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An examination of the perception of variations in the adoption of the National Framework for Municipal Indigent Policies

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Abstract: Purpose: This study examined the variations in the adoption of the National Framework for Municipal Indigent Policies in different municipal categories across South Africa. The goal was to contribute towards the strengthening of the adoption of the National framework for municipal indigent across municipalities to ensure improved access to free basic services at the municipal level. **Design/methodology/approach:** This study used a qualitative research approach and descriptive multiple case study design. Using a representative sample of 21 participants, data was collected through structured interviews and analysed using deductive thematic analysis. **Findings:** The study revealed significant variations in how the NFMIP is adopted and implemented in different municipal categories. These variations aligned to the following aspects: revenue management, indigent targeting options, indigent service levels, the financial framework, the indigent validity period, and qualification criteria. **Originality/value:** This study's originality lies within its comprehensive approach to revising municipal indigent policies. The value of this study is underscored by creating an alternative framework reinforced by creating a more inclusive and equitable social welfare system directly benefiting indigent communities.

Keywords: municipality; poverty; policy design; policy implementation; municipal categories; indigent policy

1. Introduction

The effectiveness of municipal indigent policy design and implementation depends on the National Framework for Municipal Indigent Policies (NFMIP) since it gives guidelines on how municipalities should develop their indigent policies. The issue of indigence has been a persisting challenge within the South African context, indicating the existence of broader socio-economic disparities despite democratic reforms. Municipalities across the country are tasked with addressing indigence and its shocks by implementing municipal indigent policies (Kuhlengisa, 2021; Leburu, 2017). The NFMIP guides municipalities in developing indigent policies to alleviate poverty (Fuo, 2020). Ngarava (2023) posits that the NFMIP determined how municipalities will provide subsidies to indigents within their jurisdiction. As a guideline, the NFMIP provides for what entails an indigent, the services standards to be provided to indigents, the selection criterion for indigents, the indigent verification process, and the indigent funding models. All these benchmarks are provided to ensure that no indigent is left in accessing basic services. According to the NFMIP (2003), it aims to ensure everyone can access basic services through a social safety net. In this regard, Luburu (2017) argue that all indigent individuals have in common the need to access affordable basic services that will facilitate their productive and health

engagement within society. Therefore, the NFMIP provides a benchmark for alleviating poverty and reducing inequalities within the local government sphere.

Kuhlengisa (2024) has argued that there are notable variations in the application of the NFMIP across municipalities, predominantly concerning different municipal categories. While numerous scholars have focused on indigent policies over the past decade, the focus has been on the ineffectiveness of and the fact that the indigent policies do not foster equity and ethical practices these policies are being implemented and support the negative indigent nexus (Latakgomo, 2011; Leburu, 2017; Mosehla, 2022; Mukonavanhu, Ukwandu and Nel-Sanders, 2022). For example, Kuhlengisa (2021) examined how indigent policy contributes to providing potable water to rural areas. Pillay (2021) investigated factors undermining indigent policy success. Bhan (2014) studied how indigent policies aid sustainable livelihoods. This study examines the variations in adopting the National framework for municipal indigent policies in different municipal categories across South Africa. We adopt the definition of an indigent as a person lacking the means to access basic services. The National Framework for Municipal Indigent Policies (NFMIP) (2003) defines an indigent as a person lacking the necessities of life due to poverty. It encompasses a range of deprivations, including lack of access to potable water, electricity, sanitation and refuse collection.

According to Stats SA (2022), in South Africa, nearly 3.6 million households are categorised as indigents. The indigent policy has been a vital pro-poor tool enabling indigents to access FBS to satisfy their needs. According to Stats SA's (2018) non-financial census of municipalities, more than 1.7 million households were in only six metropolitan municipalities, with eThekweni, City of Tshwane Metropolitan Municipality, City of Cape Town, and City of Johannesburg constituting the highest numbers of indigents. Alers (2022) argues that in most cases, metropolitan municipalities have the highest number of indigents because of inward migration since many people migrate to big cities in search of employment and sustainable income. South Africa adopted the National Framework for Municipal Indigent Policies (NFMIP) to address these challenges.

This study assessed the factors that have led to variation in adopting the NFMIP across municipalities in different categories in South Africa. In addition, the study also assessed how variations in the adoption of the NFMIP have impacted the service delivery and socio-economic outcomes across municipalities. By comparing municipalities with varying levels of adoption, this study identified areas needing improvement. We believe this study offers several contributions, including guiding policymakers in making informed decisions that align with societal goals and values. In addition, this research contributes significantly to developing a robust theoretical framework for the discipline of Public Administration by drawing lessons from both the old and new design work to determine several foundational criteria for effective indigent policy design. The study recommendations will improve the grounding of future scholarship and enhance the body of knowledge on policy design, thereby significantly contributing to how policies are designed based on improvement principles.

2. Interpretive framework

This study is underpinned by the Systems Theory proposed by David Easton in 1953. Systems theory argues that an organisation or a system encompasses interrelated and interdependent parts that work together to achieve a common goal (Mansoor and Williams, 2018). This theory has four main principles that will be linked with the study: interconnectedness and interdependence, complexity, adaptation and holistic approach. Within the context of this study, this theory aids our understanding of how different elements within municipalities interact and impact the adoption and implementation of the NFMIP (Kuhlengisa, 2024). In line with the theory, each municipality operates as a system composed of interconnected and interdependent subsystems, including a financial management system, social service departments and community engagement mechanism. Therefore, the interaction between these subsystems influences the adoption of the NFMIP within a particular municipality. For example, the financial management subsystem influences indigent service delivery standards, the nature of the services provided to indigents and the number of indigents to benefit from indigent support.

