



# 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:***

**Pemba/Palma, Mozambique; 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, 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)

## *Project Developments in Central & Southern Angola*

In 2013, Angola's GDP grew an unexpectedly low 5,1% but a sharp rise is predicted for 2014 at 8% and almost 9% in 2015. It certainly has the potential to return to double digit growth. However, the recent sharp drop in the world price for oil constitutes a major constraint on growth. A 'windfall' budget based on the oil price is allocated to special Projects for example regional agriculture and these are likely to be curtailed.

Angola has a population approximating 22 million. Luanda Province accounts for some 30% with the other northern provinces taking a further 28% of this figure. The government spending generally correlates with Luanda receiving almost a third of the total budget. The oil-rich Cabinda however receives a disproportionately high 6% of budget.

Will the future see greater attention being paid to the central and southern provinces of Benguela, Bié, Cuando Cubango, Cunene, Huambo, Huila, Moxico and Namibe? The completion of the Lobito rail line by the Chinese should logically give impetus to a southward shift. This probability is enhanced by the resources of the centre-south including agriculture, potential power generation and mining resources such as the Cassinga iron ore deposits in Huila Province. There is imperative for Angola to reduce its over-dependence on oil (almost half of GDP) and boost production from other sectors. Agriculture and fisheries provides only 10% while mining stands at only 2% with diamonds dominating. Apart from Benguela, Huambo and Hula, the central and southern provinces are sparsely populated as a result of war and there are vast tracts of empty arable land.

The National Agricultural Programme initiated in 2013 entails the implementation of large-scale irrigation schemes, seed, equipment and fertilizer distribution largely

to the central and southern provinces. Some 605 000 hectares will be tilled and it is hoped that 500 000 tons of different crops will be produced. *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.

Huambo is the key trading centre in central Angola. There is much property development in the previously war-damaged town which was the original capital under colonial rule. The *Cimento e Tinto* (Cement and Paint) Programme entails assistance from the provincial government for the restoration of buildings and homes. Land is being allocated for housing for teachers, police etc. The Huambo area is also growing into a major agricultural zone. One South African supplier of irrigation equipment is supplying seven farms in the region. The *Agrarian Development Institute* is planning investment in a major rice production Programme in central Huambo Province.

The long-awaited USD 8 billion Lobito oil refinery has registered a little progress with the award of the FEED contract to *KBR* and civil works having commenced in December 2012. *Standard Chartered Bank* was appointed as the financial consultant.

Support infrastructure is also receiving attention. There are plans to open the isolated south-eastern province of Cuando-Cubango through the construction of five new airports capable of handling medium-size aircraft. There is a special Programme for the development of the previously-neglected Cuando-Cubango. The Cross-Border Conservation Area of Okavango-Zambezi (*KAZA*) initiative being implemented by Angola, Namibia,

Botswana, Zambia and Zimbabwe seeks to promote tourism to the province.

*APM Terminals* and *Sogester* of Angola are the concessionaires for the operation, maintenance and development of Namibe port. The duration of the concession is 20 years. 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. There are a number of hydro power Projects in the north of the area such as the 2 070 MW Lauca hydro and the 960 MW Cambambe hydro plants.

There are numerous commercial property and housing developments in the area. *Shoprite* has a major presence with 19 registered outlets earlier this year. Outlets are in Huambo, Lobito, Porto Amboim, Menongue and Ondjiva. The company plans to open stores in the capitals of all Angola's provinces.

Logistics remains a serious constraint for investors and operators. Luanda port is seriously congested and there has been little

news of progress on the proposed Barro do Dande port to the north of the capital. However, it is clear that Porto Amboim situated between Luanda and Lobito is being developed as an oil services alternate centre. Observers believe that major initiatives there should commence in 2017. Fabrication yards have already been established.

Operators report a sharp decline in cross-border trade activity in the Namibian border towns of Oshikango and Ondangwa. Goods from South Africa and Namibia destined for southern Angola have for years followed this route. Some believe that this is due to improved logistics and systems in Angola while others point to bans on imports in order to protect Angolan production.

There have been some recent improvements relating to business conditions in Angola. An example is new regulations which permit importers and exporters to receive and send amounts not exceeding USD 3 million through their commercial banks instead of the central bank. There is no appointed nation-wide pre-shipment inspection agency.

