

# **iNFRASTRUCTURE** **Investment Handbook** **2024**



## MINISTER'S FOREWORD



## Minister Dean Macpherson Public Works and Infrastructure

***“South Africa is ready for infrastructure investment, and I look forward to engaging with any investor to turn our country into a construction site.”***

The need for infrastructure development and investment in South Africa has never been more urgent. Not only does our transport networks, energy generation, and public facilities require significant upgrades and expansion, but infrastructure investment is also widely viewed as a catalyst for economic growth. Aside from the immediate employment opportunities it provides, it additionally lays the foundation for long-term sustainable economic development. The building of new roads, railways, sustainable electricity supply, hospitals and schools helps to improve the overall functioning and efficiency of our economy.

The government of South Africa has a bold vision to transform our country's economic landscape. Our overriding objective is to close the infrastructure investment gap by developing a bankable pipeline of infrastructure projects and programmes that can leverage private sector financing. We are improving the legislative and regulatory environment to open the door for increased private sector participation, crucial for the sustainability and scalability of these projects.

I oversee Infrastructure South Africa which is the central government agency responsible for coordinating and driving a national infrastructure investment programme with the intent of improving infrastructure investment and delivery. Working closely with the Infrastructure Fund, have developed this Infrastructure Investment Handbook that provides visibility of infrastructure projects and programmes that have the potential to leverage private sector investment.

Infrastructure investment plays a key role in improving the productivity of many sectors, reducing the cost to companies and creating jobs. The successful execution of infrastructure investment requires long-term planning and oversight as well as deeper private and public sector collaboration and partnerships. The Infrastructure Investment Handbook is intended to generate interest from infrastructure providers and financiers. South Africa is ready for infrastructure investment, and I look forward to engaging with any investor to turn our country into a construction site.

## EXECUTIVE SUMMARY



## Ms. Mameetse Masemola Head of ISA (Acting)

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***Infrastructure South Africa, working in collaboration with the Infrastructure Fund, are mobilising funding and financing thereof, to progress these to financial close.***

Infrastructure South Africa is established to provide strategic, technical and financial advisory support to project sponsors for the planning, preparation, development and implementation of national pipeline projects and strategic integrated projects.

This edition of the Infrastructure Investment Handbook profiles priority infrastructure projects, the size and scale that will have a significant positive impact on the economy. They underscore the deeper collaboration models between the private and public sectors that we have embedded over a period of time to develop a comprehensive pipeline of bankable projects.

The portfolio of projects showcased seek to leverage significant levels of private sector finance due to limited fiscal borrowing capacity, amounting to US \$56,8 billion. These are high impact projects utilising blended finance as well as PPPs, private sector led infrastructure projects in the energy sector that require financing and have demonstrable opportunities in terms of supply of equipment and technology as well as the future project pipeline. Infrastructure South Africa, working in collaboration with the Infrastructure Fund, are mobilising funding and financing thereof, to progress these to financial close.

Additionally, we are showcasing projects that are currently under project preparation with a total value of over US \$14,9 billion. This is a future project pipeline, but also requires Infrastructure South Africa to utilise its seed funding to catalyse additional project preparation grant funding to close the financing needs for project preparation.







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# Infrastructure Overview – South African Context



# SA Infrastructure Investment Factsheet

The factsheet provides an overview showing important macroeconomic variable trends and the key highlights thereof.

## SA ECONOMIC INDICATORS AT A GLANCE

Measure	Facts	Highlights	
Gross Domestic Product (GDP)	2023: US\$ 362 877 m	GDP increased since 2020. Growth of 0,6% between 2022 and 2023.	
	2022: US\$ 360 707 m		
	2021: US\$ 353 945 m		
	2020: US\$ 338 046 m		
Foreign Direct Investment (FDI) Inflows	2023: US\$ 5 364	Significant decline in FDI inflows between 2022 and 2023.	
	2022: US\$ 9 195 m		
	2021: US\$ 40 659 m		
	2020: US\$ 3 154 m		
Gross Fixed Capital Formation (GFCF) % of GDP	2023: 15,6% (increased)	Overall increase in GFCF towards 2023.	
	2022: 15,4% (increased)		
	2021: 13,0% (increased)		
	2020: 12,5% (decreased)		
Inflation (CPI)	2023: 6,1% (decreased)	Significant improvement in inflation between 2022 and 2023. Recent 2024 release shows inflation improved to 4,6%.	
	2022: 7,0% (increased)		
	2021: 4,6% (increased)		
	2020: 3,2% (decreased)		
Rand/US\$ Exchange Rate	2023: R18,45 (Depreciation)	Rand depreciated between 2022 and 2023. Recent data shows appreciation to R17,95/US\$.	
	2022: R16,94 (Appreciation)		
	2021: R20,02 (Depreciation)		
	2020: R18,34 (Depreciated)		

The table above reflects a constant growth in the GDP whilst also indicating an upward trend in domestic investment. The exchange rate has also depreciated, which is to the benefit of foreign investors. It should be noted that the inflation rate has improved significantly to its lowest levels in the last three years.

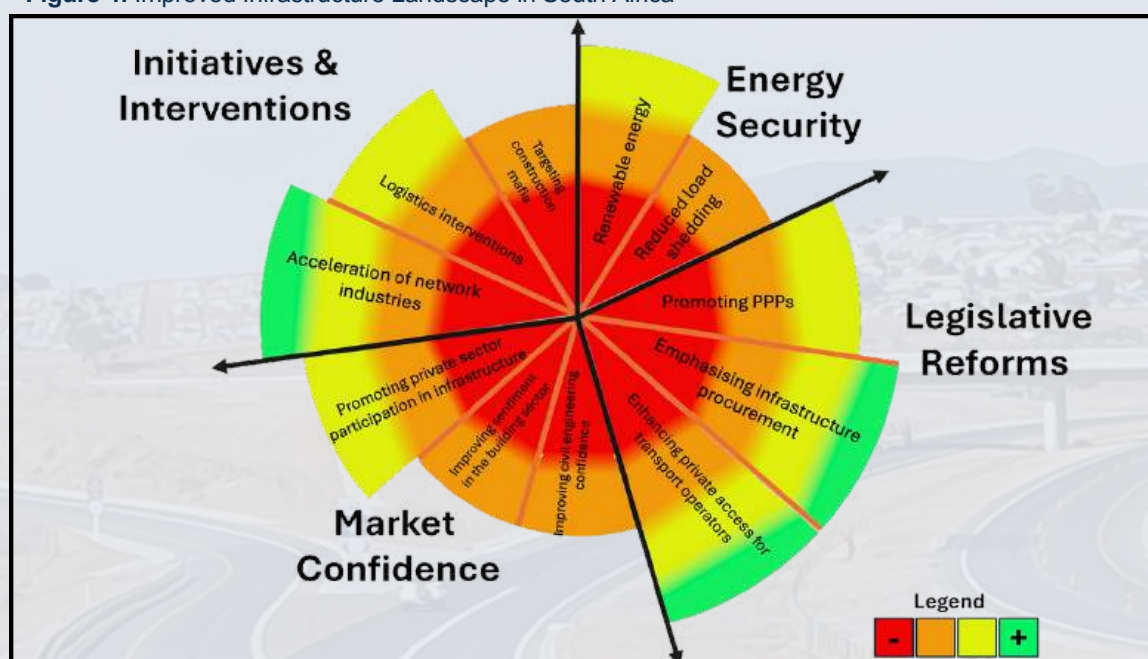
Noting the above indicators, the next section provides an overview of the main infrastructure sectors.



## INFRASTRUCTURE LANDSCAPE IN SOUTH AFRICA

The infrastructure landscape in South Africa has transformed and is showing positive signs of improvement. The figure below depicts the strategic reforms, improvements in energy security, positive market sentiment and the infrastructure legislative reforms.

**Figure 4:** Improved Infrastructure Landscape in South Africa



The market sentiment, as indicated by the civil engineering and building confidence index, has shown improvements post covid for the construction sector. Government has also initiated numerous programmes targeted at collaboration with the private sector in the development and delivery of infrastructure. There has been a concerted effort to address the energy security challenges experienced by the country, resulting in a reduction in load shedding and the conclusion of renewable energy projects. Legislative reforms in the form of a newly established transport economic regulator which aims to improve market access for private participation.

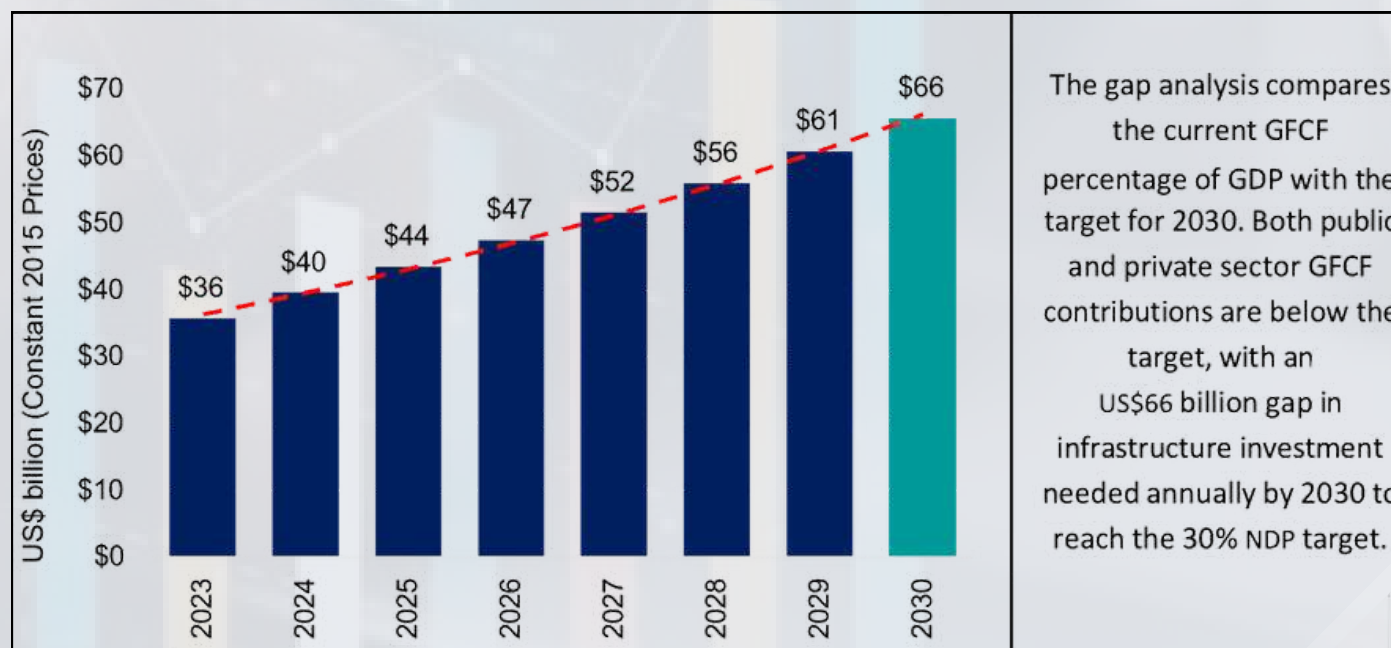
Other reforms relate to amendments to the public-private partnership (PPP) regulations and the amendments to procurement legislation to formulate regulations regarding the procurement of infrastructure. Government has also made progress in improving the delivery of infrastructure through key strategic reforms aimed at streamlining approval processes for network industries, improving freight logistics and addressing the surge of the construction mafia. The infrastructure landscape provides a positive outlook with room for potential improvements towards 2030 NDP targets.

