



Welcome to the Saldanha Bay Industrial Development Zone

The first Southern African Special Economic Zone to include a port.

A Hub Dedicated to The Oil and Gas Industry and Marine Repair
and Fabrication Cluster.

Shaping A Vibrant Marketplace Where Investors, Local Businesses
and Communities Can Unlock Economic Growth.



SALDANHABAY
INDUSTRIAL DEVELOPMENT ZONE

Update on Progress

SBWQFT AGM

20th February 2020

Langebaan Country Estate

Kaashifah Beukes, CEO



About me: Kaashifah Beukes, CEO

Kaashifah is passionate about inclusive delivery that makes a difference.

As one of a handful of SEZs in South Africa, Kaashifah leads the SBIDZ team on complex, strategic and operational matters to deliver value to its shareholder (the Western Cape Government) and stakeholders alike.

Kaashifah has been with the SBIDZ-LC since its start up in 2014 in an Executive position in Stakeholder Management, and before that, since 2010 as one of the lead project managers overseeing its feasibility study and business plan development with local, provincial, national, community and private sector stakeholders, and then eventual designation by the South African National Cabinet. Prior, she practised as a civil engineer for a private consultancy in Cape Town.

Kaashifah holds a BSc in Civil Engineering (UCT) and an MBA from the Graduate School of Business (UCT). She hails from Port Elizabeth in the Eastern Cape.





Taking stock of key milestones

Feasibility Study

- SBM, WCG & DTI supports SBIDZ application & further business plan

Designation

- Operator Permit
- 1st SEZ in a Port in SA
- Community structures for Skills & Enterprise Development
- Schedule 3C Entity under Wesgro

Establishing

- SBIDZ-LC Act
- R86m WCG Opex Funding
- R100m WCG Land Funding
- R741m dti SEZ Capex Funding
- 9 ROFRs
- *Voice of the Customer*
- *Socio-Economic Assessment of the Communities of SBM*
- SBM HOA & SLAs
- TNPA HOA & 1st MOU

Ready for scale

- 4 tenants operational (incl OSSB)
- 1 in construction; 2 ready to start
- CCA Designation on 70%
- 2nd TNPA Lease
- R2,5bn leveraged from the public sector
- R21,9bn investment pipeline established
- 2,199 training opportunities created to date
- R168m value to local construction companies to date