Another component of the systems theory is complexity, which argues that municipalities vary in complexity attributed to their size, resources, administrative structures and socio-economic environment (Patience and Nel, 2021). In line with the above, metropolitan municipalities are more complex because they have extensive administrative structures and larger budgets, which allows them to adopt and implement indigent policies effectively. On the other hand, district and local municipalities face greater challenges due to limited resources and administrative capacity (Tshishonga, 2021). Understanding this complexity assists in determining why metropolitan municipalities have a higher adoption rate of indigent policies compared to the district and local municipalities.

In understanding the variations in NFMIP adoption, it is paramount to examine all influencing factors holistically, such as economic conditions, administrative capacity, political dynamics and community engagement. This approach assists in identifying underlying systemic issues that need to be addressed. Applying systems theory to this study provides a robust framework for understanding the complex dynamics within municipalities that affect NFMIP adoption.

3. Literature review

This section delves into the review of literature related to the study, with the aim of providing a comprehensive understanding of the context surrounding our study. This exploration not only highlights the significance of our findings but also sets the stage for a deeper analysis of the data collected. The section encompasses the theoretical grounding of the study, an overview of the NFMIP and components of the NFMIP to enhance our understanding of the NFMIP.

3.1. Overview of the National Framework for Municipal Indigent Policies

In 2003, the government of South Africa introduced the NFMIP, which aimed to provide FBS to enhance indigents' lives. FBS within the local sphere of the government is provided following the prescripts of the municipal indigent policy

developed under the NFMIP. This framework was developed to ensure that those excluded from accessing basic services due to their inability to pay have access to them (NFMIP, 2003). Pillay (2022) argues that the framework is vital in assisting municipalities to develop and implement their indigent policies. The framework aims to provide a bedrock on which municipalities can develop their indigent policies to meet their obligation to provide basic services for all (NFMIP, 2003). According to this framework (2003), indigent policies are guided by the NFMIP regarding indigent service levels, financial framework and indigent targeting options.

The NFMIP guides municipalities in developing their indigent policies aimed at alleviating poverty (Fuo, 2020). Ngarava (2023) posits that the NFMIP determines how municipalities provide subsidies to indigents within their jurisdiction. The NFMIP provides guidelines for determining who qualifies as indigent, the service standards to be provided, selection criteria, verification processes, and funding models for indigents. All these benchmarks are provided to ensure that no indigent is left without access to basic services. The NFMIP (2003) aims to ensure that everyone is included in accessing basic services by providing a social safety net. In this regard, Leburu (2017) argues that all indigent individuals have in common the need to access affordable essential services that will facilitate their productive and healthy engagement within society. The NFMIP provides a benchmark for achieving this within the local government sphere.

The NFMIP (2003) stipulates that local municipalities are responsible for formulating and implementing indigent policies peculiar to their settings to deliver FBS to poor households. According to Stats SA (2022), nearly 3.6 million South African households are indigent. The indigent policy has served as a vital pro-poor tool, enabling indigents to access FBS to satisfy their needs. According to Stats SA's (2018) non-financial census of municipalities, more than 1.7 million indigent households were located in only six metropolitan municipalities, with eThekweni, City of Tshwane Metropolitan Municipality, City of Cape Town, and City of Johannesburg having the highest numbers of indigents. The following are the key components of the NFMIP.

3.2. Components of the National Framework for Municipal Indigent Policies

The following are the components of the NFMIP.

3.2.1. Service level standards

According to NFMIP (2003), the minimum standards of FBS that the municipality should provide to its indigents are as follows: a minimum of 60,00l of potable water per household monthly, 50 kWh of electricity per household monthly, and provision of infrastructure needed for sanitation. However, various scholars have argued that these minimum standards stipulated in the NFMIP are inadequate as they do not comply with international standards (Kuhlengisa, 2021; Ledger, 2022; Maramura, 2017; Shayamano, 2020). According to Maramura (2017), indigents must be provided potable water as stipulated by the World Health Organisation (WHO), which provides access to 50 litres of potable water daily. On the other hand, Ledger (2022) argues that a household must have access to 200 kWh of electricity per month.

Geographic location, infrastructure development, and population density influence access to potable water, sanitation, and electricity, among other services. This contributes to the variation in how municipalities design and implement their indigent policies per the NFMIP. Leburu (2017) argues that municipalities in urban areas provided indigent potable water from yard taps when implementing their indigent policies. On the other hand, Kuhlengisa (2021) revealed that water is provided using community taps due to inadequate infrastructure in rural areas. Kimemia et al. (2021) argue that in areas without the infrastructure to provide electricity, people living in poverty are provided with 20 litres of paraffin. Fuo (2020) highlights that in urban areas, the provision of water through indigent support is done using metered house connections, and sanitation is done using full sewer and waterborne sanitation. On the other hand, in most rural areas, water is supplied through wells or public standpipes, and sanitation is provided using ventilated improved pit toilets. Given the above, it is clear that the geographic location and infrastructure development contribute to the variations in designing and implementing the NFMIP as they determined the nature of the services to be provided to indigent individuals and how they may be provided to indigent individuals.