## INVESTMENT OPPORTUNITIES

A significant infrastructure investment gap has been identified in achieving the NDP target for GFCF of 30% as a percentage of GDP, noting the current levels at 15,6%. The gap illustrates significant investment opportunity with a strong need for private sector participation. As of 2023, private sector investment was around \$27.6 billion with a need for an additional \$85.2 billion over the next six years.

The numbers presented in the gap analysis image below are in 2030 nominal values. It provides a holistic overview of the GFCF target required by 2030 to ensure that GFCF stands at 30% of GDP and how much the public and private sectors require additional infrastructure investment spending.

**Figure 5:** Gross Fixed Capital Formation Annual Gap – Investment Requirements in South Africa



**Source:** Statistics SA (2010 – 2022); Infrastructure South Africa Forecast (2023 – 2030)

From the above, it is evident that the market for infrastructure investment is substantial, and it is supported important interventions to ensure long term sustainability. The following sections will provide a snapshot of the projects that are available for investor interest.





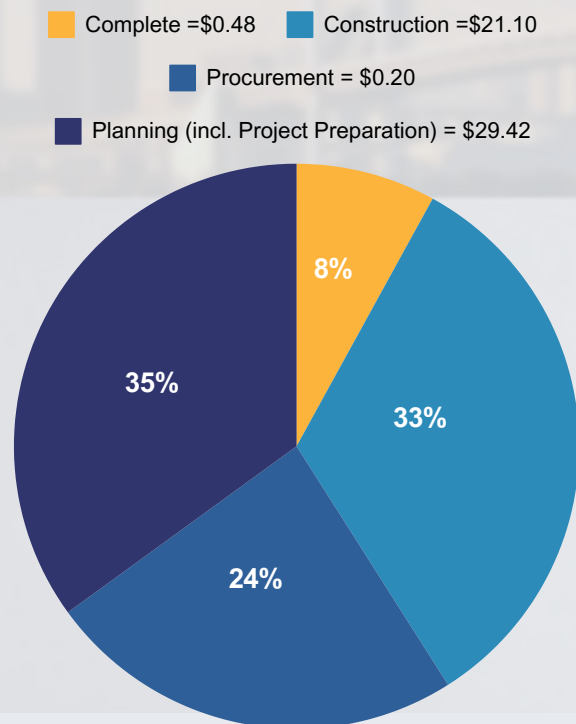
# INFRASTRUCTURE PIPELINE

## INFRASTRUCTURE PIPELINE

Infrastructure South Africa (ISA) undertakes the development of comprehensive infrastructure project pipeline, ensuring governance, visibility, and transparency in respect of project structuring, due diligence, quality assurance to build investor confidence and leverage private sector funding. The infrastructure project pipeline supported by ISA and Infrastructure Fund (IF), consists of:

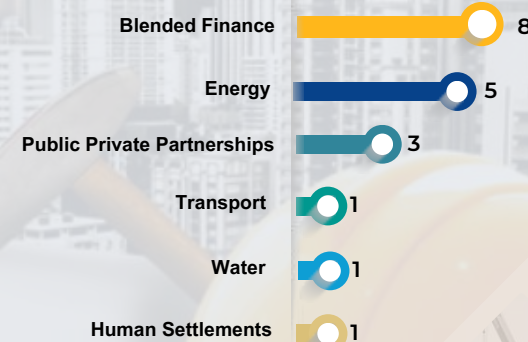
- Projects registered and gazetted as Strategic Integrated Projects (SIP) in terms of the Infrastructure Development Act,
- Projects registered for support in the development of business cases to achieve investment readiness and seek capital funding support,
- Projects registered and require financial structuring such as Private Public Partnerships, and to address funding gaps through blended finance solutions.

THE PIPELINE OF INFRASTRUCTURE PROJECTS REGISTERED WITH ISA ARE MEGA, CATALYTIC PROJECTS DISTRIBUTED THROUGHOUT THE COUNTRY, AND ARE AT VARIOUS STAGES OF DEVELOPMENT AS OUTLINED IN THE FIGURE BELOW:

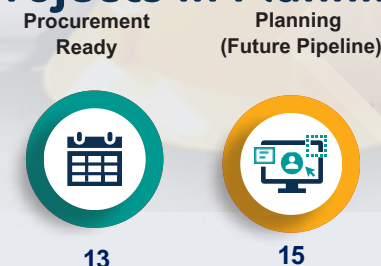


THIS SECTION PROVIDES AN OVERVIEW OF THE INFRASTRUCTURE PIPELINE, PROFILING PROJECTS SUPPORTED WITHIN ISA PIPELINE AS FOLLOWS:

### Investment Ready Projects



### Projects in Planning

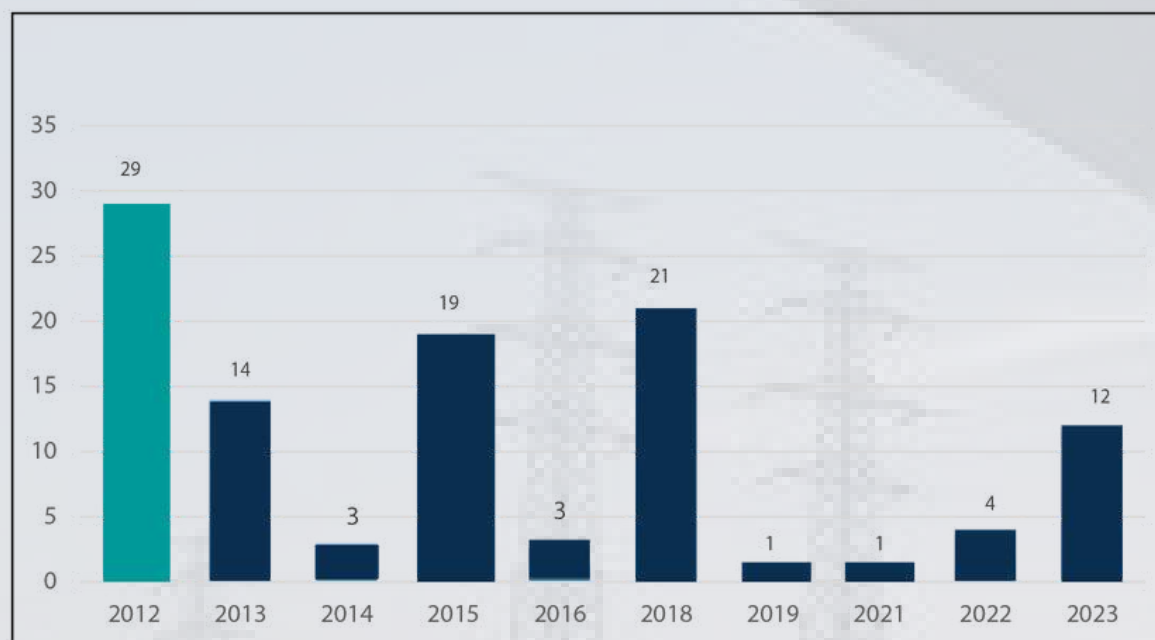


## PUBLIC PRIVATE PARTNERSHIP PROJECTS

South Africa has established the need to enhance private sector participation in the delivery of the infrastructure investment programme. Private sector participation is not only essential for addressing the infrastructure funding gap but also for crowding in technical capacity and expertise that exist within the private sector.

Public-Private Partnerships (PPPs) are integral in crowding in private sector investment and the government has prioritise the need to improve the ease of investing in PPPs in the country. Although there is an increase in the number of PPP projects that have reached financial closure (i.e., see Figure 6), there remains a need to enhance the PPP pipeline. To further support this, the government has initiated various reforms to support PPPs in South Africa including the review of the PPP framework. Furthermore, South Africa has the necessary experience, processes and expertise to implement and operate PPPs.

**Figure 6:** PPP Projects that have reached financial closure (period 2012 – 2023)



Investors may invest or participate in PPPs through a competitive bidding process where the government issues a request for proposals. Alternatively, investors may invest in these projects through local development finance institutions or the Infrastructure Fund, which offers opportunities for blended finance in some of these PPP projects. Secondary objectives such as employment creation (i.e., **preference for women, people living with disabilities and the youth**), partnerships with Small, Medium and Micro Enterprise (SMME) and the development and the use of local content **are important in delivering on South Africa's PPP investment programme.**





## INTEGRATED RENEWABLE ENERGY AND RESOURCE EFFICIENCY PROGRAMME (IREREP)

The iREREP is the official national Programme for Resource Efficiencies and Renewable Energy for Government facilities in a bid to meet sustainability targets of Government and South Africa at Large.

