

Data Summary Table

A.Secondary Questions Responses Summary for the City of Cape Town

<u>Name of Participant/Pseudonym</u>	<u>Question 1: What constitutes Shared Accommodation/SAEs and their Stakeholders</u>	<u>Question 2:The the SAEs/SAI Value and Benefits in municipalities</u>	<u>Question 3: Suggestions for managing and regulating SAI/SAEs</u>
<u>Definitions of terms where needed</u>	<u>The focus is on SAEs/SAI - definitions, the participants and role players</u>	<u>The focus is on the SAI value and benefits and Challenges</u>	<u>On how the municipalities manage and can regulate the SAEs/SAI</u>
1. Angus	<u>Understanding and definitions of SAEs/SAI:</u> <ul style="list-style-type: none"> • Its everything from Airbnbs to apartments that can be rented out to companies which they rent out as accommodation/a apartment that is they pay a monthly rental on but they only use it from a Sunday night to a Thursday evening because that is you know that's it's cheaper than staying at a hotel • It's houses that have added their big old family homes and they've managed to convert them into self-catering accommodation. • If its with Airbnb is whether it's somebody's hiring up their entire house, or whether it's a part of the house or being a cottage • And then there are some apartment complexes where it's not being used for the traditional sense of somebody is resident, they all the time, it's registered to a company. So it's seen 	<u>The benefits/Value of SAEs:</u> <ul style="list-style-type: none"> • From the individual entity, its somebody that has converted the cottage to something, it's an additional sense, source of income for them. • SAEs offer consumers with alternatives as people are moving away from the traditional sense of hotels, they want to get involved in the lifestyle they want to get involved in the culture of a place and you don't really get them hotel • So it's probably a more immersive experience for tourists that want to do that and it adds value to the local economy • Hotels, and maybe the traditional kind of bed and breakfasts needed to have competition to change the way that they did business and looked at business and maybe had a monopoly on some things, and it makes us change how we do our business and keeps us on our toes. 	<u>Suggestions to manage and regulate SAEs/SAI:</u> <ul style="list-style-type: none"> • The municipalities just need to get organized, and needs to understand that business because they're losing a lot of money there because a lot of the Airbnb type operators are operating illegally and are renting out their places for cash. • The municipality need to get the SAEs to operate in some semi legal aspect, you know, in some way, you know, to look after the environment, to look after the employees • The municipality need to regulate the development of these Airbnb type of accommodations especially in residential areas where they bring challenges including putting pressure to the already aging infrastructure • The municipal inspectors and law enforcement needs to up their game

	<p>as alternative to staying in a hotel,</p> <ul style="list-style-type: none"> • it could be registered in multiple sites, either being a bed and breakfast or on Airbnb or short term rentals, rentals or student accommodation. • And the room rates are very comparable to those of hotels in the area and well with double the facilities because like hotels <p><u>The role players and participants:</u></p> <ul style="list-style-type: none"> • B&Bs and the smaller kind of bespoke kind of boutique hotels or guest houses. • Service providers who do the cleaning and related services to the SAEs 	<ul style="list-style-type: none"> • Some of the challenges is that it grew very fast with supply now outstripping the demand in some spaces <p><u>The Challenges of SAI to municipalities:</u></p> <ul style="list-style-type: none"> • SAEs causing housing shortages with companies unable to find accommodation for the people who work in their offices because the rent has become so expensive, because people make more money with short term letting. 	
2. Freiderich	<p><u>Understanding and definitions of SAEs/SAI:</u></p> <ul style="list-style-type: none"> • Its definitely think of Airbnb, whose original idea of Airbnb was that somebody was sharing your house and the room in your house or the sofa in the living room • The other thing which would come into mind in shared accommodation is the apartment site where a lot of places have now to see bedrooms and apartments, and they use that for short term let instead of long term let • Its anybody with a spare room is involved in the Airbnb market and renting them out • There is also some developers who had actually built apartment blocks, and sold them to investors with the 	<p><u>The Value of SAEs/SAI:</u></p> <ul style="list-style-type: none"> • The SAEs serve as a market segment because there is a need and a demand for that kind of accommodation. People want to be more in smaller places more with the family or a lot of the Airbnb is driven by costs. So they're tapping into that market, and they're successful • What Airbnb is doing also very well is that the commission structure is much lower, compared to the likes of booking.com and Expedia and hotel beds and Agoda <p><u>The challenges of SAEs/SAI:</u></p> <ul style="list-style-type: none"> • One of the biggest challenge, I think, is that a lot of these places are not regulated. And that's a big issue • But then with that comes all the other 	<ul style="list-style-type: none"> • If the municipality really want to find out if a place offers accommodation, they must just need to go onto the internet, and you go on the Airbnb platform • The municipalities just need to get organized, and somebody needs to understand that business because I think they're losing a lot of money there because a lot of the Airbnb places, rent out rooms for cash. • The municipality need to get the SAEs to operate in some semi legal aspect, you know, in some way, you know, to look after the environment, to look after the employees

