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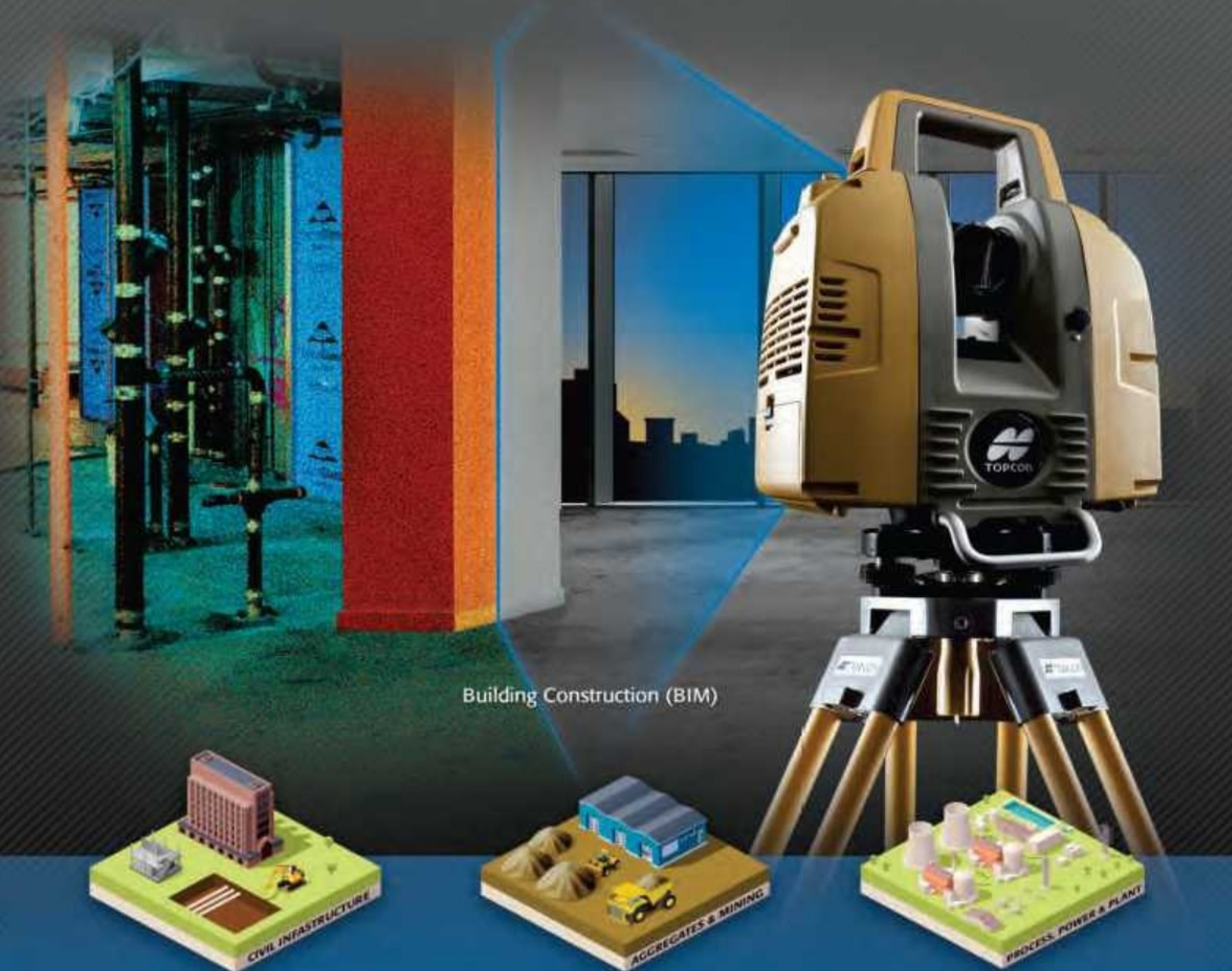




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Slight uptick noted in construction's overall business conditions - CIDB



The SME Business Conditions Index moved from 42% to 43%, reflecting an improvement in activity, while both confidence and activity were above the long-term average, with order books looking healthier. Demand for new work increased while profits were better. The constraint of insufficient demand improved significantly and is now below its long-term average.

According to the latest Construction Industry Development Board (CIDB) Business Conditions Survey, overall conditions in the South African construction sector in the third quarter of the year 2022 were little changed from those in Q2.

Sentiment improved for both general building (GB) and civil engineering (CE) contractors. Skilled labour and building material constraints eased, however, access to credit became more difficult. Rising interest rates might be affecting building contractors.

These findings are the quarterly results of the

SME Business Conditions Survey conducted by the Bureau for Economic Research (BER) on behalf of the CIDB.

"Recovery in the construction sector continues, albeit at a slow pace," says Bongani Dladla, CEO of the CIDB.

"The sector was grievously mutilated by the economic slowdown in South Africa, hit again by the Covid-19 pandemic, and is suffering from the uncertainty brought on by load shedding.

"There is no doubt that the third quarter has seen a continued strengthening of the sector as a whole and is a hopeful indicator that better days lie ahead.

General building sector
In the general building sector, more than half of the respondents were still dissatisfied by the present business conditions, although the level of dissatisfaction is much better than the long-term average. Thus, confidence ticked up by two points to 46%.



Activity was better and is now just above the historic average, yet lower than a year ago, with a continuing shortage of skilled labour. Tendering competition declined to an all-time low – possibly due to more projects going out to tender or fewer contractors tendering for projects.

A good indicator was that profitability is at its highest since 2018.

Civil engineering sector
In the civil engineering sector, confidence continued to rise, reaching a joint highest level

in the last four-and-a-half years. This was supported by a significant increase in activity, plus employment and profitability at their best levels since the start of 2021.