## **ADDITIONAL SERVICES**

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

*The following are APA's PLANNED GROUP VISITS FOR 2015 (subject to change):*

- *15-19 March: Visit to Kampala and Lake Albert, Uganda*
- *25 June: Visit to Saldanha Bay Port, Western Cape*
- *13-19 September: Accra and Takoradi Port, Ghana*
- *28-29 October: Visit to Mining and Oil Companies Offices in Gauteng*

*26 October to 1 November 2014, Africa Project Access led a large GROUP VISIT TO PEMBA AND PALMA, NORTHERN MOZAMBIQUE. There were twenty-six delegates. The visit included meetings with Anadarko, Halliburton and site visits to industrial parks in Pemba and Palma as well as port inspections.*

*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 Monday 10 November 2014 and covered the findings of the APA group visit to Pemba and Palma, Mozambique. A panel of clients from various sectors presented their impressions.*

*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 November-December 2014 edition of the London-based publication, AFRICA INVESTOR carries articles on private equity in Africa, an IFC view of development in Africa, President Mahama of Ghana, monocline insurance, the impact of Ebola and the development of malls in the continent. Paul Runge of APA has a regular projects feature in the publication, "In The Pipeline."*

*The May/June 2014 edition of AFRICAN TRADER carries articles on the Zimbabwean economy, the curse of natural resources, PPC's expansion into Africa, solar-powered irrigation, the potential of Nigeria and African agri-business activity.*

## 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)

**Templates including contact details of the projects below will follow in the Africa Project Access Database in approximately 7 days.**

### ANGOLA

Development of **PORTO AMBOIM** situated in Kwanza Sul Province between Luanda and Lobito (about 220 kilometres south of Luanda) as a major oil and gas logistics base is likely to take off in 2017. *Sonangol* and *Esso* are developing large offshore oil deposits in the vicinity and this will contribute to the town's growth. *Paenal* (joint venture of Sonangol) and *Heerema* have established two major fabrication yards in Porto Amboim. Africa's largest crane capable of lifting cargo up to 2 500 tons and designed by a Japanese company was installed in 2013 in the port. *Gauff Engineering* is preparing a water supply system for the town. The development will relieve congestion at Luanda port.

Civil works for the **SONAREF LOBITO OIL REFINERY** situated 8 kilometres north of Lobito began in December 2012. *Standard Chartered Bank* was appointed as the financial consultant. In 2009, *KBR* won the license contracts. The capacity of the plant will be 200 000 barrels per day. The budget has not been finalised but USD 8 billion has been the estimated cost. The Project has experienced considerable delays although *Sonangol* now gives the date of commissioning as 2017/18. *Sinopec* of China withdrew from the Project.

Work on the **CABINDA DEEPWATER PORT** in Cabinda, Northern Angola is expected to start in June 2015. The construction period is one year. *Caio Porto* won the construction contract and has begun site clearance. The port will be developed in three phases with the first comprising a commercial wharf wall, a breakwater, ship repair facilities and an access canal. The first phase will cost USD 600 million. The Ministry of Transport is promoting the Project. It is unclear as to the extent to which Angolan Projects will be affected by the sharp drop in the world price for oil.

### CAMEROON

Construction of support transport infrastructure for the **MABALAM-NABEBA IRON ORE PROJECT** is expected to begin in 2016. The two mines are on the Cameroon/Congo Republic border with Mbalam in Cameroon and Nabeba in the Congo Republic. The intention is to construct a 500 kilometre rail line linking the Cameroon mine to a 35 million tons per annum deepwater minerals handling port terminal at Lolabé. Nabeba will be linked through a 70 kilometre link rail line. The terminal will also be fed by other iron ore mines in the area. The cost of the infrastructure is estimated at USD 3,5 billion. The mines are being developed by *Sundance Resources* of Australia. *Mota Engil* of Portugal has been appointed as the EPC contractor. The realisation of the iron ore potential of central Africa depends on support transport infrastructure.

The Ministry of Economy and Planning and the *Eximbank of Korea* have concluded an agreement for the construction and equipment of the **GAROUA HOSPITAL** in the North Region of Cameroon. The double-storey hospital will have 290 beds. The duration is estimated at 42 months. The cost is estimated at 42,5 billion CFA. The Cameroon government will also contribute financially. The Ministry of Health is the implementing agency. The objective is to provide medical facilities outside of the main areas of Douala and Yaoundé.

### CONGO (DEMOCRATIC REPUBLIC)

A combination of funders have raised USD 135 million for the **NYUMBA AKIBA (LUCKY CEMENT) PROJECT** at Songololo in the Kimpese area of Bas Congo Province. The total cost of the Project is estimated at USD 270 million. The lead funder is the *African Development Bank (AfDB)* with a contribution of USD 60 million. The others are the *International Finance Corporation (IFC)*, *Habib Bank* and the *Emerging Africa Infrastructure Fund*. The Project is held 50-50 by *Lucky Cement Limited* of Pakistan and the *Groupe Rawji* of the DR Congo. The plant will add 1,18 million tons in cement supply capacity. The country is experiencing a serious shortage of cement in the face of greatly increased construction activity. Local production is inadequate and the imported cement is expensive.