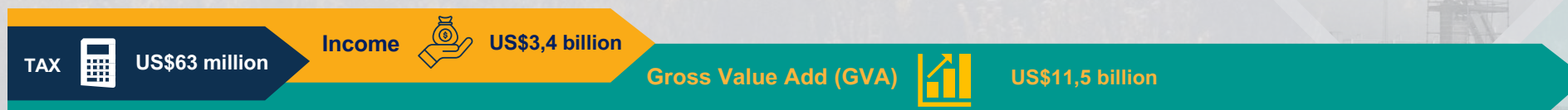
The delivery of the programme is anchored across centralised governance, security of supply, budget rationalisation, socio-economic development, and environmental sustainability. The programme is being packaged for the request for proposal process to be communicated with the market in November 2024.

The programme focuses on a revised utility management approach to improve efficiency (water, energy, waste) and harness the value of deploying renewable energy technologies. iREREP is spearheaded by the South African Government ministries and entities, with clear outcomes based on quantifiable targets in energy, water use, reduction and cost of waste.

The programme's technology options analysis includes:

- Sourcing reliable, environmentally friendly, cost-effective renewable energy and waste recycling technologies.
- Deployment of smart metering solutions.
- Minimising of system losses (water and energy)

## Economic Impact Potential



## QuickFacts

### Project Capital Value

~\$21,5 billion

### Project Ownership

Public Private Partnerships  
Department of Public Works and  
Infrastructure

### Province

National

### Status/Stage

Procurement & Contract Structuring

### Funding Need

Debt & Equity

## IREREP Targeted Outcomes for Environmental Sustainability



**REDUCTION OF ENERGY USE INTENSITY OF BETWEEN 22% AND 45%.**



**CO2 AND OTHER GHG EMISSION REDUCTION OF 52 Mt BY 2050.**



**WATER USE INTENSITY REDUCTION OF BETWEEN 30% AND 55%.**



**REDUCE WASTE AND DIVERT 50% OF WASTE FROM LANDFILL SITES.**



**REDUCE WASTE COSTS BY 50%.**

## REDEVELOPMENT OF PORTS OF ENTRY

The project aims to reduce delays experienced by passengers and vehicles at six inland borders that South Africa shares with its neighbouring countries. This will facilitate the efficient movement of goods to improve regional trade.

This is a PPP project, where the private party is expected to undertake the design, construction, and operation and financing of the redevelopment of the identified borders. The private party will also be responsible for the maintenance and provision of technical equipment for the project.

The six ports of entry include:

- Beitbridge (Zimbabwe)
- Kopfontein (Botswana)
- Lebombo (Mozambique)
- Oshoek (eSwatini)
- Ficksburg (Lesotho)
- Maseru (Lesotho)



## QuickFacts

### Project Capital Value

TBC

### Project Ownership

Department of Home Affairs &  
Border Management Authority

### Province

National

### Status/Stage

Procurement & Contract Structuring

### Funding Need

Debt & Equity

### Financial Close

October 2025

The procurement process is underway with the closing date scheduled for 12 September 2024 Link to Procurement: <https://www.gtac.gov.za/tenders/ppp-tenders/>



## TYGERBERG HOSPITAL REDEVELOPMENT

The new Tygerberg Central Hospital is a 893 bed hospital. The new hospital will consist of 846 beds procured via a Public Private Partnership [PPP] and 47 beds situated in the Oncology Building [Gene Louw Building] on the Tygerberg Hospital Estate.

The new hospital will provide some General Specialist [Level 2], Sub-Specialist [Level 3], and Super-Specialized Quaternary [Level 4] services to patients referred from the East Metropole and the Paarl and Worcester Rural Geographic Service Drainage Areas [Paarl Hospital Drainage Area and Worcester Hospital Drainage Area].

The new hospital will also serve as a training platform for health professionals in partnership with Higher Education institutes [HEI's]. The HEI's include Stellenbosch University [SU], the University of the Western Cape [UWC], the University of Cape Town and the Cape Peninsula University of Technology [CPUT].

The new hospital will also serve as a training platform for medical registrars from other provinces and parts of Africa.



## QuickFacts

### Project Capital Value

To be finalised after cost evaluations for the PPP RFP are complete

### Province

Western Cape

### Project Ownership

Department of Health and Wellness:  
Western Cape Provincial

### Status/Stage

Procurement & Contract Structuring

### Investment Opportunities

Debt & Equity

Health Sector

## PROJECT UKUVUSELELA – GAUTENG TO EASTERN CAPE CORRIDOR

The Ukuvuselela freight rail line is viewed as an important enabler of the automotive sector expansion, specifically for the export-orientated Original Equipment Manufacturers (OEMs), based in the Tshwane area, who have made substantial investments in expanding their plants.

The existing supply chain from the Port of Durban is currently facing operational challenges, including congestion and delays. These issues are primarily attributed to capacity constraints within the port infrastructure. The project will run longer general freight trains such as clinker and container trains between provinces and allow alleviation of traffic both on the National Road (N3) between Pietermaritzburg and Durban and the Port of Durban.

This Project entails the extension of 17 crossing loops along the mainline to accommodate three (3) 50-wagon trains that will be utilised to haul vehicles. It comprises of the upgrade of railway yards, per way loop extensions, acquisition of new rolling stock, formation of an Automotive Operating Company and optimisation and expansion of port terminal infrastructure. It must thus be accelerated through design, financing, and construction execution to meet the export volume ramp-up deadline for the automotive industry which will increase carriage from 1 train with 30 wagons a day to 3 trains with 50 wagons per day by 2026.

Project Ukuvuselela is a strategic investment that will strengthen the automotive industry's growth in South Africa. By modernizing port infrastructure, the project will support the manufacturing sector which is a vital economic driver.



## QuickFacts

### Project Capital Value

To be finalised after cost evaluations for the PPP RFP are complete

### Province

National

### Project Ownership

Department of Health and Wellness:  
Western Cape Provincial

### Status/Stage

Procurement & Contract Structuring

### Investment Opportunities

Debt & Equity

Transport sector



# STRATEGIC INTEGRATED PROJECTS



## RENEWABLE ENERGY INDEPENDENT POWER PRODUCER PROGRAM (REIPPP)

The Renewable Energy Independent Power Producer Program (REIPPP) is a competitive tender process that was designed to facilitate private sector investment into grid-connected renewable energy generation in South Africa through various bidding windows (BW). Bid windows are defined as the time between when a Request for Proposals (RFP) is issued and the deadline time for submission. The offtake for the program is the public sector through Eskom as the offtaker. A total of 9,906MW has been purchased from 123 IPP projects during BW 1 through BW5 of the independent power producer procurement process.

The preferred bidders for BW6 for 1000MW of solar PV were announced in December 2022 [NB1] (**see Annexure B**). BW6 is proceeding to financial close. Currently under procurement is BW7 which seeks to procure 3,200MW from wind and 1,800MW from solar PV resources (**See Annexure C of preferred bidders**). The RFP closed on 15 August 2024. Evaluation targeted for completion within 3 months and financial close targeted for 6 months thereafter. The need for possible funding and the supply of equipment were identified by bidders.

The REIPPPP programme includes the following technology options:

- Solar: Balance of Plant (BOP), Civil & Electrical, Structures & Trackers, Modules, Cables, Inverters
- Wind: BOP, Civil & Electrical, Towers, blades, Nacelles, Hubs
- Storage: Battery Energy Storage Systems (BESS)
- Substations: Transformers, Circuit Breakers, Busbars, Capacitors



## QuickFacts

### Project Capital Value

Estimated: US\$ 816.7 Million (Bid Window 6)  
Estimated: US\$ 4.2 to 5.6 Billion (Bid Window 7)

### Province

National

### Project Ownership

Various Independent Power Producers (IPPs)

### Status/Stage

Procurement & Contract Structuring

### Investment Opportunities

Funding and Equipment Supply

## ENERGY SECTOR

\*DTIC designated sector thresholds apply

[Industrial Procurement - The Department of Trade Industry and Competition \(thedtic.gov.za\)](https://www.thedtic.gov.za/)

## EMBEDDED GENERATION NATIONAL PROGRAMME

The Embedded Generation National Program (EGNP) is in pursuit of incentivising further investment and development across the country's renewable energy landscape through private sector investment in utility-scale renewable energy projects. The offtake for the program is the private sector. The program aims to diversify supply and reduce emissions in line with the industry's commitment to reach a target of net-zero carbon emissions by 2050.

The program is currently supporting the pipeline of more than 100 projects representing over 10,000MW of new private sector renewable generation capacity which is now at various stages of development and comprising the petrochemical, mining and other industrial sectors. Potential exists for funding and supply of infrastructure for the various projects currently under development.

The programme includes the following technology options:

- Solar: Solar: Balance of Plant (BOP), Civil & Electrical, Structures & Trackers, Modules, Cables, Inverters.
- Wind: BOP, Civil & Electrical, Towers, Blades, Nacelles, Hubs
- Storage: Battery Energy Storage Systems (BESS)
- Substations: Transformers, Circuit Breakers, Busbars, Capacitors



## QuickFacts

### Project Capital Value

~\$11.1 billion

### Province

National

### Project Ownership

Various Private Off-takers

### Status/Stage

Various (Feasibility – Procurement & Contract Structuring)

### Investment Opportunities

Funding and Equipment Supply

**\*DTIC designated sector thresholds apply**

Industrial Procurement - The Department of Trade Industry and Competition ([thedtic.gov.za](http://thedtic.gov.za))



## ELECTRICITY TRANSMISSION AND DISTRIBUTION FOR ALL PROGRAMME

The Transmission Development Plan (TDP) Program entails investment in 14 000 km of new power lines that will need to be added by 2032 at a yearly rate of 1 500 km. Furthermore, required will be the installation of 122 600 MVA of new transformation capacity, representing 77% of Eskom's current installed base.

The TDP comprises more than 300 projects to expand the grid and 47 quick-win projects have been identified that would allow the connection of roughly 37 GW of new generation capacity. A significant number of these (25) revolve around strengthening existing substations by bringing onboard new transformers. Over the coming 5 years, the program requires an investment of US\$ 4 Billion. During this period, 25 transformer projects will be undertaken at existing substations to unlock 13,000 MW of new generation.