3.2.2. Financial Framework

The NFMIP (2003) posit that financing indigent policies in municipalities is regarded as an operating expenditure that must be financed using its sources, such as user charges, rates, levies, and equitable shares. The NFMIP emphasises the use of the equitable share to support indigent policies. In line with the NFMIP (2005), the provision of FBS within the municipalities can be financed through equitable sharing. According to Section 214 (1) of the Constitution (1996), each sphere of the government is entitled to an equitable share of the revenue from the national purse to enable the provision of services and execute its constitutional obligations. Despite the introduction of the indigent policy being a progressive move towards enhancing the lives of the indigent population, its funding model, through equitable sharing, contributes to its demise. Knodler (2022) regards equitable shares as an unconditional allocation of funds to the local government where municipalities determine the priorities for such funds, and these municipalities are accountable for how the funds are spent. Similarly, Majali (2019) defines an equitable grant as a share of the money that is given to the municipalities or government departments from the National Treasury that is unconditional in nature. Equitable shares allow municipalities to plan and budget to achieve their constitutional obligation (Jacobs, 2019). However, literature has raised concerns about using equitable share in financing indigent policies, highlighting that it does not compel municipalities to provide services (ABS, 2018; Kuhlengisa, 2021; Pillay, 2022). This tends to be problematic as municipalities can use the money for other services, which they consider a priority, leaving the indigent excluded from receiving free FBS.

According to Mashau and Kroeze (2023), rural municipalities with weak revenue management systems, which result in inadequate resources, struggle to implement the framework. The above statement tends to be true in ADM and NLM, given that they have struggled to implement the NFMIP fully, where FBS are provided to all the people who qualify for it and services to indigents below the standards stipulated

within the NFMIP (Parliamentary Monitoring Group, 2022). Alers (2022) argues that rural municipalities are struggling to implement indigent policies fully, leading to gaps in providing basic services and eligibility restrictions. Variations in the availability of financial resources among metropolitan municipalities, district municipalities and local municipalities can result from differences in municipal revenue management, financial framework, fiscal capacities and budgetary allocation from the national and provincial treasury (Balie & Horn, 2021; Propheter, 2019). In the previous financial year, 2022/23, BCMM had a healthy financial base as it collected revenue from service charges and tax, and it received a higher budget than ADM and NLM (EC Department of Treasury, 2023). ADM was placed under financial administration, and NLM depends on provincial treasuries to finance its day-to-day activities. This impacts how these municipalities will design and implement their indigent policies.

3.2.3. Targeting options

The NFMIP (2005) provides the following indigent targeting options that can be adopted by the municipalities to determine the indigents.

Service level targeting is regarded as a general target that is linked to a service level package, and this may include the amount of water to be provided to people at a particular time. Case (2021) postulates that service level targets measure service providers' performance and are developed as a way of avoiding clashes between two parties because of a misunderstanding. In the context of the NFMIP, service level targeting refers to where a particular service level is given for free to the poor. Leburu (2017) applauded this method by citing that service-level targeting is very simple and transparent. However, this method is only applicable where there are mixed service levels with a particular service level suitable as a basic service level widely applicable to the indigent.

Consumer-based targeting—This entails that those people using a low amount of the service are provided for FBS. However, the major problem with this method is that it is only applicable to services that can be measured. This, therefore, means that this method might be tricky to utilise in rural areas where people use a communal tap or where there are no prepaid water meters.

Means testing—The third targeting option identified by the NFMIP is means testing, which entails subsidising services to those households that fall below the household income threshold. The main shortcoming of this method is that the poorest are often least able to engage with the administration system, and the incentive for those who are not poor to understate their income is large. Other targeting options identified by the NFMIP (2005) include property value-based targeting and targeting based on plot size.

Several targeting options may lead to variations in implementing indigent policies across municipalities in different municipal categories. Municipalities vary in socioeconomic diversity, which influences the targeting options they employ. In most instances, in municipalities with a relatively uniform socioeconomic profile, the municipality is likely to use the means of testing to assess household financial resources. On the other hand, municipalities with diverse income level plot sizes and property value criteria may be suitable for targeting assistance to the indigent population. Mthiyane, Wissink and Chiwawa (2022) posit that the urban-rural divide

influences policy adoption and implementation. Urban municipalities may have higher property values and land prices, which leads to property value and plot size criteria that are relevant for targeting indigents. On the contrary, rural municipalities tend to have lower property values and limited access to basic services, which requires different targeting mechanisms such as geographical (zonal) targeting as it addresses spatial disparities in poverty. Effective targeting requires serious consideration of socio-economic factors and administrative capacity to ensure that indigent policies are equitable, responsive to local needs, and aligned with the overarching goal of poverty alleviation.

As a result of different factors causing variations in indigent policy design and implementation, municipalities may offer different benefit packages to indigents. Ruiters (2018) postulates that financially viable municipalities may provide benefit packages to indigents beyond those stipulated within the national framework. Mosala (2020) indicates that municipalities with a sound revenue base can extend the services provided through indigent policies beyond providing potable water, electricity, sanitation, and refuse collection, as highlighted in the NFMIP. A study conducted by Pillay (2010) revealed that in most instances, metropolitan municipalities provide indigent individuals with FBS beyond those stipulated in the NFMIP, with Ekurhuleni, Nelson Mandela Bay, eThekweni, and Tshwane providing additional support in the form of exemption from paying property taxes, assistance with burial costs, and transport services.

