

SADC 3P Network Project Scan

Executive Summary

November 2013



Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH
SADC Promotion of Economic Integration and Trade Program (ProSPECT)

Southern African Development Community
Public Private Partnership Network

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Glossary

3P or PPP	Public-Private Partnership
BMZ	Bundesministerium für wirtschaftliche Zusammenarbeit und Entwicklung
DBSA	Development Bank of Southern Africa
ICT	Information and Communication Technology
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit
MDG	Millenium Development Goals
Member States	Angola, Botswana, DRC, Lesotho, Malawi, Mauritius, Mozambique, Namibia, Seychelles, Swaziland, Tanzania, Zambia, Zimbabwe (South Africa & Madagascar were excluded from the scan)
PIDA	Programme for Infrastructure Development of Africa
RIDMP	SADC Regional Infrastructure Development Master Plan
STAP	Short Term Action Plan
WBI	World Bank Institute



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1 Introduction and Background

1.1 Introducing SADC 3P and the Regional Infrastructure Development Master Plan

The Member States of the Southern Africa Development Community (SADC) have been subjected to primary constraints presented by infrastructure gaps and backlogs related to the limited amount of economic and social infrastructure developed. It is these very constraints that have prompted the development of the Regional Infrastructure Development Master Plan (RIDMP). But the available public finance coupled with ceilings on public debt falls short of the estimated investment needed to leverage infrastructure development in the region. Compounded to these challenges is the lack of technical capacity in Member States necessary to operationalize the RIDMP.

To address these constraints in Member States, a need was identified to engineer institutional arrangements and legal frameworks to support the procurement of infrastructural projects in partnership with the private sector. Primarily, the SADC 3P Network aims to assist Member States in setting up institutions and frameworks through strengthening the capacity of public-private partnership (PPP) practitioners for defining, managing and implementing PPP policies, programmes, projects and harmonising processes, institutions and policies across the region.

The Southern African Development Community (SADC) is looking at ways to implement trans-boundary infrastructure in order to facilitate trade and deepen the process of regional integration and cooperation. To this end, the SADC 3P Network has decided to assist the Member States to identify a few potential PPP projects, based upon the infrastructure priorities set forth in the SADC Regional Infrastructure Development Master Plan (RIDMP), national infrastructure master plans and short term action plan.

The Regional Infrastructure Development Mater Plan is a strategic framework which articulates the region's aims, underpinned by a collection of projects in sectors including energy, tourism, transport, information and communication technology (ICT), meteorology and water.

The region is facing basic infrastructure capacity constraints, which have not only delayed regional economic growth, but have failed to tackle supply side constraints, productive competitiveness, and the core issue of poverty. The RIDMP is specifically designed to tackle these issues and form a collaborative plan to facilitate growth and cross-border cooperation in order to achieve the goals of the region.

The SADC goal is premised on the three key objectives of poverty eradication, food security and economic development.

The key aims of infrastructure development include the following:

- Providing infrastructure support for regional integration within the context of the regional economic integration agenda; and



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- Infrastructure provision for poverty eradication through enhanced universal access to water supply and sanitation, transport, secure energy sources, communications and ICT, in order to maximise economic development and attain the MDGs targets, as the SADC region seeks to address its overarching objective of reducing poverty.

In addition SADC has developed a Short Term Action Plan (STAP), which looks at the timeframe between 2013 and 2017 and has prioritized some infrastructure projects that require rapid development.

Successful PPPs are integral to improved infrastructure development. Although PPPs maybe the answer for many governments, they are not without risk and there are certain challenges. Thus before PPP projects enter the development phase, they must undergo appropriate suitability checks and pre-feasibility processes. This is vital in ensuring that projects are prioritised and that application of limited funds to “dead end” projects is minimised. Determining the suitability of projects for PPP procurement upfront will allow SADC to assign resources effectively and meet the objectives of the STAP. In April 2013, the SADC 3P Network issued a request for proposal (“RfP”) for the services of suitably qualified consultants to conduct a scan on the RIDMP and STAP, to determine the suitability of no more than two to four projects to conduct a feasibility study to be implemented through a PPP Strategy.

