



# Africa Project Access

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***“I dream of an Africa which is in peace with itself.”***  
**(Nelson Rolihlahla Mandela)**

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***Africa Project Access Visit Reports:***

**Lubumbashi-Likasi-Kolwezi, DR Congo, Luapula Province, Zambia, Richards Bay, Dar es Salaam-Mtwara, Tanzania; Kinshasa-Matadi & Katanga, DR Congo; North-Western Province, Zambia; Juba, South Sudan; Tete, Zambezi Valley, Nacala, Pemba, Mozambique; Kampala, Uganda, Guinea Conakry etc**

(Contact *Africa Project Access* at Johannesburg 27 11 4656770 or cell 0826510707 for details on how to obtain copies)

### *Is China's Approach to Africa Changing?*

*During a recent Africa Project Access sub-group briefing the inevitable subject of China's role in Africa came up. The remarks were expected: the difficulty in beating Chinese tender pricing, the securing of Projects through effective barter trade for raw materials, the exclusive use of Chinese resources for Projects including manual labour, lack of sufficient concern for the human and physical environmental impact of Projects. We then did a snap survey of the thirty client companies present and found that about a third were involved in some type of business relationship with Chinese entities! This high return would have been unlikely a few years ago. Has China changed its practice and become more collaborative towards non-Chinese role-players?*

The facts show that China's presence in the continent has undoubtedly strengthened considerably. Its bilateral trade with Africa has gone from about USD 10 billion in 2000 to a current USD 200 billion and will surely continue to rise. Its total development assistance to Africa has reached USD 5 billion through initiatives such as the *China-Africa Development Fund* and through successful coordination of its political and financial instruments such as the foreign affairs ministry, *China Exim Bank* and *Sinosure*. It is estimated that around one million Chinese are now resident in Africa.

However, a recent study by the *Industrial Development Corporation (IDC)* of South Africa suggests that China's comparative strength may be exaggerated. China ranks considerably below the United States and even behind Japan in the list of the world's outward

FDI investors. China also ranked well below the historically dominant *European Union (EU)* as a source of Greenfield FDI projects in Africa and far less than India. According to *UNCTAD*, between 2009 and 2013, China was a source of only 3% of Greenfield African Projects compared with 41% from Europe, 13% from North America and 6% from India. In fact, it is surprising to note that developing economies saw their share of Greenfield FDI Projects in Africa decline from 63% in 2012 to 49% in 2013. There have also been some high-profile Project set-backs such as its dismissal from the huge *Belinga iron ore Project* in Gabon, a country with a long history of close relations with China. Negative experiences in certain African markets may lead to greater caution in the future.

The late president of Zambia, *Michael Sata* stated "We want to work with the Chinese, but they must change." Has China indeed begun to change its approach to our continent? The following are recent changes or shifts.

One discernable shift on a sectoral basis is a new emphasis on the power sector. This correlates with its long-standing interest in the oil and gas sectors. A good example is the 540-kilometre gas pipeline that will pipe gas from the *Mtwara area* of the *Rovuma Basin* to *Dar es Salaam* where it will be fed into gas-fired power stations. The Project is largely funded by the *China Exim Bank* and there are three Chinese contracting companies involved led by *China Petroleum Engineers*. China is likely to strengthen its share in the telecommunications sector through major players such as *Huawei* which

secured the 4G network contract in Ethiopia. A rising area of interest is rail as long manifested by TANZAM and the Lobito rail in Angola but now in urban rail such as in the case of Addis Ababa. Some observers believe that China is the only country capable of implementing the difficult rail Project in Guinea. There are also references to interest in the automobile industry with private companies such as *Zhejiang Geely* involved.

Some analysts believe that the Chinese companies are moving away from mergers and acquisitions. In the mining sector, M&A activity has been marked. An example is the acquisition of concessions held by *Anvil Mining* of Australia by *China Minmetals Resources*. The same analysts point to new joint ventures with non-Chinese entities. However, it should also be pointed out that these partnerships are often with national utilities and remain within the political sphere. Public-Private-Partnerships are favoured and Chinese subsidiaries of international firms have been merged (such as *Bolloré*) but purely private joint ventures between Chinese and other companies involved in Africa are not easy to find apart from strategic agreements with local companies. There are signs that Chinese companies are beginning to outsource some of their requirements to local and other companies. *Pilot Crushtec* of South Africa was assisting a Chinese contractor with the supply of aggregate for a road in Luapula Province, Zambia.

Such genuine private partnerships and joint ventures may well arise with increasing role of Chinese private companies as opposed to state entities. However they are relatively few and in 2011, there were only 57 in the Fortune Top 500 list. The major companies are in telecommunications, steel and metal processing, real estate and construction,

automobile, food and beverage. The notion that the Chinese effort is being implemented solely by state institutions should be tempered by the growing importance of these private players.

China is often accused of dumping cheap goods in Africa and not giving sufficient attention to local beneficiation and manufacturing. Now as manufacturing in China becomes more expensive, there are signs that the Chinese are increasingly considering manufacturing industries in Africa. The shoe manufacturer, *Huajian* has set up a factory in Ethiopia and an agreement has been reached with *JiangSu Automobile* for a vehicle assembly plant in Nigeria but the much-lauded *ZTE* mobile handset plant in Nigeria has stopped production

While China appears to be almost everywhere in the continent, its presence in individual markets is made apparent by major Projects such as the Lobito rail line in Angola and the gas pipeline in Tanzania. It appears to be belatedly focussing on a few economic ‘hotspots’ that it has largely missed (apart from as an offtaker) such as the coal-rich Zambezi Valley and gas-rich Rovuma Basin in Mozambique. Chinese players such as *Shanghai Electric Power* have new participation in the coal-fired power station envisaged by *Ncondezi* in Tete and *CNPC* now has a share of an *ENI* concession in the Rovuma Basin.

As the debate continues, the question should be asked as to what would happen if China was not present? In the fast-growing town of Pemba in northern Mozambique, there is a new airport – built by the Chinese. Urgent repair and expansion of the strategically important four-kilometre link road from the airport to the hotel area is being undertaken – by the Chinese. Would these have happened or would they have taken far longer if China was absent?