	<p>idea of using them for Airbnb business</p> <ul style="list-style-type: none"> There are differences in the role players, with the large operators been professional about it as compared to Airbnb type operators. <p><u>The role players and Participants in the SAI:</u></p> <ul style="list-style-type: none"> So in terms of players, it is everybody who has a room at the moment, and then you have the more established places 	<p>things, you know, fire regulation, health and safety, you know, workers compensation, VAT and other things</p> <ul style="list-style-type: none"> The legal aspect and the environmental aspect So I think the whole Airbnb market or these short term rental needs to be more regulated, for the sake of the guests and for the sake of the employees. And for the sake of the owners On the other hand, you know, it does create new opportunities. And that's good, you know, and established operators have to also look at their business practices and say, Is this actually still relevant to the market out there. Why do people use Uber instead of taxis? Because it's more convenient So I think the market eventually forces all this things out 	
3. Jefferson	<p><u>Understanding and definitions of SAEs/SAI:</u></p> <ul style="list-style-type: none"> Shared accommodation enterprise, effectively it can range from Airbnb's and can range from private homes being let out on an informal basis, and it can be ranging from boutique hotels, Guest houses. It's just all accommodation, other than the formal accommodations And a lot of these are not registered as such, this is where half of the ethical dilemmas comes from 	<p><u>The Value and Benefits of SAEs and SAI:</u></p> <ul style="list-style-type: none"> They bring a tremendous amount of value, because it provides another angle another arm to the accommodation sector because not everybody has the wherewithal to stay in formal accommodation being in hotels or formal guest houses in particular hotels since people don't have as much disposable income This form of accommodation provides is the opportunity for, let's call it people that are a bit more cash strapped to still get away and have a meaningful 	<ul style="list-style-type: none"> There's a space for everyone. There's a different demand requirement, and the demand for accommodation will cover all different sectors The likes of Fedhasa, the guesthouse association should now pick up the discussion and get to some sort of agreement to say that we need to play by the same rules. There is space for everybody. Embrace each other's businesses, business models

	<p><u>Clarification of Formal Accommodation:</u></p> <ul style="list-style-type: none"> • That's effectively registered accommodations facilities within each province or municipal area • what you have to do with regards to licensing with regards to your health and safety with regards to your insurance, with regards to all the various legal aspects of your registration of your business • So this would affect all your formally registered hotels, Guest houses, boutique hotels, B&B operations <p><u>The role players and participants:</u></p> <ul style="list-style-type: none"> • Other than Airbnb, a lot of them are operating in small bases. As far as I'm aware, there might be others that I'm not aware of because prior to that, there were maybe private homesteads that were renting out rooms and parts of the owned residences. • There are a couple of smaller groupings, if you like I couldn't, at the minute give you the names of them, but where they have a cluster of these private dwellings that they manage on behalf of the owners. 	<p>holiday with their families</p> <ul style="list-style-type: none"> • And even from a business point of view, quite a few business people also staying in short term letting facilities because of the basic cost because many companies are still only paying the employees that are lucky enough to have a job, or 20% and 30% of the actual salaries. So it's very definitely provides a niche in the market. • SAE/SAI provides another segment to the accommodation sector <p><u>The Challenges of SAEs/SAI:</u></p> <ul style="list-style-type: none"> • The concern or was and probably still is, maybe it's progressed is that if we need to play off the same playbook because there's a lot of the Airbnb's that aren't properly registered within the municipalities as accommodation providers. • The biggest concern from stakeholders is that the CoCT signed an agreement with Airbnb before they even engaged with the formal accommodation sector. 	
4. Andrew	<p><u>Understanding and definitions of SAEs/SAI:</u></p> <ul style="list-style-type: none"> • That SAEs/SAI represents the most unbelievable platform to leverage your assets for additional income. • Its predominantly an incredibly advantageous way to earn additional 	<p><u>The Value and Benefits of SAEs/SAI:</u></p> <ul style="list-style-type: none"> • The benefits of our shared economic activities really happening in your traditionally well served areas • We want to see people reinvesting into Cape Town, and we want to see people spending time in Cape Town 	<ul style="list-style-type: none"> • And what I've always liked about the sharing economy is that it relies a lot on emergence, and on serendipity and the people involved in it tend to be the ones that create the solution to it • The municipality doesn't have to be