KPMG Services (Pty) Ltd (“KPMG”) was successful with its proposal to provide services and engaged with SADC 3P Network in April 2013. This assignment was intended to identify two to four projects that can be taken forward, into detailed feasibility studies, soliciting project preparation funding for implementation through a PPP delivery type model. The project conducted in two phases has produced Reports for each of the two phases. This report is the executive summary of the work carried out over the two phases and should be read in conjunction with the comprehensive Phase I and Phase II Reports. In Phase I of the SADC Network Scan a total of 194 projects were taken from the STAP and RIDMP project lists and an additional 30 were identified by the Member States and KPMG country staff. After a process of analysing these projects against predefined criteria and member states for PPP maturity, 39 projects were identified for the potential PPP process. In Phase II of the SADC Network Scan the 39 projects were assessed against further detailed criteria and weighted/ rated.



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2 Summary of Phase I: High-level scan

A total of 194 projects were taken from the STAP and RIDMP project lists and an additional 30 were identified by the Member States and KPMG country staff. The 224 projects were also cross referenced across the SADC-COMESA-EAC project list to ensure that no projects were omitted. The Database projects list was thus 224 projects, of which a number were cross border and SADC wide initiatives.

A very simple but effective screening method was used to identify the projects that would be most suitable for implementation as PPPs in the short term. For each project on the long list the absence or presence of the following three characteristics was sought:

1. "Is there a project pre-feasibility study or concept note?"
2. "Is there a possible revenue stream from user charges, supplemented by existing budget or other support?"
3. "Is any procurement of investors or other forms of private parties absent?"

By applying each of these screens on a simple "yes/no" response for each project and only passing the projects that had three affirmative responses, the number of projects reduced from 224 to 72.

The last screening activity in this first phase of deriving a potential PPP long list of projects was to match the Member State country assessments with the list of 72 projects to develop the subset of projects in Member States assessed as PPP Maturing.

The evaluation of each Member State in terms of development and maturity of the PPP related frameworks & systems was carried out by looking at the following six broad categories:

- a) Macro-economic and political stability
- b) Availability of domestic capital and debt funding
- c) Judicial system
- d) Governance and decision making
- e) Ease of doing business in the Member State
- f) PPP environment in the Member State



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Each Member State’s readiness for PPP was assessed on a four point scale (1 – 4) with points 1 & 2 indicating a “developing state” and points 3 & 4 indicating a “maturing state” for that category of evaluation.

From the 6 broad categories, a number of constituent indicators/trends (“sub-categories”,) were assessed in terms of a rating of 1 - 4. An overall figure was given to the broad category; these figures were added to an overall sum per Member State out of 24.

The information and indicators were obtained from external sources referenced in Appendix 4 and actual visits to the Member States referenced in Appendix 3 (excluding Seychelles and Swaziland) and KPMG Country Reports.

