



# 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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# Editorial

## *The North-South Corridor Progress Report Part 1*

*Africa Project Access and Whitehouse Associates were contracted by the Built Environment Professions Export Council (BEPEC) of South Africa to investigate opportunities arising from the North-South Corridor Programme. Our last presentation to BEPEC members was at the end of 2011 and this is an update on developments relating to the Corridor since that date.*

### Introduction

The North-South Corridor is a concept and Programme rather than a specific Project. Its objectives are to reduce the high costs of intra-African trade in southern Africa by improving transport logistics infrastructure and inland connectivity. The handling of a 20-foot container in Africa costs around USD 2 000 compared to less than USD 1 000 in Asia.

There is considerable emphasis on one-stop border posts. The initiative also entails stimulation of local industry and beneficiation of local production. Development nodes have been identified along the route.

The geographic context of the North-South Corridor is a main line extending from Gauteng to Dar es Salaam passing through Botswana, Zimbabwe, Zambia, Katanga in the DR Congo, Malawi and Tanzania. This is the 'spine' and the 'ribs' feeding into the main line include the development corridors of Mozambique, Namibia and Angola.

The donor community led by the *Department for International Development (DfID)* is strongly supportive of the Corridor and in April 2009, a donors conference in Lusaka was concluded with a total pledge of USD1,2 billion in support of the Programme. However, this donor support may have lost some impetus and the UK government recently withdrew financial assistance to the agency created to promote the Programme, the Pretoria-based *TradeMark*. The Corridor is nevertheless included in the list of initiatives falling under the *Presidential Infrastructure Champion Initiative (PICI)* and is being championed by President Zuma.

The Programme registered a few initial successes notably the Chirundu one-stop border post between Zimbabwe and Zambia. This was however offset by less successful developments such as the malfunctioning Kasumbalesa border post between Zambia and the DR Congo and

problems at Beit Bridge where previous PPP's have not been successful.

Projects and initiatives along the main line as well as along the feed-in corridors are applicable.

The initiative is underpinned by the *Southern African Development Community Regional Infrastructure Master Plan (RIMP)* which entails Projects totalling USD 500 billion. The Programme covers 15 years from 2012 to 2027.

### Recent Developments – Transport Infrastructure

*CFM* and *Vale* are constructing and rehabilitating sections of the Tete-Nacala rail line that traverses Malawi. Bulk handling facilities for the coal exports are being established at Nacala port.

The European Union (EU) has issued a tender for the supervision of works for the implementation of the Malange-Mocuba corridor in Zambezia Province linking Mozambique to Malawi. Phase II includes the tarring and upgrade of 110 kilometres of road as well as the upgrade of 150 kilometres of rural roads.

There have been some improvements made to the Sena line linking Beira to Tete. The contract for improvements to the line was won by Mota Engil and the Visabeira Group of Portugal. They plan to allocate about USD 223 million for this work.

A major development is the announcement by *Grindrod* and the *North West Rail Company* of the funding of the USD 1,1 billion north west rail line that will link Zambia's two copperbelts to the nearly-completed Benguela rail line to the Angolan coast. This will help ensure that beneficiated copper will be exported through a new route. Negotiations are currently underway for linkage with the DR Congo copperbelt.

*Transnet* is reportedly considering the undertaking of the 6<sup>th</sup> phase of the Richards Bay Coal Terminal that will increase its capacity from 91 million tons per annum to 110 MTPA.

There have been considerable improvements to Walvis Bay port. There will be 10 000 metres of quay walls and jetties for 30 large berths compared to the current 1 500 metres. A ship and rig repair yard with an oil and gas supply base will

be established. An undercover dry bulk terminal will handle 100 million tons per annum. Car import, ro-ro and passenger terminals will be built. A liquid bulk terminal with large crude carrier berths will be constructed. The *African Development Bank* has approved a R3 billion loan to *Namport* for the construction of a container terminal at Walvis Bay port. *Namport* hopes to achieve a 70% increase in the port's cargo volumes by 2020 while developing as a regional hub for SADC as well as the Gulf of Guinea.

The Tanzanian Ports Authority is busy negotiating a loan from the China Eximbank for the construction of berths 13 and 14 in order to reduce the serious congestion being experienced at Dar es Salaam Port.

The relatively isolated but rich Luapula Province in northern Zambia will be disenclosed and linked to the copperbelt through the construction of the road through the DR Congo pedicle currently being undertaken by *China Henan*. A power transmission line and fibre optic cable are also planned for the route.

Zimbabwe and Zambia have signed an agreement for the establishment of a long-awaited one-stop border post at Victoria Falls/Livingstone. South-bound traffic from Zambia will be cleared by Zimbabwean authorities while north-bound traffic will be cleared by Zambian controls.

The tolling of the Beit Bridge road has been completed. In late 2012, the *Infrastructure Development Bank of Zimbabwe* stated that USD 1,5 million has been raised for the Harare-Beit Bridge and Harare-Chirundu Toll Roads. There have been implementation problems.