## ADDITIONAL SERVICES

### ADDITIONAL SERVICES FOR SUBSCRIBERS & ACTIVITIES OF AFRICA PROJECT ACCESS

*10-16 August 2014, Africa Project Access and the South Africa-Zambia Chamber of Commerce led a **GROUP VISIT TO LUSAKA AND LUAPULA PROVINCE, ZAMBIA**. There were fifteen delegates. The visit included site visits to a manganese mine, hydro power stations, agricultural and tourism Projects.*

*On 20 June 2014, APA led a **GROUP VISIT TO RICHARDS BAY HARBOUR**, KwaZulu-Natal to investigate inter alia future plans for the export of coal from Botswana and Swaziland, and the possibility of establishing the port as a supply centre for gas operations on the East Africa coast. The visit was facilitated by Trade & Investment KwaZulu-Natal.*

*The last **FULL APA BRIEFING** took place at Sage Pastel on Thursday 24 July 2014 and covered the regional implications of the Richards Bay Industrial Development Zone, a report by the Industrial Development Corporation on foreign direct investment flows in Africa, main findings of a renewable energies investigation in nine African countries, and lessons learned from an expert on supply chain management and logistics in the health products sector.*

*A special **PORTS AND RAIL SUB-GROUP MEETING** was held on Thursday 18 September 2014 at the Henley Business School. It was decided that the next meeting will include Transnet Capital Projects and the Africa Strategy of the Department of Public Enterprises.*

*A special **SUB-GROUP MEETING ON OPPORTUNITIES ARISING FROM THE ROVUMA BASIN (PEMBA/PALMA)** was held on Thursday 18 September 2014 at the Henley Business School. It was decided that the next meeting will include relevant development finance institutions, retail chains and commercial property management companies.*

*A **WATER & SANITATION SUB-GROUP MEETING** was held on Thursday 26 June 2014 at the Henley Business School. It was decided that the next meeting will include a water utility such as Rand Water or Umgeni Water, a contractor, an environmental consultancy, a logistics company and a development finance institution such as the DEG. It was also proposed that a special briefing be held on the financing of water and sanitation Projects in Africa.*

*A special **OIL AND GAS SUB-GROUP MEETING** was held on Thursday 13 March 2014 at the Henley Business School. The next meeting will include representatives of the South African Oil and Gas Alliance as well as Schlumberger.*

*A special **MINING SUB-GROUP MEETING** was held on Thursday 13 March 2014 at the Henley Business School. The next meeting will include representatives of a mining house, Renaissance Capital and other mining equity fund managers. A map of Africa with main mining areas will be produced. A tour of mining houses and international mining engineering companies with offices in Johannesburg will be arranged.*

*The twelfth **ICT/TELECOMMUNICATIONS SUB-GROUP** was held on Wednesday 30 July 2014 in collaboration with the South African Electro-Technical Export Council (SAEEEC) at their offices in Midrand. A group visit to South Africa-based mining, gas and engineering companies involved in major resources Projects in Africa was discussed. It was decided that representatives of the Konza City ICT Park in Kenya will be invited to address the next meeting. It was concluded that one of the main South African mobile telecommunications operators, Convergence Partners, Technology 100 and Broadband Barn from the Western Cape will also be invited.*

The **APA AGRICULTURE SUB-GROUP** briefing took place at the Henley Business School on Thursday, 10 July 2014. It was agreed that the next meeting would include representatives of the development finance institutions notably the International Finance Corporation, agriculture equity fund managers as well as agri fund managers and Agri-SA be invited. Also proposed were bio-fuels associations and private game reserve developers. The presence of a logistics company is also required.

The **APA HOTELS/COMMERCIAL PROPERTY SUB-GROUP** briefing was held on Thursday 10 July 2014 at the Henley Business School. It was agreed that, a hotel management group such as Atterbury and African Century Properties, the International Finance Corporation hotels and commercial property specialist as well as banks and a logistics company will be invited for the next briefing.

The **APA POWER SECTOR SUB-GROUP MEETING** took place at the Henley Business School on Thursday 10 April 2014. It was agreed that the next meeting will include the Eskom Division responsible for regional transmission, TransAfrica Projects, former Eskom official, Peter O'Connor, Doug Kune, and an EPC contractor.

The **APA TRANSPORT SECTOR SUB-GROUP MEETING** took place at the Henley Business School on Thursday 10 April 2014. It was agreed that the next meeting will include Transnet Freight Rail, Grindrod, OneLogic and a company producing locomotives in Port Elizabeth.

The sixth **APA HEALTH SECTOR SUB-GROUP MEETING** was held on Wednesday 13 November 2013 at the Henley Business School. Various health and health-related Projects and initiatives were discussed. It was agreed that the APA ICT and Health sub-groups should merge for a special session on the application of ICT in the health sector and specifically remote diagnosis. The sector lead for health at the International Finance Corporation as well as a specialist on cold chain warehousing should be invited.

Africa Project Access is participating with the Johannesburg Chamber of Commerce & Industry (JCCI) on a series of **AFRICA MARKET FOCUS BRIEFINGS**. The last was held on 17 September 2014 on the Kinshasa-Matadi and Kolwezi-Lubumbashi Corridors in the DR Congo.

The July-August edition of the London-based publication, **AFRICA INVESTOR** carries articles on African Infrastructure Funds, liberalisation of the African energy sector, President Kenyatta, offshore and low-cost tax jurisdictions, African cocoa production, hotel developments and the issue of land rights. Paul Runge of APA has a regular projects feature in the publication, "In The Pipeline."

The April/May 2014 edition of **AFRICAN TRADER** carries articles on renewable energies, investments in Africa, the power deficit, broadband infrastructure, the Northwest rail in Zambia, Nigerian petroleum import dilemma, red meat for Africa and GMO crops.

## PROJECTS

(Africa Project Access subscribers are welcome to contact Paul or Nicole at Johannesburg telephone 27 11 4656770, cell 0826510707, Email: [afric.projs@pixie.co.za](mailto:afric.projs@pixie.co.za) for templates/further details/contacts pertaining to specific Projects listed below)

### ANGOLA

The *Agrarian Development Institute (IDA)* is planning investment in a major **RICE PRODUCTION PROGRAMME** in central Huambo Province. Some 100 tons of seeds are being prepared. Rice farmers are being registered. The Province will also soon have a new agro-farming product purchasing institution that will be based in Londuimbali and will assist the farmers in selling their crops. The initiative falls under the Programme of Purchase of Agro-farming Products (*Papagro*) Programme being promoted by the ministries of commerce and agriculture.