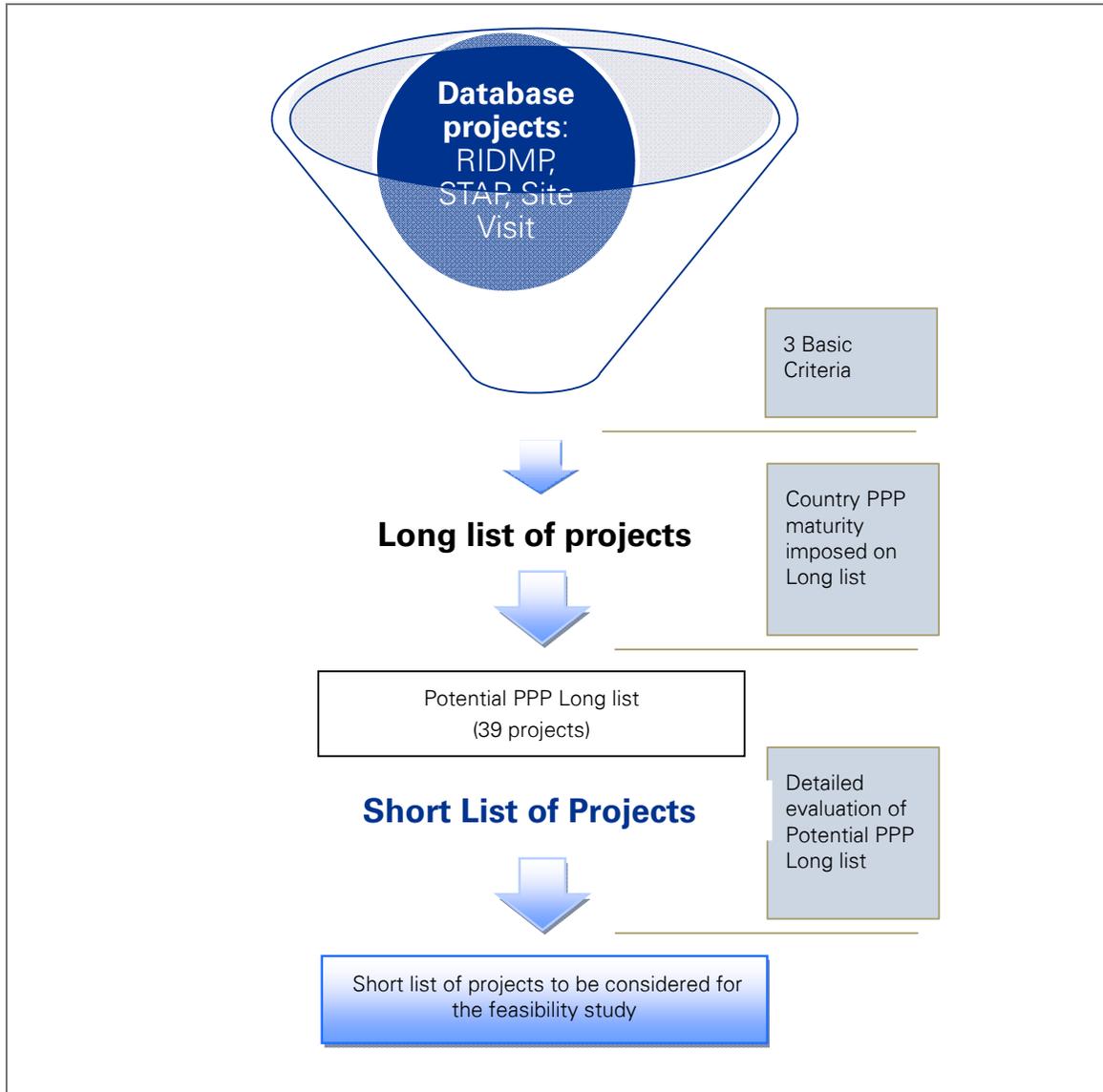
Member States that scored more than 12 out of 24 were classified as “PPP Maturing” and those scoring 12 or less were classified as “PPP Developing”. While this was a relatively simplistic method, it did have the advantage of measuring crucial requirements for enhancing the likelihood of successful PPP programme implementation across categories.

Table 1: Member State PPP Maturity

PPP Maturing	PPP Developing
Mauritius	Mozambique
Botswana	Swaziland
Zambia	Lesotho
Namibia	Malawi
Tanzania	Zimbabwe
	Angola
	Democratic Republic of Congo
	Seychelles

The combination of country and project screens reduced the number of projects in the Long List from 72 to 39.