2010

8

2013

28

2016

40

2019

Ready to scale for the Maritime Sector

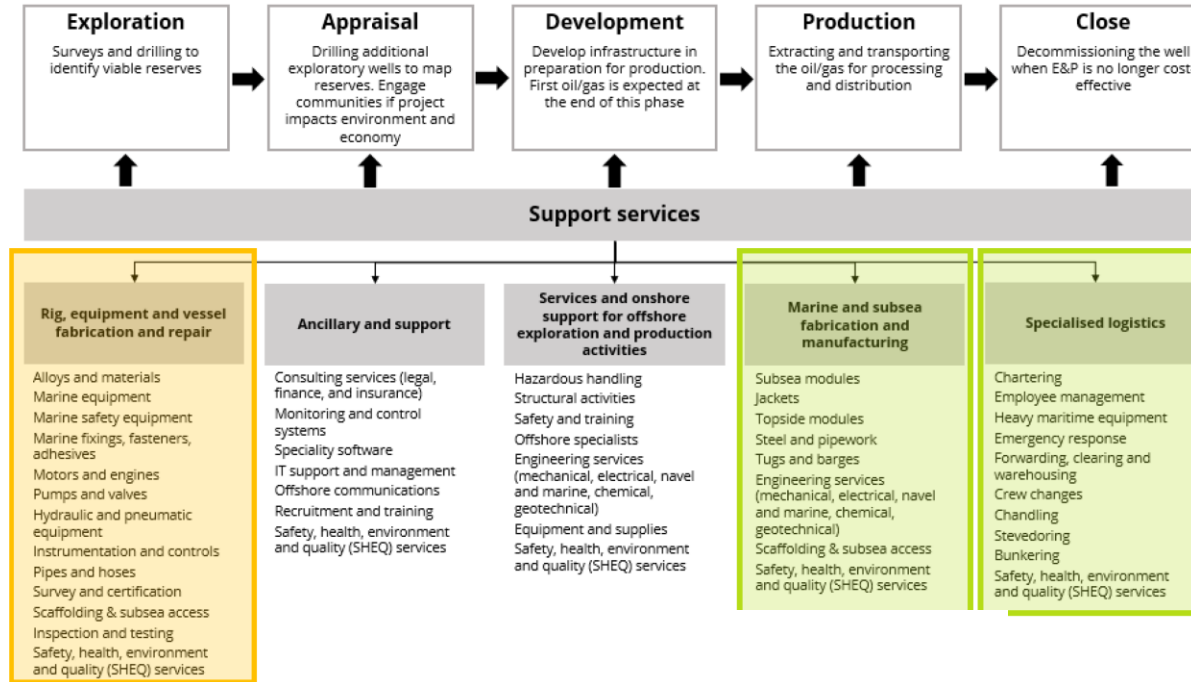


- ~ Global sea trade has more than quadrupled over the past 4 decades¹
- ~50,000 merchant ships trade internationally, crewed by over one million seafarers of every nationality²
- ~30,000 vessels sail through South Africa's waters annually³
- ~13,000 vessels dock at South Africa's ports annually & 5% are serviced locally⁴

Shipping has become one of the most globally competitive industries. Increasing trade volumes & technological advances mean larger and more specialised ships will be built which require larger, deeper ports and specialised terminals. IMO 2020 also demands ports and infrastructure to meet environmental sustainability pressures.



Ready to scale for the Oil & Gas Sector



- Drilling rig count in Africa rose from an average of 83 in 2017 to current year average of 117 in 2019¹
- ~89% of total workforce in repair and maintenance came from the Western Cape²
- First gas from ENI's Mozambique FLNG Coral South facility is expected in 2022
- First proof of concept LNG project for industrial offtake (2 x 52MW) approved by NERSA using Cape Town

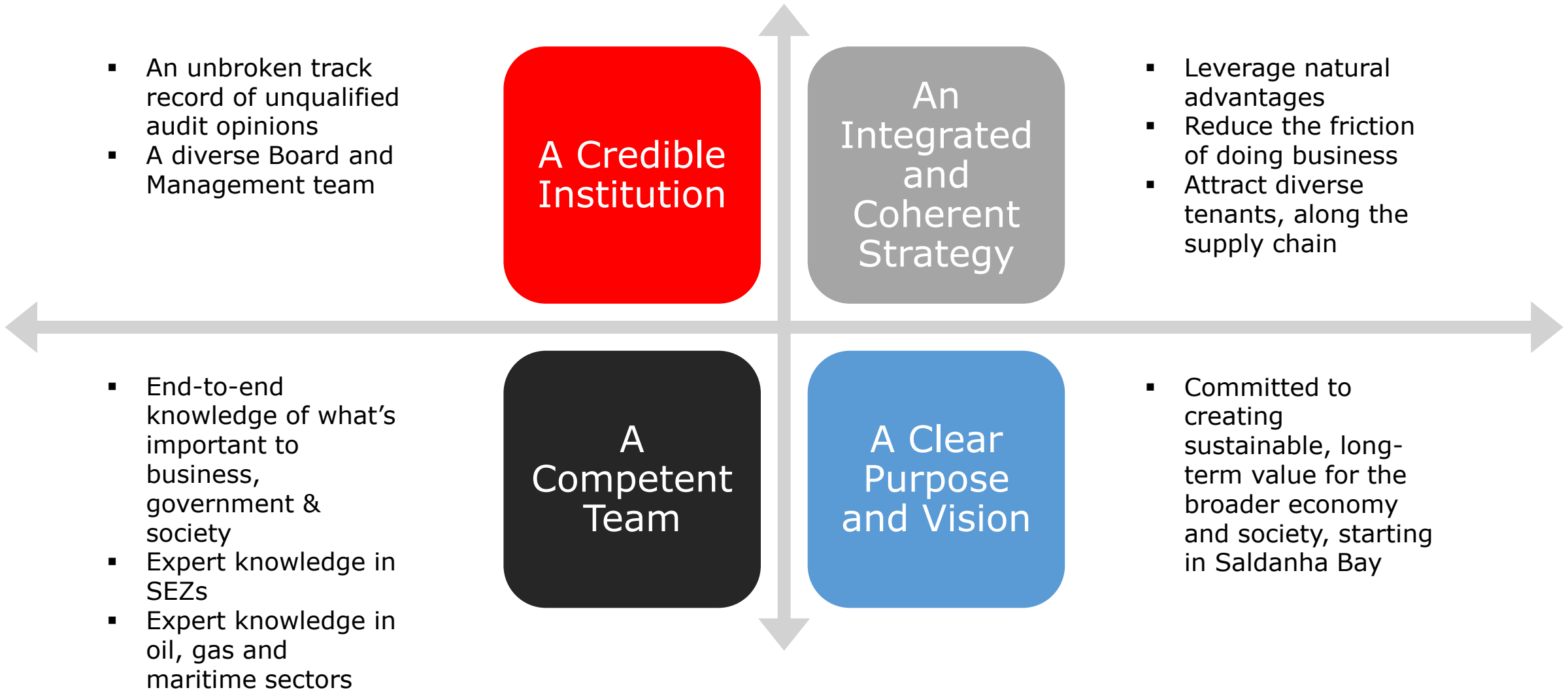
South Africa and the Western Cape is strategically positioned for OG&M activity and support services globally as it links Asia, Africa and the East Coast of North and South America via the South-South Trade Corridor, and offers the bulk of the skills. South Africa's manufacturer's and service operators can be part of the lower-carbon solution.