The Angolan Ministry of Hotels & Tourism is focussing on tourism development in Cuando Cubango Province in southern Angola within the context of the **CROSS-BORDER CONSERVATION AREA OF OKAVANGO-ZAMBEZI (KAZA)** and has just appointed a new head of the Angola chapter. The Project involves Angola, Namibia, Botswana, Zambia and Zimbabwe. The *Peace Parks Foundation* is the appointed implementing agency. The initial MOU was signed in 2006 and the KAZA-TFCA was launched in March 2012. Over USD 50 million has been allocated to the Project mainly by Germany through the *KFW* and the Netherlands. The *World Bank* has been providing technical assistance. KAZA will be the world's largest trans-frontier park at 520 000 square kilometres or the size of France. A univisa initiative for visitors has just been launched.

The Ministry of Fisheries is promoting the **NATIONAL AQUACULTURE DEVELOPMENT PROGRAMME**. The Programme includes the installation of shipyards for construction, repair and maintenance of the fishing fleet. The emphasis is on semi-industrial and artisinal fishing. It seeks to take advantage of the country's 1 650 kilometre coastline and the equatorial and Benguela currents. It involves a marine reserve of 330 000 square kilometres. The *Food & Agricultural Organisation (FAO)* of the *United Nations* is supporting mapping for the location and development of hatcheries. Angola has an allocation for the export of frozen fish to the *European Union*.

*APM Terminals* and *Sogester* of Angola are the concessionaires for the operation, maintenance and development of **NAMIBE PORT** in southern Angola. The duration of the concession is 20 years. The port has a depth of 6 metres. Japan funded the rehabilitation of the cargo terminal a few years ago. The company was *Japan Port Consultants Limited*. The port now requires the development of its container terminal. The port is linked to the interior through the 907 kilometre rail line to Menongue.

*Marubeni* of Japan is implementing a major **SUGAR AND ETHANOL PROJECT** on a turnkey basis near the town of Humbe, Cunene, southern Angola. The Angolan government allocated USD 652 million for the Project. The intention is to plant sugar cane over an area of 75 000 hectares and to construct a mill for USD 82 million. The plant will have a capacity of 400 000 tons of cane and 40 million litres of ethanol. The Project will help negate the current need to

import sugar. Another major sugar Project is being developed by the *Biocom* consortium of *Odebrecht*, *Sonangol* and *Damer* over an area of 30 000 hectares in Cacuso near Malange.

The **BAIA DE LAUNDA WATERFRONT PROJECT** is being developed on the Ilha in Luanda, Angola at a total cost including support infrastructure of USD 7 billion. Four plots on Luanda Bay are being developed for inter alia a five-star hotel and entertainment complex. Some dredging has been required to extend the land area. Companies involved include *Baia de Luanda SA* and *GENI Holdings*. A prestigious hotel management company is being sought. Three other construction Projects are underway near the bay.

### CONGO (DEMOCRATIC REPUBLIC)

*Glencore* and *Fleurette* are planning to repair two turbines at the **INGA II HYDRO POWER PLANT** and to upgrade 2 000 kilometres of transmission line that link Inga to the mines in Katanga. It is hoped that the upgrades will add 450 MW of power. The cost is estimated at USD 360 million. Katanga Province receives only half of its electrical power requirement and has an estimated deficit of 730 MW. The mines in Katanga are unable to improve copper production because of the ongoing critical power shortage. *Glencore* is the majority owner of *Katanga Mining*.

### CONGO (REPUBLIC)

\*\* The planned **RIVERFRONT COMMERCIAL PROPERTY DEVELOPMENT** in Brazzaville on the Congo river will include a retail centre, hotels, offices, apartments, a market square and a tower plaza. A marina will cater for ferries and leisure craft. The Project is at an early stage and requires an economic feasibility study and urban design. A development agency as well as a task team has yet to be established. The complex will effectively connect Brazzaville city to the river.

\*\* Investment is sought for the **YOUKOU IRON ORE PROJECT** situated in the Mbomo district in the north-west of the Republic of the Congo near the border with Gabon. The mine has a reported resource of 7 billion tons. The airborne surveys, drilling and mapping studies have been completed. The initial development of the mine was undertaken by *Waratah Resources* of Australia.

### ETHIOPIA

There are reports that progress on the 756-kilometre **ADDIS ABABA-DJIBOUTI RAIL LINE** is progressing. The USD 1,2 billion contract for a new line section of 339 kilometres was awarded to the *China Civil Engineering Construction Company (CCECC)*. There are however reports of theft of a section of the old historical line. The implementing agency is the *Ethiopian Railway Corporation (ERC)*. The *Compagnie Cemin de Fer Ethio-Djiboutien* ceased operations in 2010. The Djibouti transport link is vital for the 90 million Ethiopian market especially as Eritrean ports are being avoided.

The *Ethiopian Railway Corporation (ERC)* is planning the construction of the 485-kilometre **AWASH-WOLDIA RAIL LINE** in central Ethiopia. The line will link the country's northern

and eastern transport systems. The estimated cost of the Project is USD 1,7 billion. The *ERC* has identified eight key rail routes covering 5 060 kilometres.

There have been a number of important developments relating to the 13-year USD 16 billion **NATIONAL ICT/TELECOMMUNICATIONS NETWORK UPGRADE PROGRAMME**. *ZTE* of China was appointed to extend the LTE and 4G networks while *Huawei* of China was appointed to extend the mobile telecommunications network. *Huawei* is also the sole provider to the light rail communications system in Addis Ababa. There have been some differences between the companies and the Ministry of Communications and Technology over the costs and taxes due. There have been reports that *Ericsson* maybe brought in and that the *Nokia* legacy network may be removed and replaced. The *France Telecom* management contract with the state utility, *Ethio Telecom* has ended. The Ethiopian government does not wish to privatise the sector but wishes to utilise revenue from the sector for other infrastructure requirements. Observers believe that Ethiopia with a population of 90 million is the fastest growing mobile market in Africa.