Figure 1: Project description



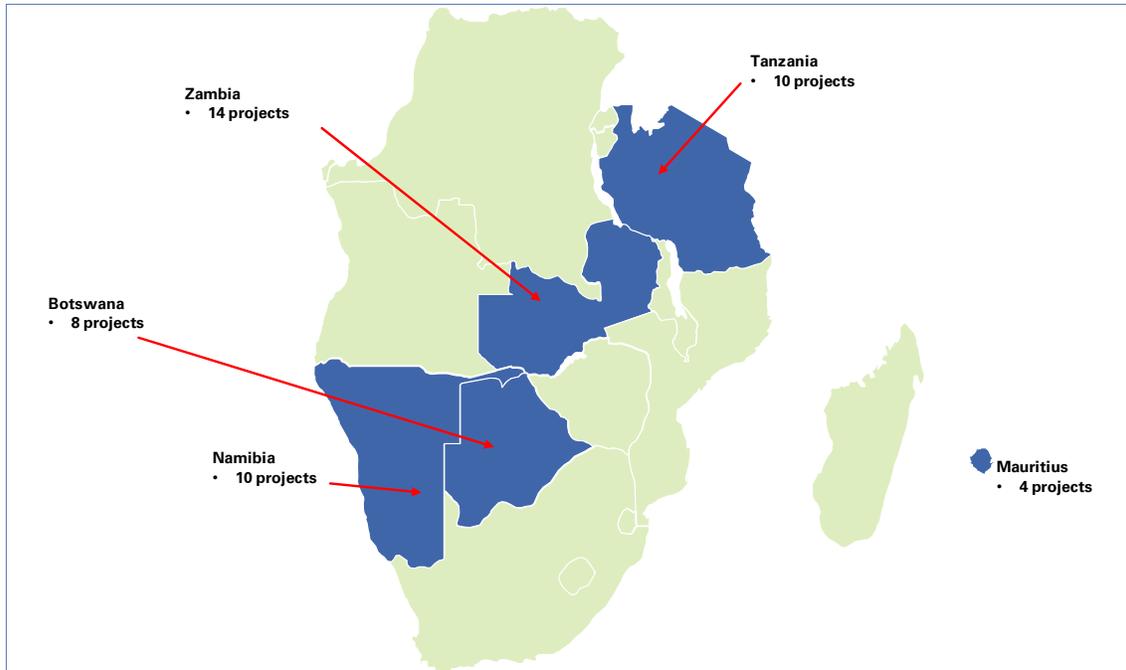


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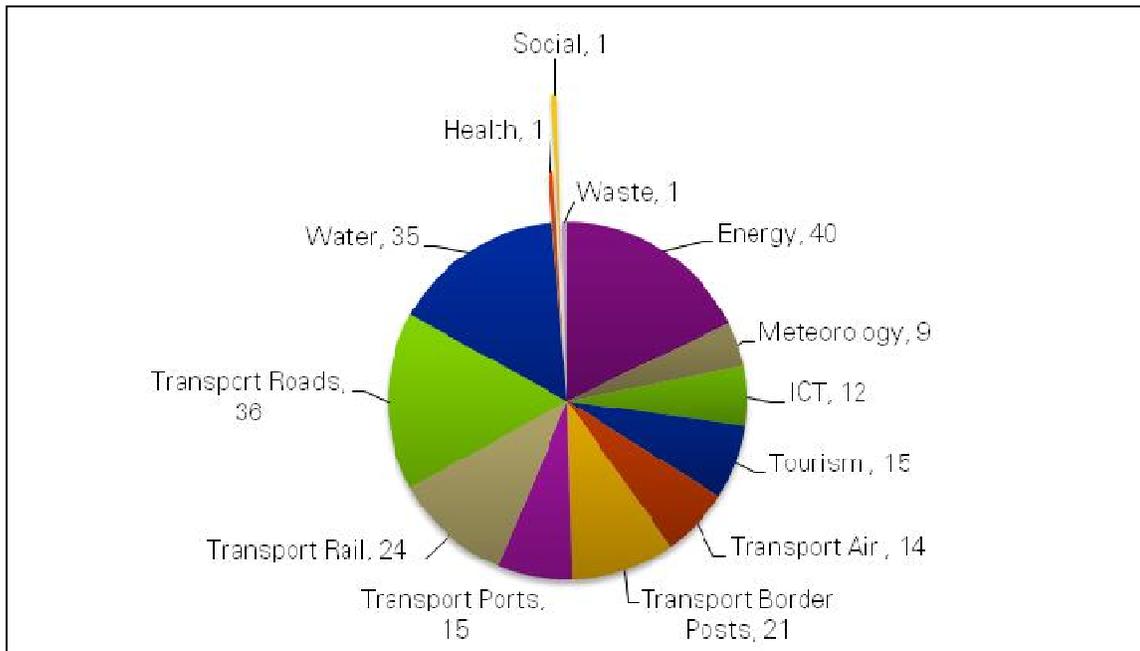
The 39 projects are spread across the five Member States.