Progress has been made on the Bas Congo Development Corridor linking Kinshasa to Matadi port. The area of the mid-way point Kimpese will see the development of industries there including the announced *PPC* cement plant. There are plans to extend the corridor to north-eastern DR Congo.

The Goba rail line in Swaziland built in the 1960's has been reactivated and 2 million tons of iron ore are being exported through Maputo, Mozambique.

The Gaborone Container Terminal (GABCON) has acquired land in Pilane in Southern Botswana just north of Gaborone for the development of a new container terminal.

IN 2012, The Botswana Department of Immigration has allocated USD 400 000 for the completion of the Maitengwe border post between Zimbabwe and Botswana.

The Rivungo canal Project on Zambia's north-western border with Angola is making good progress. The USD 50 million canal links Shangombo in Zambia with Rivungo in

Angola over a distance of fifteen kilometres of which ten kilometres have been completed.

The OPWAY consortium comprising the Portuguese contractors, *Mota Engil* and *Soares Da Costa* will be constructing a 14-kilometre new link road between the new Tete Bridge which they have almost completed and the mining area of Revuboe.

The coastal road linking Pemba, Mocimboa da Praia and Palma on Mozambique's north coast has almost been completed.

First Quantum has lengthened the runway and extended the apron at Solwezi Airport, North West Province, Zambia.

The Nacala airport has almost been completed.

The Beira-Lusaka between Mozambique and Zambia has been re-established with the first train since the civil war in Mozambique carrying 1 050 tons of fertilizer along the Machipanda rail line through Zimbabwe to Lusaka.

*Part 2 will include an update on support infrastructure and industry developments as well as planned initiatives relating to the North-South Corridor.*

# Additional Services

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

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 **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 eleventh **ICT/TELECOMMUNICATIONS SUB-GROUP** was held on Wednesday 12 February 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 and the International Finance Corporation will be invited to address the next meeting. It was concluded that one of the main South African mobile telecommunications operators as well as Convergence Partners 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 last **APA INFRASTRUCTURE SUB-GROUP MEETING** “Show me the Projects” was held on Tuesday, 18 June 2013 at the Development Bank of Southern African in partnership with the Built Environment Professions Export Council (BEPEC). It concentrated on gas-related developments in Mtwara and Pemba as well as the BEPEC industrial centre to be established in Tete. There were addresses on the Export Credit Insurance Corporation (ECIC) products and the Capital Projects Feasibility Programme (CPFP).

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 B.A. Link in a series of **AFRICA COUNTRY FOCUS BRIEFINGS**. Recent briefings were on Côte d’Ivoire, Ghana, Angola, Rwanda, Botswana, Mozambique the DR Congo and Namibia.  
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The May/June 2014 edition of the London-based publication, **AFRICA INVESTOR** carries articles on GDP investment, private equity in the healthcare industry, update on China’s trade with Africa, investing in Nigeria, oil and gas discoveries in East Africa and hotel investments in Ghana. 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

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for templates/further details/contacts pertaining to specific Projects listed below)

## ANGOLA

**CABINDA PORT** in northern Angola is planning the construction of a new passenger terminal to service the oil operators and services companies. It will improve the port's mobility. The cost and date of commencement of construction has yet to be announced. The *China Gezhouba Group Company (CGGC)* built a new 320 metre long 12 metre wide jetty for the port in 2012. The jetty enables two large vessels to dock at the same time.

## CONGO (DEMOCRATIC REPUBLIC)

The DR Congo's **RAIL UTILITY, SNCC** is undergoing a USD 712 million restructuring Programme. Much of the funds are allocated to clearance of the social debt. The *World Bank* has assisted with the payment of retirement packages and the number of *SNCC* employees has been reduced from 20 000 to 8 000. A major issue however is the lack of trained operational staff. *Vecturis* of Belgium has the management contract for the utility and answers to the Ministry of Public Enterprises. *Vecturis* is particularly intent on regaining the trust and support of the miners operating in the DR Congo.

The DR Congo rail utility, *SNCC* and its management contractor, *Vecturis* of Belgium are in discussions with Angola for the implementation of the Luau border rail section to link with the **BENGUELA RAIL LINE** that Chinese contractors are completing. Lubumbashi has a concrete sleeper factory. They are also in discussions with the Zambians on rail transport to Lubumbashi and the Zambians on TAZARA.

## CONGO (REPUBLIC)

*Sundance Resources* of Australia has received a 25-year operating license from the government for its **NABEBA IRON ORE PROJECT**. The Project is situated in the north west of the country close to the border with Cameroon. Intended production is 35 million tons per annum. The company initially received a mining permit in 2012. The mine will be operated by the company's local affiliate, *Congo Iron*. Later phases of the Project include a 510-kilometre rail line to Lolabe on the Cameroon coast where a deep water iron ore export terminal is to be developed.