### GHANA

The **ATUABO GAS PROCESSING PLANT/GHANA GAS INFRASTRUCTURE PROJECT** in western Ghana will help the national economy by saving on imports of light crude for energy. The cost of the Project is estimated at USD 1 billion. Gas will be fed from the offshore Jubilee field. The plant will be able to process 150 million cubic feet per day. The Project is being implemented by the *Ghana National Gas Company*. The responsible authority is the Ministry of Energy and Petroleum. Ghana has a deposit of 200 billion standard cubic feet offshore that will be used for electricity generation. Construction on the long-delayed Project began two years ago.

### KENYA

The Kenyan government has signed a USD 66 million agreement with the *Agence Francaise de Développement (AFD)* for the expansion of the **MOMBASA MOI INTERNATIONAL AIRPORT**. A study funded by Japan (*JBIC*) in 2002 found that there was a need to rehabilitate the runway and taxiway and to expand passenger terminal buildings. The facilities have deteriorated as a result of lack of maintenance. Last year local land grabs stalled the airport expansion. The implementing agency is the *Kenya Airports Authority (KAA)*. There are currently about twenty airlines utilising the airport.

The Danish port engineering firm, *Niras* is the appointed Project management company for the **NEW MOMBASA OIL TERMINAL**. It was appointed by the *Kenya Ports Authority (KPA)*. The terminal is scheduled for completion in 2017 and will quadruple the country's oil import capacity. It will be able to handle four vessels at a time. The estimated total cost is about USD 140 million. It will be located off the old Kipevu oil terminal which it will replace. *Niras* will soon be preparing the tender documents. *KPA* is also promoting a new offshore fuel handling facility. Capacity could be further increased if the *National Corporation of Kenya (NOCK)* succeeds in its plans for a new jetty. Mombasa's oil import capacity is critical for the land-locked interior countries.

## MOZAMBIQUE

There are reports that the new state utility *ENH Integrated Logistics* is holding the contract for the administration of the **PEMBA GAS SERVICES TERMINAL**. Another new local utility, *Portos de Cabo Delgado* is the implementing agency. The reports add that the *ENHILS/Orlean Investment of Nigeria/Sonangol Integrated Logistics Services* consortium is preferred. The *Development Bank of Southern Africa (DBSA)* has allocated Project preparation funding for the same concession to another grouping led by *Muyake* of South Africa. The latter group is reportedly instigating claims and the current situation is not clear.

\*\* The Japan-supported *Agro-Negocio para o Desenvolvimento de Mocambique (ADM)* was established in early 2012. It has created 60 farmers clubs with 6 000 members to grow **JATROPHA** in four districts (Ancuabe, Macomia, Meluco, Quissanga) in Cabo Delgado Province, northern Mozambique. The Project entails production and sale of biofuel and biofertilizer made from *Jatropha* seedcake and produced for local entities at a reasonable price. A plant has been established at Bilibiza. Initial funding was from the Kanagwa municipal government. The *Japan International Cooperation Agency (JICA)* is supporting the Project. The *Nippon Biodiesel Fuel Company (NBF)* is implementing the Project. The agency is also involved in an initiative for the improvement of rice crops in the province.

A new 300-400 tph **CRUSHING PLANT** will be established in the Pemba area of northern Mozambique. The plant will be arriving from Portugal and installation is expected to commence in January or February 2015. There are two existing quarries in Pemba and quarries in Moeda some 200 kilometres from Palma. There is no suitable stone in the Palma area where *Anadarko* and *ENI* will be establishing their LNG production facilities.

The following are **COMMERCIAL PROPERTY DEVELOPMENTS** in the Palma area of northern Mozambique:

- The Palma Residences established by *African Century* is an apartment hotel with a few units each comprising two rooms and two bathrooms plus a restaurant/bar and swimming pool. They currently have 12 units but will be adding 30 more units over the next 9 months.
- *African Century* is building a new business camp two kilometres away and the Palma Business Park that will include warehouses with water and power.
- The contractor, *Enteposto* is planning the construction of 115 apartments, a shopping centre and a bank.
- *Imnotourist* of Mozambique is building a 90-room hotel.
- The Palma Condominium built by a Spanish company has recently opened.
- A company from Malta, *Medi-Link* will be establishing life-support clinics.
- A *Toyota* garage will open.
- There are reports that a Kenyan and a Zimbabwean company are planning two new hotels.
- There are plans for an exclusive airport on the Afungi Peninsula

The **PALMA MARINA** in northern Mozambique is being developed by a South African and is the only current marina for boats. It is reportedly up for sale at USD 1,5 million. The jetty at the marina will have to be strengthened for the transport of heavy equipment to the gas rigs. The port at Palma is not suited to such discharge. There are a number of investors investigating different logistics options for the Palma area in preparation for the LNG production facilities that will be built there.

*Ncondezi* of the UK has signed an agreement with the *Shanghai Electric Power Company (SEPC)* for the construction of a 300 MW coal-fired **POWER STATION** at its concession near Tete, Zambezi Valley, central Mozambique. The capital of *SEPC* is held mainly the *China Power Investment Corporation*. *SEPC* will also acquire a minority share in the Ncondezi coal Project. The intention is to eventually increase the capacity of the plant to 1 800 MW. While the transport logistics for exporting coal from the Zambezi Valley remain, operators are investigating coal-fired mine mouth power Projects.

### NAMIBIA

The 4,5 MW **OMBURU PHOTOVOLTAIC POWER PLANT** is being developed by *Innosun Energy Holdings/Omburu Sun Energ* in the Erongo region of central Namibia. Construction has begun and should be completed in 2015. The power will be supplied to *NamPower*. The estimated cost is N\$ 135 million. The plant will generate 11 000 MW hours of clean electricity per annum. The Ministry of Mines and Energy is the responsible authority. Finance is from the *Development Bank of Namibia*. The plant will supply just over 1% of the country's domestic power generation.

*Weatherly International* of the UK has stated that the open pit **TSCHUDI COPPER MINE** in the Oshikoto Region of Northern Namibia is expected to produce copper from mid-2015. Construction began in April 2014. The reserve is 17 000 tons per annum. *Basil Read* was awarded the mining contract and *Minxcon* did the bankable feasibility study. The Project received a USD 80 million loan facility from *Orion Mine Finance*. The installation of support infrastructure will entail access and haul roads as well as some buildings.