In terms of transmission line construction, Eskom has adopted an engineering, procurement and construction (EPC) model (see attached information for appointed EPC and transformer suppliers). The first 3 years of the programme are funded, with funding required for the subsequent years

The programme includes the following technology options:

- Transmission infrastructure: Towers, Conductors Substations: Transformers, surge arrestors, reactor, protection, isolators, circuit breakers, capacitors



## QuickFacts

**Project Capital Value**  
~\$4.0 billion (FY 23-27)

**Province**  
National

**Project Ownership**  
National Transmission Company of South Africa

**Status/Stage**  
Various (Feasibility – Procurement & Contract Structuring)

**Investment Opportunities**  
Funding and Equipment Supply

\*DTIC designated sector thresholds apply

[Industrial Procurement - The Department of Trade Industry and Competition \(thedtic.gov.za\)](https://thedtic.gov.za/)



## GREEN HYDROGEN PROGRAMME

Green hydrogen (GH2) is a key priority for South Africa's Just Energy Transition Investment Plan (JET-IP). GH2 is defined as hydrogen produced by splitting water into hydrogen and oxygen using renewable electricity through the electrolysis process. This technology presents a significant opportunity for economic development and enabling creation of emerging markets that are instrumental in job creation. Owing to its abundant renewable energy sources and platinum group metals (PGM) production volumes, South Africa has the potential to play a dominant and leading role in GH2 and green ammonia (GNH3) production, contributing to South Africa's decarbonisation commitments. This will give South Africa a sustainable competitive advantage in local green energy trading and creation of export markets.

Against this backdrop, South Africa has developed a pipeline of GH2 (and GNH3) projects worth more than US\$ 44 billion, within 16 programmes registered with Infrastructure South Africa (ISA) to assist with regulatory unblocking and fast-tracking project delivery. Key strategic locations have been identified owing to the high possibility of GH2 and GNH3 production, enabling facilities for export markets to thrive as captured in the graphic below.

In 2021 South Africa developed the Hydrogen Roadmap followed by the designation of GH2 as Big Frontier 1 in the Country's Investment Strategy. South Africa further gazetted the Green Hydrogen National [NB3] [4] Programme (GHNP) under the Infrastructure Development Act (Act No. 23 of 2014), creating the necessary enabling investment climate for the private sector to develop and invest into the emerging GH2 industry. Thereafter, the Green Hydrogen Commercialisation Strategy (GHCS)[1] was approved by the South African cabinet in October 2023, followed by the cabinet approval of JET-IP in November 2023.

<https://www.thedtic.gov.za/green-hydrogen-commercialisation-strategy/>

## Project Sponsors

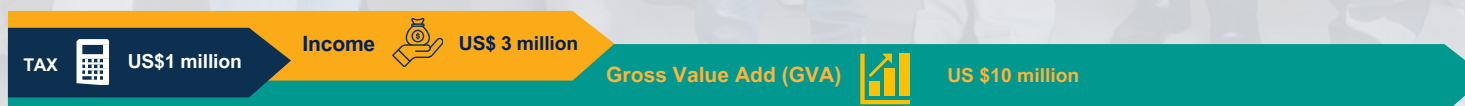


## CATALYST AND MEA PRODUCTION

Isondo Precious Metals (IPM) manufactures membrane electrode assemblies (MEAs) and platinum group metals (PGM) based catalysts. MEAs, coated in PGM catalysts, are key components used in electrolyzers and fuel cell production. Electrolyzers form integral part of hydrogen production and, fuel cells find applications in transport and power generation sector. The project will source PGMs from South Africa's platinum mines and beneficiate it into MEA's for Fuel cell electric vehicles and electrolyzers (FCEV). IPM will also be able to produce and sell PGM chemicals and catalyst pre-cursors. Furthermore, IPM intends to create recycling facility for the PGMs.

Hydrogen Refuelling Project: IPM additionally has access to 7 tons of relatively pure and immediate available hydrogen in Gauteng which can be used to power over 400 trucks and buses. This project is able to deploy hydrogen into fuel cell vehicles at a price level which is equivalent to operating a diesel vehicle on a total cost of ownership basis. This will result in avoidance of 40 000 to 80 000 tons of greenhouse gas emissions annually.

## Economic Impact Potential



## QuickFacts

### Project Capital Value

~US\$19,44 million

### Project Ownership

Isondo Precious Metals

### Province

Gauteng

### Status/Stage

Execution

### Investment Opportunities

Grants and Equity



## COEGA GREEN AMMONIA PROJECT

Hive Hydrogen South Africa is developing the Coega Green Ammonia project (CGAP), with 1,200MW of electrolyzers, which uses wind and solar photovoltaic renewable energy to electrolyse water to produce hydrogen and use air separation units to produce nitrogen, thereafter, producing green ammonia. The project will produce 1000 000 tons per annum for the export markets. The final product will be stored on site and exported via the Port of Ngqura (PoN), in the Eastern Cape province. The project is expected to be commissioned in 2028. A comprehensive Environmental, Social and Governance Strategy has been developed to ensure proper and timeous engagement with the various communities in the four project clusters to ensure maximum utilization of local products, services and skills, upskilling of local labour where possible, localization of supply of large volume and cost items (i.e. local wind tower manufacturer), formation Local Liaison Committees and development of the Corporate Social Responsibility Strategy.



## QuickFacts

### Project Capital Value

~\$5,8 billion

### Project Ownership

Hive Hydrogen South Africa

### Province

Eastern Cape

### Status/Stage

Bankable Feasibility

### Investment Opportunities

Development Funding, Project Rights  
Procurement, Debt, Equity

## Economic Impact Potential

TAX



US\$170 million

Income



US\$ 910 million

Gross Value Add (GVA)



US \$1 billion



## LESOTHO HIGHLANDS WATER PROJECT (LHWP)

The Lesotho Highlands Water Project (LHWP) is a bi-national water infrastructure project between the Republic of South Africa and the Kingdom of Lesotho. Overall, LHWP entails harnessing the waters of the Senqu/Orange River in the Lesotho highlands through the construction of an intricate network of tunnels and dams to divert water from the mountains of Lesotho to South Africa.

The development in Lesotho comprises building dams, tunnels, power stations and the related infrastructure within the borders of Lesotho. Development in South Africa comprises tunnelling, delivery, integration and flow control of water into the Ash River outfall in South Africa.

Lesotho highlands Water Project is divided into Phase I and II. LHWP Phase I was divided into 1A and 1B and concluded in 2003. LHWP Phase II was launched on 13 November 2020 and is underway. Phase II includes the construction of a dam at Polihali, the 38 km 5.2 m diameter Polihali to Katse water transfer tunnel and a significant investment into ancillary infrastructure. The concrete faced rockfill dam wall will stand 165m high, have a crest length of 921m and a crest width of 9m.

At its base, the embankment will be 470m wide. Over 13 million cubic metres of rock which will be quarried locally within the dam basin will be compacted to form the embankment. The dam will create a reservoir on the Senqu and Khubelu rivers with a surface area of 5 053 hectares and a full supply storage capacity of 2 325 million cubic metres.



## QuickFacts

### Project Capital Value

~\$2,3 billion

### Project Ownership

Department of Water and Sanitation

### Province

Bi-National (South Africa & Lesotho)

### Status/Stage

Implementation

### Investment Opportunities

Further construction funding required for Phase II.

## Economic Impact Potential

TAX



US\$ 68 million

Income



US\$ 370 million

Gross Value Add (GVA)



US \$1,25 billion

## MAITLAND METRO PRECINCT

Maitland Metro is a precinct in the western portion of Maitland, Cape Town that is being rejuvenated into a thriving mixed-income, mixed-use precinct, predominantly through the development of affordable housing opportunities. This rejuvenation project intends to develop at least 1,600 residential opportunities in this ideally located node. The precinct is serviced by exceptional public transport to the city centre, universities, and industrial and working nodes.

Maitland Metro will undermine apartheid spatial planning and increase access to affordable housing in Cape Town.

The 2023 Mayoral report of the City of Cape Town has through a location-based analysis of the Maitland area identified a priority project pipeline of bulk infrastructure investments to strengthen infrastructure delivery in the area and unlock the future developments in the Maitland area.

The progress on the Maitland Precinct is as follows:

- The Prime - 143 affordable housing apartments: operational for nearly three years with an average occupancy of 98%.
- Maitland Mews - 204 social housing units: opened 18 months ago with a current occupancy of 100%.
- 164 Voortrekker - 237 affordable housing apartments: Construction commenced in August 2024.
- One Beach - 310 affordable housing apartments: Anticipated to break ground in early 2025.
- Welcome Park - 675 affordable housing apartments: Anticipated to break ground in early 2026.
- 7 Camp – 100 affordable units: Anticipated to break ground in early 2026.
- One Beach, Welcome Park and 7 Camp: All have opportunity for equity investment.

## Human Settlement



### QuickFacts

#### Project Capital Value

~\$74,72 million

#### Project Ownership

Blue Buck Projects and Maitland Ark in collaboration with City of Cape Town

#### Province

Western Cape

#### Status/Stage

Structuring & Design

#### Investment Opportunities

Total Capex \$74 722 222

CAPEX to be raised \$48 444 444

#### Equity Investment

\$28 222 222

Debt

\$34 555 555





# INFRASTRUCTURE FUND



# INFRASTRUCTURE FUND – BLENDED FINANCE PROJECTS

## MANDATE

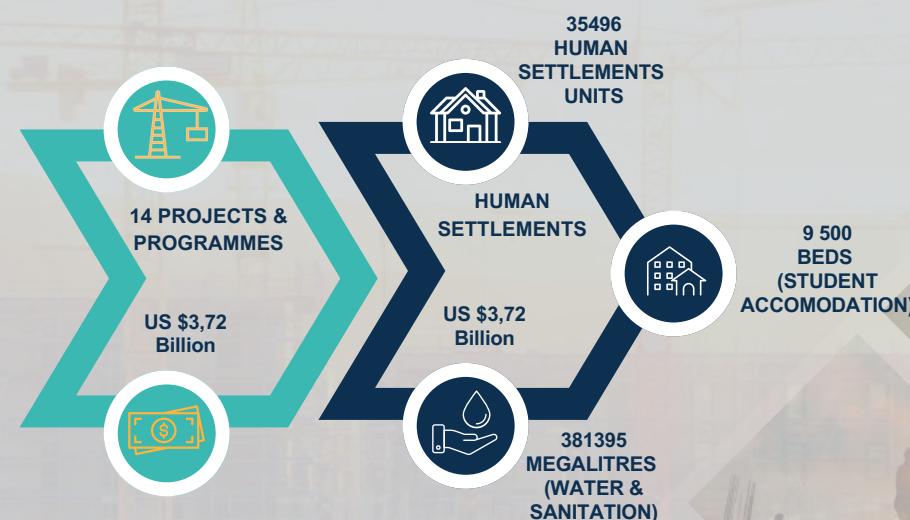
The Infrastructure Fund, established in August 2020 by South African National Treasury, Department of Public Works and Infrastructure acting through Infrastructure South Africa and the Development Bank of Southern Africa is mandated to create blended finance solutions in order to significantly crowd in private sector investment in the implementation of infrastructure programmes and projects in South Africa.

