

Mozambique Oil and Gas and Ancillary Infrastructure

Africa House Virtual Visit

25 to 29 January 2020

To engage with stakeholder to gather intelligence that will bring our clients up to speed with developments on the LNG project so that they can hit the ground running after an absence of 10 months from the market.

With the reintroduction of some lockdown regulations in South Africa in January 2021 our clients have and will continue to find it difficult to travel. Africa House has also been unable to offer our usual Group Visit programme in 2020 and this will be the case for most of 2021. The second wave of the pandemic and recently imposed travel restrictions have forced us to review the logistics and timing of our planned Virtual Visit to Mozambique. We are however pleased to confirm that the visit will go ahead and that we have in the meantime secured the support of the Mozambican Oil and Gas Chamber (MOGC) in the execution and compilation our report. The Chamber will offer increased access to all decision makers. To accommodate the new situation and the current effects of the second wave, we have now reserved flights to visit Maputo from 25 to 29 January 2021.

The express purpose of the visit will be to gathering intelligence that will bring our clients up to speed with developments on the Mozambique LNG project so that they can hit the ground running when activities resume later in the year.

Since announcing our intention to execute this Virtual Visit last year we can furthermore confirm that Africa House and the MOGC will jointly host an online Local Content Partnership Conference that will focus on connecting / linking Mozambican and South African firms. The overall objective of the conference will be based on a strategy that says that collaboration JV's etc between the South African and Mozambican private sector will ensure that both parties are better able to compete for work that will emerge in the Energy and others sectors in the years to come.

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Clients may be aware that the President of Mozambique met with his Tanzanian counterpart this week and that both SADC and the EU will be executing visits to Mozambique in January 2021. The purpose of all these meetings is to address the insurgency in northern Mozambique. It is believed that the rescheduling of the visit ensures a better alignment and ability to obtain information on the way forward for the Mozambique LNG Project.

For those of you who are not aware, Totals Area 1 LNG Project worth more than USD 20 billion, reached financial close about two months ago. This means that once travel restrictions in the EU and Africa are completely lifted and the situation normalises there will be a frenzy of activity to engage with key stakeholders. There has also been a delay in announcing FID on ExxonMobil's Area 4 Project which provides an opportunity for our clients to better prepare for engagement with this project and engaging stakeholders linked to the ExxonMobil project will form an important part of this virtual visit.

The visit will be undertaken by Roelof Van Tonder who has extensive experience in Mozambique in general and in the LNG project specifically. He has led 4 visits to Mozambique over the last few years with two of these focused specifically on the LNG projects.

What do Virtual Visit Participants get?

Africa House will travel to Mozambique on behalf of clients, visit all stakeholders and prepare and Virtual Report for Clients. Each participant will receive a report containing current and actionable intelligence and recommendations on the way forward without having to travel to Mozambique. Using multimedia technology, the report will be as visual as possible incorporating visuals of interviews and site visits. The report on the visit based on the following:

- Using contacts and insight gained from three Group Visit in 2019 the report generated will focus specifically on meetings with stakeholders across the value chain including the IOC's, EPC'S, Contractors, Suppliers and all other stakeholders responsible for the execution of current and future project in the Oil and Gas Sector;
- Focus on meetings with stakeholders responsible for ancillary infrastructure in the energy, transportation, water and sanitation and the commercial property sector.

- Meetings with public sector entities responsible for the movement of people, goods and services across borders in order to give clients clarity on what is needed holistically to trade and do business with Mozambique.
- The approach allows for a deeper dive into the procurement schedule, projects, timing, ownership, funding, contracts and additional intelligence not always available from individual company visits;
- Intelligence from the visit is locked in for a 3-month period, giving exclusivity to the initial participants, thereafter the cost of buying the report escalates significantly;

Who Should Participate?

- Any company with an interest in along the LNG value chain from conception to delivery and maintenance and associated services and products;
- Suppliers of goods and services into the Oil and Gas and related infrastructure sectors;
- Companies with an interest in the development of housing and commercial property;
- Support Infrastructure (roads, water supply & sanitation, ports, railways)
- Supply-chain and Logistics companies;
- Those companies that are already active and looking for an independent assessment of progress and opportunities

Costing

The cost of the report in Rands excluding VAT is as follows:

Category of Client	Pre-Visit Purchase	Post-Visit Purchase
Africa House Subscribers	5 500	9,500
Non-Subscribers	11,000	14,500

What Needs to be Done to Secure Participation?

Interested parties need to complete the attached form and return it to Nicole Drake on ndrake@africainfo.co.za. The visit leader, Roelof Van Tonder is available to discuss the visit and the report on 082 573 1639 or at roelof@africainfo.co.za

Draft Programme

Programme Structure

- Travel to Maputo, Mozambique
- Meetings as and when stakeholders are available.
- Visit and Video Capturing of facilities such as those at Agility Logistics Park and Beluluane Industrial Park
- Meetings as and when stakeholders are available
- Travel to Johannesburg, South Africa

Stakeholders Targeted for Appointments:

Oil and Gas Stakeholders in Government:

- ENH (National Hydrocarbons Company)
- INP (National Institute for Petroleum) Ministry of Mineral Resources and Energy

International Oil Companies

- Total
- ExxonMobil
- ENI

EPC's, Contractors and Oil Services Companies

- CCS JV (Saipem, McDermott)
- JFT JV (Fluor, Technip, JGC)
- Baker Hughes, W Industries, Van Oord, Besix Group
- Renco, Bonatti, Mota Engil, Murry and Roberts, WBHO

Public Sector – Ancillary Projects

- APIEX (Investment and Export Promotion Agency)
- EDM (Electricity Utility Company)
- Ministry of Public Works, Housing and Water Resources
- ENA (National Road Agency)
- FIPAG (Fund for water and sanitation projects)

- Ministry of Industry and Commerce

Business Support Organisations, Local Businesses and / or Local Content Partners

- CTA (Confederation of Economic Associations)
- ODE (Order of Engineers)
- CPGM (Mozambique Oil and Gas Chamber)
- Standard Bank Incubation Centre
- Standard Bank, FNB
- Pemba Chamber of Commerce
- Local Firms dealing with Legal, Tax, Immigration and HR matters