### CONGO (REPUBLIC)

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### COTE D'IVOIRE

*China Eximbank* has approved a loan of 460 billion CFA for the **ABIDJAN PORT EXTENSION PROGRAMME**. The funds will be used to widen and deepen the Vridi canal that will permit the berthing of 25 000 to 50 000 ton vessels as well as for the construction of container terminal and a ro-ro terminal. Operations are expected to begin in early 2015 with completion of all phases expected by 2021. A consortium led by *Bolloré* of France will undertake other port improvements. The implementing agency is the *Port Autonome d'Abidjan*. Abidjan port is a major entry point for imports to the land-locked countries of the hinterland.

### EQUATORIAL GUINEA

*MAECI* of the USA is working on the **ANNOBON ISLAND SOLAR MICRO-GRID SYSTEM PROJECT**. The Project will produce 5 MW of power to the population of 5 000 who have depended on the erratic supply of diesel-generated electricity. Also involved are *Wise Power International Systems*, *Princeton Power Systems* and *Eaton* which is providing the electrical engineering services and the power distribution equipment. The Project falls under the National Economic Development Plan – Horizon 2020.

### ETHIOPIA

The Ethiopian government is implementing major **NATIONAL INDUSTRIAL ZONES PROGRAMME**. A new industrial park is being developed over an area of 243 hectares at Kilinto south of Addis Ababa. The cost of this Project is around USD 250 million. The existing 156-hectare Bole Lemi industrial park on the outskirts of the capital is being expanded at a cost of USD 128 million. A loan from the *World Bank* is being utilised for the two parks. A Special Economic Zone (SEZ) is being established at Dire Dawa and three manufacturing hubs will be established in various parts of the country. The launch of

Ethiopia's Eurobond has been successful and has raised about USD 1 billion much of which will be devoted to power generation.

*Tracon Trading* of Ethiopia and the *Al Ghurair Group* of Dubai are partnering for the construction of an **ALUMINIUM PRODUCTION PLANT** on a 30 000 square metre plot in Addis Ababa. Production capacity will be between 25 000 and 30 000 metric tons. The plant is expected to begin producing in a year. The estimated cost is USD 50 million. Production will later be exported to the region. The Project is being supported by the Ministry of Trade.

*Power Africa* of the USA has appointed a transaction advisor to ease implementation of the **CORBETTI GEOTHERMAL POWER PLANT** in southern Ethiopia. Initial studies have been completed but the Project needs to overcome technical and financial challenges and the Ethiopian authorities are still busy with a suitable framework. This would be the country's first independent power producer (IPP). The *African Legal Support Facility* sponsored by the *African Development Bank (AfDB)* is assisting. The Project is being implemented by *Reykjavik Geothermal* of Iceland with its local company, *Corbetti Geothermal*. The first phase entails a 500 MW plant ramping up in phase two to 1 000 MW. A 25-year power purchasing agreement with the *Ethiopian Electric Power Corporation (EEPCO)* is envisaged. The total cost is about USD 4 billion. Other parties involved include the *European Union-Africa Infrastructure Fund*, *KFW* of Germany, *Rift Valley Geothermal*, the *Blackstone Group* and the *Geological Survey of Ethiopia* as well as the ministries of finance and energy.

#### GHANA

The *International Atomic Energy Agency (IAEA)* has reportedly approved the development of a **NUCLEAR POWER PLANT** in Ghana. The 1 000 MW plant would cost about USD 2,5 billion and the construction period would be about ten years. The government has adopted a Nuclear Power Programme and the Nuclear Regulatory Power Bill is being considered in parliament. Parties involved are the Ministry of Energy, the *Electricity Company of Ghana*, the *Ghana Atomic Energy Commission* and the *School of Nuclear and Allied Sciences* at the University of Ghana. The Programme is being questioned by the *Africa Centre for Energy Policy*. Some are concerned about a possible involvement of *Rusatom*, the Russian contractor specialising in nuclear plants. Ghana has for long experienced a severe shortage of electricity.

#### KENYA

The *Kenya Ports Authority (KPA)* will be appointing a private concessionaire for the **SECOND MOMBASA PORT TERMINAL** in March 2016. The concessionaire will operate two berths at the terminal. It is currently under construction. The cost is about USD 300 million. The intention is to achieve 450 000 TEU's by 2016 and 1,2 million TEU by 2019. It is estimated that the port will have handled 25 million tons in 2014.

#### MAURITIUS

New efforts are being undertaken by the Mauritian Ministry of Environment to begin implementation of the **NATIONAL ECO-VILLAGES PROGRAMME**. The Programme was approved by the government in 2010. The original intention was to develop nine eco-villages over three years. It was thereafter decided to complete two eco-village pilot Projects at Panchvati and Pointe-aux-Piments. A foreign donor is reportedly involved and a foreign investor will be sought. The Project falls under the International Climate Protection Initiative.