In structuring Blended Finance solutions, the Infrastructure Fund strategically utilises fiscus funds to mobilise financing from multilateral institutions, development finance institutions and the private sector to enhance the development impact of infrastructure.

## VALUE PROPOSITION

Through the intervention of the Infrastructure Fund, the following outcomes are achieved:

- Blended finance solutions and co-financing mechanisms.
- Improve commercial viability.
- Alleviate pressures on the fiscus by attracting private investment.
- Creation of a sustainable infrastructure development eco-system.
- Accelerate, scale-up and catalyze infrastructure development and implementation.
- Drive socio-economic development.



Since inception, the Infrastructure Fund packaged 14 blended finance projects / programmes with a capital value of US \$3,72 billion across several sectors. The advanced pipeline summary is as follows

## Social Housing Programme

The Infrastructure Fund is supporting the social housing programme to address demand for housing and by initially providing bridge facilities to 3 projects, with an objective of attracting private sector refinancing after 4 years. The programme aims to provide social housing for low to middle income households within a band of R1 850 to R22 000.

- Midrand Heights: aims to deliver 305 units in Midrand, City of Johannesburg.
- Hospital Street: aims to deliver 1 056 units in Newcastle municipality in KZN.
- Goodwood Station: aims to develop 1,055 social housing units located near the Goodwood (passenger) rail station, in Goodwood, Cape Town, in the Western Cape province.

The Goodwood Station Social Housing Project is earmarked to deliver 1 055 units in two phases, reached financial close in October 2023.

The project was officially launched in December 2023, occupation of Phase 1 has started and practical completion for the project was achieved in July 2024. The total for IF facilities is R179m.

In addition to the above, the Infrastructure Fund is seeking to attract ~ R5 to R8 billion annually from external financiers to deliver approximately 15 000 social housing units annually as part of the next phase of this Programme.



## QuickFacts

### Project Capital Value

US \$72 million

### Project Ownership

Department of Human Settlements

### Province

Gauteng, KZN and Western Cape

### Status/Stage

Financial Close

### Investment Opportunities

Debt Refinancing

### Fiscus Contribution

US \$16,94 million

### Financial Close

August 2024

**Human Settlement**

## Olifants Management Model Programme Phases 2B and 2B+

The Project includes major bulk raw water pipelines, and bulk and potable water distribution infrastructure. The construction of bulk and potable water infrastructure will supply targeted communities and commercial water users (such as mining companies, industrial users, etc.) . The project scope includes 121 km of new steel pipeline, with varying diameters of 750mm to 1,400 mm, with a design capacity of 95 Ml/d (potentially 120 Ml/d); and three new associated pump stations at Flag Boshielo dam, Mokopane and Pruisen respectively.

The OMM Programme aims to leverage infrastructure development to strengthen economic development within the Middle Olifants catchment in Limpopo and unlock strategic mineral and industrial potential in specified regions. It will also enhance water supply to the Polokwane Local Municipality. To date Phases 1A, 2A and 2C have been built The OMM Programme will focus on Phases 2B , 2B+ ,2H and Phase 2F.



### QuickFacts

**Project Capital Value**

US \$355,6 million

**Project Ownership**

Department Water and Sanitation Lebalelo Water  
User Association

**Province**

Limpopo Cape

**Status/Stage**

Financial Close

**Investment Opportunities**

Debt Refinancing

**Fiscus Contribution**

US \$133 million

**Financial Close**

September 2024

**Water Sector**



## Lufhereng Mixed Use Development

Lufhereng is an integrated housing “Flagship” project of the City of Johannesburg (CoJ) situated west of Soweto. It comprises 32 636 housing opportunities of varying typologies and tenure. The Project also includes 18 educational facilities, commercial development (retail, offices, filling stations etc.), parks, recreational sites, sport centers and Urban Agriculture.

The project is at various stages of execution with some phases in planning, construction and some completed. The funding gap on the project is focused on the upgrading and construction of bulk infrastructure enabling future phases of development.

Bulk infrastructure has been a major impediment to the development. This has been largely addressed through the Budget Facility for Infrastructure Submission as well as the Special Purpose Vehicle through which co-funding is being crowded in through Senior Debt.

The enablement of the bulk infrastructure allows for the accelerated implementation of the development and the accelerated delivery of housing opportunities in the development area.

The Infrastructure Fund is assisting the City Of Johannesburg in raising funding to match the BFI approved funding. 29.6% of the total cost is related to enabling bulk infrastructure that is required to unlock a potential of US \$1,1 billion in public and private developments.



## QuickFacts

### Project Capital Value

US \$355,6 million

### Project Ownership

Department Water and Sanitation Lebelelo Water User Association

### Province

Limpopo Cape

### Status/Stage

Financial Close

### Investment Opportunities

Debt Refinancing

### Fiscus Contribution

US \$133 million

### Financial Close

September 2024

## Human Settlement

## Olifantspoort and Ebenezer

Lepelle Northern Water and the Infrastructure Fund, signed a Memorandum of Agreement towards funding, financing, and implementation of the first phase of the Olifantspoort/ Ebenezer Upgrade Project to the capital value of R4.6 billion.

This is an upgrade and refurbishment of the Olifantspoort & Ebenezer water supply schemes. The project is envisaged to be implemented in three phases and the proposed phase 1 upgrade works will increase the availability of portable water by 55 to 65 Ml/day by 2026.

The proposed upgrade of the aims to reduce water services backlogs & meet the current & projected commercial and social water needs mainly for Polokwane Local Municipality and areas, including Sekhukhune District Municipality & Mopani District Municipality.

Polokwane Local Municipality and the Capricorn District Municipality are currently experiencing a water supply crisis, and this is preventing the local municipality to meet its socio-economic goals.



## QuickFacts

### Project Capital Value

US \$255 million

### Project Ownership

Lepelle Northern Water

### Province

Limpopo

### Status/Stage

Financial Close

### Investment Opportunities

Debt Financing

### Fiscus Contribution

US \$77,8 million

### Financial Close

July 2025

## Water Sector

## Umkhomazi Water Project

The uMkhomazi Water Project is the recommended augmentation option to meet the long-term water requirements of domestic and industrial water users in the Umgeni Water Area.

The uMWP-1 project will be an inter-basin water transfer scheme and will increase the yield of the system from 394 million m<sup>3</sup> to 614 million m<sup>3</sup> per annum.

It consists of 81m<sup>3</sup> and 252 m<sup>3</sup> per annum Dam at Smithfield on the uMkhomazi River and a 32km long conveyance infrastructure and 5km raw water pipeline. A gravity potable water pipeline to link the system to Umgeni Water's 57' Pipeline is also proposed.

The economic & social benefits of the project are the uMgeni System yield by 54% from 394 to 608 million m<sup>3</sup>/a.



## QuickFacts

### Project Capital Value

US \$1,3 billion

### Project Ownership

TCTA

### Province

KZN

### Status/Stage

Financial Close

### Investment Opportunities

Debt Financing

### Fiscus Contribution

US \$667 million

### Financial Close

December 2025



## Student Housing Programme

The Student Housing programme is strategic in that it aims to provide safe, accessible, affordable and decent student accommodation to improve educational outcomes while addressing the acute backlog of student housing across the PSET(Post-School Education and Training) sector.

The shortage of affordable student housing has negative consequences on the attainment of quality educational outcomes.

Phase 2 Cluster 2 has 4 Projects delivering 9 500 beds:

- University of KwaZulu-Natal (UKZN) – 3 000 beds.
- Tshwane University of Technology (TUT) - 3 500 beds,
- Gert Sibande TVET college – 1 500 beds.
- Majuba TVET College - 1 500 beds.
- 869 jobs to be created during construction.



## QuickFacts

### Project Capital Value

US \$168 million

### Project Ownership

Department of Higher Education and Training

### Province

Gauteng, KZN, Limpopo

### Status/Stage

Financial Close

### Investment Opportunities

Debt Financing

### Fiscus Contribution

US \$50 million

### Financial Close

TBC

## Student Accommodation

## Moretele North Klipvoor BWSS

The MNKBWSS is a R5.2 billion regional bulk water scheme aiming to supply reliable and sustainable bulk potable water to Moretele North in the North-West and Bela- Bela, Modimolle, Mookgophong and Mokopane municipalities in Limpopo.

Aim is to secure Moretele Ground Water Optimization to identified villages in Moretele North and Ngobi. KWTWs that will be constructed just downstream of the Klipvoor Dam to supply the benefitting areas via new bulk pipelines, reservoirs and booster pump stations.

Bulk pipeline from Klipvoor WTW to Ngobi command reservoir, extending to Bela-Bela, Modimolle, Mookgopong and Mokopane.  
The project aims to provide additional capacity of 42Ml/day



## QuickFacts

### Project Capital Value

US \$289 million

### Project Ownership

Magalies Water

### Province

North West, Limpopo

### Status/Stage

Financial Close

### Investment Opportunities

Debt Financing

### Fiscus Contribution

US \$106 million

### Financial Close

June 2025

## Pilanesberg Phase 2

The Pilanesberg Bulk Water Supply Scheme Phase 2 (PBWSS-2) is in the North-West province. It aims to augment supply to ensure sustainable bulk potable water to the Rustenburg, Moses Kotane and Thabazimbi Local municipalities.