## COTE D'IVOIRE

\*\* The re-establishment of the **HEADQUARTERS OF THE AFRICAN DEVELOPMENT BANK** from the temporary headquarters in Tunis to Abidjan entails the establishment of a new upper class compound in the upmarket suburb of Cocody, Abidjan. The previous compound utilised by *AfDB* staff prior to departure is being rehabilitated. The new compound will have to accommodate around 5 000 staff members most of whom are expatriates.

## ETHIOPIA

*Reykjavik Geothermal* of Iceland has secured a 25 year Power Purchasing Agreement with the *Ethiopian Electric Power Corporation (EEPCO)* for the development of a **GEOHERMAL POWER PROJECT** on an imploded volcano in the Rift Valley. The pilot Project will produce 20 MW but should be ramped up to 500MW in 2018. The total cost is estimated at USD 2 billion. Further financing will be

secured possible from the US *Power Africa Initiative*. Initial funding has come from *KFW* of Germany and the *European Union African Fund*. Drilling operations have begun.

The *Ethiopian Sugar Corporation* (ESC) is developing a number of **SUGAR PLANTATIONS AND FACTORIES** each of which will use the waste to produce power. It is expected that they will deliver a total of 340 MW by 2016 and up to 800MW by 2020. The *ESC* aims to increase annual current production of sugar from 300 000 tons from the three factories to 2,25 million tons in five years. It also wishes to raise ethanol production from 18 million litres to 181180 00 cubic metres.

The *Ethiopian Electric Power Corporation* (EEPCO) and the Ministry of Water & Energy have finalised a turnkey contract with *Cambridge Industries Limited* for the design and construction of a 50 MW **WASTE-TO-ENERGY PLANT** in Addis Ababa. The Project is located next to a 50-year dump called Koshe. This will be the country's first waste-to-energy Project and will process 350 000 tons of waste annually. The cost is estimated at USD 120 million. *Cambridge* is also undertaking feasibility studies throughout Ethiopia to recommend future waste-to-energy Projects in various cities including Dire Dawa, Adama, Mekelle, Gonder, Behar Dar, Hawasa and Jimma.

*Lafto Turbine Technologies* of the USA is developing the **AYSHA WIND FARM PROJECT** in the Somali Region of southern Ethiopia. 300 MW of wind power will be developed in phases. There were originally three wind power Projects but these have now been conglomerated into phases of a single Project. The *Ethiopian Electric Power Corporation* (EEPCO) has been informed by the *European Investment Bank* (EIB) that it will be funding the first phase of the Project. The *China EXIM Bank* has also shown interest.

## **GHANA**

The **GREATER ACCRA WATER SUPPLY PROGRAMME** includes the Kpong Water Supply Expansion Project, the Kpong Intake Rehabilitation Project and the ATMA Rural Water Rehabilitation Project. The Kpong Projects are near completion but further expansion of the system is required. The daily demand in the metropole is 150 million gallons and capacity stands only at just over 90 million gallons. The ATMA Project will add another 9 million gallons per day. The *Ghana Water Company Limited* (GWCL) has treatment plants at Weija and Kpong. In February 2014, the Kpong plant had to be shut down to allow contractors to undertake pipeline connections between the Projects. The *Gezhouba Group* (CGGC) has been completing the Kpong Expansion Project.

## **KENYA**

*Pancontinental Oil and Gas* of Australia is working on the first-ever **OIL DISCOVERY** off the Kenyan coast. Its Sunbird – 1 concession includes the L6 block on the Lamu Basin on the northern coast as well as the L10.A and L10.B blocks on the Tana River Basin further south. The company has undertaken five 3D surveys since the Mbawa gas discovery in 2012. Kenya has also registered some onshore finds. Commercial viability is being determined.

Some 200 acres of land have been acquired for the establishment of a new **REFERRAL HOSPITAL** near Eldoret airport in western Kenya. The Project has reportedly already been approved. The implementing agency is the Ministry of Health. The government is preparing a Programme for the establishment of two level 5 hospitals for each of the country's 47 counties over the next four years. An amount of 34 billion Kenyan Shillings has been budgeted.

## **LESOTHO**

The following is an update on the **LESOTHO HIGHLANDS WATER PROJECT PHASE 2:**

The Project includes the construction of the Polihali dam in Mokhotlong, extension of the Muela hydro power station, building of a 38,2 kilometre water transfer tunnel connecting Polihali with Muela, construction of access roads, establishment of camps, erection of power transmission lines and establishment of administrative centres. Construction of the dam is expected to begin in 2017 with completion set at 2023. The implementing agencies are the Ministry of Energy, Meteorology & Water Affairs, the *Lesotho Highlands Development Authority* (LHDA) and the *Lesotho National Development Corporation* (LNDC). Local companies will be given priority for the supply of goods and services.

## MALAWI

The **NATIONAL AIRPORTS PROGRAMME** includes the construction of a new airport in Mangochi, the rehabilitation of the Kamuzu International Airport in Lilongwe and a new Chileka international airport in Blantyre. Domestic airports at Karonga, Likoma and Mzuzu will be upgraded. Funding has been mooted from the *European Union (EU)*, China and Japan. China has allocated USD 250 million for the airport in Blantyre. The Ministry of Transport and Public Works is the implementing agency.