## MOZAMBIQUE

*Savannah Resources plc* of the UK is developing the **JANGAMO MINERAL SANDS PROJECT** in Inhambane Province in southern Mozambique. It is working on five mineralised zones for the production of ilmenite, rutile and zircon as well as other elements including uranium. The concession covers an area of 180 square kilometres. A scoping study is underway. The Project is benefiting from close proximity to roads, power and access to the sea.

The Provincial Director for Public Works and Housing of Cabo Delgado Province, *Dino Coutinho* has stated that the upgrade and tarring of the key **MONTEPUEZ-RUASSA ROAD** linking Cabo Delgado and Niassa Provinces in northern Mozambique should be completed by September 2015. Fifteen kilometres have already been tarred. The 60-kilometre Montepuez-Balama road has been completed. The implementing agency is the *Agencia Nacional de Estradas (ANE)*. The Mozambican authorities are prioritising road developments in northern Mozambique to support the new gas industry there.

The *National Petroleum Institute* of Mozambique has launched a tender for fifteen new **OIL AND GAS BLOCKS**. The concessions cover an area of 76 800 square kilometres. They include three offshore concessions in the Rovuma Basin off Cabo Delgado Province, the offshore concessions off the Angoche area of Nampula Province, six in the Zambezi Basin, three on the mainland in the Pande/Temane areas and a concession in Palmeira, Gaza Province in the south. The results of the tender are scheduled for publication on 20 January 2015. The implementing agency is the national oil and gas utility, *ENH*.

## NAMIBIA

\*\* Approximately USD 15 million is required for exploration and drilling at the **DICKER WILLEM AND KEISHOEHE RARE EARTH, PRECIOUS METALS AND STONES DEPOSITS** in southern Namibia. The Dicker Willem site covers 4 500 hectares while the Keishoehe site covers 16 700 hectares. *Bonya Resources* is the operator. The licenses have been acquired and the environmental clearance and geophysical studies have been completed. Final reports are expected in 2016. The sites are situated close to transport and power links with Lüderitz port.

Rehabilitation work at **ONDANGWA AIRPORT** in northern Namibia is scheduled to commence in early 2015. The runway will be rehabilitated to take *Embraer 135* aircraft and a new turning pad constructed. The Project forms part of the 2014-2017 Strategic Plan of the *Namibia Airports Company (NAC)*. Ondangwa and nearby Oshakati are strategic points for trade with southern Angola.

## SAO TOME & PRINCIPE

\*\* USD 10 million is required for basic infrastructure for the completion of the **LAGOA AZUL COMMERCIAL PROPERTY DEVELOPMENT** on Sao Tome island. The Project is under development over an area of 300 hectares. There are 1 500 plots. The Project includes a 185-room hotel. Prefabricated housing will be imported from South Africa.

## SIERRA LEONE

*Cape Lambert Resources* of Australia was recently granted a license by the *Minerals Advisory Board* for the implementation of the **MARAMPA IRON ORE PROJECT** situated in western Sierra Leone. *Timis Mining Corporation* is arranging to purchase the rights from *Cape Lambert*. The environmental impact assessment was completed in 2013. The associated *African Minerals* has reportedly begun shutting down its operations in Sierra Leone due to lack of working capital.

### 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.*

It is reported that the 45 MW **SISHEN SOLAR PV PLANT** near the town of Kathu in the Dibeng area of Northern Cape Province is now connected to the national grid. The main developer, *Acciona Energy* of Spain together with South African partners, *Aveng* and the BEE company, *Soul City Institute* have concluded a 20-year Power-Purchase Agreement with *Eskom*. The Project was awarded by the Department of Energy under its *Independent Power Producers Renewable Bid (IPP REBID)* Programme. The developers have established a local community trust.

### SOUTH SUDAN

The *African Development Bank (AfDB)* has approved a grant under the **POWER DISTRIBUTION SYSTEM REHABILITATION & EXPANSION PROJECT** for power distribution networks in three urban areas of Juba Province. The initiative includes capacity-building Programmes at the *South Sudan Electricity Corporation (SSEC)*. Included are transmission lines, transformer stations and pre-paid meters. The value of the grant is USD 26 million. Only a very small percentage of the population has access to the electricity from the grid.

### SWAZILAND

*Aurecon Consulting Engineers* of South Africa are reportedly the appointed Project managers for the planned five-star international hotel and convention centre called the **KING MSWATI III HOTEL AND CONVENTION CENTRE** situated in the Ezulwini Valley near Mbabane, Swaziland. The cost is reported to approximate R1 billion. According to local observers, *Bicon Consulting Engineers* of Mbabane are the local partners.

### TANZANIA

The *Tanzania Horticulture Association (TAHA)* and the government of Finland are developing a **HORTICULTURE PROJECT** on the Zanzibar islands. The 3-year Project includes a cold storage facility in Unguja. Approximately 8 000 small farmers are involved. The value is estimated at just under one million USD. The natural offtakers are the numerous hotels and tourism lodges on the islands. The Project is supported by the Ministry of Agriculture and Natural Resources.