### NIGERIA

*Sasol* of South Africa expects the **ESCRAVOS GAS-TO-LIQUIDS PLANT** in the Niger Delta to be fully operational from mid-2015. It is undertaking the Project in collaboration with *Chevron Nigeria* and the *Nigeria National Petroleum Corporation (NNPC)*. Initial production was recently achieved after years of delay. The cost of the Project has now increased to almost USD 10 billion. The construction contract was awarded in 2005 to a consortium comprising *KBR, JGC* and *Snamprogetti*. The plant will also produce LPG and kerosene.

The Federal Ministry of Transport and *China Civil Engineering Construction Corporation (CCECC)/China Railway Construction Corporation (CRCC)* have agreed on the construction of the 750 kilometre Lagos-Benin City-Warri-Port Harcourt-Aba-Calabar **COASTAL RAIL LINE**. The cost is estimated at just under USD 12 billion. An original agreement was signed in 2010. The line would also integrate and link the west and east lines of Lagos-Nguru and Port Harcourt-Maiduguri which require upgrading. The Project forms part of the *ECOWAS* Rail Programme. It is also included in the National Rail Strategic Plan to 2027 that encourages private investment in the sector.

### RWANDA

The *Rwanda Energy, Water & Sanitation Authority (EWSA)* has awarded a **METHANE GAS-TO-POWER IPP PROJECT** to *Symbion Power* of the USA. The onshore plant at Cape of Busororo in Nyamyumba district will draw methane gas from Lake Kivu. The Project will be developed in phases. Lake Kivu contains 60 cubic kilometres of trapped methane gas. The Project is supported within the context of the US presidential *Power Africa Programme*.

### SOUTH AFRICA

*Africa Project Access* does not normally focus on Projects in South Africa. However, inserts and updates on Projects and Project-related issues in this country are included where there is involvement by the donors, international development finance institutions and international support agencies or there is a potential for involvement by these agencies and in cases where there is an African regional context.

South Africa (through the KwaZulu-Natal government), Mozambique, Swaziland and the Seychelles are promoting the dubbed **EAST3 ROUTE REGION**. This is a regional Programme emphasising collaboration between the four countries on trade and investment opportunities with the emphasis on logistics and tourism-related business. An investment seminar addressed by senior officials for all four was recently organised in Durban. *KwaZulu-Natal Trade & Investment* is one of the main promotion agencies.

### TANZANIA

*Dangote Industries (Tanzania)* has applied for a build-own-operate license from the *Energy & Water Utilities Regulatory Authority (EWURA)* to construct a 75 MW coal-based **POWER PLANT**. The plant will feed power to its 3 million tons per annum USD 500 million cement plant being constructed near Mtwara, southern Tanzania. The commissioning of the plant is now expected during the first half of 2015. The cost of the power plant was not stated.

The Ministry of Transport has identified four major **HIGHWAY ROAD REHABILITATIONS** that will enhance Tanzania's regional transport capability. The intention is to convert some of these into PPP-based toll roads. The implementing agencies are the Ministry of Transport and TANROADS. The 100 kilometre Dar es Salaam-Chalinze expressway would be upgraded at a cost of USD 520 million. The 105 kilometre Arusha-Moshi-Himo road will be dualised at a cost of USD 400 million. The 188 kilometre Kigoma Port-Kidahwe-Ilunde-Kaliua road would be upgraded at a cost of USD 150 million. The 260 kilometre Manyoni-Tabora road would be rehabilitated at a cost of USD 57 million.

### UGANDA

A consortium of construction companies is sought for the 238-kilometre **MALABA-KAMPALA (EASTERN ROUTE) RAIL UPGRADE PROJECT** in south-eastern Uganda. Malaba is on the border with Kenya. The line will be standard gauge and a new route is planned. The feasibility study was undertaken by the *China Civil Engineering Construction Company (CCECC)* but the Project has been delayed. *Gauff Engineers* estimated the cost at USD 2,8 billion. Bid documents were recently approved by the Ministry of Works. Funding is being sought via an EPC

concession or from the *African Development Bank (AfDB)*. New stations are planned at Malaba, Jinja, Tororo and Kampala. The existing line is in poor condition.

### ZAMBIA

The *World Bank* has allocated USD 50 million to the **ZAMBIA WATER RESOURCES DEVELOPMENT PROJECT** that will be implemented over five years, 2013-2018. The Project is supporting an integrated framework for the development and management of water resources in the country. One of the objectives is to upgrade infrastructure. The implementing agency is the *National Water Supply & Sanitation Council (NWASCO)*.

### ZIMBABWE

*National Food Holdings Limited (NatFoods)* is planning an upgrade of its **FLOUR AND MAIZE UNITS** in the country. The amount allocated is USD 8,3 million. It is also investing USD 30 million in new mills. *Natfoods* re-opened its Bulawayo flour mill in 2011 and its Mutare mill in 2014. The company is working with the Ministry of Agriculture and the *Grain Millers Association of Zimbabwe (GMAZ)* on achieving a compromise price for maize. It is Zimbabwe's largest agri-business company.

### REGIONAL

South Africa (through the KwaZulu-Natal government), Mozambique, Swaziland and the Seychelles are promoting the dubbed **EAST3 ROUTE REGION**. This is a regional Programme emphasising collaboration between the four countries on trade and investment opportunities with the emphasis on logistics and tourism-related business. An investment seminar addressed by senior officials for all four was recently organised in Durban. *KwaZulu-Natal Trade & Investment* is one of the main promotion agencies.

The *African Development Bank (AfDB)* will be funding the feasibility studies, environmental assessments, engineering designs, and preparation of bidding documents for several road sections of the **CENTRAL CORRIDOR TRANSPORT PROGRAMME**. The roads concerned will be Rusumo-Lusahunga in Tanzania, Rumonge-Rutungu-Bujumbura in Burundi, Nyakanazi-Kasulu-Manyovu and Kayonza-Kigali in Rwanda. The value of the loan is USD 2,6 million. The Programme is being coordinated by the *East African Community (EAC)*.