Fuo (2020) also indicated that metropolitan municipalities with a solid revenue base can provide indigents with services beyond the minimum standards identified by the NFMIP. This statement supports Ruiters' (2018) findings, which revealed that Ekurhuleni Municipality provides its indigents with 9000 litres of water per month rather than the 6000 litres stipulated in the NFMIP. Tshwane Municipality provides 100 kWh of electricity to its indigents rather than the 50 kWh per household per month stipulated in the NFMIP. In contrast, Bailey (2019) argues that rural municipalities fail to provide the minimum service standards stipulated in the NFMIP. Given the information above, one can conclude that the scope and magnitude of benefits for the indigent are influenced by factors such as resource availability, socioeconomic context, local governance structures, and political leadership. The researcher argues that differences in indigent benefit packages, as discussed above, may result in disparities in the level of support received by indigents across municipalities in different categories. The NFMIP's primary objectives are to alleviate poverty, promote equity, and address inequalities, and consistency and fairness must be ensured in the NFMIP's application.

Resource availability, socioeconomic context, local governance structures, and political leadership influence the variations in administrative procedures across municipalities in different municipal categories. Municipalities may vary in procedures for indigent status application, verification, and registration processes (People's Assembly, 2023). Pillay and Metereko (2022) posit that there are variations in the documents required by different municipalities to qualify for indigent support, variations in application procedures, the duration of eligibility for indigent support, and timelines for appeal processes. These variations in administrative procedures across municipalities in different municipal categories have significant implications

for indigent individuals. Divergent administrative procedures lead to disparities in accessing FBS (Fuo, 2020). According to Fuo (2020), municipalities such as Ekurhuleni and NMBM, with stringent documentation requirements, inadvertently exclude indigents lacking the necessary paperwork. Conversely, municipalities with flexible documentation requirements make it easy for indigents to navigate the bureaucratic processes. It is worth noting that inconsistency in document requirements across municipalities impacts transparency and accountability and creates confusion among applicants. Indigent beneficiaries may lack trust in the indigent support system's fairness and integrity. Standardised administrative procedures promote accountability and ensure that indigent policies are implemented impartially across municipalities.

4. Materials and methods

The study draws on the qualitative research approach, descriptive multiple case study design with the aim of providing a detailed account of a phenomenon within its context and an interpretive research philosophy. This study focused on three municipalities within the Eastern Cape Province of South Africa within different categories, with distinct socio-economic profiles and governance structures. Buffalo City Metropolitan Municipality (BCMM) is a category A municipality classified as an urban metropolitan characterised by high population density and significant economic activities (BCMM Annual Report, 2023). According to BCMM Indigent Policy (2023), the municipality faces high poverty levels and informal settlements. The second municipality is the Amathole District Municipality (ADM), which is a Category C municipality, a peri-urban, exhibiting rapid urbanisation and informal sector growth, posing distinctive challenges in service delivery and social development (ADM Annual Report, 2023). The third municipality is Ngqushwa Local Municipality (NLM), which is a Category B municipality situated in deep rural areas facing entrenched poverty, limited infrastructure, and scarce resources, exacerbating the vulnerability of indigent populations (NLM Annual Report, 2022). The difference in socio-economic context, governance capacity, and delivery mechanism across these municipalities reflects the variations in the applicability of the NFMIP across different categories.

To gain an in-depth understanding of the adoption and implementation of the NFMIP across municipalities in different municipal categories, we solicited the views of officials within the selected municipalities. The study employed key informant interviews to solicit information purposively from 21 participants across the selected municipalities. The inclusion criteria were that the participant must be 18 years and above and have worked within the municipality for five years and above. Employees who have worked within the selected municipalities for less than five years and employees who do not speak the primary language used in the study were automatically excluded.

We used different means of conducting our interviews with the participants, including telephonic and electronic interviews using TEAMS and face-to-face interviews. These interviews were conducted from September 2023 to March 2024. We took a top-down perspective and focused our data collection on people involved

in developing, approving, implementing, and evaluating indigent policies. In this regard, the sample comprised nine senior management services (SMS) members, thus three members from each municipality, including the municipal manager, CFO, and director of community services. Three indigent managers that is one from each municipality, three indigent supervisors, translating to one from each municipality and six elected officials, translating to two officials from each municipality. To gain a deeper understanding, we solicited these expert views of SMS members and officials because they are directly in departments (directorates responsible for developing and implementing indigent policies) and have been employed for more than five years. Our interview schedule followed a semi-structured guide to ensure comparability and consistency. The researchers included questions that addressed the main themes relevant to the research objectives. The guide facilitated in-depth discussions, enabling flexibility in responses. The main emphasis was on factors contributing to variations in the applicability of the NFMIP.

Data collected was analysed through deductive thematic analysis following the six-step thematic analysis by Braun and Clarke (2006). The first step was familiarisation with data sets, and to achieve this, the researcher transcribed all 21 recordings, read through the data sets and jotted down notes. According to Braun and Clarke (2006), the second step is the generation of initial codes, and this was achieved by organising and labelling data gathered into meaningful groups. The third step entails the preliminary development of themes, and the researchers develop a thematic table. The fourth step followed this, the potential themes review and the researchers were able to assert that there is adequate data to support the themes. The fifth step was naming themes; we achieved this by ensuring that the data developed a coherent story and identified themes. The last step was producing a report, which was achieved by writing convincing arguments that addressed the research questions and developing a discussion on how the themes fit into the broader study. In the context of this study, over 60 significant statements were identified, and they were instrumental in producing and substantiating the main themes that emerged from data analysis.