There are a number of coal-to-power initiatives in the **RUKWA COAL FIELDS** situated near Mbeya in south-western Tanzania on the Mtwara Development Corridor. *Kibo Mining* is planning a 300 MW mine-mouth *Edenville Energy* is planning a 100 MW coal-to-power Project in its concession area. The first phase mining feasibility studies have been completed. The Projects are close to established transport infrastructure.

### UGANDA

The Ugandan authorities through the Ministry of Energy have delayed the announcement of the lead investor for the **OIL REFINERY** to handle production from the Lake Albert fields in western Uganda. In June 2014, they selected two consortia each led by the *SK Group* of South Korea and *RT-Global Resources*

of Russia. Implementation will be on the basis of a Public-Private-Partnership (PPP). The government is formulating an incentive package. The estimated cost of the Project is USD 2,5 billion. It includes the refinery and storage facilities in Hoima, a terminal near Kampala linked to a 205-kilometre pipeline.

#### ZAMBIA

\*\* The **LAKE BANGWEULU FISH CAGE FARMING PROGRAMME** in the Luapula and Northern Provinces of Zambia is registering some success. *Kambashi Bream Fisheries* reports a production of 10 000 bream fish stock from its operation on Chilubi Island on the lake. The Ministry of Agriculture as well as the Luapula Province authorities are promoting new fish farming Projects in the southern end of Lake Bangweulu. The annual national demand for fish is 120 000 tons but the country is only producing around 70 000 tons.

A pilot Project for the national **IRRIGATION DEVELOPMENT & SUPPORT PROGRAMME (IDSP)** will cover 5 000 hectares. The Programme will support 1 300 smallholder farmers on three sites: Chibombo in Central Province, Siavango in Southern Province and Mufulira in Copperbelt Province. It entails dams, canals and irrigation systems and includes road construction and housing. The total value of the Programme is USD 190 million with funding mainly from the *World Bank* but also via the Ministry of Agriculture and Livestock. Zambia hopes to increase national crop production by 60%.

#### ZIMBABWE

The tender for the **NATIONAL SMART METERING PROGRAMME** closes on 20 January 2015. It is being issued by the *Zimbabwe Electricity Transmission & Distribution Company (ZETDC)* of *ZESA Holdings*. The estimated value is USD 100 million. The Project includes a central data management system. Numerous companies have responded to the tender but front runners include *Solahart* and *Finmark*. Five companies will be shortlisted. The Programme will permit companies and individual customers to budget for their power expenditure.

*Premier African Minerals* will be installing a processing plant to start production at its **RHA TUNGSTEN MINE** situated near Hwange, Matabeleland, North-Western Zimbabwe. The cost of the plant is around USD 2 million. The mine has an approximate capacity of 200 000 tons. It is held jointly by *Pan African Minerals* through its local subsidiary and the *National Indigenisation & Economic Empowerment Fund (NIEEF)* which has 51%.

#### REGIONAL

Construction of support transport infrastructure for the **MABALAM-NABEBA IRON ORE PROJECT** is expected to begin in 2016. The two mines are on the Cameroon/Congo Republic border with Mbalam in Cameroon and Nabeba in the Congo Republic. The intention is to construct a 500 kilometre rail line linking the Cameroon mine to a 35 million tons per annum deepwater minerals handling port terminal at Lolabé. Nabeba will be linked through a 70 kilometre link rail line. The terminal will also be fed by other iron ore mines in the area. The cost of the infrastructure is estimated at USD 3,5 billion. The mines are being developed by *Sundance Resources* of Australia. *Mota Engil* of Portugal has been appointed as the EPC contractor. The realisation of the iron ore potential of central Africa depends on support transport infrastructure.

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

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

\*\* USD 10 million is required for basic infrastructure for the completion of the **LAGOA AZUL COMMERCIAL PROPERTY DEVELOPMENT** on Sao Tome island. The Project is under development over an area of 300 hectares. There are 1 500 plots. The Project includes a 185-room hotel. Prefabricated housing will be imported from South Africa.

*Aurecon Consulting Engineers* of South Africa are reportedly the appointed Project managers for the planned five-star international hotel and convention centre called the **KING MSWATI III HOTEL AND CONVENTION CENTRE** situated in the Ezulwini Valley near Mbabane, Swaziland. The cost is reported to approximate R1 billion. According to local observers, *Bicon Consulting Engineers* of Mbabane are the local partners.

The Ethiopian government is implementing major **NATIONAL INDUSTRIAL ZONES PROGRAMME**. A new industrial park is being developed over an area of 243 hectares at Kilinto south of Addis Ababa. The cost of this Project is around USD 250 million. The existing 156-hectare Bole Lemi industrial park on the outskirts of the capital is being expanded at a cost of USD 128 million. A loan from the *World Bank* is being utilised for the two parks. A Special Economic Zone (SEZ) is being established at Dire Dawa and three manufacturing hubs will be established in various parts of the country. The launch of Ethiopia's Eurobond has been successful and has raised about USD 1 billion much of which will be devoted to power generation.

