procurement process ensures that houses are built with good quality materials and infrastructure?

Yes

No

Have the community faced any challenges with housing allocations due to procurement issues?

Yes

No

Section D: Community Involvement and Participation

Are community members consulted before housing projects are planned and executed?

Yes

No

Have you ever attended a meeting or forum where housing procurement was discussed? If yes, what was your experience?

Yes

No

Section E: Recommendations

What changes would you suggest to improve the housing procurement process in your settlement?

Do you believe that public procurement planning should be more transparent? If so, how can this be achieved?

Yes

No

What role do you think local government should play in ensuring that procurement planning benefits residents effectively?

Are there any specific issues related to housing that you feel are not being addressed adequately through procurement planning?

Thank you for your time and valuable input.

Appendix 2: Semi-Structured Interviews for COJMM Officials working with procurement and housing

SECTION A: PARTICIPANT INFORMATION SHEET

THE EFFECTS OF PUBLIC PROCUREMENT PLANNING WITHIN THE HOUSING DEPARTMENT OF THE CITY OF JOHANNESBURG METROPOLITAN: THE CASE OF ORANGE FARM EXTENSION 10 TJOVITJO INFORMAL SETTLEMENT

PROSPECTIVE PARTICIPANT

My name is Tholakele Nyathi, and I am a Master's degree student at the Department of Public Administration and Management at the College of Economics and Management Sciences at UNISA. I invite you to participate in a study on the effects of public procurement planning within the housing department of the city of Johannesburg metropolitan area: the case of the Orange Farm Extension 10 Tjovitjo Informal Settlement. The findings of this research will be presented in a dissertation and will be made available in the UNISA library after graduation.

You are invited to participate in the study because of your extensive experience with the topic. Your insights would assist me in generating a comprehensive picture of your understanding working with procurement for housing development in the Orange Farm Extension 10 Tjovitjo Informal Settlement.

This study is voluntary, and you are under no obligation to consent to participate. If you choose to take part, you will receive this information sheet to keep and will be asked to sign a written consent form. You are free to withdraw at any time without providing a reason.

You will be required to participate in an interview that will last no longer than 60 minutes or to complete a questionnaire that may take 30 to 45 minutes.

Your privacy will be respected throughout the research by ensuring that no pressure is placed on you to participate in the study or to disclose your private information. No one will be able to connect you to the responses provided. Soft copies of the data will be stored by the researcher on a password-protected computer, while hard copies will be locked in the researcher's office cabinet. Future use of the data will be subject to Research Ethics Review and approval, if applicable. All information will be permanently destroyed after three years through shredding documents and deleting electronic information from the computer's hard drive.

You will not receive any payment or reward, financial or otherwise. The study will not incur undue costs for you.

This study has received written approval from the Research Ethics Review Committee of the College of Economic and Management Sciences, UNISA. A copy of the approval letter can be obtained from the researcher if you wish. Should you require any further information or would like to contact the researcher about any aspect of this study,

please contact Miss Tholakele Nyathi at 074 999 9173 or 062 471 3199. The email address is tholakelenyathi79@gmail.com. Thank you for taking the time to read this information sheet and for participating in this study. My name is Tholakele Nyathi, and I am a Master's degree student at the Department of Public Administration and Management at the College of Economics and Management Sciences at UNISA. I invite you to participate in a study on the effects of public procurement planning within the housing department of the city of Johannesburg metropolitan area: the case of the Orange Farm Extension 10 Tjovitjo Informal Settlement. The findings of this research will be presented in a dissertation and will be made available in the UNISA library after graduation.

You are invited to participate in the study because of your extensive experience with the topic. Your insights would assist me in generating a comprehensive picture of the experiences of community organisations advocating for housing development in the Orange Farm Extension 10 Tjovitjo Informal Settlement.

This study is voluntary, and you are under no obligation to consent to participate. If you choose to take part, you will receive this information sheet to keep and will be asked to sign a written consent form. You are free to withdraw at any time without providing a reason.

You will be required to participate in an interview that will last no longer than 60 minutes or to complete a questionnaire that may take 30 to 45 minutes.