5. Results

This section presents the study's results, and it is structured as follows: presentation of the study cases, themes of the study, discussion of the results, recommendations and conclusion.

5.1. Presentation of the study cases

This study utilised a descriptive multi-case study design where three municipalities, BCMM, ADM and NLM, are used as cases. It is worth noting that these municipalities are indifferent municipal categories with diverse socio-economic characteristics that affect how they design and implement their indigent policies. The table below describes how each municipality adopts the NFMIP in line with revenue management, targeting approach, qualification criteria, indigent service level, financial framework and validity period.

Buffalo City Metropolitan Municipality, which is a municipality located in a big city which is heavily industrialised, has exclusive municipal executive and legislative

authority in its area. Based on its location and financial prowess, the municipality has an indigent office that explicitly deals with indigent management, uses two indigent targeting approaches, and provides indigent support beyond those stipulated within the NFMIP. In addition, BCMM’s indigent policy is financed using more than one income stream, its indigent validity period is three years, and it has comprehensive qualification criteria. The second is the Amathole District Municipality, a Category C located in rural areas and has municipal executive and legislative authority in an area that includes more than one municipality. The finance department manages indigent matters in this municipality, has one indigent target approach, provides only potable water and sanitation services, the indigent support is financed using only one source, the validity period is two years, and the qualification criteria is premised on citizenship and providing proof that one lives in poverty. The third municipality is Ngqushwa Local Municipality, a Category B municipality, meaning it shares municipal executive and legislative authority in its area with a Category C municipality within whose area it falls. The municipality is located in deep rural areas within the Eastern Cape Province, and because of its financial status, the municipality only provides two services: 50 kWh of electricity and refuse removal at the bare minimum, depending on the national and provincial government to finance indigent support, and people can only receive indigent support for only a year afterwards they have to reapply for support. **Table 1** below explains how indigent policies are designed and implemented within the selected municipalities.

Table 1. Indigent policy design and implementation in diverse municipal categories.

Municipality name, category and Type	Revenue management	Targeting approach	Indigent Service Level	Financial framework	Validity period	Appeal discrepancies in the National Framework for Municipal Indigent Policies	Qualification criteria
Buffalo City Metropolitan Municipality: Category A Type A1	Existing indigent affairs office	Household Income (two x R1600 Property value (R120,000))	6 kl potable water 50 kWh of electricity Refuse collection Sanitation Free property rates Burials	Administration revenue Equitable share	3 Years	14 days	South African citizens Foreigners who are permanent residents Refugees People living in informal settlements Child-headed households
ADM: Category C Type C1	Finance department	Household income two x old person grants)	6 kl potable water Sanitation	Equitable share	2 years	14 days	South African citizens Child-headed households Bank statements Income statements
Ngqushwa Local Municipality: Category B Type B4	Revenue office	Property value (R60,000) Household income (two x R1600) Geographical targeting	50 kWh electricity Refuse removal	Equitable share	1 year	21 days	South African citizens Child-headed households Bank statements Income statements Letter from the councillor confirming that the applicant lives on the poverty

Source: Researchers Own Construction, 2024.

5.2. Study themes

This section presents the findings from our deductive thematic analysis grounded in the transcript of key informant interviews regarding the implementation of the NFMIP. This analysis utilised predetermined themes from literature derived from the NFMIP; the aim is to systematically explore how they manifest in the participants' narrative. The study results revealed not only the presence of these themes in the data it highlighted the complexities of their application in diverse municipal categories. The study revealed significant variations in how the NFMIP is adopted and implemented in different municipal categories. These variations aligned to the following aspects: revenue management, indigent targeting options, indigent service levels, the financial framework, the indigent validity period, appeal discrepancies in the NFMIP, and qualification criteria, which are discussed below.

5.2.1. Revenue management

The study revealed that the adoption of NFMIP in municipalities varies across municipalities in terms of revenue management. According to the NFMIP, revenue management maintains a robust financial management system. Based on the findings, only BCMM have established indigent offices to manage indigent revenues and design and implement indigent policies. Participants from the selected municipalities highlighted the following:

“I am responsible for indigent consumers within the inland region of Buffalo City, from Ilitha to Dimbaza. My responsibilities include indigent revenue management, policy evaluation, and policy review” (BCMMP1).

“I am a Revenue collector. I am dealing with revenue collection, but the indigent section reports to me” (NLMP4).

“I am within the revenues unit for components, data management, billing, receipting cash management, credit control and indigent was added to my portfolio ordinarily, it was not under my key performance area, meaning I was not getting any performance bonus attached to indigent support” (ADMP1).

Based on the preceding comments, variations in revenue management emanate from establishing indigent offices in some municipalities. BCMM have an established stand-alone office to manage its indigent policies due to its financial prowess, larger population and complex service delivery needs, allowing for specialised focus and dedicated resources to effectively address the diverse challenges faced by indigent households. In contrast, ADM and NLM rely on existing employees from other sections to support indigents because budget constraints and linear administrative structures necessitate a more integrated approach to resource allocation and service delivery.