New efforts are being undertaken by the Mauritian Ministry of Environment to begin implementation of the **NATIONAL ECO-VILLAGES PROGRAMME**. The Programme was approved by the government in 2010. The original intention was to develop nine eco-villages over three years. It was thereafter decided to complete two eco-village pilot Projects at Panchvati and Pointe-aux-Piments. A foreign donor is reportedly involved and a foreign investor will be sought. The Project falls under the International Climate Protection Initiative.

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

*DfID* of the UK has announced additional funding of 6 million British Pounds for the **MOBILE FOR DEVELOPMENT UTILITIES PROGRAMME**. It is in partnership with *GSMA* which represents mobile operators throughout the world. The Programme provides seed funding for utilities and NGO's for utility service provision in developing countries. It also provides research and innovation grants. The emphasis is on the power and water supply sectors. The total funding for the Programme now stands at 10 million British Pounds.

The *Industrial Development Corporation (IDC)* of South Africa has a **TECHNOLOGY VENTURE CAPITAL FACILITY** that provides equity funding for start-up technology-focused South African businesses. Funding of up to R40 million per Project is provided.

The **AFRICAN DEVELOPMENT BANK (AfDB) REGIONAL INTEGRATION POLICY & STRATEGY 2014-2023** will be supporting intra-African trade through developing larger and more investment-friendly markets and linking land-locked countries. The harmonisation of regional policies and regulations will be a focal point. From 2015, the bank will begin preparing new regional integration strategy papers.

The Nigeria-based **TONY ELUMELU ENTREPRENEURSHIP PROGRAMME** has been announced by the *Tony Elumelu Foundation*. The USD 100 million Programme will provide business skills training courses to budding African entrepreneurs as well as seed finance.

The **RENEWABLE ENERGY POLICY NETWORK FOR THE 21<sup>ST</sup> CENTURY (REN21)** is an initiative supported by the *United Nations Environment Programme (UNEP)* which tracks the development of renewables worldwide. It works with regional partners such as *ECOWAS*. It publishes Global Status Reports on renewable energy developments.

**Note:** See “UN/NGO Contacts” below.

## CONTACTS

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#### **AFRICAN GOVERNMENT CONTACTS**

The following are senior officials in **AFRICAN MINISTRIES OF AGRICULTURE**:

- Tanzania: *Sophia Kaduma*, Permanent Secretary, telephone 255 22 2862480/1.
- Kenya: Dr *Romano Kiome*, Permanent Secretary, telephone 254 20 718870
- Nigeria: *Ibukun Odusote*, Permanent Secretary, telephone 234 9 31415458, e-mail: [ibukun@ibukunoduspte.com](mailto:ibukun@ibukunoduspte.com)

#### **ICT/TELECOMMUNICATIONS CONTACTS**

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

The contact details for the **AGRARIAN DEVELOPMENT INSTITUTE (IDA)** of Angola are telephone Luanda 244 222 335001 or 321446 or 323326.

*Charles Taffs* is CEO of the Harare-based specialised consulting firm, **AFRICA FARMING SOLUTIONS (AFS)**, e-mail: [africaconsult@gmail.com](mailto:africaconsult@gmail.com) The firm is a grouping of African agriculture specialists who have joined to provide practical solutions for African agricultural systems. Their services include market and financial linkages, economic hub development, mentor schemes, environmental solutions and placements. *Charles* is also President of the *Commercial Farmers Union (CFU)* of Zimbabwe.

The following are senior officials in **AFRICAN MINISTRIES OF AGRICULTURE**:

- Tanzania: *Sophia Kaduma*, Permanent Secretary, telephone 255 22 2862480/1.
- Kenya: Dr *Romano Kiome*, Permanent Secretary, telephone 254 20 718870
- Nigeria: *Ibukun Oduote*, Permanent Secretary, telephone 234 9 31415458, e-mail: [ibukun@ibukunoduspte.com](mailto:ibukun@ibukunoduspte.com)

*Mamoudou Diallo* is the Representative in Angola, for the **FOOD AND AGRICULTURAL ORGANISATION (FAO)** of the *United Nations*, e-mail: [fao-ao@fao.org](mailto:fao-ao@fao.org)

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

*Sisay Gemechu* is the newly-appointed Chief Executive Officer at the **ETHIOPIAN INDUSTRIAL PARK DEVELOPMENT CORPORATION (IPDC)**, telephone Addis Ababa 251 11 5517020. It falls under the ministry of trade and industry.

*Jonathan Zink* is Managing Director at the **BURBA HOTEL NETWORK (BHN)**, telephone 1 714 6409300, e-mail: [zink@burba.com](mailto:zink@burba.com) The company is undertaking the *BHN* Hotel Investment Survey and will publish the results in its *Hotel Investment Outlook*. A donation to charity will be made by *BHN* for each response.