Figure 2: Location of Potential PPP Long-List of Projects



Note: Some projects are cross-border and indicated in more than one Member State.

Figure 3: Spread of Potential PPP Long-List of Projects per sector



The dominant sector is transport with energy and ICT following behind.

Note: some projects on the Potential PPP long list are cross border projects.

Table 2: Tables of Potential PPP Long List Projects by sector

Energy	Type	Member States
Energy-88: Namibia-Angola	Transmission	Mozambique, Namibia, Angola
Baynes	Hydro Power	Namibia
Lunsemfwa Lower	Hydro Power	Zambia
Kalungwishi	Hydro Power	Zambia
Rumakali	Hydro Power	Tanzania
Mambilima Falls Site 1 and 2	Hydro Power	Zambia



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Water	Type	Member States
Water Supply to 13 Housing Estates in Mauritius (Project P1-6)	Reticulation	Mauritius
Artificial Recharge of Windhoek Aquifer - Phases 2B and 3 (Project P1-8)	Bulk	Namibia

Social	Type	Member States
Grand Baie Social Welfare Complex	New Development - Services, Mixed Use, Retail	Mauritius

Transport Roads	Type	Member States
Establishment of Cargo Freight Station (CFS) – Kisarawe	Logistics, Handling	Tanzania
Luanda-Windhoek Corridor roads	Upgrading	Angola, Namibia
Platjan bridge	Upgrading	Botswana and South Africa
Driver Education and Testing Centre	Service Provision	Mauritius
Road Decongestion Programme	Upgrading	Mauritius
Kolwezi- Dilolo road(Angola border, SADC Route 20, 426 km)	Rehabilitation	Angola

Transport Rail	Type	Member States
Upgrading of Dar Es Salaam (DSM)- Isaka (ISK) Railway line to standard gauge and construction of Isaka-Keza-Kigali (Rwanda)/Musongati (Burundi) Railway Line	Upgrade	Tanzania
Tanzania Railways Limited Revival	Commercialisation	Tanzania
Construction of Mtwara – Songea-Mbambabay Railway Line with Spurs to Mchuchuma/Liganga	New Development	Tanzania, Malawi, Mozambique, Zambia
Tchobanine Heavy Haul Railway (Tchobanine)	New Development	Mozambique, South Africa, Botswana, Zimbabwe, Swaziland
Restructuring of Zambia's railway systems	Commercialisation	Tanzania, Zambia
Chingola-Solwezi Railway Extension	Extension	Zambia, Angola
Trans-Caprivi-western Zambia Railways from Kolwezi (DRC), through Solwezi (Zambia) to Mongu, Sesheke (Zambia) and Katima Mulilo (Namibia)	New Development	Zambia, Namibia
A heavy haul railway line and a port at Ponta Techobanine, Mozambique	New Development	Mozambique, Botswana, Zimbabwe
Kinshasa- Ilebo Railway Link	Extension	DRC, Zambia, Zimbabwe, South Africa, Botswana and Tanzania
Trans Kalahari Railway	New Development	Namibia, Botswana