5.2.2. Financial framework variations

According to the NFMIP (2003), indigent policy can be funded through equitable shares, administrative revenue and cross-subsidies. The results indicate that funding indigent policies through equitable shares within the selected municipalities seems very common, as all the municipalities use this method. Only BCMM uses multiple funding sources, including equitable shares, cross-subsidies, and administrative revenue. Participants indicated the following:

“Our indigent support is solely financed by equitable shares, which is the money the municipality receives from the national treasury, which is not enough to cater for all the needs of the municipality” (NLMP3)

“Equitable shares that the municipality receives to support indigent services are based on the number of beneficiaries from the previous year, which means that it might not be enough to cover for indigents the current year if the number of indigents increases” (ADMP3).

“The municipality uses both equitable shares and administrative revenues to fund indigent support, which has proved beneficial as it allows the municipality to sustain its indigent programme and implement the indigent policy effectively” (BCMM1).

The aforementioned statements highlight that BCMM may have multiple sources to fund indigent policies because of its larger tax base and diverse revenue-generating capabilities, enabling the municipality to leverage funds from equitable shares, service charges and local taxes. On the other hand, ADM and NLM rely solely on equitable shares because of their limited financial resources and fewer opportunities for additional revenue generation, making them rely on national allocation for their indigent support initiatives.

5.2.3. Indigent Qualification Criteria variations

The Department of Provincial and Local Government (DPLG), in a bid to simplify the NFMIP, introduced the indigent policy implementation guidelines, which identified the criteria to be followed and included that the applicant must produce some form of recognised identification, a UIF card, bank statement, income returns and salary advice from the employer. The results indicate that these indigent qualification criteria vary when implementing indigent policies across and within municipalities. For example, although participants within municipalities acknowledged the qualification criteria, the criteria related by the participants differed. Participants revealed that:

“For one to qualify for indigent support, you must be a South African citizen or permanent resident or have a valid refugee status” (BCMMP5)

“As a municipality, we also provide indigent support to those living in informal settlements, though we are struggling because these settlements do not have addresses. Child-headed households automatically qualify for indigent support” (BCMMP4)

“To qualify for indigent support, one must be a South African and provide an ID; they also need to provide a bank statement and proof that they are the house’s owner. Households headed by children under the age of 18 qualify for indigent support” (ADMP3)

“A valid South African ID is a requirement when applying for indigent support. The applicant must provide income documents, and in the absence of these documents, they can come with a letter from their councillor confirming that they are living in poverty. The applicant must also prove that they own the property they live in.” (NLMP2)

The aforementioned points indicate that another variation in the applicability of the NFMIP emanates from indigent qualification criteria. BCMM extends its indigent

qualification criteria to include foreigners, refugees and informal settlement dwellers. This is due to its greater financial capacity and diverse industrial base, which allows for a more flexible funding source. In contrast, ADM and NLM emphasise indigent support being provided to South African citizens who are property owners because of limited financial resources and a reliance on equitable shares from the national government.

5.2.4. Indigent targeting options

According to the NFMIP (2003), there are various targeting options that a municipality can use, including property value, means testing, and geographical (zonal) targeting. However, the NFMIP does not compel a municipality to use a specific targeting method or restrict municipalities to using only one targeting method. Its silence on this matter has led to variations which have negatively affected the implementation of the NFMIP as financially better-positioned municipalities can have comprehensive targeting options, and those municipalities struggling financially have streamlined targeting options. The participants highlighted the following:

“For a household to qualify for indigent support, the combined or joint gross income of all occupants or dependents in a single household which receives services from the Municipality must be equivalent or equal to two times the Government social grant” (ADMPI).

“To qualify for FBS, the combined gross income of a dependent in a particular household must not exceed the threshold income of not less than two state pensions per month. In addition, where households staying in a property valued less than R60 000 automatically qualify for indigent support” (NLMP2: NLMP3).

“Apart from household income, another targeting option is the property value, a property valued at R120 000 and under automatically qualifies for indigent support” (BCMMP3).

Variations in indigent targeting options across municipalities exacerbate existing inequalities as BCMMP leverage their stronger financial positions to implement comprehensive targeting criteria that consider household income and property values up to R120,000, thereby enabling a more distinct approach to identifying and supporting vulnerable populations. In contrast, ADM typically relies solely on household income. At the same time, NLM imposes even stricter criteria by limiting property value considerations to R60,000 and below, restricting access to essential services for those in need and reinforcing socio-economic disparities between urban and rural settings.

5.2.5. Indigent service level

The NFMIP (2003) lists the minimum levels that municipalities must provide to indigents in relation to potable water supply, refuse collection, sanitation, and electricity. The NFMIP also recognises that an extended package beyond these four services may be offered depending on the municipality's financial capacity. In determining the indigent service levels in the selected municipalities, participants highlighted the following:

“Beyond the provision of essential services in accordance with the NFMIP, BCMMP's indigent policy embodies the spirit of solidarity and inclusivity by

including burial assistance and property rates exemptions to indigents, ensuring that no one is left behind or forgotten” (BCMMP4).

“Access to potable water and sanitation is paramount to ADM, and as mandated by the NFMIP, they provide only 6kl of water and sanitation per month to sustain the well-being of indigents” (ADMP2).

“ADM assists us in water and sanitation service provision, and our indigent policy only focuses on refuse collection and electricity provision, ensuring that even the most vulnerable members of their community have access to the bare minimum of essential services” (NLMP4).