¹ BakerHughes Africa Drilling Rig Count, 7 Oct 2019

² Western Cape Maritime Industry 2018 Economic Contribution, Stratecon, 2019



Ready for scale from within





...and brutally realistic about getting it done

- Uncertainty is the new normal, viz. global geo-politics, climate change activism resurgence, growing inequality in developed countries.
- Global growth, as forecast by the IMF, is expected to be weaker than forecast at the time of the MTBPS 2019.
 - SA economy contracted by 0.6 per cent q/q in Q3 2019.
 - Structural constraints and deteriorating public finances weigh on business confidence and private investment mobilization.

“SA’s economic recovery requires substantially improved **coordination** between the public and private sectors, and across industrial, financial and service sector stakeholders.

An improved macroeconomic outlook, in South Africa’s current low-growth trap, has to be underpinned by **joint engagement** to **restore confidence**, **accelerate investment** and **broaden economic participation** across a broad policy front – fiscal, financial, sectoral, local and institutional.”

We are clear on what our job is

Why do we exist?

Purpose

We build successful and responsible models of inclusive, sustainable and thriving societies and economies for generations now and to come in Saldanha Bay and beyond.



What do we do?

Mission

We foster responsible investment in the zone.

We act as an inclusive and sustainable economic catalyst.



Where are we going?

Vision

Our vision is to be Africa's premier oil, gas and maritime industrial and services centre, offering a world-class integrated engineering, fabrication, logistics and Freeport environment to zone users and tenants.