Transport Border Posts	Type	Member States
TransKalahari/Mamuno OSBP	Upgrade	Botswana, Namibia
Nakonde/Tunduma OSBP	Upgrade	Tanzania, Zambia
Katima Mulilo/Wenela OSBP	Upgrade	Zambia, Namibia
Oshikango-Santa Clara OSBP	Upgrade	Angola, Namibia
Mwami-Mchinji OSBP	Upgrade	Malawi, Zambia
Plumtree-Ramokgwebane OSBP	Upgrade	Zimbabwe, Botswana
Pioneer Gate-Skilpadhek OSBP	Upgrade	South Africa, Botswana
Kasumbalesa OSBP	Upgrade	DRC, Zambia
Ariamsvlei OSBP	Upgrade	Namibia, South Africa



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Transport Ports	Type	Member States
Development of deep water port at Mwambani Tanga	New Development	Tanzania
Mtwara Port and EDZ development	New Development	Tanzania (benefiting countries include Malawi, Mozambique and Zambia)

ICT	Type	Member States
Regional e-Services and Applications Development	Services, Harmonisation	All Member States
Strengthening of the Postal Sector	Commercialisation, Extension	All Member States
Consolidation of Regional Communications Infrastructure	Extension	All Member States

Note: some projects on the Potential PPP long list are cross border projects. For the cross border projects we included the names of all the Member States involved.

3 Summary of Phase II: Detailed Project Scan

The focus of Phase II of the assignment was to conduct a detailed and comparative analysis of each of the 39 Projects with the aim of developing a Short List which should be considered for PPP feasibility studies in the short term and a pipeline of projects for medium and long term.

In keeping to the purpose of the project scan, the credibility of the current projects were assessed in more detail in terms of information across a range of project indicators and each project was evaluated to allow a comparative analysis between projects. This is intended to maximise the opportunities for accessing project development (feasibility) funding for 2 to 4 projects, in the short term to get PPP projects implemented in the SADC region. The detailed evaluation criteria were based on predefined, agreed questions. Responses to these questions would allow an assessment of their suitability for PPP procurement.

The questions were divided into three categories namely; the critical questions, the important questions and the expected questions. The three categories received different weightings. The questions which were grouped under 'critical' type questions received a weighting of 5, similarly if a question was deemed important it was placed within the 'important' type question carrying a weighting of 3, all other questions were then classified as 'expected' type questions and received a weighting of 1.

The scoring of the projects is based on the answers obtained to the evaluation questions. Thereby, if a project was rated as positive in response to a question, it was assessed as favourable for PPP procurement and awarded with a score of 1. Thereafter weightings as discussed above were applied and an overall score was derived. The evaluation questions are listed in Table 1 below and the weightings assigned to the evaluation questions are listed in more detail in Phase 2 report, a summary is presented below:

Table 3: Evaluation Criteria Questions

“Critical” Questions
1. How supportive is the public sector environment?
2. Charges and Revenues
3. How well suited are the project characteristics to a PPP?
“Important” Questions



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1. Public sector PPP capacity and experience
2. Public sector funding assistance for PPPs
3. How do other factors impact on PPP suitability? Time constraints
4. Land availability
“Expected” Questions
1. How supportive is the private sector environment? / Private sector capability and appetite
2. Economic, environmental and social impacts
3. Impacts on labour and employment

A final further assessment was performed. An evaluation based upon private sector appetite/ interest within a particular sector was applied to the projects utilising assigned weightings to the sector. A higher weighting, say 4, implied 'good' private sector interest, a weighting of 2 implied 'some' interest, provided there was good commercial viability, and a weighting of 1 implied 'little' interest subject to commercial opportunity and ease of implementation.

Table 4: Sector Weighting point allocation

Points	Sector
2	Energy - Power - Transmission
4	Energy - Power - Generation
4	Energy - Petroleum and Gas
1	Transport - Border Posts
4	Transport – Road
4	Transport – Rail
4	Transport - Air
4	Transport - Ports
2	Tourism
4	Telecommunication - ICT
2	Telecommunication - Postal

An overall score was then determined after the series of criteria-evaluated questions. Weightings were assigned to the questions and the sector score added to the projects. The overall scores were as follows:

Table 5: Overall Scores of the Projects.