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The following participants will be interviewed

- City Manager (1)
- Manager from the Office of Public Housing Stock Management (1)
- Supervisors at the office of Public Housing Programme Director (2)

- Administrative staff dealing with housing procurement at the Office of Finance (2)
 - Administrative staff at the office of Business Management Support (2)
-

Dear Participant,

INSTRUCTIONS FOR COMPLETING THIS QUESTIONNAIRE:

Please do not write your name, surname, or other personal details or identifiers on this interview.

The interview will not take more than 40 minutes to complete.

There is only one answer permitted per question.

Kindly note that the information you provide in this section will remain confidential and solely be used for research purposes.

PLEASE TICK THE BOX BELOW IF YOU CONSENT TO PARTICIPATE:

I hereby consent and understand that my participation is voluntary and anonymous and that the information will be confidential.

This questionnaire explores the Effects of Public Procurement Planning within the City of Johannesburg Metropolitan Housing Department, explicitly focusing on Orange Farm Extension 10, Tjovitjo Informal Settlement.

SECTION A: DEMOGRAPHIC INFORMATION

This section helps to collect basic information about the respondents.

Gender:

Male

Female

Other

Age:

18–24 years

25–34 years

35–44 years

45–54 years

55 and above

Level of Education:

No formal education

Primary school

Secondary school

Tertiary education

Other (please specify): _____

How long have you worked for the COJMM?

Less than 1 year

1–3 years

4–6 years

More than 6 years

Section B: Awareness and Understanding of Public Procurement Planning

This section focuses on your awareness and understanding of public procurement processes related to housing projects.

Are you familiar with the public procurement planning process for housing projects?

Yes

No

Are you aware of any public procurement planning related to housing projects in your area (Orange Farm-Extension 10 Tjovitjo)?

Yes

No

Do you believe the procurement planning aligns with COJMM's broader housing strategy?

Yes

No

I don't know

How involved are you in public procurement planning activities related to housing projects?

Directly involved

Somewhat involved

Not at all involved

How transparent and effective is your department in communicating with other housing-related departments during procurement?

Very transparent and effective

Somewhat transparent and effective

Not transparent and effective at all

Section C: Public Procurement Planning and Its Effects on Housing Delivery

This section focuses on the impact of public procurement planning on the housing projects in your area.

Has public procurement planning affected the delivery of housing in Orange Farm Extension 10? Please describe how.

What are the key challenges in procurement planning that have impacted housing delivery?

Have you experienced any delays in housing delivery due to procurement planning issues? Please describe how.

Section D: Community Participation and Satisfaction

This section focuses on your involvement and satisfaction with the housing development process.

How would you rate your department's role in the procurement planning process for housing projects?

Excellent

Average

Poor

Do you believe your department's feedback is considered in public procurement planning?

Fully considered

Partially considered

Not considered at all

How satisfied are you with the progress of housing projects in Orange Farm Extension 10?

Very satisfied

Satisfied

Neutral

Dissatisfied

Very dissatisfied

How would you rate the quality of the housing units built through effective procurement?

Excellent

Good

Average

Poor

Very poor

In your opinion, what could be done to improve public procurement planning and housing delivery?

Section E: General Perception of Public Procurement and Housing

This section gathers overall thoughts about public procurement's effectiveness and impact.

How do you perceive the role of public procurement in housing development in informal settlements like Orange Farm?

Do you think the housing department effectively uses public procurement to address housing challenges in informal settlements?

What recommendations would you make to improve the public procurement process within the housing department?

Do you believe there should be greater community or departmental involvement in the public procurement process?

Yes

No

Section F: Role-Specific Feedback

This section allows for detailed, role-specific feedback based on your position within the housing procurement process.

City Manager:

What changes would you recommend at the strategic level to improve public procurement and housing delivery in Orange Farm Extension 10 Tjovitjo?

Public Housing Stock Management Manager:

How do you see your department improving procurement-related coordination with other departments?

Supervisors and Administrative Staff:

What challenges does your office face during procurement planning and implementation for housing projects, and how could they be mitigated?

Thank you for your participation!

Appendix 3: Permission letters to conduct research



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13 February 2025
Tholakele Nyathi
Master of Administration in public Administration
University of South Africa

Ref: Permission to conduct research study

This letter serves to acknowledge receiving the letter requesting permission to conduct research in the City of Johannesburg under the title: **“.THE EFFECTS OF PUBLIC PROCUREMENT PLANNING WITHIN THE HOUSING DEPARTMENT OF THE CITY OF JOHANNESBURG METROPOLITAN: THE CASE OF ORANGE FARM EXTENSION 10,TJOVITYO INFORMAL SETTLEMENT .”** I am aware that the study entails the collection of information from the city, city officials and participants from communities through semi-structured interviews, questionnaires, observation participation and other fora of the city.