Variations in the levels of indigent services across municipalities significantly contribute to inequalities among indigent populations. BCMM provides a broader spectrum of services beyond the four stipulated in the NFMIP, thereby enhancing access and support for vulnerable groups. In contrast, ADM offers only the bare minimum of water and sanitation services as mandated by the NFMIP, while NLM extend minimal electricity and refuse collection services, ultimately perpetuating disparities in service delivery and quality of life for indigents in less-resourced areas.

5.2.6. Indigent support validity period

The silence of the NFMIP on the indigent support validity period has led to variations in the implementation of the framework across the selected municipalities. The BCMM has an indigent validity period of three years, ADM has an indigent validity period of two years, and NLM has a validity period of one year. Regarding the indigent validity, period participants highlighted the following:

“In BCMM, indigent beneficiaries receive support for a maximum period of 36 months, equivalent to three years” (BCMMP2, BCMMP5, BCMMP7).

“The ADM municipality provides support for a validity period of 24 months, the assumption is that individuals may be in need for these two years, and later, their situation is reviewed, possibly after finding work” (ADMP7).

“In NLM, the validity period for indigent support is only one year, and the indigent register is reviewed annually” (NLMP5).

Variations in the validity periods for indigent support do not align with the objectives of the National Framework for Municipal Indigent Policies (NFMIP) aimed at minimising inequalities, as they have created disparate classes of indigents across municipalities. Metropolitan municipalities typically offer a three-year validity period for indigent benefits. In contrast, district municipalities provide support for only two years, and local municipalities restrict assistance to a mere one-year period, necessitating annual reapplication that consumes valuable time and resources, thereby exacerbating the vulnerabilities of those in less-resourced areas.

6. Discussions

This study revealed significant variations in adopting the National Framework for Municipal Indigent Policies (NFMIP) across different municipal categories in South Africa. These variations are evident in revenue management, financial frameworks, qualification criteria, indigent targeting options, service levels, support validity periods, and appeal processes. Systems Theory offers a robust framework to understand these variations by emphasising the interconnectedness and

interdependencies within the municipal governance system. Systems Theory posits that the interactions and feedback loops between various system components, such as financial resources, administrative capacity, and local socio-economic conditions, influence policy adoption and implementation. In this context, the success or failure of indigent policy implementation is a function of how well these components interact and adapt to changes within the system.

All the cases operate under the NFMIP, which provides guidelines on how municipalities can develop their own indigent policies. This shared framework ensures that each municipality's indigent policy is aligned with national objectives, even though notable variations exist (Fuo, 2020; Leburu, 2017; Ngarava, 2023; NFMIP, 2003). Another common similarity in the selected municipalities is that each case focuses on vulnerable populations, those low-income households needing support for basic services inclusive of potable water, sanitation, electricity and refuse collection (Kuhlengisa, 2021; Ledger, 2022; Maramura, 2017; Shayamano, 2020). This commonality underscores a collective commitment to addressing poverty and inequality in their jurisdiction.

The main variation in implementing the NFMIP in the selected municipalities is noted in revenue management. BCMM, because of its financial prowess and location, can establish a stand-alone indigent office and attract suitably qualified personnel for indigent management. In contrast, in ADM and NLM, indigent management is done by the revenue unit under the finance department. Establishing specialised offices is crucial for providing adequate support services to indigents, which means that indigents from BCMM benefit more than those residing in ADM and NLM (Abdi and Agrawal, 2021; Mabizela and Matsiliza, 2020; Rukema, 2022). ADM and NLM relying on revenue office staff may experience a lack of specialised attention and resources, leading to inadequate support for indigents and perpetuating inequalities in service delivery among different municipalities.

The financial capacity of the BCMM allows them to diversify funding sources, including equitable shares and administrative revenue, allowing for robust indigent support. Conversely, ADM and NLM primarily rely on equitable shares from the national government, constraining their ability to expand services or innovate in their approaches. This disparity in financial frameworks directly impacts indigent assistance (Khambule, 2022; Pillay, 2021; Shikwambane, 2017). These variations in the financial framework lead to a two-tiered system where indigents in BCMM experience enhanced living conditions. At the same time, those in ADM and NLM face persistent poverty and inadequate access to basic services. Consequently, this undermines the NFMIP's goal of minimising inequalities, as the lack of consistent and equitable support across municipalities perpetuates systemic disparities, leaving many indigent households without the necessary assistance to escape poverty. Another variation in the implementation of the NFMIP emanates from indigent qualification criteria. The BCMM uses flexible qualification criteria to include foreign nationals, refugees and residents living in the informal settlements, addressing a broader spectrum of vulnerability and ensuring that diverse populations receive the necessary support. On the other hand, the stringent focus of ADM and NLM on South African citizens who own property restricts access to essential services for marginalised groups, perpetuating cycles of poverty and exclusion among those who may not meet

these narrow criteria (Fuo, 2020; Leburu, 2017). Scholars argue that tailoring indigent policies to the unique challenges of different jurisdictions enhances inclusivity and sustainability (Fuo, 2020; Masuku, 2019; Shikwambane, 2017). As discussed in this section, the disparities exacerbate inequalities among indigents and contradict the NFMIP objective of minimising disparities in service delivery. ADM and NLM's failure to recognise all vulnerable populations' needs risks creating a fragmented support system that neglects significant portions of the population, ultimately undermining social cohesion and exacerbating socio-economic disparities.