Five countries are contending to host the site of the new **SADC REGIONAL CENTRE FOR RENEWABLE ENERGY AND ENERGY EFFICIENCY (SACREE)**, Namibia, Mozambique, Botswana, Zimbabwe and South Africa. The Project is being promoted by the Energy Thematic Group of the *SADC Secretariat*. The purpose of the centre is to help increase access to modern energy services and improved energy security for the people of the region by promotion of market-based renewable energy and energy efficiency technologies and services. The centre will act as a regional information hub. The first operational phase will run for three years. Initial funding will be from the Austrian Development Agency, *ADA* and the *United Nations Industrial Development Organisation (UNIDO)*. The centre will focus on solar, biomass, wind, energies, biofuels, low-impact hydro power, geothermal generation, liquid and solid waste conversion and other technologies. The Project falls under the *United Nations-led Sustainable Energy for All Initiative*.

The Nigerian Federal Ministry of Transport and *China Civil Engineering Construction Corporation (CCECC)/China Railway Construction Corporation (CRCC)* have agreed on the construction of the 750 kilometre Lagos-Benin City-Warri-Port Harcourt-Aba-Calabar **COASTAL RAIL LINE**. The cost is estimated at just under USD 12 billion. An original agreement was signed in 2010. The line would also integrate and link the west and east lines of Lagos-Nguru and Port Harcourt-Maiduguri which require upgrading. The Project forms part of the *ECOWAS Rail Programme*. It is also included in the National Rail Strategic Plan to 2027 that encourages private investment in the sector.

The Angolan Ministry of Hotels & Tourism is focussing on tourism development in Cuando Cubango Province in southern Angola within the context of the **CROSS-BORDER CONSERVATION AREA OF OKAVANGO-ZAMBEZI (KAZA)** and has just appointed a new head of the Angola chapter. The Project involves Angola, Namibia, Botswana, Zambia and Zimbabwe. The *Peace Parks Foundation* is the appointed implementing agency. The initial MOU was signed in 2006 and the KAZA-TFCA was launched in March 2012. Over USD 50 million has been allocated to the Project mainly by Germany through the *KFW* and the Netherlands. The *World Bank* has been providing technical assistance. KAZA will be the world's largest trans-frontier park at 520 000 square kilometres or the size of France. A univisa initiative for visitors has just been launched.

**COMMERCIAL PROPERTY, CONSTRUCTION, HOTELS, LEISURE DEVELOPMENTS AND TOURISM-RELATED PROJECTS**

*(Projects in North Africa/Maghreb Countries are included in this section)*

The following are **COMMERCIAL PROPERTY DEVELOPMENTS** in the Palma area of northern Mozambique:

- The Palma Residences established by *African Century* is an apartment hotel with a few units, each comprising two rooms and two bathrooms plus a restaurant/bar and swimming pool. They currently have 12 units but will be adding 30 more units over the next 9 months.
- *African Century* is building a new business camp two kilometres away and the Palma Business Park that will include warehouses with water and power.
- The contractor, *Enteposto* is planning the construction of 115 apartments, a shopping centre and a bank.
- *Imnotourist* of Mozambique is building a 90-room hotel.
- The Palma Condominium built by a Spanish company has recently opened.
- A company from Malta, *Medi-Link* will be establishing life-support clinics.
- A *Toyota* garage will open.
- There are reports that a Kenyan and a Zimbabwean company are planning two new hotels.
- There are plans for an exclusive airport on the Afungi Peninsula

\*\* The planned **RIVERFRONT COMMERCIAL PROPERTY DEVELOPMENT** in Brazzaville on the Congo river will include a retail centre, hotels, offices, apartments, a market square and a tower plaza. A marina will cater for ferries and leisure craft. The Project is at an early stage and requires an economic feasibility study and urban design. A development agency

as well as a task team has yet to be established. The complex will effectively connect Brazzaville city to the river.

The Angolan Ministry of Hotels & Tourism is focussing on tourism development in Cuando Cubango Province in southern Angola within the context of the **CROSS-BORDER CONSERVATION AREA OF OKAVANGO-ZAMBEZI (KAZA)** and has just appointed a new head of the Angola chapter. The Project involves Angola, Namibia, Botswana, Zambia and Zimbabwe. The *Peace Parks Foundation* is the appointed implementing agency. The initial MOU was signed in 2006 and the KAZA-TFCA was launched in March 2012. Over USD 50 million has been allocated to the Project mainly by Germany through the *KFW* and the Netherlands. The *World Bank* has been providing technical assistance. KAZA will be the world's largest trans-frontier park at 520 000 square kilometres or the size of France. A univisa initiative for visitors has just been launched.

The **BAIA DE LAUNDA WATERFRONT PROJECT** is being developed on the Ilha in Luanda, Angola at a total cost including support infrastructure of USD 7 billion. Four plots on Luanda Bay are being developed for inter alia a five-star hotel and entertainment complex. Some dredging has been required to extend the land area. Companies involved include *Baia de Luanda SA* and *GENI Holdings*. A prestigious hotel management company is being sought. Three other construction Projects are underway near the bay.

**SPOTLIGHT ON AID AGENCIES, INTERNATIONAL DEVELOPMENT FINANCE INSTITUTIONS, FUNDS & SELECTED RELATED ORGANISATIONS**

The Delaware, USA-based **GLOBAL CLEARING HOUSE FOR DEVELOPMENT FINANCE (GobalIDF)** was established in 2010 and is anon-profit organisation committed to mobilising the private sector for development, advancement of economic growth, job creation, poverty reduction and the achievement of the *UN Millennium Development Goals*. Funders include the *United Nations*, the Swiss and Norwegian governments and the *Ford Foundation*. The financing for development tools developed by the organisation is being deployed to facilitate informed decision-making, improved business-enabling environments and dissemination of lessons learned.

## CONTACTS

### AIRLINE



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### AFRICAN CONTACTS

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### AFRICAN UTILITY CONTACTS

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Engineer *Netsanet Hussein* is the Project Manager for the Addis-Djibouti rail Project at the **ETHIOPIAN RAILWAYS CORPORATION (ERC)**. *Abebe Mihretu* is Head: Information & Public Relations, telephone Addis Ababa 251 11 6188136.