## MOZAMBIQUE

*Gigawatt* of Mozambique has secured a power purchase agreement with *Electricidade de Mocambique (EDM)* for supply from its planned 118 MW **GAS-FIRED POWER PLANT** at Gigawatt Park in Ressano Garcia on the South African border in southern Mozambique. The duration of construction of the plant will be 18 months. *Parsons Brinckerhoff Power (PB Power)* is the consultant and *WBHO* of South Africa is the contractor. Funding has now been secured from *Standard Bank*. The total cost is estimated at USD 235 million. Gas supply for the Project has been secured through an agreement with *MGC* and *Sasol*.

*SASOL* of South Africa will be undertaking a prefeasibility study with the national oil company, *Empresa Nacional de Hidrocarbonetos (ENH)* and *ENI* of Italy on a possible **GAS-TO-LIQUID FUEL PLANT** in the Pemba area of northern Mozambique. Further details are unknown at this stage. The Mozambican authorities are developing a gas master plan to promote beneficiation of its large gas resource.

\*\* A local contractor is promoting the development of a 3-4 star **HOTEL** in Beira, Central Mozambique. A land area of 3,7 hectares has been secured. The site is in the northern area and in good proximity to the airport and city centre. The capital requirement is estimated at USD 20 million. There is a serious shortage of adequate upmarket accommodation in this port city.

The Department of Planning of Maputo City is working on the **BAIXA MASTER PLAN** that will see considerable development of the Mozambican capital. The Baixa is the sea-facing area of downtown Maputo. Plans include the pedestrianisation of the main streets, the establishment of a waterfront next to the port, the construction of a cultural centre on the old *FACIM* fair site, preservation of historic buildings and the establishment of an inter-modal transport hub next to the Maputo-Catembe bridge construction of which is scheduled to start before the end of 2014. The Planning Committee includes *Eduardo Mondlane University*, *Cardno* of the USA and *Design Convergence Urbanism (DCU)* of Spain.

\*\* A **COMMERCIAL PROPERTY DEVELOPMENT** is being planned for Nampula in northern Mozambique. The Project includes middle and high-income apartments, a 25 000 square metre shopping centre, a clinic, a hotel and a leisure park. Water and power supply as well as waste management services are required. The cost of the Project is estimated at USD 160 million. Nampula is a major trading and commercial centre linked by a good road to Nacala port.

## NAMIBIA

The following are Projects falling under the **NATIONAL RAIL PROGRAMME** of Namibia:

- The conceptualised **TRANSKALAHARI RAIL PROJECT** began with the signing of an MOU between Namibia and Botswana in 2010 and a bilateral agreement in 2013 for the establishment of a coal facility at Walvis Bay port and a loading facility. It is hoped that the Project will be developed by the private sector.
- The feasibility study for the **TRANSCAPRIVI RAIL PROJECT** has been completed. The Grootfontein-Katima Mulilo link is planned.
- The 200 kilometre **KRANSBERG-TSUMEB RAIL LINE** has been rehabilitated. The port of TransKunene will be developed.
- Tendering for earthworks for the 38 kilometre **ONDANGWA-OSHIKANGOLINE** from Tsumeb is underway. The Project falls under phase 3 of the Northern Rail Extension Programme.
- The 140 kilometre **AUS-LUDERITZ LINE** is being upgraded and will be completed in September 2104. It will especially benefit fruit growers in Namibia and the Northern Cape.
- There is a possibility of a heavy haul rail line and deep water terminal at Angra Point opposite Lüderitz in southern Namibia.
- Three **COMMUTER LINES** are planned for Windhoek: Windhoek-Okahandja, Windhoek-Airport, Windhoek-Katutura. The studies for these lines will commence this year.
- The concrete sleeper plant at Tsumeb is producing 100 000 units per annum but plans are to increase this to 150 000 units.

The following are some of the planned Projects and initiatives for the **EXPANSION OF WALVIS BAY PORT** and the establishment of the SADC Gateway Terminal covering 1 330 hectares:

- A 40 hectare new container terminal costing R4 billion will be commissioned in 2017 plus a 600 metre quay wall constructed. A loan has been approved by the *African Development Bank (AfDB)*. This will increase the port's container handling capacity from 350 000 TEU's per annum to 750 000 and eventually 1,05 million.
- The current terminal will be converted into a multi-purpose facility.
- An additional 10 000 metre wall will be built and 30 berths established. (The transport of coal from Botswana on the TransKalahari route is envisaged.)
- A R30 billion tanker jetty is planned for 2016.
- Phase 2 provides for a dry bulk terminal.
- Phase 3 provides for a coal terminal and ship and additional rig repair facilities.

The *China Harbour Engineering Company* is assisting.

An **INDUSTRIAL PARK AND ZONE** is planned for an area situated east of Dune 7 near Walvis Bay in central Namibia. The road behind the dune will be tarred and a new bridge built over the Swakop River. It will be able to handle heavy duty transport. The area will be further opened up through the improvement of the Swakopmund-Hentjies Bay-Uis-Kamajab road.