The City of Johannesburg promote the research study because it helps both students and practitioners to gain an understanding of the sociology of the city, as it evolves and contributes towards the building of developmental local government.

I, Tersia Johanna Groenewald, as delegated authority of the City of Johannesburg Municipality (the City), hereby give permission to the primary researcher Tholakele Nyathi, the following:

To collect and publish information about the city is publicly not available, for the research project titled: **“THE EFFECTS OF PUBLIC PROCUREMENT WITHIN THE HOUSING DEPARTMENT OF THE CITY OF JOHANNESBURG METROPOLITAN: THE CASE OF ORANGE FARM EXTENSION 10,TJOVITYO INFORMAL SETTLEMENT”**.

- This authorisation is based on mutual understanding that the City's name can be revealed in her/his project; and
- The researcher contacts the relevant department for arrangements pertaining to the research; and
- The information provided by the employees or any other means (such as company's archived documents or reports) of the city is purely for academic purposes and cannot be used for any other purpose.

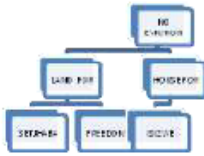
Please note that on completion of the study, a copy of the research report should be submitted to the City of Johannesburg in honour of your commitment.

I urge you to present this letter of permission whenever you come across officials and participants in the research study. I thank you for choosing the City of Johannesburg to conduct the study.

Kind Regards

A handwritten signature in black ink, appearing to read "Takalani Maria Wakpo".

Takalani Maria Wakpo (On behalf of Tersia Groenewald)
Administration Officer
Tel. 011 407 6847
Email: takalaniw@joburg.org.za



Ekhurhuleni, Vaal/Sedibeng, Soweto, Tshwane, East Rand
GAUTENG HOUSING CRISIS COMMITTEE (GHCC)

Regional Office: ERF 62612 Zone 17, Sebokeng Vanderbiljpark 1983

Date: 06 May 2025

To: Tholakele Nyathi
Master of Administration in Public Administration
Attention: University of South Africa

Cc: Mr. Buti Lekonyane (Supervisor)
Tel: 074 999 9173 | (012) 429 6116
Email: 63358174@myLife.unisa.ac.za | lekonbc@unisa.ac.za

Subject: Permission to Conduct Research Study

Dear Ms. Nyathi,

The **Gauteng Housing Crisis Committee (NGO)** acknowledges receipt of your request to conduct a research study within our organisation, under the title:

“The Effects of Public Procurement Planning within the Housing Department of the City of Johannesburg Metropolitan: The Case of Orange Farm Extension 10, Tjovityo Informal Settlement.”

Please take note of the following:

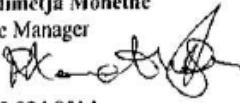
APPROVAL

I, **Peter Monethe**, as the delegated authority of the Gauteng Housing Crisis Committee, hereby grant permission to the primary researcher, **Tholakele Nyathi**, to collect and publish information that is not publicly available, strictly for academic purposes as part of the above-mentioned research project.

Any information provided, whether obtained through interviews, archived documents, or internal reports, must be used exclusively for academic purposes.

We trust this approval supports your research objectives.

Kind regards,
Peter Madimetja Monethe
Programme Manager

Signature 
Mobile: 062 924 0514
Email: revolutionaryp@gmail.com



IZANDLA ZIYAGEZANA

8559
Drieziek Extension 5
Orange Farm
Johannesburg
1841

NPO REGISTRATION NUMBER : 2024/477830/08

To: Tholakele Nyathi Master of Administration in Public Administration
Attention: University of South Africa

Cc: Mr. Buti Lekonyane (Supervisor)
Tel: 074 999 9173 | (012) 429 6116
Email: 63358174@myLife.unisa.ac.za | lekonbc@unisa.ac.za

Subject: Permission to Conduct Research Study

Dear Ms. Nyathi,

Izandla Ziyagezana (NPO) hereby acknowledges receipt of your request to conduct a research study within our organization, under the title:

"The Effects of Public Procurement Planning within the Housing Department of the City of Johannesburg Metropolitan: The Case of Orange Farm Extension 10, Tjovityo Informal Settlement."