	<p>income and revenue that you can then either put back into the local economy or invest elsewhere</p> <ul style="list-style-type: none"> • It's a much more sustainable way of consuming resources <p><u>The role players and participants:</u></p> <ul style="list-style-type: none"> • The individual homeowners using it as supplementary retirement income, or as single parents occupational income • The other big ones are the body corporates, some of whom didn't want to tolerate short term leases within their buildings. And then the other ones were from sort of closed gated communities • Then there hotel groups and property developers also involved 	<p>and actively participating in Cape town's economy and the shared economy sector supports that as it improves livelihoods</p> <ul style="list-style-type: none"> • Source of economic growth and economic opportunities and job creation. • Allows people to leverage their assets, to build wealth and to build financial security 	<p>overly heavy handed from the government's perspective, and you don't necessarily want to do unduly tax people. There is no need to create more barriers to entry but there is definitely a need to have kind of equal playing fields of being able to access</p>
5. Monroe	<p><u>Understanding and definition of SAEs/SAI:</u></p> <ul style="list-style-type: none"> • Shared accommodation as with shared economy, for me it speaks to community. And, and in respect to our concept, it speaks to the utilization of common spaces across a building in a way that brings people together • And it advocates, community connection and collaboration between people • Short term accommodation, especially in the world that we live in now and are referred to short term and anything under three months, is exceptionally important • And the flexibility to offer one night stays or three months stays is really important. For shared economy, short 	<p><u>The Value/Benefits of SAEs/SAI:</u></p> <ul style="list-style-type: none"> • The principles on shared economy can be leveraged to really create societal, positive societal growth for people on all possible levels • Shared economy spaces in any form, whether it's short term, or long term, add real value to South Africa, across the board because it creates cheaper and more affordable accommodation, which is massively necessary given the housing shortage. • SAEs creates community across people, you know, who, in sort of a country where there are absent fathers and community is needed more than ever, support is needed, is more than ever. 	<p><u>SAI Needs and Suggestions for municipalities:</u></p> <ul style="list-style-type: none"> • A little bit more flexibility around zoning codes and Town Planning approvals as it relates to the product. • The building code around SAEs is important. So firstly, understanding it properly defining what it is in respect to public policy by setting minimum standards in terms of quality of specifications • Density and more parking, spaces and public transport. So shared economy works based around density and that's a big issue because for the concept of work, you need to have enough people within a space for the economics to work

	<p>term accommodation, needs to speak to that flexibility.</p> <p><u>The role players and participants in SAI:</u></p> <ul style="list-style-type: none"> • The main short term providers across the country are obviously the traditional hotel brands that have existed for a long time • The traditional hotel brands who operate, short stay spaces are having to adapt and evolve, because traditional hospitality for me is no longer relevant • Everyone is really involved through the process, the banks, obviously play a massive role in funding new developments • The visitors especially the remote workers mainly including the Europeans, Brazilians, Argentinians, living and working in our spaces, Germans, Dutch, Swedish people, sometimes English people as well and from a religious point of view, more Muslims use SAEs so they can cater for themselves 	<ul style="list-style-type: none"> • The value shared economy spaces is twofold. One, because you sharing spaces, the cost comes down. In theory, it should cost someone 20% to 30% less than a bachelor unit of a market related flat in Cape Town by staying in an SAE. • So the first and foremost benefit is really saving from a cash flow perspective for consumers, because of the way that the SAEs are designed and serviced • Second benefit is being able to build shared economy spaces bring the cost of living down substantially which speaks to community. And, community exists in various forms and society, churches, religious organizations, non-profit organisations, and in most cases, it's very positive • The sense of community provides support within the context of the environment that it exists in modern day living. • The principle around shared economy, whether it is in a township, or in the City of Cape Town, is that there's a support structure around someone which has a massive benefit socially • And so fundamentally, the two biggest value adds of SAEs outside of other things is the that it costs a lot less and people do really reap the benefits of a support structure as a young professional who are leaving school or 	<ul style="list-style-type: none"> • More public, private forums around SAI, and education around it for the for the broader market is critical • The opportunity to engaging the city leaders and municipal managers and explaining the opportunity and why, while we think it can really help society, and people and talking about building community, ending loneliness, thinking about like, encouraging society to interact in collaborative spaces
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was leaving varsity who might not be ready to get married just yet