### **NIGERIA**

The local *Churchgate Group* are the developers of the **WORLD TRADE CENTRE ABUJA** in the capital in central Nigeria. The multi-phase mixed-use commercial property development includes 1-6 bedroom apartments, an office tower, a mall and a five-star hotel. The 24-storey Tower One is the first phase. A show flat is currently being unveiled. Phase one is scheduled for completion during the first half of 2015.

### **SIERRA LEONE**

Funding of USD 18 million has been secured for the **FREETOWN SOLAR PARK PROJECT**. The *Abu Dhabi Fund for Development* and the *International Renewable Energy Agency (IRENA)* will be providing most of the funding for the 6 MW solar power plant. The management contract has been awarded to the company, *Advanced Science & Innovation Company (ASIC)*. The responsible authority is the Ministry of Finance & Economic Development. The Project will target the city's undersupplied urban areas as well as nearby rural communities.

### **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.

A multi-client survey of the **OIL AND GAS POTENTIAL OF THE ORANGE BASIN** on South Africa's west coast from Saldanha Bay to Namibia is underway. The Orange Basin deep water license area covers 43 000 square kilometres. Seismic survey of an area of 3 200 square kilometres is planned for 2014. The implementing agency, the *Petroleum Agency of South Africa (PASA)* has confirmed that it is in constant contact with the Namibian authorities.

### **TANZANIA**

The *Cashew Nut Board of Tanzania* has indicated that three new **CASHEW NUT PROCESSING PLANTS** will be established in southern Tanzania. The sites are likely to be in the Mtwara area for reasons of proximity to the long-established cashew nut port of Mtwara. The existing cashew nut plant in the town is owned by the Indian, Singapore-registered group, *OLAM*. It began operations in 1995 and is the largest cashew nut plant in the world by number of workers. The plant supplies 7,5% of the world's production. Although

this plant processes the raw cashews, the industry has not reached anything near its potential because about 90% is exported as raw crop. Nearly 150 000 tons are produced annually.

## **ZAMBIA**

In 2013, the Zambian government allocated USD 120 million to kickstart the **NATIONAL RAIL REHABILITATION PROGRAMME** notably for the acquisition of rolling stock and infrastructure. The country has 848 kilometres of line and a capacity of 6 MTPA. In 2003, it had achieved 2 MTPA but by mid-2012 as a result of poor performance by the private operator, this had dropped to only 600 000 metric tons. The speed dropped from 70 kph to 15 kph. Of the 37 locomotives, only 24 are operational. *Zambia Railways Limited (ZRL)* requires 13 new locomotives over the next five years. A total of 2 600 wagons are required as well as 665 000 sleepers (180 000 are in stock). The Nacala line to Mozambique has increased requirements and an immediate need is 10 locomotives and 500 wagons. There is a need to rehabilitate 650 wagons plus rails. Some 2 000 kilometres of greenfield lines are planned excluding sidings. USD 50 million and 100 kilometres of line are required to improve inter-mine connectivity in the Copperbelt. Much store is placed on the recently announced north west rail to Lobito in Angola. Regarding passenger services, the number of trains dropped from five to two. Two more trains are required and thirty coaches (from the current sixteen.) Driver training and computer services are included in the Programme.

In 2014, the Zambian authorities took over the 170 kilometre abandoned **LIVINGSTONE-NAMIBIA BORDER RAIL LINE** in southern Zambia. It is estimated that USD 100 million is required mainly for the procurement of sleepers and rails. The intention is to connect southern Zambia to Walvis Bay port.

*Shoprite* of South Africa will be opening a **NEW SUPERMARKET** in a new shopping mall in Solwezi, North West Province. The site will be at the show grounds. It is scheduled to open in April 2015. The mall will include furniture and fast food outlets. The mining activity in the Solwezi area has led to a major population influx. The group will be opening a number of new stores in Zambia including in Chingola and Chililabombwe.

The *Zambian Roads Development Agency (RDA)* is planning the dualisation of the 45,5 kilometre **KITWE-CHINGOLA HIGHWAY** at a cost of 561 million Kwacha. This will mean a four-lane highway extending from Ndola to Chingola through the old Copperbelt. Also planned is the improvement of the Chingola-Solwezi road to the new Copperbelt which will include bypasses and road links to the mines financed through PPP's. A later phase Project is the dualisation of the road to the Kasumbalesa border post with the DR Congo.

*Zambia Railways Limited (ZRL)* is planning the construction of the 290 kilometre **NSELUKA-MPULUNGU GREENFIELD RAIL LINK** in northern Zambia. The rail spur would link to the *TAZRA* line, improve access to the Great Lakes and reduce the cost of trade between Zambia and Burundi within the context of reduction of intra-African trade links along the North-South Corridor. Breakbulk trade is long-standing between Mpulungu Port and Bujumbura Port but has been limited by poor infrastructure. Other key greenfield rail links being considered are: Livingstone-Katima Mulilo linking to the TransKalahari; Kafue-Lions Den linking to the Beira Corridor; Chingola-Jimbe linking to the Lobito Corridor; and Chipata-Mpike linking to the Nacala Corridor.

