

# Mineral sector market study

– *Botswana & Namibia*



## **DISCLAIMER**

This market study was conducted by Raw Materials Group, February - April, 2011, on behalf of MeetingPoints Mining at the SGU, Geological Survey of Sweden. Views or opinions expressed are solely those of the author and do not necessarily represent those of the Geological Survey of Sweden.

## **Summary and recommendations**

Swedish subsidiaries in Botswana and Namibia are screaming for skilled staff, in particular for operators, fitters, mechanics and electricians. The lack of locally available skills is a main hampering factor for Swedish companies to begin, continue and expand their businesses in both countries. This needs also to be seen in the light of the Black empowerment policies which restrict the granting of work permits for expatriate staff. Some Swedish companies invest already in training their own staff, primarily in South Africa.

With such a wide spread demand for skilled staff there is a lot of “poaching” going on and irrespective of the numbers the training is not enough. Therefore an idea might be to get together in a collective approach to establish training companies as business subsidiaries that also sells training services to the market including to mining companies.

To complement the above mentioned mining sector vocational training companies would be to restart an international training program at management level within Sida’s ITP programs. Such a program will be beneficial for the proposed training companies and vice versa.

Besides Skills development it is proposed to further explore the establishment of a core drilling company in Namibia and to further explore the cooperation possibilities with the new government owned Epangelo Mining Company in Namibia.

Another mining related sector not really covered by this study but which is recommended to explore further is metal scrap in particular electrical and electronic scrap including also in South Africa.

Lars Klöfver  
Raw Materials Group, June 2011

## **Background**

The Swedish Government has decided to reduce the number of countries that Sweden supports with long term development aid and to focus with even more emphasis on poverty alleviation. This policy has led to the discontinuation of traditional development assistance to Botswana, Namibia and South Africa in Southern Africa.

However during a transition period when support is provided is under what is named Partner Driven Co-operation Sweden aims at supporting sustainable relations between actors in Sweden and in respective country. The areas of co-operation agreed between Sida and the three countries in Southern Africa are mining, energy and environment. Sida has appointed the Swedish Geological Survey to act as facilitator for the mining sector.

Within this facilitation program, called MeetingPoints Mining (MPM), SGU appointed Raw Materials Group to conduct a market survey of the mining sector in Botswana and Namibia focusing on identification of business and co-operation possibilities between Swedish and Botswanian and Namibia companies, institutions and other interests.

The study was carried out during two missions to Namibia (22 February-7 March) and Botswana (22 March-1 April) respectively with a presentation of the results at a seminar in Uppsala on 13 April 2011.

## **Terms of Reference. Boundaries and Limitations**

The scope of the study was to identify Swedish companies currently established and active within the mining sector in Botswana and Namibia including also major national and international players. The focus of the study was to identify common needs and business and co-operation interests and possibilities between Swedish and Botswanian/Namibian parties. The scope of the study also comprised a survey of the business climate including export and investment rules and identification of the most relevant funding possibilities.

The study did not include South Africa. Botswana's and Namibia's dependence on South Africa including strong historical and economical ties justifies a closer look at those relations and from the fact that major Swedish companies have their regional headquarters in South Africa. This aspect may eventually be covered in more detail when a similar study on South Africa will be made.

From the outset we did not limit the study to encompass only direct mining companies and mining activities but approached the study by being open also to upstream and downstream businesses. Furthermore when looking at mining of various minerals and the possible interest of Swedish actors, mainly mining companies, we focused more on base metals and operations that we had reason to believe were of relatively higher interest than diamonds and uranium, although these operations are of great interest to Swedish equipment manufacturers.

Mining is much dependent on a functioning infrastructure like reliable supply of power and water while mitigating its environmental impact is always and important task. It has therefore been important to co-ordinate the study with Sweco who has been assigned a similar role as facilitator for Partner Driven Co-operation in Southern Africa in the areas of energy and environment.

The lead concept of the Partner Driven Co-operation is sustainability. This is interpreted to mean relations between Swedish and Botswanian/Namibian actors that can be self sustained without long term aid support. We believe that such relations are mainly to be found within the private sector and thus in relations that are driven by respective party's business interests. With the limited time available we have therefore focused more on the Swedish private sector's interest than that from public institutions and agencies.

### **Previous studies and reports**

In 2009 Raw Materials Group was assigned by SGU to conduct a survey of the mining sector in Botswana and Namibia. These studies contain updated data and all relevant information on general geology and business climate including rules for obtaining exploration and mining licenses. The mining sectors in the two countries are described in detail including mining companies, production, and ownership and also of exploration companies that are in more advanced stages. Therefore we make reference to these studies for all basic mining, mining company data and information.

