

Mozambique Oil and Gas and Ancillary Infrastructure

Africa House Virtual Visit

18– 22 January 2021

Objective: 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 various levels of Lockdown regulations in South Africa and the closure of our borders for most of this year, our clients have been unable to travel, and Africa House has been unable to offer our usual Group Visit programme. While borders in the region are opening up, it is still difficult and, in some cases, risky to travel in the region with some corporates still restricting travel by employees. Recently more than 20 South Africans were detained and some of them denied entry into Mozambique at Pemba Airport. The Mozambican Authorities stated that the groups travel papers were allegedly not in order.

Africa House expects the travel situation between South Africa and Mozambique to be normalised from March 2021 onwards. Given that most of our clients have been absent from the market since March 2020 Africa House has decided to undertake an extended Virtual Visit to Maputo from 18 to 22 January 2021 with the express purpose of gathering intelligence that will bring our clients up to speed with developments on the LNG project so that they can hit the ground running. The input and insight from this visit will also be used to finalise Africa House's strategy and engagement for 2021. The visit is planned to take place in Maputo. Should enough clients sign up, then a visit to Pemba will be included.

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

Draft Programme

Note: The team leader will be based in Maputo for a period of 6 workdays. Given that this visit will only take place in January 2021 it is not possible to give specific dates and times for meetings at this early stage. A list of stakeholders that will be targeted for meetings during the visit are listed. It should be noted that this list is not exhaustive, and further entities may be added as the programme unfolds.

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