The US agri-industrial investment group, *Cargill* will be establishing a **MAIZE MILLING PLANT** in the Chipata District of the Eastern Province. It is hoped that the plant will begin operations by the end of 2014. The national power utility, *ZESCO* is upgrading power supply to the area.

The following are selected Projects at planning stage from Zambia's **LINK ZAMBIA 8000 ROADS PROGRAMME**:

- Mpika-Nabwalya Lot 1 (118 kilometres, contract sum: 430 million Kwachas)
- Mubwa-Itezhi Tezhi (111 kilometres, contract sum: 286 million Kwachas)
- Isoka-Muyombe Lot 3 (90 kilometres, contract sum: 333 million Kwachas).

Eighteen kilometres of the 171 kilometre Mbala-Nakonde road have been completed. The value of this contract is USD 180 million.

## **ZIMBABWE**

The *State Procurement Board (SPB)* is currently reviewing tenders for the **BEITBRIDGE-HARARE-CHIRUNDU HIGHWAY REHABILITATION**. It is hoped that the rehabilitation will commence before the end of 2014. The estimated cost of the Project is USD 1 billion. The implementing agency, the Ministry of Transport and Infrastructure Development floated a tender to construction companies in March 2014 and claims to have received a strong response. The *SPB* cancelled a tender awarded to the *ZimHighways* consortium.

## **REGIONAL**

The DR Congo rail utility, *SNCC* and its management contractor, *Vecturis* of Belgium are in discussions with Angola for the implementation of the Luau border rail section to link with the **BENGUELA RAIL LINE** that Chinese contractors are completing. Lubumbashi has a concrete sleeper factory. They are also in discussions with the Zambians on rail transport to Lubumbashi and the Zambians on TAZARA.

In 2014, the Zambian authorities took over the 170 kilometre abandoned **LIVINGSTONE-NAMIBIA BORDER RAIL LINE** in southern Zambia. It is estimated that USD 100 million is required mainly for the procurement of sleepers and rails. The intention is to connect southern Zambia to Walvis Bay port.

*Zambia Railways Limited (ZRL)* is planning the construction of the 290 kilometre **NSELUKA-MPULUNGU GREENFIELD RAIL LINK** in northern Zambia. The rail spur would link to the *TAZARA* line, improve access to the Great Lakes and reduce the cost of trade between Zambia and Burundi within the context of reduction of intra-African trade links along the North-South Corridor. Breakbulk trade is long-standing between Mpulungu Port and Bujumbura Port but has been limited by poor infrastructure. Other key greenfield rail links being considered are: Livingstone-Katima Mulilo linking to the TransKalahari; Kafue-Lions Den linking to the Beira Corridor; Chingola-Jimbe linking to the Lobito Corridor; and Chipata-Mpike linking to the Nacala Corridor.

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

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

The re-establishment of the **HEADQUARTERS OF THE AFRICAN DEVELOPMENT BANK** from the temporary headquarters in Tunis to Abidjan entails the establishment of a new upper class compound in the upmarket suburb of Cocody, Abidjan. The previous compound utilised by *AfDB* staff prior to departure is being rehabilitated. The new compound will have to accommodate around 5 000 staff members most of whom are expatriates.

The Department of Planning of Maputo City is working on the **BAIXA MASTER PLAN** that will see considerable development of the Mozambican capital. The Baixa is the sea-facing area of downtown Maputo. Plans include the pedestrianisation of the main streets, the establishment of a waterfront next to the port, the construction of a cultural centre on the old *FACIM* fair site, preservation of historic buildings and the establishment of an inter-modal transport hub next to the Maputo-Catembe bridge construction of which is scheduled to start before the end of 2014. The Planning Committee includes *Eduardo Mondlane University*, *Cardno* of the USA and *Design Convergence Urbanism (DCU)* of Spain.

\*\* A **COMMERCIAL PROPERTY DEVELOPMENT** is being planned for Nampula in northern Mozambique. The Project includes middle and high-income apartments, a 25 000 square metre shopping centre, a clinic, an hotel and a leisure park. Water and power supply as well as waste management services are required. The cost of the Project is estimated at USD 160 million. Nampula is a major trading and commercial centre linked by a good road to Nacala port.

The local *Churchgate Group* are the developers of the **WORLD TRADE CENTRE ABUJA** in the capital in central Nigeria. The multi-phase mixed-use commercial property development includes 1-6 bedroom apartments, an office tower, a mall and a five-star hotel. The 24-storey Tower One is the first phase. A show flat is currently being unveiled. Phase one is scheduled for completion during the first half of 2015.