#### **HEALTH SECTOR CONTACTS**

*Melanie Da Costa* is Chairperson at the **HOSPITAL ASSOCIATION SOUTH AFRICA (HASA)**, telephone Johannesburg 27 11 7846828, e-mail: [contact@hasanet.co.za](mailto:contact@hasanet.co.za)

Dr *Kwame Anim Boamah* is Medical Director at the **KOFORIDUA REGIONAL HOSPITAL** in Ghana, telephone 233 34 202311. The hospital has recently introduced an electronic folder (e-folder) system.

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

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

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

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#### **USEFUL WEBSITES**

The *Power Africa Working Group* of the *US Corporate Council on Africa* has recently initiated the **POWER AFRICA/TRADE AFRICA WEB PORTAL** that will facilitate collaboration on the power sector in the continent.

**Contact:** e-mail: [mwarner@africacncl.org](mailto:mwarner@africacncl.org)

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

*NEDBANK CAPITAL* has entered into a mining sector research-sharing agreement with the *Canadian Imperial Bank of Commerce (CIBC)* and the latter's *Equity Research Group* which monitors mining stocks.

*EATON* will be supplying the electrical engineering services and power distribution equipment for the Annobon Island Electrification Project in Equatorial Guinea.

**TRAVEL NOTES**

There are a number of options for **HOTELS IN LUBANGO**, southern Angola:

- *Casper Lodge* (highly rated situated some 20 minutes from the airport)
- *Pululukwa Resort* (comprising bungalows in a game reserve)
- *Serra de Chela Hotel*
- *Hotel Lubango*
- *Grand Hotel* (large but old and in need of renovation.)

**SOUTH AFRICAN AIRWAYS (SAA)** is increasing its flights in to Africa. The increases in flights from Johannesburg are: Maputo (17 to 21 per week), Harare (18 to 19), Kinshasa (6 to 7), Mauritius (9 to 10).

Business travellers to **MOGADISCO, SOMALIA** often hold their meetings at the airport for security reasons. A recent suicide bombing near the airport entrance will mitigate against this practice.

## FORTHCOMING EVENTS

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

The **LUBANGO INTERNATIONAL BUSINESS FORUM** in southern Angola is being promoted by the Huila provincial government and will be held during 2015. The theme will be “Angola Invests”. Dates and details have yet to be conformed.

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.

**Website:** [www.breakbulk.com/africa](http://www.breakbulk.com/africa)

**Receive 10% VIP Guest Discount as an APA Subscriber.**

**For registration assistance in Africa, please contact Jennifer Hodge via phone at +27 11025 8799 or via email at [jennifer@msqddesign.co.za](mailto:jennifer@msqddesign.co.za) Monday – Friday 08:30 – 17:00 SAST.**

**For registration assistance outside of Africa, please contact Joanna Lenck via phone at +1 201 653 0957 or via email at [events@breakbulk.com](mailto:events@breakbulk.com) Monday – Friday 9:00 AM – 5:00 PM EST.**

**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 Afrika Verein of Germany is organising a conference **MANAGING RISK IN AFRICA** in Munich on 25 February.

**Contact:** Pieter Bouwer, Afrika Verein, telephone 49 15110374094, e-mail: [bouwer@afrikaverein.de](mailto:bouwer@afrikaverein.de) website: [www.afrikaverein.de](http://www.afrikaverein.de)

**NUCLEAR AFRICA 2015** conference and exhibition will be taking place 18-20 March 2015 in Midrand.

**Contact:** Carol van Niekerk, telephone Pretoria 27 12 8073920, e-mail: [exec@nuclearafrica.co.za](mailto:exec@nuclearafrica.co.za)

The SA Electrotechnical Export Council (SAEEC) is organising a **BUSINESS MISSION TO ETHIOPIA AND SOUTH SUDAN** 23-27 March 2015.

**Contact:** Chiboni Evans, SAEEC, telephone Johannesburg 27 11 3150209, e-mail: [chiboni@saeec.org.za](mailto:chiboni@saeec.org.za)

The **EAST AFRICA PROPERTY INVESTMENT SUMMIT** will be held 15-16 April 2015 at the Villa Rosa Kempinski Hotel in Nairobi.

**Contact:** Muhammad, telephone 27 828550009, e-mail: [Muhammad@apisummit.co.za](mailto:Muhammad@apisummit.co.za)

**The ONSHORE GAS AFRICA CONFERENCE** will be taking place 21-22 April 2015 at the Radisson Blu Gautrain Hotel in Sandton.