Project Number	Project name	Overall score	Comment
39	Consolidation of Regional Communications Infrastructure (Fibre Backbone)	31.33	Short term, feasibility required with proper Needs Analysis required to define the need in each member state
21	Chingola-Solwezi Railway Extension	30.50	Short term
13	Driver Education and Testing Centre	26.67	Short term project
25	Trans Kalahari railway	26.50	Short term project
22	Trans-Capriwi-western Zambia Railways from Kolwezi (DRC), through Solwezi (Zambia) to Mongu, Sesheke (Zambia) and	24.67	Medium to long term project reason is it goes through 3 jurisdictions

	Katima Mulilo (Namibia)		
8	Artificial Recharge of Windhoek Aquifer - Phases 2B and 3 (Project P1-8)	24.17	Short term project
19	Transport-38: Tchobanine Heavy Haul Railway (Techobanine)	23	Key transport rail linked to Project 23
23	A heavy haul railway line and a port at Ponta Techobanine, Mozambique	23	Long term includes port.
37	Regional e-Services and Applications Development	21.33	Medium term however the value is too small for PPP approach
New project Added	Regional Locomotive Wagon Pool	21.33	Medium term - the status of the rail and demand unknown across the 3 jurisdictions
38	Strengthening of the Postal Sector	16.17	Medium to long term – numerous jurisdictions, some of the objectives will be long term
29	Oshikango-Santa Clara OSBP		8 November 2013, Outstanding – awaiting data from project sponsor
26	TransKalahari/Mamuno OSBP		8 November 2013, Outstanding – awaiting data from project sponsor
34	Ariamsvlei OSBP		8 November 2013, Outstanding – awaiting data from project sponsor
16	Upgrading Of Dar Es Salaam (Dsm) - Isaka (Isk) Railway Line To Standard Gauge And Construction Of Isaka- Keza – Kigali(Rwanda) / Musongati (Burundi) Railway Line		8 November 2013, Outstanding from Tanzania PPP unit – awaiting project sponsor detail
17	Tanzania Railways Limited Revival		8 November 2013, Outstanding from Tanzania PPP unit – awaiting project sponsor detail
5	Rumakali		8 November 2013, Outstanding from Tanzania PPP unit – awaiting project sponsor detail
35	Development of deep water port at Mwambani Tanga		8 November 2013, Outstanding from Tanzania PPP unit – awaiting project sponsor detail
36	Mtwara Port and EDZ development		8 November 2013, Outstanding from Tanzania PPP unit – awaiting project sponsor detail

Table 6: Projects excluded from the potential pipeline with the reasons

Project Number	Project name	Comment
27	Nakonde/ Tunduma OSBP	All Zambia OSBP cancelled as PPPs, government doing them directly
15	Kolwezi- Dilolo road(Angola border, SADC Route 20, 426 km) :Rehabilitation	Procurement underway
11	Luanda-Windhoek Corridor roads	Majority of this procured, in no need of study report
1	ENERGY-88: Namibia –Angola	No concept note available
12	Platjan bridge	Already in procurement
32	Pioneer Gate-Skilpadhek OSBP	Being implemented
31	Plumtree-Ramokgwebane OSBP	Already being implemented, Infrastructure already being handed over
24	Kinshasa- Ilebo railway link: construction	Already in procurement
33	Kasumbalesa OSBP	All Zambia OSBP cancelled as PPPs, government doing them directly
18	Construction Of Mtwara – Songea – Mbambabay Railway Line With Spurs To Mchuchuma / Liganga.	Feasibility done
30	Mwami-Mchinji OSBP	All Zambia OSBP cancelled as PPPs, government doing them directly
14	Road Decongestion Programme	Already in procurement
9	Grand Baie Social Welfare Complex	No concept or feasibility study available and a small project of \$1.5 million
7	Water Supply to 13 Housing Estates in Mauritius (Project P1-6)	Mauritius PPP could not find any concept or feasibility study
2	Baynes Hydro Power Plant	Feasibility completed, into design and got committed funding for development of feasibility
28	Katima Mulilo/Wenela OSBP	All Zambia OSBP cancelled as PPPs, government doing them directly
10	Establishment Of Cargo Freight Station (Cfs) – Kisarawe	Funding committed by World bank for feasibility study
20	Restructuring of Zambia’s railway systems	Procurement underway
3	Lunsemfwa Lower (Power generation)	The project is well down the line of being developed privately and does not require any assistance
4	Kalungwishi(Power generation)	The project is well down the line of being developed privately and does not require any assistance
6	Mambilima Falls Site 1 and 2	The project is well down the line of being developed