We welcome and recognize the importance of this academic inquiry, particularly as it relates to issues of housing delivery, service provision, and the lived realities of communities in Orange Farm. Your research aligns with our broader commitment to accountability, transparency, and social justice in housing policy and practice.

Please take note of the following we approve your request to conduct research within our organization.

I, Thulani Zulu, in my capacity as the delegated authority of the Izandla Ziyagezana NPO, hereby grant permission to Tholakele Nyathi, to collect and publish information that is not publicly available, strictly for academic purposes as part of the above-mentioned research project. We trust that this approval will fully support your research objectives.

Kindly note that, upon completion of the study, a copy of the final research report is to be submitted to the Izandla Ziyagezana NPO, in fulfilment of the undertaking made and as a gesture of accountability and partnership.

Kindly Regards

Thulani Zulu
Coordinator



izandlaziyagezana178@gmail.com

Appendix 4: Unisa Ethical Clearance Certificate



College of Economic and Management Sciences_ERC Public Administration and Management

Date: 06/08/2025

Dear: Ms Tholakele NYATHI

Ref #: 8603
Name: Ms Tholakele NYATHI
Student #: 63358174

Decision: Ethics Approval from 05/08/2025 to 04/08/2028

Researcher: Ms Tholakele NYATHI

George Storrar Dr &, Leyds St, Groenkloof, Pretoria, 0027

Pretoria

63358174@mylife.unisa.ac.za 0124205568

Supervisor: Mr Buti Lekonyane 63358174@mylife.unisa.ac.za

Co-Supervisor:

Co-Researcher(s):

Email address:

The Effects of Public Procurement Planning within the Housing Department of the City of Johannesburg Metropolitan The Case of Orange Farm-Extension 10 Tjovitjo Informal settlement

Qualification: Master of Public Administration


Thank you for the application for research ethics approval by the College of Economic and Management Sciences_ERC Public Administration and Management for the above-mentioned research study. Ethics approval is granted for three years.

The **low risk application** was **reviewed** by the College of Economic and Management Sciences_ERC Public Administration and Management on 25 July 2025, and it is in compliance with the Unisa Policy on Research Ethics and the Standard Operating Procedure on Research Ethics Risk Assessment.

The proposed research may now commence with the provisions that:

1. The researcher(s) will ensure that the research project adheres to the values and principles expressed in the UNISA Policy on Research Ethics.
2. Any adverse circumstance arising during the undertaking of the research study that may affect the ethical integrity of the study, including those involving research participants, third parties, or juristic persons, must be reported in writing to the College of Economic and Management Sciences_ERC Public Administration and Management without delay.
3. The researcher(s) will conduct the study according to the methods and procedures set out in the approved application.
4. Any changes that may affect study-related risks to research participants, juristic or third persons, must be reported in writing to the College of Economic and Management Sciences_ERC Public Administration and Management, accompanied by a progress report.

Appendix 5: Language and Editing Certificate



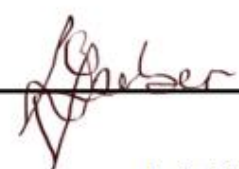
Certificate of Editing

*THE EFFECTS OF PUBLIC PROCUREMENT PLANNING WITHIN THE
HOUSING DEPARTMENT OF THE CITY OF JOHANNESBURG:
THE CASE OF ORANGE FARM EXTENSION 10 TJOVITJO INFORMAL
SETTLEMENT
THOLAKELE NYATHI*

Edited for English language usage:


- ❖ Proofreading for mechanical errors such as spelling, punctuation, grammar.
- ❖ Copy-editing that includes commenting on, and where appropriate, correcting, structure, organisation and logical flow of content, basic formatting, eliminating unnecessary repetition.
- ❖ Checking citation style is correct and punctuating as needed.
- ❖ Commenting on suspected plagiarism and missing sources.
- ❖ Returning the document with track changes for the author to accept.


I confirm that I have met the above standards of editing and professional ethical practice. The content of the work edited remains that of the author.



Lorinda Gerber
18th of October 2025

Note: I am not accountable for any changes made to this document subsequent to my edit.





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Appendix 6: Turn-it-in Report

Similarity Report

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