Service Level has led to variations in adopting the NFMIP in municipalities in different municipal categories. Indigents living in BCMM benefit from a broader range of services, enhancing their overall quality of life and facilitating pathways out of poverty (Mosala, 2020; Kaywood, 2021). In contrast, the limited provision of potable water and sanitation services by ADM and minimal electricity and refuse collection by NLM fails to address the comprehensive needs of indigent populations and perpetuates cycles of poverty and inequality (Shongwe and Meyer, 2023). The failure to provide comprehensive support not only jeopardises indigents' well-being but also challenges the broader objectives of the NFMIP aimed at fostering equitable access to essential services for all citizens, regardless of their municipality.

The variation in the indigent validity period was noted when adopting the NFMIP across the selected municipalities. In BCMM, a three-year validity period enables more stable and continuous support, allowing indigents to plan and access basic services without the constant stress of reapplication. On the other hand, the two-year and one-year validity periods in ADM and NLM, respectively, force indigents to reapply annually, consuming valuable time and resources that could otherwise be directed toward improving their living conditions. This exacerbates their vulnerability by creating uncertainty around service continuity and hinders the NFMIP's goal of minimising inequalities, as those in less-resourced municipalities face greater barriers to accessing necessary support. Ultimately, these disparities can lead to increased poverty and social exclusion among indigents in areas with shorter validity periods, further entrenching systemic inequalities within the broader socio-economic landscape. Scholars argue that such disparities can lead to unequal access to services, creating further disparities among indigent populations (Fuo, 2020; Maduku, 2018; PARI, 2021).

The synthesis of the themes discussed above revealed that effective revenue management and a robust financial framework are vital in shaping the efficiency of indigent service levels and targeting options and validity within the NFMIP. In addition, the discrepancies in indigent qualification criteria not only exacerbate inequalities among municipalities but also impede the overarching goal of the NFMIP, which is to ensure equitable access to essential services for all indigents.

Systems Theory underscores the importance of considering the holistic system, including the interactions between municipal departments, external funding agencies, and local communities. From this perspective, BCMM's success in managing indigent policies can be attributed to a well-integrated system where financial resources, administrative structures, and policy frameworks are aligned. The stand-alone office for indigent management represents a critical node within this system, facilitating effective coordination and resource allocation. In contrast, ADM and NLM exhibit

systemic weaknesses, such as over-reliance on external grants and less cohesive administrative structures, which disrupt the balance and flow within their systems. Systems Theory suggests that improving indigent policy adoption requires interventions that enhance system integration, feedback mechanisms, and adaptive capacities. By strengthening these components, municipalities can better respond to changes and challenges, leading to more equitable and effective indigent policy implementation. These findings underscore the need for targeted interventions to address the unique challenges various municipalities face, promoting equitable and sustainable indigent support across the country.

7. Conclusion

This research highlights significant differences in adopting the National Framework for Municipal Indigent Policies (NFMIP) among various municipal categories in South Africa. Systems Theory helps provide a comprehensive understanding of these differences by emphasising the interconnectedness and interdependencies within the municipal governance system. The interactions and feedback loops between financial resources, administrative capacity, and local socio-economic conditions influence the success or failure of indigent policy implementation. The results show that metropolitan municipalities like Buffalo City Metropolitan Municipality (BCMM) are more successful in implementing indigent policies due to strong financial management, specialised administrative structures, and integrated systems. On the other hand, district and local municipalities, such as Amathole District Municipality (ADM) and Ngqushwa Local Municipality (NLM), face systemic weaknesses, including over-reliance on external grants and less cohesive administrative frameworks, which lead to less effective policy implementation. These differences emphasise the need for targeted interventions to enhance system integration, feedback mechanisms, and adaptive capacities within municipalities. Addressing these systemic issues is crucial for promoting equitable and sustainable indigent support across South Africa.

The study recommends the following:

- 1) Revenue management: The study recommends that every municipality establish an indigent office with dedicated employees to manage and service indigents within their jurisdiction.
- 2) Financial framework: The study noted variations in the findings of indigent policies using the existing NFMIP, where only BCMM (category A municipality) can fund its indigent support using equitable shares, administrative revenue and cross-subsidies. Other municipalities depend solely on equitable shares. To address these funding discrepancies, the study recommends using conditional grants to fund municipal indigent policies. Conditional grants allow for targeted allocation for indigent policies, ensuring that resources are directed towards achieving the objectives. Conditional grants also allow policymakers to align funding with indigent policy objectives, resulting in consistent use of financial resources to implement indigent policies.

- 3) **Qualification criteria:** The study recommends that an indigent produce a letter from the councilor or traditional leader confirming that the person is indeed an indigent and should be assisted by the municipality.
- 4) **Indigent targeting option:** The study recommends that municipalities should only use household income as a targeting option. Household income is a measurable and objective criterion that allows municipalities to have a clear and quantifiable metric to identify needy households. Municipalities must regularly assess and adjust this targeting criteria to adapt to changing socio-economic conditions.
- 5) **Indigent service level:** The study recommends that municipalities provide 12,000 kl of potable water, 200 kWh of electricity per household per month, sanitation services, and refuse collection through indigent support.
- 6) **Indigent support validity period:** The study recommends having a fixed validity period amongst all municipalities, with three years as the recommended validity period. Adopting a standardised validity period is critical to ensuring that indigents receive equitable treatment regardless of their geographic location.

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