Our strategic priorities

Being financially fit
reduces the public fiscal
burden

Commercial
sustainability

We achieve more &
quicker when we
understand &
appreciate each
other

Business,
government &
society
partnerships

Catalytic
Infrastructure &
Facilities

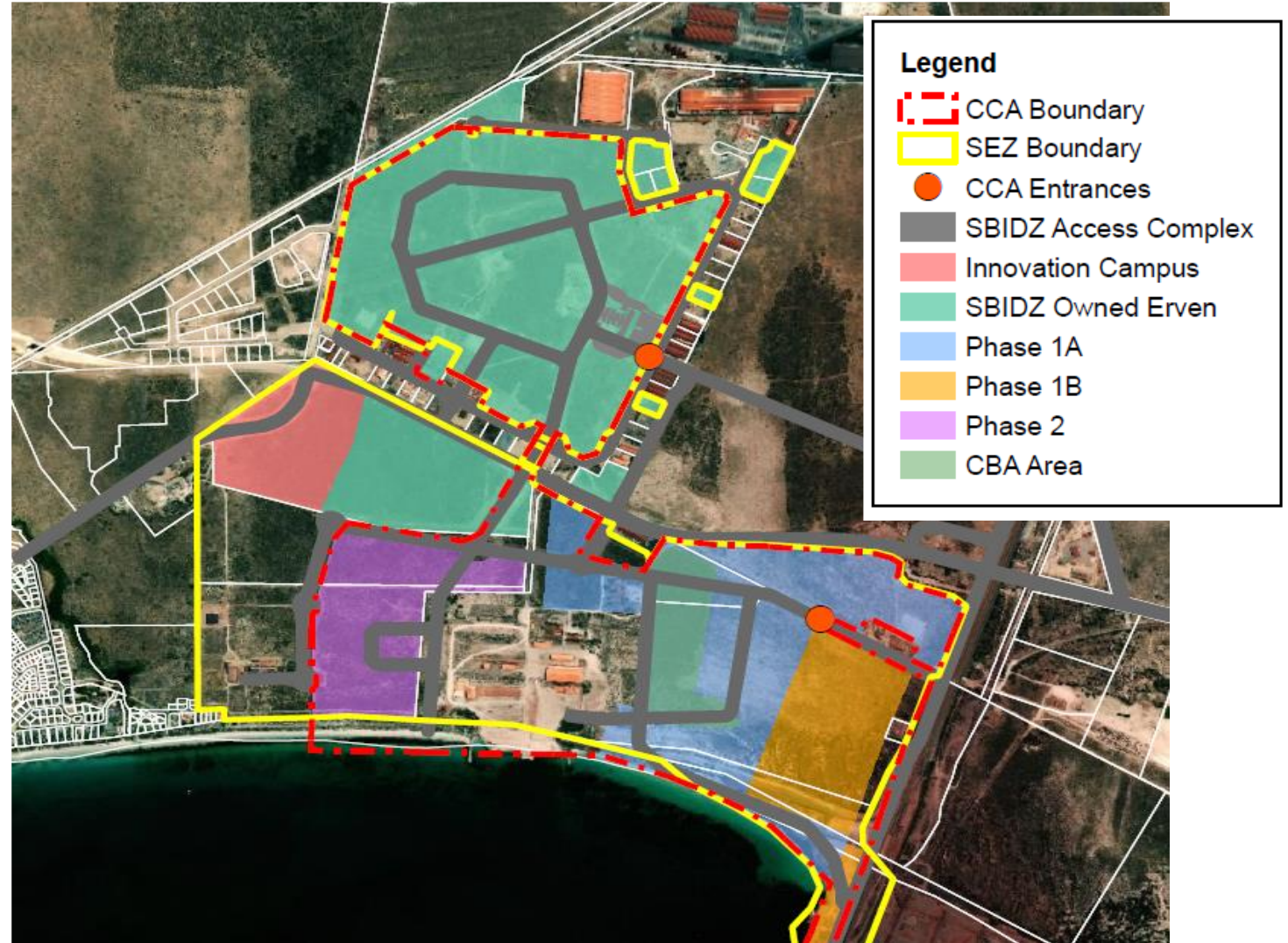
Growth needs
capacity to do the
work

Local &
industry
readiness

Building competitive
know-how takes time
and practice

Status ito environment

- We have an EA on North precinct & parts of Portland.
 - What's covered: Construction of buildings, offices, warehouses, etc.; roads, de-vegetation for development purposes
- We have a waste management licence for handling hazardous fuels.
- Tenants will provide a Waste Management Plan for the EMP.
- If operations trigger a listed activity from NEMA, a separate EIA is necessary.





Priorities for short-term

- Offset agreements to develop other sites on footprint.
- Scoping of a marine EIA to support port infrastructure developments.

“The planning period ahead will require the same diligent work in a new direction: becoming fully operational and ushering in a new *busyness* to the too-long quiet West Coast port and hinterland.”

SBIDZ-LC Board Chairperson, Dr JC Stegmann, *SBIDZ Five-year Strategic Plan 2020-2025*



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INDUSTRIAL DEVELOPMENT ZONE

**Thank
you for
your
time**

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