**Contact:** Diana Lauzi or Renu Kannu, telephone 61 2 90804193, e-mail: [renu.kannu@informa.com.au](mailto:renu.kannu@informa.com.au)

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

## **AFRICA & THE GLOBAL ECONOMIC DOWNTURN**

The *African Development Bank (AfDB)* estimates that **AFRICA'S MIDDLE CLASS** has been growing 3,2% since 1983. It also estimates the current number of middle class Africans to be around 300 million. However, 150 million of these are considered "floating" in that adverse developments could see them drop from the middle class ranking.

## WHISPERINGS – FOOTNOTES

### WHISPERINGS – FOOTNOTE 1

The sudden fall in the oil price is bound to have a particular effect on the **ANGOLAN ECONOMY**. It retains an oil price-based ‘windfall’ budget that is used for special Projects for example, agricultural Programmes. These Projects are now likely to be curtailed. Much of Angola’s oil is deepwater and the costs of extraction are relatively high. Nevertheless, the Angolan sovereign wealth fund has indicated that it is reserving USD 1,6 billion for infrastructure and hotel Projects in sub-Saharan Africa.

### WHISPERINGS – FOOTNOTE 2

Operators report a considerable drop in trade activity in the **OSHIKANGO-ONDANGWA** towns in northern Namibia with regard to their status as a logistics base for supply into southern Angola. There is a view that the Angolans have improved their own supply systems and are now less reliant on imports through their southern neighbour.

### WHISPERINGS – FOOTNOTE 3

Supply of **ELECTRICAL POWER TO SOUTH AFRICA** from neighbouring countries is complicated by the question as to which party (South African or neighbour) takes most of the risk? This may account for the delay to the proposed *STE* transmission line from the Zambezi Valley in Mozambique. Already power from Cahora Bassa is perceived to be particularly unreliable.

### WHISPERINGS – FOOTNOTE 4

The **INTERNATIONAL FINANCE CORPORATION (IFC)** of the *World Bank* group has produced a number of useful guides for the formulation of business plans and Project proposals. Environmental agencies follow the environmental guidelines for Project development.

### WHISPERINGS – FOOTNOTE 5

Tourism in Kenya will be greatly boosted when the country hosts the first **WORLD TRADE ORGANISATION (WTO) MINISTERIAL SUMMIT** to be held in sub-Saharan Africa. More than 6 000 delegates from 160 member countries will be visiting.

### WHISPERINGS – FOOTNOTE 6

*ExxonMobil* has stated that it will be able to cope with the recent sharp **FALL IN THE WORLD OIL PRICE**. However this does raise the question of whether the oil independents or juniors will be able to maintain themselves.

### WHISPERINGS – FOOTNOTE 7

Progress is being made with regard to exploitation of the **ROVUMA BASIN LNG DEPOSITS**. Mozambique announced its Gas and Petroleum Act on 25 November 2014 and *ENI* and *Anadarko* will now

submit their development plans. The Act provides the legal and fiscal framework required by these investors. In Tanzania, the government has announced that the 517-kilometre Mtwara-Dar es Salaam gas pipeline built by *China Petrol & Technology Development Company* will be feeding gas for power generation in January 2015.

#### **WHISPERINGS – FOOTNOTE 8**

The launch of the **ETHIOPIAN EUROBOND** has been successful and has raised about USD 1 billion. The funds will be used mainly for power generation, development of the sugar industry and stimulation of the textile sector. The country is registering an annual growth rate of around 9%.

#### **WHISPERINGS – FOOTNOTE 9**

There is much current debate around the **STATUS OF GAUTENG AS A GATEWAY TO THE REST OF AFRICA**. Detractors justifiably refer to Dubai as a growing supply base into the continent. The *Africa Project Access* experience is however that European, Asian and American companies are increasing allocating the responsibility for growing their African business to their affiliates and partners in South Africa.

#### **WHISPERINGS – FOOTNOTE 10**

The Thai state energy company, *PTT Exploration & Production (PTTEP)* has stated that it will be making substantial investments in Mozambique's LNG sector. The company has a stake of 8,5% in *Anadarko's* LNG Project in northern Mozambique and will be purchasing liquefied gas from the producer. This is an example of the increased **ROLE OF OFFTAKERS** in the realisation of the Projects that will benefit them. An agreement has also recently been signed in New Delhi with India for the future receipt of Mozambican LNG.

# QUOTABLE QUOTES

## **QUOTABLE QUOTES 1**

*“If we rely on the South African market, we would be going backwards.”*  
(Mike Upton, outgoing CEO of Group Five.)

## **QUOTABLE QUOTES 2**

*“The stupid easy money is over.”*  
(Experienced operator in Angola on the need for more than just good political connections but also appropriate skills and abilities to achieve business in the Angolan market.)

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

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

- **Development of *Lagoa Azul* Commercial Property Development, Sao Tome**
- **Fish Farming in Luapula Province, Zambia**
- **Dicker Willem & Keishoeh Rare Earths Project, Namibia**

### **INDEMNITY**

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