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	privately and does not require any assistance
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Note: if the project was indicated as a cross border project, the project was evaluated and scored in each country and the lowest score was used as part of the ranking system.

In conclusion, the following five projects were identified as the top ranked and should be taken into consideration for the next steps in arranging development funding which involves preparing the projects for application for raising project preparation funding.

- North West Rail, Zambia: Kalumbila Mine to Jimbe border with Angola
- Trans Kalahari Railway Project
- Consolidation of Regional Communications Backbone Infrastructure Project (A)
- Artificial Recharge of Windhoek Aquifer- Phases 2B, 2C and 3 Projects.
- Driver Education and Testing Centre Project

4 Potential Project Preparation Funders and Public/Private Dialogue (PPD) Forum

4.1 Funders

Potential project development financiers were identified and approached once the top projects were identified, only those funders who had the potential to fund the identified projects in particular sectors were approached. As no projects in the energy sector were identified and thus none of the energy funds were approached.

Of the 16 potential funders we approached, 10 showed interest and have the appetite to fund feasibility studies. Some of the funder's will provide funding that is subject to conditions. These conditions depend on the project's location; whether or not the project delivers a public good; whether it is within a programme; whether it is certain industries; the type of projects; on condition of the funders participating in the senior debt; on the specific project sponsors; and whether the request for funding has been made by a government entity.

Refer to the Phase II report for the detail.

4.2 PPD

SADC 3P Network together with NBF in the aim to improve public and private dialog held a Public-Private dialogue Forum (PPD), in Johannesburg on the 23th and 24th of October 2013. A number of organisations, senior government officials, investors, legal and financial advisors, and senior industry representatives were invited and over 120 representatives attended. The aim of the PPD was to:

- promote the PPP approach to infrastructure development in the SADC region
- introduce SADC 3P, NBF and its objective
- provide background to current Scans and project opportunities
- provide a number of selected projects

Delegates were exposed to the current and upcoming PPP projects in the SADC region from the PPP scan. The priority projects from this scan were presented and dialogue and collaboration between public and private parties took place.

The way forward on these projects were identified and need for future PPD sessions were established.



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5 Conclusions

The assignment was to identify two to four projects that can be taken forward into detailed feasibility studies and the solicitation of project preparation funding for implementation through a PPP delivery type model.

Two reports were produced. In Phase I of the SADC Network Scan, 39 projects had been identified for the potential PPP process. In Phase II of the SADC Network Scan, the 39 projects were assessed against further detailed criteria and ranked. A number of these projects were assessed in terms of short term, medium term and long term preparedness for implementation.

The following 5 projects were identified as the top ranked and potential Funders/ Grant providers should now be approached with the requisite project information from the Phase II Report in order to solicit feasibility study grant funding.

- North West Rail, Zambia: Kalumbila Mine to Jimbe border with Angola
- Trans Kalahari Railway Project
- Consolidation of Regional Communications Backbone Infrastructure Project (A)
- Artificial Recharge of Windhoek Aquifer- Phases 2B, 2C and 3 Projects.
- Driver Education and Testing Centre Project

Official letters would need to be obtained from the Governments of Mauritius, Namibia, Zambia and Botswana requesting assistance from SADC 3P to approach various potential funders to start the discussion on raising feasibility study funding.



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