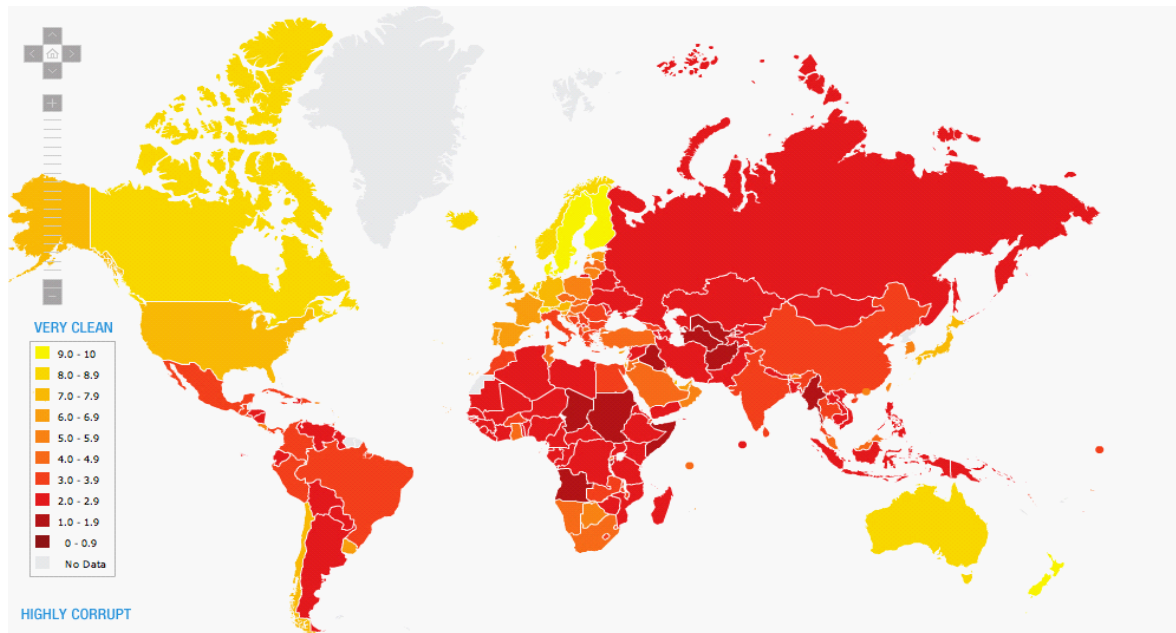
Furthermore the Swedish Trade Council has conducted two independent studies and presented corresponding reports on Botswana:

- In debt study of the Botswana mining sector, May 2010
- Establishing a Business in Botswana, The administration of carrying out trade with Botswana, December 2010.

### **General Business climate**

Botswana became independent in 1966 and Namibia in 1990. Both countries are stable democracies and ranks high in annual surveys as relatively secure and as some of the least corrupt countries in Sub-Sahara Africa. The taxation and regulatory frameworks, including land title and environmental and socio-economic regulations, are considered to be the most stable and reliable in Africa.

This generally favorable situation is reflected by such organizations as Transparency International, MoIbrahim Foundation and the Fraser Institute. Swedish EKN considers Botswana and Namibia to be among the least risky countries in Africa, placing them in premium class 3.



*Corruption Perception Index 2010. Source: Transparency International.*

Transparency International ranks Botswana and Namibia, together with South Africa, as the least corrupt countries on the continent while the Mo Ibrahim Foundation which is a broader index that ranks each country's performance in a number of sectors by development indicators. Botswana's overall rank is 3 surpassed only by Mauritius and Seychelles. South Africa and Namibia come closely thereafter as nos 5 and 6 respectively. Botswana ranks as no 2 when it comes to Safety and Rule of Law and Sustainable Economic Opportunity.

More specifically the Canada based Fraser Institute conducts an annual survey of regions and countries by interviewing mining company executives in relation to their views on mineral endowments and public policy factors such as taxation and regulation affect exploration investment. Botswana is again ranked highest among African countries and is ranked as no 8 on a global scale.

Namibia is improving its position every year and South Africa is on place 31 in last year's survey. One can remark here that the Fraser Institute has ranked individual states and jurisdiction in certain countries fore example in Canada.