The Challenges of SAEs/SAI:

- The biggest challenge is the cost of building is number one for greenfield projects. It is difficult in Cape Town, because things are expensive and buildings in Cape Town, specifically, historical ones, are too expensive to buy and repurpose
- So it's hard to actually acquire buildings and make the numbers work because of the cost of renovation
- The other big challenge for shared economy accommodation is also around capital raising. So the banks specifically, like long term 5/10 year lease agreements that are predictable, and they don't like to finance unpredictable short term accommodation as they need a track record. And so funding absolutely and the cost of building
- Outside of that, as a consumer, or digital nomad who's coming to South Africa, there is also the visa system for visitors for digital nomad long stays hasn't been promulgated yet
- So that the digital nomad visa of three months is still in the process that's been quite slow. To compensate for young people who have skills who want to work in the country, and experience Cape Town, Durban

		<p>Joburg, that hasn't been possible just yet, because you can only come on a travel visa</p> <ul style="list-style-type: none"> • There is also the education around SAEs. People don't really understand shared economy, they understand student housing, because that exists. However other business models of shared economy, like the hybrid spaces where young people graduate from student housing, between the 23 and 35 year old gap is not something that people understand • And then outside of that challenges relate to the actual management of the shared economy spaces, because obviously, what shared spaces means people need to clean up after themselves • So managing that human interaction within the space can be interesting to see/witness as well. 	
6. Mahlatse	<p><u>Understanding and defining SAEs and SAI:</u></p> <ul style="list-style-type: none"> • Its implicit in the name is shared accommodation, which suggests that I, as a primary resident of a house and apartment, choose to share my available accommodation to a third party for commercial gain, or financial gain • But what it has become is another distribution channel for not just for the person who has a spare bedroom in his apartment, but has become a 	<p><u>The Value and Benefit of SAEs/SAI:</u></p> <ul style="list-style-type: none"> • The sharing economy platform spreads the tourism Rand/ dollar a lot more across any economy – it spreads the money across • It helps to bring the tourism industry into the mainstream for the ordinary person and helps to quantize a lot more people because they tend to benefit more • To grow the number of arrivals, there is a need for more inventory and to build that inventory in the form of 	<p><u>Suggestions to manage the SAEs/SAI:</u></p> <ul style="list-style-type: none"> • The one is for cities and municipalities to go to a like an Uber or Airbnb and say, every single business or every single one of your listings, has address behind and has a person who's listed you know, so, you know, make that that listing database available to us. • They will probably tell you that they are a platform and that they cannot divulge that information • The other way of doing it is, is