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#### **AFRICAN REGIONAL ORGANISATIONS**

The President of the Abidjan-based **ASSOCIATION OF POWER UTILITIES OF AFRICA (APUA/ASEA)** is *Tahar Laribi*, the CEO of **STEG** of Tunisia. The Secretary-General is *Abel Didier Tella* of Benin. The e-mail is [secgen@apua-asea.org](mailto:secgen@apua-asea.org)

#### **AFRICAN GOVERNMENT CONTACTS**

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The Provincial Director of Minerals and Energy of **TETE PROVINCE** in Mozambique is *Manuel Jose Sithole*, telephone 258 252 23015, e-mail: [sithole.manuel@gmail.com](mailto:sithole.manuel@gmail.com)

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#### **AGRICULTURE/AGRI-BUSINESS CONTACTS**

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#### **HOTELS/TOURISM/COMMERCIAL PROPERTY CONTACTS**

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*Mauro Philipe Martins* is Director: Business Development at **BAIA DE LUANDA** which is developing the commercial property Project of the same name in Luanda. He can be contacted through the website: [www.baiadeluanda.ao](http://www.baiadeluanda.ao)

#### **HEALTH SECTOR CONTACTS**

The Secretary of State for Health in **ANGOLA** is *Carlos Alberto Maseca*, telephone Luanda 244 222 339789 or 393579 or 391641.

#### **DONOR/DFI/FUND/ECA CONTACTS**

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#### **UNITED NATIONS/NGO CONTACTS**

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#### **DIPLOMATIC CORPS CONTACTS**

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#### **SOUTH AFRICAN GOVERNMENT & UTILITY CONTACTS**

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*Michael Mabuyakhulu* is MEC for Economic Development, Tourism & Environmental Affairs at the **KWAZULU-NATAL PROVINCIAL GOVERNMENT**, telephone 27 33 2642530, e-mail: [Michael.mabuyakhulu@kzned.gov.za](mailto:Michael.mabuyakhulu@kzned.gov.za)

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#### **BRICS/ASIA/AMERICA/EUROPE CONTACTS**

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#### **USEFUL WEBSITES**

A useful website for recent **ECONOMIC DEVELOPMENTS IN ANGOLA** is that of the official press agency, **ANGOP**; [www.portalangop.co.ao](http://www.portalangop.co.ao)

*Trade & Investment KwaZulu-Natal* has just launched its **KZN EXPORT INFORMATION PORTAL** on [www.exportkzn.co.za](http://www.exportkzn.co.za) Features include uploading of company profiles, products and services on a self-managed platform, trade enquiries routed to companies of interest, searches for exporters, freight forwarders, container depots etc, export tracking tools, product and sector fact

sheets, INCOTERMS, export journals, trade tariffs, country profiles and trade blocks, export councils and industry associations, and a calendar of export-related events.

**PROJECT-RELATED ACHIEVEMENTS AND/OR ACTIVITIES OF AFRICA PROJECT NEWSLETTER SUBSCRIBERS, ASSOCIATES AND CONTACTS**

GIS company and APA client, **GEOTERRA IMAGE** has produced

- South African Mining Footprint Statistics 2013-2014, Current & Abandoned Mining Activities in Spatial & Non-Spatial Format
- Surface Water Inventory for South Africa 2013-2014.

**Contact:** *Lorraine Bronkhorst*, telephone Pretoria 27 12 8079480, e-mail: [lorraine.bronkhorst@geoterraimage.com](mailto:lorraine.bronkhorst@geoterraimage.com)

**SDV BOLLORE SOUTH AFRICA** has launched a new regular Johannesburg-Lubumbashi-Johannesburg airfreight service undertaken by *Katanga Air Express*.

**GROUP FIVE** has established an artisanal training centre in Lubumbashi, DR Congo.

APA associate agri-industrial company, **CBM FARM FRESH** of Mozambique was recognised at the *Grow Africa Business Forum* as one of three companies with the potential to change farming in Africa. The other two companies were from Ghana and Malawi.

**TRAVEL NOTES**

The main hotels in **PEMBA, MOZAMBIQUE** are the *Nautilus* (around USD 150 per night including breakfast) and the *Pemba Beach* (special rate of USD 230 including breakfast.) There are a few much cheaper guest and diving lodges such as CI Divers Accommodation or Pete's Place.

Accommodation in **PALMA, NORTHERN MOZAMBIQUE** is very limited and bookings must be made well in advance. Limited accommodation is available at the *Palma Residences* for USD 300 per night (telephone 258 87655287, e-mail: [benjamin.ojeda@africancentury.co.mz](mailto:benjamin.ojeda@africancentury.co.mz) website: [www.palmaresidences.co.mz](http://www.palmaresidences.co.mz) Alternative accommodation could be found in Mocimboa de Praia some 70 kilometres away.

It is strongly advised that **ROAD TRAVELLERS TO PALMA** commence their return to Pemba by 14h00. The road between the two towns is good but there is a 40-kilometre stretch which is narrow and dangerous at night.

Mozambique road travellers are recommending **DRIVE MOZ** which is a network of drivers reporting on road conditions in Mozambique in real time. The *zello* app must be installed.

*Protea Hotels* is opening two **NEW HOTELS IN TAKORADI, GHANA AND KIGALI, RWANDA**, the *Protea Select Takoradi* and the *Protea Kigali*. Reservations: telephone Cape Town 27 21 4305000, e-mail: [reservations@proteahotels.com](mailto:reservations@proteahotels.com)

*Kenya Airways* has launched two new **LUXURY AIRPORT LOUNGES** at Jomo Kenyatta International Airport. The *Simba* and *Pride* lounges are on the second floor of terminal 1.A.

## FORTHCOMING EVENTS

*Inserts in bold, italics and larger font indicate participation by Africa Project Access:*

The ***MINING INDABA 2015*** will be taking place 9-12 February at the Cape Town Convention Centre.

**Contact:** website: [www.miningindaba.com](http://www.miningindaba.com)

***BREAKBULK AFRICA*** will be taking place 16-19 February 2015 at the Sandton Convention Centre, Johannesburg.

**Contact:** Nigel Brown, telephone 27 11 4777000, e-mail: [nbrown@breakbulk.com](mailto:nbrown@breakbulk.com)

***The AFRICA ENERGY INDABA 2015*** will be taking place 16-20 February 2015 at the Sandton Convention Centre. APA will be running an Energy Projects Roundtable on 19 February 2015. The event will feature the US-supported Power Africa Programme.