Without going into detail the conclusion must be that Botswana and Namibia are two of the most attractive countries in Africa when it comes to investment climate in the mining sector. A quote by a mining company executive speaks for itself: "Africa, having some of the world's most significant undeveloped resources, has one of the most attractive jurisdictions with respect to exploration and development—Botswana—and one of the worse—DRC"

Yet another source to look at to get a relative comparison between countries when it comes to business risk is the Export Credit Guarantee Board, EKN which ranks both Botswana and Namibia in premium class 3 on a scale 1-7 with 1 being less risk and lower premium.

## Minerals and mining sector

The minerals and mining sector's contribution to GDP is 13% in Namibia and as high as 40% in Botswana. Minerals export contributes to 50% of foreign exchange earnings in Namibia and 75% in Botswana. The dependence on their raw minerals resources is thus high in both countries, in particular so in Botswana.

Governments in both countries have since long adopted a policy of diversification to ease the dependence of raw materials export and reduce the vulnerability of a fluctuating world market with rapidly changing metal and commodity prices.

### - Botswana

Botswana's most important export commodity is (jewel quality) diamonds. Jwaneng and Orapa mines are the largest and most well known. The relative share has declined during recent years, first as a result of the financial crisis but over a longer term also because of increased costs (deeper mines, lower grades, unreliable power supply etc.)



The efforts to attract and establish Botswana as a hub for downstream processing (cutting & polishing) has gained some results but not yet as expected. Botswana has abundant coal resources however with somewhat low quality. Due to its landlocked position Botswana has faced difficulties to export its coal while current production is used for electricity generation.

Although less significant to the Botswana GDP than diamonds, base metals such as copper and nickel are being extracted in the northeast of the country.

Due to foreseen increased prices for base metals there are increased activities in exploration both around existing mines and in the northwest and central Botswana. Mining activities are dominated by foreign controlled companies, in particular Australian, Canadian and UK companies. There is currently no Swedish mining company active in Botswana.

A number of copper and base metals exploration activities (Discovery Metals, African Copper, Hana Mining and Triprop Holdings), such as in the Kalahari Copper Belt, have reached advanced stages.

### - Namibia

Namibia has like Botswana a large diamond industry. Much of the diamonds are harvested offshore. The most important raw materials commodity is however uranium that has now surpassed diamonds as the biggest foreign exchange earner.

Namibia is the fifth largest uranium (yellow cake) exporter in the world (with Rössing, Langer Heinrich and Trekkopje being the three largest operating mines) and

the new high grade Husab mine (earlier called Rössing South) is expected to take Namibia even higher on this ranking.

The Namibian Government has adopted, like the Government in Botswana, a policy of diversification with the ambition to add increased value in downstream links of the raw materials value chains. The results of this policy still remain to be implemented.



*Namibia*

Like in Botswana, Namibia is currently phasing a boom in mining operations with new mines being opened and old, closed down mines and tailings are being reopened while exploration activities are going on all around the country. 34 mining companies are currently operating in Namibia of which 16 are Australian and 10 Canadian.

More than 10 base metals exploration projects are currently in an advance stage and UK based Dundee has reopened its Tsumeb toll smelter.

Gemstones and semi-precious stones are mined by small scale miners around the country. The quality of the stones is usually low due to poor or limited ability for cutting and polishing.

With the objective of a greater direct involvement and to benefit more from the country's mineral wealth the Government of Namibia has established the 100% state owned Epangelo Mining. The objective is to acquire stakes in uranium and other mining operations as well as in exploration activities and also in contract mining. So far Epangelo has had limited access to government capital for its expansion plans.

## **Infrastructure**

Both Botswana and Namibia are large countries, sparsely populated with around two million inhabitants each. Except for northern part of Botswana the climate is very dry and the two countries share the Kalahari Desert among themselves.

Water supply to the minerals industry is thus a challenge. The big uranium mines in Namibia is to a great extent dependent on desalination plants built at the sea coast. The French company Areva is investing in a new desalination plant to supply its Trekopje uranium mine with electricity. Botswana's diamond and other mines are dependent on ground water aquifers which do not seem to recharge themselves. Large distances are a challenge to Botswana's future coal exploitation as well as to transport of concentrates from new mines in the interior of both countries. A new trans-Kalahari railway line is planned from Botswana through south Namibia to Walvis Bay. The possible realization of this project will be important for the further development of minerals sector in both countries.

Power is another necessity for the minerals sector and power is in short supply in both countries. Botswana and Namibia imports large quantities of power from South

Africa which is facing rapidly increasing demands and thus wants to reduce its export to neighboring countries. Botswana's total electricity demand is in the order of 500MW of which around 350 MW is imported from South Africa and 100-150 MW generated in the Moropule coal fired power plant. Botswana may develop its Mmamabula and Mmamantswe coal deposits for additional power generation while Namibia's ambition to build a nuclear power plant most likely must be considered as a less likely vision, at least for the foreseeable future.