	<p>platform for commercial players</p> <p><u>The role players involved in the industry:</u></p> <ul style="list-style-type: none"> • First it's the individual property owners who constitute the main part of the business model of Airbnb in the beginning • it's the individuals who own an apartment and have access space. which are listed properties on the platform • Then it's the platform owners themselves, the likes of Airbnb, • Then there is the shared accommodation service providers which has led to the emergence of a considerable real economy created in that shared space 	<p>hotels could easily take five, six years.</p> <ul style="list-style-type: none"> • SAEs can take on any sort of excess demand that the more formal sector can't take on. <p><u>The Challenges of SAEs/SAI:</u></p> <ul style="list-style-type: none"> • at Airbnb, it is B&B in all of the collateral and in kind of their positioning as they have always sold themselves as this company that assists the man in the street to augment his income by a renting an extra bedroom in his apartment. • But if you if you go onto an Airbnb platform, you will find serviced apartments, you know, a private company that owns a whole building and all of those apartments in that building are on the Airbnb platform. So it's no longer just the simple square meter apartment, the whole building is set up and listed on Airbnb • So Airbnb for instance has become a distribution channel for that business • The bulk of the firm's that are international, global businesses with no real home other than maybe Silicon Valley. They are launched across jurisdictions and they don't often take into account the issues in the specific jurisdictions in which they operate • The challenge that sector faces is that from a regulatory point of view, it's in no man's land 	<p>enacting new bylaws which say that if you are not registered on a database and you run the kind of business you are running fall off of a bylaw.</p> <ul style="list-style-type: none"> •
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<p>7. Farouk</p>	<p><u>Understanding and defining SAEs and SAI:</u></p> <ul style="list-style-type: none"> • Shared accommodation depends/it's dictated by the needs of the person requiring accommodation • What has happened is that how people travel has changed how short term rentals are perceived. Traditionally it would have been for a fixed period of time, as long as they don't go past the visa period • What we've seen from digital nomads is that it is beginning to shift, where people are merging both work and leisure when visiting a destination so they can work • Sometimes the purpose is for work where their requirements will be different as to when they travel for leisure where families may be involved • The definition of short term rental is probably where the issue lies in terms of how we define it. And maybe it is time for us to define or redefine what short term rentals mean, and they may even need to be some subcategories of what that means, depending on the intent of the traveller • Short-term rentals are actually in two parts with the word short referring to the duration, with short term being anything under 30 days based on kind or just experience of what we see because the minute it goes beyond 30 days, and then it's not short. 	<p><u>The Value and Benefit of SAEs/SAI:</u></p> <ul style="list-style-type: none"> • Anybody doing shared accommodation, does it for a financial gain and the value depends on two things • Where shared accommodation has provided value is that it's created a new income stream for people with multiple properties • SAEs give people the choice of choosing something that they want for the price they want and that's the negotiable bit where as a hotel room depends on best available rate • The opportunity to make travel accessible to all including the domestic markets and also has the potential to drive transformation and entrepreneurship in previously marginalised areas of our cities (better opportunities for SMMEs) <p><u>The Challenges of SAEs/SAI:</u></p> <ul style="list-style-type: none"> • Where it's become a dilemma for governments in general is that in a country like South Africa, where housing and the lack of housing is a significant problem, at significant scale, it creates a thing where the haves are able to generate more revenue and not comply with the regulations that are set for the formal sector that has to comply with certain regulations in order to operate • The disadvantages is that you've got a 	<p><u>Suggestions to manage the SAEs/SAI:</u></p> <ul style="list-style-type: none"> • The municipality needs to embark on a clear study, an independent study will give them options around what to consider and how to address it. • But then that means also multi stakeholder engagements with the formal sector and the informal sector, • The informal sector is also trying to operate in the same space, and they may not have access to the shared economy platforms, with a quite slow traditional, and that could be excluding them from it • What should inform the approach is on how to leverage this for the benefit of all citizens, • And that's something that should inform bylaws and policies, which could be for every 90 days you rent out, you're going to have to give a week for a homeless person. •
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	<ul style="list-style-type: none"> • So short term rentals doesn't necessarily mean shared accommodation. The one speaks to the duration of stay while the SAE/SAI is a description of an accommodation segment/type. The two words can't be used interchangeably for all intends and purpose • There is short term rentals for visitors, which could be that they have a place that they can use as a base, and then they can go and visit other parts of the country or even Africa, and they use that as a base as they may have it for an extended period of time • From a tourism perspective, it speaks to shared economy stuff and not to where someone is just opening up a room to share with someone else for a fixed period of time for a student as an example • Shared accommodation has existed for a long time and it's probably where the nuances of explanation are muddled and then I think when it comes to putting in policies, or any form of governance around it, it further exacerbates the confusion • And for the last six years since the shared economy has become something of significance in South Africa, we haven't really spent that time • It's called shared accommodation on the macro level. When you are 	<p>major housing problem in traditionally well off areas, wherein a lot of people from disadvantaged areas who need to be closer to the areas of production in the CBD, can't find housing, but you've got people that have housing and offering them to others</p> <ul style="list-style-type: none"> • If you look at the housing that's being rolled out, since the start of democracy, it's all in the same far off places – building housing not close to the areas of production • The municipality is not dealing with the real issues around apartheid era spatial planning. • With Airbnb type operators there is the challenge that no employment is created, no real employment because what it is, is it's just a service 	
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	<p>referring then to shared accommodation for travellers, and if we use the UNWTO definition of a tourist, then for those purposes, anybody spending a night but more than 50 kilometres from their household</p> <ul style="list-style-type: none"> • So shared accommodation with someone else, for whatever reason that person has that is using the other part of that property for whatever other purpose. So therefore, they're not defined as a tourist, because they intended purpose and the distance, even though they may be spending more than one night in in that location, exclude them from this. • So shared accommodation means that even though the property is also available to be shared, it could still be occupied by one person if they can afford it <p><u>The role players and participants:</u></p> <ul style="list-style-type: none"> • If you take the definition, broadly, and on a macro level, then it would be anybody that requires accommodation for a fixed period of time because it is shared. It doesn't say short, long or medium, it's shared • So anybody that might need a room, in an existing house, apartment, for whatever intent or purpose or duration would be that. • The shared bit will be whether it's a 		
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	<p>formal property, an existing property that's designed and zoned to accommodate people, at least more than one person, and then for an extended period of time, or it could be then also informal accommodation, where again, it can at least, have space for more than one person to share that accommodation</p> <ul style="list-style-type: none"> • So depending on the purpose of seeking the accommodation and its duration, the stakeholders changes from a tourist/traveller to a citizen • And of course there a different types of tourists/travellers, which is Business(trader versus an investor) and Leisure • The visa conditions determines the length of stay that is going to be required by the traveller, and that then of course will influence the type of accommodation they would choose and their budget/affordability factor 		
8. Johan	<p><u>Understanding and defining SAEs and SAI:</u></p> <ul style="list-style-type: none"> • Shared accommodation is a new label or term that you're introducing for me, I'm not familiar with that, as a business term, familiar with sharing multiple things in economic activities, all forms of clustering • In terms of accommodation, there's multiple forms of different ways that people offer accommodation as well 	<p><u>The Value and Benefit of SAEs/SAI:</u></p> <ul style="list-style-type: none"> • So the benefits are both on the supply and the demand side, and definitely good for the economy • It generates income for people who need income, which is from a supply side. From the demand side it is also very important because it allows more people to go on holiday. • It allows more people to travel it allows more people to trade because the costs as it offers a lower cost 	<p><u>Suggestions to manage the SAEs/SAI:</u></p> <ul style="list-style-type: none"> • Government and municipalities should make it easier for business to succeed • There should be a lot of flexibility for informal businesses, give them space to just cope and survive and make an income for themselves rather than be dependent on the state to tie them • The more people that we can get the genuine income for yourself, the less we have to depend on the state or