**Contact:** Emma Sayers, telephone Johannesburg 27 11 4639184, e-mail: [info@energyindaba.co.za](mailto:info@energyindaba.co.za)

The ***GHANA OIL & GAS SUMMIT*** will be taking place 21-23 April 2015 at the Accra International Conference Centre.

**Contact:** [ghanaeng@thecwcgroup.com](mailto:ghanaeng@thecwcgroup.com)

***The GAS AFRICA CONFERENCE*** will be taking place 23-24 June 2014 at the Maslow Hotel in Johannesburg.

**Contact:** Bette and telephone 27 11 2341196, e-mail: [events@mcnaughtonevents.co.za](mailto:events@mcnaughtonevents.co.za)

### AFRICA & THE GLOBAL ECONOMIC DOWNTURN

Despite disappointing results in South Africa, ***VODACOM*** registered a 13% growth in revenue from its operations in five other African markets including Mozambique, Tanzania and the DR Congo.

## WHISPERINGS – FOOTNOTES

### WHISPERINGS – FOOTNOTE 1

The Zimbabwean government is becoming increasingly impatient with **INDEPENDENT POWER PRODUCERS** who have had their Projects approved by the *Zimbabwe Energy Regulation Authority (ZERA)* and yet who have not begun implementing them. It is threatening to cancel some of the fifteen or so IPP's that would generate over 5 000 MW. The Projects include Lusulu (2 000 MW), Sengwa (2 400 MW), Sunlight (600 MW), Shangano (600MW) and Nyangani hydro. IPP's have responded by pointing out lack of policy clarity and the indigenisation laws.

### WHISPERINGS – FOOTNOTE 2

There is some debate around **AFRICA'S FAST-RISING POPULATION** and the negative effects this may have on the continent's future economic growth. If current demographic patterns continue for another 85 years, Africa would have 4,2 billion people compared with 1,1 billion today. There is also reference to urbanisation and the ability of African cities to cope with the increasing numbers. However, many African countries are currently establishing satellite cities such as Tatu City in Kenya, Kigamboni in Dar es Salaam and Cité du Fleuve that will partly relieve the congestion.

### WHISPERINGS – FOOTNOTE 3

**RESOURCE NATIONALISM** has reached new levels in Tanzania where to officials of the *Tanzania Petroleum Development Corporation (TPDC)* have been arrested for failure to reveal to parliament, oil and gas contracts signed with foreign and local investors. Civil society groups are pressing authorities for greater transparency and Tanzanian control over oil and gas resources.

### WHISPERINGS – FOOTNOTE 4

Our contacts in Tete, Mozambique report that the **TETE-NACALA RAIL LINE** will be officially inaugurated on 4 December 2014. The line should have a capacity of 20 million tons per annum and will provide some logistics relief for the export of coal from the Zambezi Valley. The alternative Sena line to Beira is inadequate at around 4 MTPA.

### WHISPERINGS – FOOTNOTE 5

A recent visit to **MOCIMBOA DE PRAIA** which is situated only 70 kilometres from Palma has confirmed that it could be a useful logistics supply point for the planned Rovuma Basin gas developments further north off Palma. The town has a port and an operational airport. The road to Palma is also in excellent condition. There are however plans for a new airport at Palma and the new port utility, *Portos de Cabo Delgado* is apparently only promoting ports in Pemba and

Palma. There are questions relating to the advisability of a new airport in Palma when the Mocimboa airport could perhaps suffice.

**WHISPERINGS – FOOTNOTE 6**

It was encouraging to recently hear the head of a South African steel fabricator explain that in order for his company to remain competitive in difficult times, they are undertaking a special programme to upskill their artisans on the basis of ISO and API standards. The company has a strong opportunity to assist the major oil and gas companies operating in Africa to meet the need for effective artisinal training for their projects. The oil and gas industries have particularly stringent requirements for example for skilled welders.

**WHISPERINGS – FOOTNOTE 7**

Potential investors await confirmation by the Tanzanian authorities as to the location of the **LNG PLANT** that will process gas from the Rovuma Basin. There have been media reports that the plant will be at Lindi, 100 kilometres north-west of Mtwara. The cost could reach USD 30 billion.

# QUOTABLE QUOTES

## **QUOTABLE QUOTES 1**

*“We want to work with the Chinese, but they must change.”*  
(The late President of Zambia, *Michael Sata*.)

## **QUOTABLE QUOTES 2**

*“For Angola, if you can import it, you can sell it.”*  
(Luanda businessman on the fact that Angola imports virtually everything.)

## **QUOTABLE QUOTES 3**

*“If we sneeze, our neighbours catch pneumonia.”*  
(South African businessman operating in Africa on the effect of the economic downturn in South Africa on neighbouring countries.)

## ***FURTHER INFORMATION & INDEMNITY***

***IN-DEPTH PROJECT INFORMATION  
IS AVAILABLE  
FOR THE FOLLOWING PROJECTS ABOVE  
MARKED \*\*  
(NO CHARGE FOR SUBSCRIBERS)***

- **Jatropha Biofuel & Biofertilizer Project in Northern Mozambique**
- **Commercial Property Projects in Palma, Northern Mozambique**
- **Youkou Iron Ore Project, Republic of the Congo**
- **Riverfront Commercial Property Development, Republic of the Congo**
- **Malaba-Kampala Rail Project, Uganda**

### **INDEMNITY**

**SOME OF THE INFORMATION CONTAINED IN THIS DOCUMENT IS OF A CONFIDENTIAL NATURE AND IS SUPPLIED TO SUBSCRIBERS ON THE UNDERSTANDING THAT CONTENTS WILL BE TREATED WITH APPROPRIATE DISCRETION. PLEASE NOTE THAT WHILE EVERY EFFORT IS MADE TO ENSURE THE ACCURACY OF THE INFORMATION CONTAINED IN THIS SPECIALISED PUBLICATION, NEITHER *AFRICA PROJECT ACCESS* NOR ITS AFFILIATE BODIES AND ASSOCIATES WILL BE HELD RESPONSIBLE FOR ANY LOSS OR INCONVENIENCE RESULTING FROM APPLICATION OF THIS INFORMATION.**