The project entails five (5) components aimed at providing 85.6 megalitres per day (MI/d) by 2040, additional to current supply of 43MI/d to meet the expected demand of 128.6MI/d.

The biggest anchor for the Project is the Rustenburg Local Municipality (RLM), including the Royal Bafokeng Administration (RBA). The significant growth in RLM is attributed to the impact of some of the world's four largest platinum mines in the immediate vicinity of the town, namely, Anglo Platinum, Impala Platinum, Xstrata and Lonmin.

Approximately 97% of the total platinum production occurs in Rustenburg, with the mining sector providing around 50% of all formal employment.



## QuickFacts

### Project Capital Value

US \$161 million

### Project Ownership

Magalies Water

### Province

North West

### Status/Stage

Financial Close

### Investment Opportunities

Debt Financing

### Fiscus Contribution

US \$100 million

### Financial Close

June 2025

## Water Sector



# PROCUREMENT PIPELINE





## PROCUREMENT PIPELINE – CONSTRUCTION BOOK

This details infrastructure projects on the procurement horizon for the current financial year. This is the first publication of the construction book and focuses on network sectors; which include transport, electricity, water, and port logistics projects. The projects are primarily funded directly by the state-owned entities (SOE's) who, in turn, own the projects. The projects showcased in this publication would create much-needed job opportunities while stimulating South Africa's construction sector and the broader economy. In future, additional sectors will be included in the book.

There are currently 153 projects included with a total capital expenditure of almost \$9bn across the network sectors. The potential impact of these projects is significant with several beneficial effects once these projects are in construction, which include job opportunities and the additional benefit of improving income levels. Project information is also available on Infrastructure South Africa's website, where tender documentation is availed to the public and the status of the procurement process is tracked closely.



**IN THIS PUBLICATION, WE FEATURE IMPACTFUL PROJECTS SCHEDULED TO BE ISSUED FOR TENDER TO THE MARKET IN THE REMAINDER OF THIS FINANCIAL YEAR, OR EARLY IN THE NEXT FINANCIAL YEAR.**

## TRANSPORT – PORTS

**OWNER:** South African National Roads Authority Limited (SANRAL) **Consolidated Projects Value:** \$ 833, 732, 705

### Development Impact

The upgrade and construction of these roads has several significant impacts such as connecting widely-spread communities and businesses, boosting regional and national economic activity, alleviating congestion on other major routes while reducing the risk of accidents, ensuring the continuity of maintenance work and, creating job opportunities.

#### R38 Badplaas to Barberton (Section 5)



The R38 is the busiest route in the Mpumalanga Province, linking several towns before linking up with the route that takes users to the Maputo border. Given its strategic importance and value proposition in improving road safety, logistics and import / export activities between neighbouring countries, its upgrade and maintenance remains crucial. This project entails the upgrade of 66km section 5 of National Road R38, from Badplaas to Barberton (km 0 to km 66).

**Planned Procurement Date: February 2025**

#### N2 Swartklip to Baden Powell



Originally constructed in 1970, Baden Powell Drive is a busy arterial road connecting Muizenberg to Stellenbosch, as well as Stellenbosch to Cape Town and provides access to Cape Town International Airport, wine farms, industrial hubs and various townships. The road is also heavily used by tourists, cyclists and pedestrians, with traffic volumes measuring over 18,000 vehicles daily. This project sees the limprovement of the road network and engineering services on National Route N2 Section 1 from Swartklip to Baden Powell in the Western Cape Province.

**Planned Procurement Date: October 2024**



### Upgrade of Huguenot Tunnel



The Huguenot Tunnel, opened in 1988, has become a vital artery on the N1 corridor, handling over 110 million vehicles annually. To address growing traffic volumes and enhance safety, SANRAL is undertaking a comprehensive upgrade of the tunnel's infrastructure, from the North Bore and South Bore on National Route 1, Section 1 in the Western Cape Province. This will see a second road being built that will result in vehicles travelling through the Huguenot Tunnel funnelled on two separate one-way roads.

**Planned Procurement Date: October 2024**

### N1 Dwarsrivier to Louis Trichardt



The upgrade of 49.75km of National Road Section 28 from Dwarsrivier to Louis Trichardt (km 49 to km 98.75) in Limpopo Province. The project falls under the broader N1 improvement that entails the general upgrading of the road section, including six major intersections, a number of farm accesses, three road bridges and seven major culverts located along the route. With over 3000 vehicles, 35% of which are trucks, traversing this road network daily, an upgrade is vital.

**Planned Procurement Date: July 2025**

### N3 Paradise Valley to Marianhill



The N3 connects Johannesburg to eThekweni hence is South Africa's principal freight and logistics corridor. With over 44,000 vehicles and over 10,000 trucks going through Marianhill Toll Plaza daily, the strategic importance of this route cannot be downplayed. This project entails the upgrade of the N3 from the southern limit at Paradise Valley to the northern limit at Marianhill toll plaza by providing additional lanes; including upgrading three major interchanges and related approaches, as well as lengthening of bridges, overpasses, underpasses, crossroads and culverts. The project is located in Kwa-Zulu Natal Province.

**Planned Procurement Date: July 2025**

### N3 Marianhill to Key Ridge



With the N3 connecting Johannesburg (South Africa's economic hub) to eThekweni (South Africa's logistics hub), up to 80% of South Africa's GDP and 60% of South Africa's import and exports can traverse this route. This project entails the Upgrade of the N3, from Mariannhill Toll Plaza to Key Ridge, increasing its capacity from 3 lanes per direction to 5 lanes per direction, including the upgrade of three major interchanges and the related upgrades of bridges, overpasses, underpasses, crossroads and culverts. With over 45,000 vehicles and over 10,000 trucks travelling this route daily, this upgrade is likely to make a major impact on economic growth targets and global competitiveness for the country. The project is located in Kwa-Zulu Natal Province.

**Planned Procurement Date: October 2024**

## TRANSPORT – PORTS

**OWNER:** Transnet National Ports Authority (TNPA) **Consolidated Projects Value:** \$280, 469, 954

### Development Impact

The upgrade of these port terminals has several significant impacts such as reducing the carbon footprint, enabling diversification with regards to energy and the support base load, revenue generation through taxes associated with the project, supporting import and export activities through the ports, boosting regional economic activity and, creating job opportunities.

#### Berth A100 for Liquid Bulk



Construction of liquid bulk berth at A100 location; which will include marine infrastructure, bulk services and associated common user infrastructure at the Port of Ngqura in the Eastern Cape Province. The terminal will be the main fuel liquid fuels supply hub for Nelson Mandela Bay and surrounding areas, and will replace the Port of Elizabeth Liquid Terminal Bulk.

**Planned Procurement Date:** August 2025

#### LNG Import Terminal Richard's Bay



In line with climate change commitments and energy security, South Africa recognised the need for new power generation capacity from a variety of sources, including gas technology. With the current ministerial determination, a gas to power programme has been designed to procure this new generation capacity in South Africa, with Richard's Bay in Kwa-Zulu Natal Province being one of the main regions to explore this technology and is set to deliver a scalable capacity from a minimum of 1 million tons to 5 million tons per annum. The project is anchored on delivering the Integrated Resource Plan (IRP) for gas-to-power.

**Planned Procurement Date:** September 2025



## **TRANSPORT: AIRPORTS**

**OWNER:** Airports Companies of South Africa (ACSA) **Consolidated Projects Value:** \$112, 245, 413

### **Development Impact**

The upgrade of the airports has several significant impacts such as boosting regional and international economic activity, supporting export and import activities nationally and regionally, boosting tourism and creating job opportunities.

#### **Chief Dawid Stuurman International Airport**



This project entails the expansion of the arrivals and departures capacity to accommodate future demand. It is located in the Eastern Cape Province.

**Planned Procurement Date:** November 2024

#### **ORTIA Cargo Development**



This project entails the expansion of cargo development to accommodate cargo throughput of up to 750,000 tonnes per annum. It is located in the Gauteng Province.

**Planned Procurement Date:** September 2024

## **WATER SECTOR**

**OWNER:** Trans-Caledon Tunnel Authority (TCTA) **Programme Value:** Over \$1bn

### **Development Impact**

The development of the water scheme will increase yield in the Province between the two catchments, thereby improving water supply, quality and security for millions of households and businesses. This will also boost regional economic activity and create job opportunities.

### **Project Profile: uMkhomazi Water Scheme (Phase 1)**



This project will be an inter-basin water transfer scheme where raw water will be stored in the uMkhomazi River catchment and transferred to the uMngeni River; thereby increasing the current yield of the system from 394 million m<sup>3</sup> to 614 million m<sup>3</sup>. The project is located in the Kwa-Zulu Natal Province.