Swedish minerals and mining sector actors presence and interest in Botswana and Namibia and national and international actors

The minerals sector in Botswana and Namibia is dominated by foreign interests, in particular Australian, Canadian and South African mining and exploration companies.

The Government of Botswana holds a 50% share in the largest diamond mining company in the country, Debswana, together with DeBeers.

The Namibian government holds a much smaller share of operating mines but has recently created its own mining company, Epangelo mining.

- *Infrastructure improvements*
- *Financial capital/venture capital (Namibia)*
- *Human capital/skills development*

The needs of the minerals and mining sectors can be summarized in three categories.

The Swedish mining equipment manufacturers Atlas Copco and Sandvik each have substantial market shares while ABB, Scania and Volvo are also important players, all of which have their subsidiary companies in respective country often with regional headquarters in South Africa. No Swedish mining company has currently any activity in Botswana or Namibia.

### **Needs in Botswana and Namibia and sustainable business possibilities for Swedish actors**

There is a large and competent cluster of actors within the minerals and mining sector in Sweden. Some of these actors may be interested in and has the potential to contribute to the needs of Botswanian and Namibian actors. The large Swedish mining, construction, transport and electrical equipment manufacturers have since long their subsidiaries established in both countries. Small and medium Swedish companies and other actors are not present with their offices or representatives.

Long term self sustained relations need to be based on mutually beneficial business activities. In the overwhelming number of cases such driving conditions exist primarily in the private sector.

The needs in both Botswana and Namibia are huge in particular with regard to the diversification efforts that are part of priority policies in each country. The focus of these policies is to add value to mining products by expanding downstream processing. It seems as if Botswana has taken one step in this direction by agreement with DeBeers to move some diamond cutting and polishing businesses to Botswana. In other respects diversification efforts are basically absent or very slow.

The large number of exploration companies in both Botswana and Namibia are looking for investors and would welcome Swedish partners. It is assumed that potential Swedish interests would not look at diamonds or uranium but in such case rather at base metals (and rare earths).

The requirements of water, electricity and transport have been touched upon above. The necessary expansion of water and power supply and the need to expand road, railroad but also telecommunications network should provide interesting business possibilities for Swedish companies. It seems to be worth the effort to coordinate partner driven cooperation initiatives of the MeetingPoints Mining project with those in the energy and environment sectors facilitated by Sweco.

The large transnational mining companies like Rio Tinto, Areva, and diamond giant DeBeers have generally the financial resources to invest in expansion projects and new explorations projects.

Small and medium sized companies face greater difficulties to find the necessary financial capital to invest in new projects. There is no Venture Capital bank in Namibia but there is the semi-governmental revolving Minerals Development Fund that may provide loans to it seems mainly small scale projects.

The lack of human capital is a common denominator among all parties of the minerals and mining sectors in both Botswana and Namibia. The large Swedish mining equipment manufacturers witness about a critical situation for future business and expansion plans. So do the mining companies currently operating in both countries.

The Chairman of Husab Uranium mentions the lack of skilled staff as one of the most problematic issues for the construction as well as operation stage of the new mine. The lack of skills is most critical at the artisan/vocational levels. A telling example is the recruitment process for an electrician: The company had received hundreds of application for three positions and selected some 20-25 applicants, all of which with various diplomas and certificates of excellency, for interviews. It became evident that none of the applicants had a clue of what was on an electrical drawing that was shown to them during the interview.

The Namibia Skills Deficit Report issued in November 2010 reveals “scattered skills,

*“scattered skills,  
low quality  
and insufficient  
quantity at all  
levels”*

The Namibia Skills Deficit Report,  
November 2010

low quality and insufficient quantity at all levels". Someone also said that it seems as if in Namibia the training and education pyramid has been turned upside down.

The situation, as far as shortage of mining sector skills is concerned, is similar in Botswana as in Namibia. The MD of a Swedish mining equipment manufacturer said: "The skills we need are nowhere to be found". Similarly a representative from Debswana said that Debswana used to overinvest in skills development but that today they can not even cover their own needs. Like in Namibia the Botswanian education pyramid has a much too narrow base. And someone said that the Government seems to put too much emphasis on higher education.

The Government of Botswana seems however to be well aware and puts high priority on education and skills development. This is evidenced by the fact that education and skills development is driven and coordinated by a special Education Hub. The Botswana Training Authority, BOTA, is responsible for vocational training and the Tertiary Training Council, TEC, as responsible for tertiary training are going to be merged in an effort to make the administration of education more efficient.