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

The **JOINT AGRIBUSINESS DEPARTMENT OF AGRICULTURE, FORESTRY & FISHERIES FOR AFRICA (JADAF)** is a recently established joint partnership between the Department in South Africa and the agribusiness sector of South Africa. It promotes agricultural trade and agri-industrial investment partnerships in Africa. Its aims are to make market information in African countries more accessible; to create a platform for information-sharing and exchange; to create a portal for up-to-date events and news on African agriculture. The new website ([www.jadafa.co.za](http://www.jadafa.co.za)) carries eleven African agriculture country profiles.

The **AFRICAN WATER FACILITY (AWF)** was established in 2004 and is managed by the *African Development Bank (AfDB)*. It provides grants and technical assistance for water Projects in *AfDB* regional member countries. Recipients are central, local and municipal governments, regional institutions, agencies and qualifying NGO's. Funding is from Algeria, Australia, Austria, the *Bill & Melinda Gates Foundation*, Burkina Faso, Canada, Denmark, the European Community, France, Norway, Senegal, Spain, Sweden, the UK as well as the *AfDB*.

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### USEFUL WEBSITES

The new website ([www.jadafa.co.za](http://www.jadafa.co.za)) of **JADAF**A (see above) carries eleven African agriculture country profiles.

General information in Portuguese on **ANGOLA** can be found on [www.angolafacil.co.ao](http://www.angolafacil.co.ao)

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

**GRINDROD** has a fleet of 34 locomotives in Sierra Leone which it is leasing to the local authorities. Critical spares are stored in the country.

**BOLLORE AFRICA LOGISTICS** is establishing a 17 000 square metre warehouse in Kolwezi, Katanga Province, DR Congo to service amine situated some 130 kilometres from the town. This helps alleviate the problem of equipment loss on mine sites.

### TRAVEL NOTES

At the time of writing, there was still much confusion over new **VISA REQUIREMENTS FOR MOZAMBIQUE** for South African passport-holders. The latest reports indicate that visas for leisure purposes will be issued on arrival but that business travellers will have to obtain visas prior to departure. Letters of invitation will be required.

The following are the African countries that will receive **SOUTH AFRICAN VISA EXCEPTIONS** under the new visa regulations invoked by the South African authorities with effect from May 2014:

90 days or less: Botswana, Namibia, Tanzania, Zambia, Zimbabwe.

30 days or less: Benin, Gabon, Lesotho, Malawi, Mauritius, Mozambique, Seychelles, Swaziland.

It is noteworthy that Kenya has not been included for exemptions. (Kenya will be imposing visa restrictions on South African passport-holders from September 2014.)

Holders of passports from non-exempted countries will be subject to more stringent visa requirements including fingerprints at approved centres. On the international front, it should be noted that China has not been included in the exception list. China requires visas from South African passport-holders.

# Forthcoming Events

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

***The GAS AFRICA CONFERENCE will be taking place 26-27 August 2014 at the Radisson Blu Gautrain Hotel in Sandton.***

***Contact: Bette or Jody, telephone Cape Town 27 21 7050147, e-mail: [jody@mcaughtonevents.co.za](mailto:jody@mcaughtonevents.co.za)***

***Note: There is a discount for APA subscribers.***

The 5<sup>th</sup> ***AFRICA GAS & LNG SUMMIT*** will be taking place at the Double Tree by Hilton hotel in Dar es Salaam 2-3 September 2014.

**Contact:** Telephone 65 65579185, e-mail: [Eugene@neo-edge.com](mailto:Eugene@neo-edge.com)

The 16<sup>th</sup> ***ANNUAL EAST AFRICA POWER INDUSTRY FORUM (EAPIC)*** will be taking place 3-4 September 2014 at the Safari Park Hotel in Nairobi, telephone *Christa Robijn*, Cape Town 27 21 7003564, e-mail: [christa.robijn@spintelligent.com](mailto:christa.robijn@spintelligent.com) Listed speakers include senior representatives of EWSA of Rwanda and Songas of Tanzania.

***The AFRICA HOTEL INVESTMENT FORUM will be taking place 30 September to 1 October 2014 at the InterContinental Hotel, Nairobi. Senior representatives of global hotel management companies such as Kempinski and Hilton are listed as speakers.***

***Contact: telephone 44 7813164649, e-mail: [joanne.howell@benchevents.com](mailto:joanne.howell@benchevents.com) or Jennifer Pettinger telephone 1 971 55884015, e-mail: [Jennifer.pettinger@benchevents.com](mailto:Jennifer.pettinger@benchevents.com)***

The ***iPAD DRC MINING & INFRASTRUCTURE INDABA*** will be taking place 21-23 October 2014 in Kinshasa and the ***iPAD KATANGA MINING BRIEFING & EXPO*** will be taking place 29-30 October 2014 in Lubumbashi.

**Contact:** website: [www.ipad-drc.com](http://www.ipad-drc.com) and [www.ipad-katanga.com](http://www.ipad-katanga.com)

The ***URBAN INFRASTRUCTURE INVESTMENT SUMMIT 2014*** will be taking place at the Crowne-Plaza, Harare, 22-23 October.