**Planned Procurement Date:** July 2025





# FUTURE PIPELINE

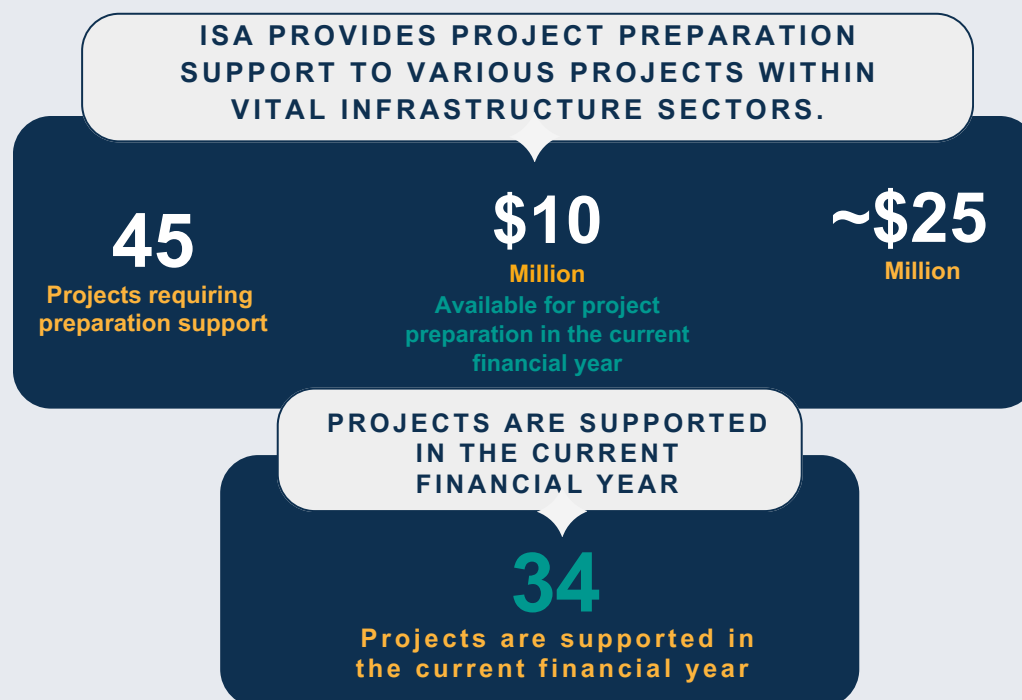


## FUTURE PIPELINE – PROJECTS IN PREPARATION

A major contributory factor in infrastructure investment needs not being met is attributed to a insufficient investment in project preparation. To address these challenges and unlock the potential of infrastructure investments in South Africa, the National Treasury has granted ISA a project preparation fund to support project development and accelerate project economic and social impact into the economy. ISA is further seeking to catalyse seed funding to blend with other project preparation facilities available to effectively support project development to a bankable stage.

SA plays a crucial role in **facilitating the development of infrastructure projects** across the country through supporting projects and programmes that:

- **can or have already secured private, development or related financing** – but require additional funding to address a viability gap,
- have not yet secured private, development or related financing and **require support to structure a financing arrangement**,
- **leverage alternative funding and delivery mechanisms** such as Public Private Partnerships, Concessions, and similar structures.



### Ngqura Port Liquefied Natural Gas (LNG)



The Port of Ngqura (PoN) is amongst three ports that have been identified as suitable for LNG importation. As part of the Gas to Power Programme, TNPA (Transnet National Ports Authority) intends to roll out the development of Port infrastructure (marine and landside) for an LNG Import Terminal.

**Project Value: US \$117 million**

**Preparation Support:** Project Preparation support for the development of a pre-feasibility study, feasibility studies and environmental authorisations.

### Saldanha Bay Freeport Expansion



Freeport Saldanha is a Strategic Integrated Project (SIP5). The New Integrated Port Infrastructure comprises a marine services jetty, a floating dry dock, and a deep-water berth 205 to catalyze opportunities in the oil and gas and marine fabrication and repair industries.

**Project Value: US \$633 million**

**Preparation Support:** Project Preparation support for transaction and legal advisory services

### Nkomazi Special Economic Zone (SEZ)



The Nkomazi SEZ's value proposition is to create a competitive and highly efficient industrial cluster that positions itself as the leading location for agro-processing and logistics services within South Africa. Its impact transcends its direct output in that it will generate a strong demand for agricultural produce, leading to a powerful multiplier effect on the entire agricultural value chain, which will result in the creation of numerous sustainable jobs.

**Project Value: US \$466 million**

**Preparation Support:** Project Preparation support for the development of a feasibility study

### Namakwa Special Economic Zone (SEZ)



Anchored in one of the nation's most resource-rich landscapes, the SEZ is more than just a geographical location; it stands as a testament to the potential of combining natural resources, innovative infrastructure, and strategic economic planning. It is strategically located within the Northern Cape province's industrial corridor which connects it to mining industries.

**Project Value: US \$194 million**

**Preparation Support:** Project Preparation support for the development of a feasibility study and a bankable business case.



## Rooiwal Wastewater Treatment Works Phase 2



The expansion of wastewater treatment plant to a capacity of 80MI/d to address the current and future deficiencies in the wastewater conveyance systems to facilitate the delivery of key residential developments aligned with the City's growth strategy and mitigate the risks associated with a lack of capacity. Provide sustainable water and sanitation services.

**Project Value: US \$77 million**

**Preparation Support:** Project Preparation support for the development of a bankable business case.

## Amatola Bulk Water Augmentation



The expansion of wastewater treatment plant to a capacity of 80MI/d to address the current and future deficiencies in the wastewater conveyance systems to facilitate the delivery of key residential developments aligned with the City's growth strategy and mitigate the risks associated with a lack of capacity. Provide sustainable water and sanitation services.

**Project Value: US \$379,4 million**

**Preparation Support:** Project Preparation support for the development of a bankable business case.

### Reinstatement of Mossel Bay GTL Refinery



The Gas To Liquids Refinery (GTLR) is currently offline and undergoing preservation maintenance. This programme entails reinstatement of the PetroSA Mossel Bay Operations (FA Platform and GTLR). This will aid in mitigating the impact of oil price variations and foreign currency fluctuations on the country

**Project Value: US \$238 million**

**Preparation Support:** Project Preparation support for specialist studies and feasibility study funding (FA platform & GTL).

### Eskom Tubatse Pumped Storage Scheme



The objective of the project is to design, construct, and commission a 1500MW pumped storage hydropower facility in Limpopo, South Africa, with the goal of enhancing grid stability and providing reliable peak load electricity supply. This project aims to support the integration of renewable energy sources into the national grid, reduce carbon emissions, serve as a blackstart facility, and meet growing energy demands sustainably.

**Project Value: US \$2 billion**

**Preparation Support:** Project Preparation support for engineering studies and Environmental and Social Impact Assessment to enable the development of a bankable business case.

## Healthcare Infrastructure Programme



The development and implementation of a clear and focused national refurbishment programme for health facilities is paramount to the provision of health care. The programme is targeted at Level 2, 3 and 4 hospitals, which covers Regional, Provincial Tertiary and National Central Hospitals.

**Project Value: US \$6,1 billion**

**Preparation Support:** Funding support for conditional assessments to enable the development of a bankable business case.

## Education Infrastructure Programme



The programme entails eradication of schools with asbestos roof covering and improper structures which have been damaged by various weather elements and storms to provide conducive learning environment. The schools are located across Limpopo, Kwa-Zulu Natal, Northern Cape, and Eastern Cape Provinces. In schools across Limpopo, Kwa-Zulu Natal, Northern Cape, and Eastern Cape Provinces. The programme also addresses sanitation issues.

**Project Value: US \$1,37 billion**

**Preparation Support:** conditional assessments to enable the development of a bankable business case. NC & EC schools are also in the project preparation pipeline for support.



### National Solar Water Heater & Efficiency Programme



The programme aims to alleviate pressure on the national energy grid by reintroducing a demand-side management programme which focuses on residential household and commercial business energy efficiency and/or energy independence interventions.

**Project Value:** US \$633 million

**Preparation Support:** feasibility assessment of the initiative, including a reconfiguration of the framework and approach for the rollout of the expanded programme such that it will provide the best technical, financial, and legal solution in delivering large-scale rollout of SWHs and distribute energy generation countrywide.

### Vaal Special Economic Zone



The project is aimed at reigniting industrialisation in South Africa through driving Green Energy-driven industrial transformation, steering investments into crucial food, agriculture, and agro-industrial domains, harnessing the potential of gateway logistics, the Blue Economy, and Tourism Sector

**Project Value:** US \$306 million

**Preparation Support:** Environmental Impact Assessment, Town Planning and specialist studies work required for the sites making up the Vaal SEZ in order to thereafter conduct feasibility studies.

## Avoca Nodal Development



The Avoca Nodal Development consists of three precincts ideally located along the N2 corridor. The precinct consists of three developments:

- The Brickworks and Northfield Business and Logistics Parks, currently being developed and
- The adjoining Caneridge property which has been designated for social and affordable housing. This includes the construction of up to 6,000 social and affordable housing units, of which 5,000 are lower income housing units. The housing units will accommodate approximately 30,000 people.

**Project Value: \$561 million**

**Preparation Support:** technical services (Engineering studies and bulk infrastructure feasibility) for the development

## N2 Nodal Development



The Nodal Development comprises of 4 sub-projects that are projected to yield over 12,100 new housing opportunities on greenfield land and formalise the small informal settlement of Gro-Gro with approximately 210 units.

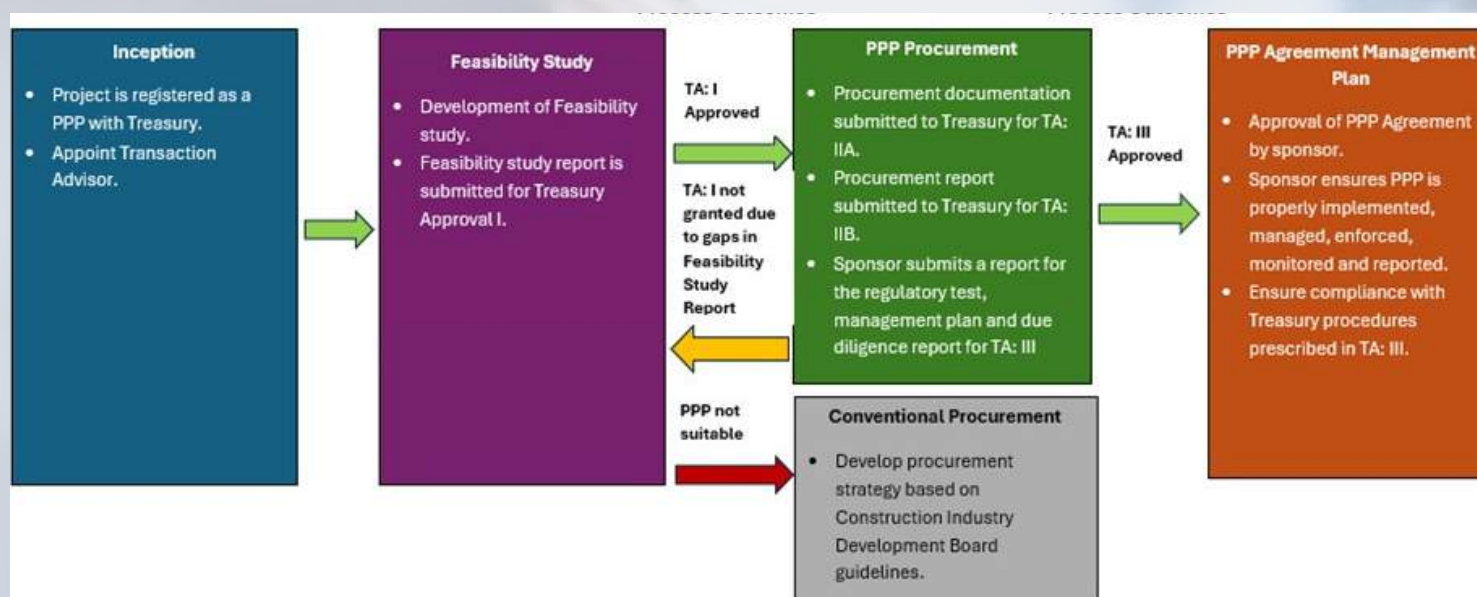
**Project Value: US \$1,86 billion**

**Preparation Support:** development of a bankable business case.

# Annexure A: Public Private Partnerships

The **PPP Process in South Africa** consists of four stages as depicted in the figure below namely:

- **Stage 1 – Inception:** The sponsor registers the project as a PPP with the National Treasury (NT) and appoints the Transaction Advisor.
- **Stage 2 - Feasibility Study:** The feasibility study is developed to determine whether PPP or conventional procurement is suitable to deliver the project. The Feasibility Study is submitted to the National Treasury for Treasury Approval (TA): I.
- **Stage 3 - PPP Procurement:** upon approval of TA: I, the sponsor must submit the PPP agreement and bid documentation to the NT for TA: IIA. Once approval (i.e., TA: IIIA) is granted by the NT, the sponsor proceeds to market (i.e., published in the tender bulletin[1] and in other government sites[2]). These bids are evaluated, and the preferred bidder is selected, the sponsor then prepares a value-for-money report, management plan and due diligence report that are submitted to the NT for approval through granting of TA: IIB.
- **Stage 4 -** Once TA: IIB is granted, the sponsor can commence negotiations with the preferred bidder and finalise the PPP Agreement Management Plan, which would grant TA: III.



**Source:** National Treasury PPP Manual



# Annexure B: Energy BID Window 6

## LIST OF SUCCESSFUL BIDDERS (ADDITIONAL)

Rank	Bid ID	Project Name	Fully Indexed Price	Bidder's combined EAT Price Points and ED score (Z/100)	Bidder's Capacity (MW)
1	RE_PV_0052_016	Kutlwano Solar Power Plant	469,50	91,11	120
2	RE_PV_0052_015	Boitumelo Solar Power Plant	469,50	91,07	150
3	RE_PV_0165_001	Virginia Solar Plant	486,50	87,16	150
4	RE_PV_0165_002	Good Hope Solar Plant	498,90	84,78	240
5	RE_PV_0036_002	Doornhoek PV	540,00	77,68	200
6	RE_PV_0053_008	Ngonyama Solar PV	548,00	74,74	140

**Source:** Department of Mineral Resources And Energy

# Annexure C: Energy BID Window 7

**Tender no: DMRE/014/2023/24**  
**REIPPPP BID WINDOW 7 LIST OF BIDS RECEIVED ON 15 AUGUST 2024**

Bid ID	Project Name	Project Company	Contracted Capacity (MW)*	Technology	Province
RE_OW_0026_005	Aberdeen Wind Facility 1	Aberdeen Wind Facility 1 (Pty) Ltd	212.40	Onshore Wind	Eastern Cape
RE_OW_0026_006	Aberdeen Wind Facility 2	Aberdeen Wind Facility 2 (Pty) Ltd	240.00	Onshore Wind	Eastern Cape
RE_OW_0026_007	Aberdeen Wind Facility 3	Aberdeen Wind Facility 3 (Pty) Ltd	240.00	Onshore Wind	Eastern Cape
RE_OW_0037_024	Juno 1 WEF	AMDA Juliett (Proprietary) Limited	140.00	Onshore Wind	Western Cape
RE_OW_0042_006	Pienarspoort WEF 2	Pienarspoort Wind Energy Facility 2 (Pty) Ltd	240.00	Onshore Wind	Western Cape
RE_OW_0048_022	Mulilo Newcastle Wind Power	Mulilo Newcastle Wind Power (Pty Ltd)	240.00	Onshore Wind	KwaZulu-Natal
RE_OW_0178_003	Klipkoppie	K2019486607	240.00	Onshore Wind	Northern Cape
RE_OW_0178_004	Salsola	Sutherland 2 Wind Farm (Pty) Ltd	140.00	Onshore Wind	Northern Cape
RE_PV_0037_020	Oslaagte Solar PV2	Oslaagte Solar 2 (Proprietary) Limited	240.00	Photovoltaic	Free State
RE_PV_0037_021	Oslaagte Solar PV3	Oslaagte Solar 3 (Proprietary) Limited	240.00	Photovoltaic	Free State
RE_PV_0037_022	Leeuwspruit Solar PV1	Leeuwspruit Solar 1 (Proprietary) Limited	220.00	Photovoltaic	Free State
RE_PV_0037_025	Mercury Solar PV 2	Consortium for Mercury Solar PV 2 (To be incorporated)	240.00	Photovoltaic	Free State
RE_PV_0043_014	Corona Solar PV Project	Corona Energy (Pty) Ltd	240.00	Photovoltaic	Free State
RE_PV_0043_015	Quagga Solar PV Project	Indus Energy (Pty) Ltd	240.00	Photovoltaic	Free State
RE_PV_0048_019	Litha Solar PV	Litha Solar PV (Pty) Ltd	240.00	Photovoltaic	Free State
RE_PV_0048_020	Phemelo Solar PV	Phemelo Solar PV (Pty) Ltd	240.00	Photovoltaic	Free State
RE_PV_0048_021	Middlepunt Solar PV	Middlepunt Solar PV (Pty) Ltd	240.00	Photovoltaic	Free State
RE_PV_0053_007	Indlovu Solar PV Project	Indlovu Solar PV (Pty) Ltd	240.00	Photovoltaic	Free State
RE_PV_0165_008	Florida Solar Park	Piscis Energy Proprietary Limited	200.00	Photovoltaic	Free State
RE_PV_0165_009	Virginia 4 Solar Park	Lupus Energy (Pty) Ltd	210.00	Photovoltaic	Free State
RE_PV_0165_010	Dwaalboom Solar 2	Dwaalboom Solar 2 (Pty) Ltd	240.00	Photovoltaic	Limpopo
RE_PV_0165_012	Dominion Solar Park	Dominion 1 Solar Park (Pty) Ltd	240.00	Photovoltaic	North West
RE_PV_0165_013	Dwaalboom 3 Solar	Dwaalboom Solar 3 (Pty) Ltd	180.00	Photovoltaic	Limpopo
RE_PV_0165_014	Dwaalboom 4 Solar	Dwaalboom Solar 4 (Pty) Ltd	180.00	Photovoltaic	Limpopo
RE_PV_0165_015	Buffalo 1 Solar Park	Carina Energy (Pty) Ltd	240.00	Photovoltaic	Limpopo
RE_PV_0165_016	Springhaas Solar Facility 8	Springhaas Solar Facility 8 (Pty) Ltd	150.00	Photovoltaic	Free State
RE_PV_0165_017	Buffalo 2 Solar Park	Canis Energy (Pty) Ltd	240.00	Photovoltaic	Limpopo
RE_PV_0165_024	Springhaas Solar Facility 1	Springhaas Solar Facility 1 (Pty) Ltd	240.00	Photovoltaic	Free State
RE_PV_0165_025	Rondebosch Solar Park	Sculptor Energy (Pty) Ltd	240.00	Photovoltaic	Mpumalanga
RE_PV_0165_026	Springhaas Solar Facility 6	Springhaas Solar Facility 6 (Pty) Ltd	240.00	Photovoltaic	Free State
RE_PV_0178_005	Zelpy 1	Eridanus Energy (Pty) Ltd	240.00	Photovoltaic	Limpopo
RE_PV_0178_006	Zelpy 2	Horologium Energy (Pty) Ltd	210.00	Photovoltaic	Limpopo
RE_PV_0178_007	Aryl	Aryl Energy (Pty) Ltd	240.00	Photovoltaic	Limpopo
RE_PV_0178_008	Irenea	Irene PV Facility (Pty) Ltd	220.00	Photovoltaic	Free State
RE_PV_0178_009	Taracus	Boschrand 2 PV Facility (Pty) Ltd	170.00	Photovoltaic	Free State
RE_PV_0178_010	Mooivlei 3	Mooivlei Solar 3 (Pty) Ltd	240.00	Photovoltaic	Free State
RE_PV_0178_011	Mooivlei 2	Mooivlei Solar 2 (Pty) Ltd	240.00	Photovoltaic	Free State
RE_PV_0231_001	Solar Capital Red	Solar Capital Red (Pty) Ltd	91.04	Photovoltaic	Northern Cape
RE_PV_0232_001	Project San	ACWA Power San PV (RF) Pty Ltd (yet to be formed)	200.00	Photovoltaic	Northern Cape
RE_PV_0232_005	Dorado 1 Solar Park	ACWA Power Dorado 1 Solar Park (RF) Pty Ltd (yet to be formed)	240.00	Photovoltaic	Limpopo
RE_PV_0232_006	Dorado 2 Solar Park	ACWA Power Dorado 2 Solar Park (RF) Pty Ltd (yet to be formed)	75.00	Photovoltaic	Limpopo
RE_PV_0235_001	Onderstepoort Solar 1 Consortium	Onderstepoort Solar 1 Proprietary Limited	220.00	Photovoltaic	North West
RE_PV_0235_002	Onderstepoort Solar 2 Consortium	Onderstepoort Solar 2 Proprietary Limited	190.00	Photovoltaic	North West
RE_PV_0235_003	Highveld Solar Consortium	Highveld Solar Power Plant (RF) Pty Ltd	240.00	Photovoltaic	Mpumalanga
RE_PV_0235_004	Vanadium Solar 1	Vanadium Solar Power Plant (RF) Pty Ltd	150.00	Photovoltaic	Limpopo

Source: Department of Mineral Resources And Energy



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