Although the skills shortage is particularly serious at the vocational level very few mining and other companies take advantage of the vocational training fund from which government subsidies can be sought for up to 30% of the training costs. As a further evidence of the Botswana government's priority on skills development is the recent construction of two vocational training colleges in Francistown and Oodi (outside Gaborone). However it seems as if these efforts have not yet led to the expected supply of skilled people to the mining and other markets. Major parts of these new and relatively well equipped facilities are currently standing idle. It is furthermore interesting to note that the Botswana government is keen to establish Botswana as a regional center of excellence in mining and energy education and has started an ambitious marketing campaign within the SADC region.

The conclusion as regards mining sector skills deficit, particularly at the vocational/artisan levels, is that improvement of such skills will benefit both Swedish companies and the mining sector in both Botswana and Namibia. A tentative idea is that Swedish companies, i.e. in the first place the large Swedish equipment manufacturers, could establish a joint mining sector vocational training company. The governments in Botswana and Namibia and/or the private sector (mining and other companies) in both countries could also join as owners.

A joint approach has the advantage that the numbers of trained people could increase more than the sum of trainees of each individual training academy and with a common approach the risk of poaching may decrease. The commercial operation of such a training company offering quality training to the shareholders staff but also to the outside market is a condition for sustainability. Co-investors could be such institutions as IFC and some of its sister organizations at national level like for example Swedfund.

Obviously one has to look at this idea from the perspective of each country but it may be possible to establish such a company also on a regional level, c.f. Botswana's ambition to establish itself as a regional centre of excellence in Mining and energy training. There are possibilities to take advantage of existing facilities and collaborate with existing institutions like the vocational training colleges in Botswana and the Namibia Institute of Mining Technology, NIMT, to mention some examples.

In order to explore the in debt interest of various parties, including several parties that have not yet been contacted, and the various options that seems to be possible at this early stage it would be needed to conduct a proper feasibility study. Such a feasibility study is proposed to be co-funded by a selection of interested companies and by MeetingPoints Mining.

There may be a possibility to establish a Namibian/Swedish core drilling company in Namibia to compete on the booming exploration market with South African and other drilling companies. The newly established state owned company Epangelo in Namibia needs support and would possibly benefit from a bench marking exercise with LKAB and has expressed interest in interpreting geophysical data to be able to select possible investments.

The new large Husab uranium mine in Namibia offers a number of opportunities for equipment suppliers. Botswana offers big opportunities for Swedish mining and transport equipment manufacturers in the coal industry and for the development of the power and transmission infrastructure.

The overwhelming need however that appears to be the common denominator among all actors including actors in governments, mining and exploration industries and among Swedish companies are the skills deficits that appear on all levels of the industry, and in particular so at the apprentice, vocational levels.

Training and education do not only fill immediate and direct gaps but creates relations over longer terms that may spill over to cluster actors that are not directly involved as owners or trainers. It benefits Sweden at large. Therefore it is proposed here as a complementary tool and idea to reinstitute and expand the Sida supported ITP in the mining sector. This would in such case be a tool that benefits not only Botswana and Namibia but a number of other developing countries in Africa and elsewhere. With time Botswana and Namibia could become partners to Swedish stakeholders to offer such high level management training to other countries in Sub Sahara Africa.

## **Financing**

There are a number of financing and funding possibilities more or less relevant depending on the specific investment or project. Of particular relevance for the opportunities discussed in this market survey and in addition to the World Bank, African Development Bank, the European and Nordic Investment banks are:

- Sida's B4D that provides a number of different sub-instruments that may be used as enzymes to stimulate further development of the mentioned project ideas.
- Swedfund's SwedPartnership provides financial support for Swedish SMEs while Swedfund is keen to look at investment opportunities in both Botswana and Namibia.
- IFC recently announced a 300 mUSD package towards the Sub-Sahara mining sector

- Finland may support a project in Namibia through its Local Development Fund
- DemoEnvironment (currently under review and administered through Tillväxtverket) could be another interesting financial instrument in its new form later in 2011.
- EU's Raw Materials Initiative, RMI, rests on three pillars, one of which is support to mineral rich developing countries. The EU is currently consulting between Commissions and Member States what practical forms this support should take.

### **People met/interviewed**

Lists of people met are attached to this report as Appendix 1-3 with separate lists for people met in Botswana and Namibia respectively and in Sweden.

## People met/ interviewed Sweden and other countries (excluding in Botswana and Namibia)

Daniel R. Smith, Ambassador  
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Paul E. Shihengo, First Secretary  
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### People met/interviewed Botswana

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