**Contact:** *Tshepho Lesake, MNCapital Group*, telephone Johannesburg 27 11 6664702, e-mail: [tshepho@mncapital.co.za](mailto:tshepho@mncapital.co.za)

The *Johannesburg Chamber of Commerce & Industry (JCCI)* is organising an ***OUTWARD TRADE MISSION TO RWANDA AND BURUNDI*** 11-15 November 2014.

**Contact:** *Melitta Openshaw*, e-mail: [melitta@jcci.co.za](mailto:melitta@jcci.co.za)

The annual ***AfriCom ICT/TELECOMMUNICATIONS CONFERENCE & EXHIBITION*** for 2014 will be taking place at the Cape Town International Convention Centre 11-13 November.

**Contact:** *Julie Rey*, telephone 44 20 70175823, e-mail: [Julie.rey@informa.com](mailto:Julie.rey@informa.com) or *Gareth Hamer*, telephone 44 20 70174056, e-mail: [gareth.hamer@informa.com](mailto:gareth.hamer@informa.com)

The ***WEST AFRICAN POWER INDUSTRY CONVENTION*** will be taking place 18-19 November 2014 at the Eko Hotel & Suites, Lagos, Nigeria.

**Contact:** website: [www.wapicforum.com](http://www.wapicforum.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 17-18 February 2015 at the Sandton Convention Centre.***

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

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

*Mercers 2014 Cost of Living Survey* for expatriates has found that while Luanda and N'djamena are the two most expensive **AFRICAN CITIES IN THE WORLD**, other African cities, notably Cape Town at 205 and Johannesburg are among the cheapest. This is partly due to the weak Rand and is in the face of the rapidly rising cost of living for South Africans.

# Whisperings - Footnotes

## WHISPERINGS – FOOTNOTE 1

The *Petroleum Agency of South Africa (PASA)* has confirmed that it is liaising with the **OIL AND GAS UTILITIES OF NAMIBIA AND MOZAMBIQUE** regarding offshore oil and gas exploration in the southern African region. Such cooperation can only be mutually beneficial.

## WHISPERINGS – FOOTNOTE 2

During the recent APA sub-group briefing on commercial property Projects in Africa, experienced suppliers to the CSI Programmes of the **MINING HOUSES** recommended examination of the holding structures of the mining companies and liaison with their mine closure planning departments. The mining companies are keenly aware of the impact of their operations on local communities and wish to implement Programmes that will leave a positive legacy. The environmental departments of the miners are particularly appropriate as they are concerned with all operations divisions.

## WHISPERINGS – FOOTNOTE 3

The announcement of the acquisition of Nigerian oil independent *Concoco Phillips* by another Nigerian independent, *Oando Energy* has been followed by a further announcement that *Oando* will be taking over *Medal Oil*. These developments indicate a trend towards the consolidation of **AFRICAN OIL INDEPENDENTS**.

## WHISPERINGS – FOOTNOTE 4

The prominent NGO, *International Rivers* claims that Norway is one of only a few donor countries supporting **HYDRO POWER PROJECTS** in developing countries. It further claims that such hydro Projects do not alleviate poverty among the local populations. It calls for diversification of aid to decentralised solar and wind Projects.

## WHISPERINGS – FOOTNOTE 5

African governments continue to pay lip service to the vital **AGRICULTURAL SECTOR** in our continent. Only 9 of the 54 countries have allocated 10% or more of their national budgets to agriculture despite the fact that Africa has over 50% of the world's unused, fertile land.

## WHISPERINGS – FOOTNOTE 6

The **WORLD FOOD PROGRAMME (WFP)** is reportedly shifting its emphasis from direct food aid to food assistance. Care is being taken not to disrupt local production through large-scale food donations.

## WHISPERINGS – FOOTNOTE 7

An oil and gas specialist has explained the proliferation of **FUEL STORAGE FACILITIES** notably in the 'new oil' African countries such as Ghana and Uganda. A new oil refinery is now only financially feasible at a production level of at least 120 000 barrels per day. Fuel storage is the alternative.

### WHISPERINGS – FOOTNOTE 8

Consideration is being given to increased US involvement in Sub-Saharan Africa's power sector. The scope of the USD 9 billion **POWER AFRICA FUND** may be broadened to include more countries.

# Quotable Quotes

### QUOTABLE QUOTES 1

*"I have come to the conclusion that politics is too serious a matter to be left to the politicians."*  
(Charles de Gaulle, former French president.)

### QUOTABLE QUOTES 2

*"You can't eat potential, you have to develop it."*  
(Lester Mouton, President, AgriSaMoz, farmers association in Mozambique.)

### QUOTABLE QUOTES 3

*"They take the smile out of our lives."*  
(APA associate who recently experienced a house robbery in Johannesburg during which he and his wife were severely assaulted by four intruders.)

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# Further Information & Indemnity

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

- **Re-establishment of *African Development Bank (AfDB)* Headquarters in Abidjan, Côte d'Ivoire**
- **Proposed Hotel in Beira, Mozambique**
- **Commercial Property Development in Nampula, Mozambique**

## **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.**