	<p><u>The role players involved in the industry:</u></p> <ul style="list-style-type: none"> • The role players and participants include private individuals and business • Private individuals renting out their homes on aperiodical or sustained basis and as either BnBs or Guesthouses • Businesses participate as property developers and also renting out these properties as apartments or apartment hotels and also as registered/licensed accommodation providers 	<p>alternative.</p> <p><u>The Challenges of SAEs/SAI:</u></p> <ul style="list-style-type: none"> • It depends also on the context. So if people are operating say in a wealthy area, they may be different because they may not have many problems • In wealthy areas the business environment is more supportive and there's more security, and there's less violence in that area • Also the challenges in terms of space access roads. So there's a number of parking spaces • It's the opposite in the poorer communities, since the poorer you are, the less you're able to meet the requirements to participate in SAI, etc • The regulations are often onerous from the requirements to register your business/operation, specification of parking spots, etc. • The rules that are made are not always ideal, and they're not anticipating all the context and all the situations 	<p>live in poverty.</p> <ul style="list-style-type: none"> • In many cases, the rules are excessive. And the support systems are maybe not as good as they should be. And it's not just the public sector, it's maybe also from organized business • So the smaller guys need support to learn from the more sophisticated established people how they can create more value for their customers • Municipality should establish the effective dialogue channels and make it easy for communication from the various clusters of in groups of businesses to articulate the issues and identify a couple impediments • And the business chambers need to play a role to organize businesses to facilitate a process make it easy • And of course it is minimize the constraints to growth, unlock, remove the obstacles and impediments
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