Business conditions improved in the third quarter, but expected business conditions worsened, yet are still in line with those since the beginning of last year. Surveyed constraints eased, including insufficient demand, and shortage of skilled labour and supply of building materials: the latter despite supply disruptions, which have improved.



Inadequate access to credit declined, nonetheless, it remains slightly above the historic average. “The civil engineering sector appears to have taken a positive step forward and it is a good omen for the future,” says Dladla.”

Confidence across grades
The contractors in the different grades experienced varying outcomes. Confidence in CIDB Grades 3 and 4, as well as 7 and 8, were well above their historic averages while Grades 5 and 6 fared worse.

For Grades 3 and 4, activity improved. The constraint of insufficient demand eased, while employment and profitability increased. For Grades 7 and 8, a notable improvement in activity and profitability was behind the leap in confidence. Sentiment was at its highest since 2016. The same is true for profitability, albeit coming off a very low base.

For Grades 5 and 6, the picture was different. Confidence declined as activity improved, even so, business conditions worsened, profitability deteriorated while tendering competition was keener, and access to credit more difficult.

Confidence in major provinces
As with the grades, so with the provinces. In the Eastern and Western Cape, confidence fell, while it remained unchanged in KwaZulu-Natal (KZN), and it soared in Gauteng. In the first two first cases, this was despite an increase in activity, while in KZN, the opposite held, and yet confidence remained steady. Insufficient demand eased, possibly indicating healthier order books.

In Gauteng, there was a significant improvement in activity, although off a very low base and merely a recovery from the second quarter this year. Insufficient demand decreased, tendering competition was higher than elsewhere in the country - thus, it is possible that larger contractors are driving activity in Gauteng.

Says Dladla: “The overall picture for the construction sector is improving, but there is still a long way to go.”

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PO.Box 178-20114, Kabazi, Nakuru, Kenya.

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Tel: +27 78 692 0826 Fax: +27 86 601 9195

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Saica Top-35-under-35 CA(SA) competition Winner



Recognising young CAs(SA) achievers who are not only excelling in their professional capacity, but who are also making a meaningful contribution to society and steering the profession in the right direction, this annual competition was launched in 2014 and has proven to be a huge success in acknowledging and promoting young CAs(SA) under the age of 35 who are making a remarkable difference.

More on the winners

The winners are considered by a diverse, multi-disciplinary judging panel as the cream of the crop among this year's Top-35-under-35 CAs(SA), who have gone the extra mile to achieve their career aspirations. Indeed, all 35 finalists are individuals who have not only successfully pursued their career dreams but have also excelled and moved swiftly through the ranks to lead operations within notable organisations.

The overall winner, Mathabo Makhaya currently holds the position of group financial manager (Health) at Harmony Gold Mining Company where she provides strategic financial oversight to the internal health management of 44,000 employees, ranging from occupational, primary and tertiary healthcare provision.

As chairperson of the Mineworkers Provident Fund (MWPF) board, she has led the team to expand alternatives and impact investing to enhance returns for members with a corresponding increase in social benefits in targeted areas such as digital infrastructure in sub-Saharan Africa, among others. She is also a founding committee member at AOFSA (Asset Owners Forum South Africa) through MWPF representation, which is a voluntary coalition of pension funds in South Africa with the strategic aim of investing in infrastructure projects in



South Africa. The total estimated value of the forum is approximately R3tn.

She is an ambitious young woman challenging the status quo in a predominantly male industry. She is passionate about transformation, small-business development and impact investing, with a specific focus on gender equality and women empowerment. She is most proud of her work to enable multiple small businesses to go through enterprise supplier development programmes and contribute to the communities they operate in through small-business development. This led her to win the Young Leaders Connect (YLC) 2022 "Lift up Leader in Business" and the

"IDEAL Authentic Leadership" awards for her consistent demonstration of humble and bold leadership and commitment to transformation in her areas of influence.

On a personal level, Makhaya is an advocate for gender equality and women empowerment through education.

The Develop category award winner is Josh Moritz, 32. After completing his training contract at EY and returning from the USA where he worked for Cross Country Consulting,

Josh joined DocFox in 2017. DocFox automates businesses' 'Know-Your-Customer' processes so that their compliance teams can make better informed decisions in a fraction of the time, all while in the pursuit of making money laundering impossible.

He formed part of the founding leadership team and was instrumental in the building of a start-up from humble beginnings to a business with over 250 financial institutions using its product each day. Having been a part of the founding leadership team, Moritz has aided in making key financial and strategic decisions which have ensured that DocFox has continuously grown by 100% year on year. He played a key role in growing the business from a team of just six employees to one that now boasts more than 80.

He believes that his role as a leader is to recognise each team member's potential and to support them in furthering their careers. Josh is zealous about helping people to achieve the things that they didn't believe to be a possibility for them.

The Influence category winner is Christiaan van den Berg, Co-founder and CEO of JOBJACK, a technology platform that makes entry-level



Mathabo Makhaya, group financial manager at Harmony Gold Mining and chairperson of the Investment Committee Mineworkers Provident Fund, has been announced as the overall winner of the highly coveted 2022 Top 35-under-35 chartered accountants [CA(SA)] competition.

opportunities accessible to low-income job seekers. Where the norm is for them to spend up to R932 per month on printing and transport costs to try and find employment, the platform makes such opportunities accessible via their phone on a web browser at no cost to create an online CV/profile and connects them to thousands of opportunities that they can apply for. Companies can then streamline their recruitment process by an automated process in which they are connected to relevant candidates that fit their vacancies best – saving all parties major costs and time.

JOBJACK currently has over 1,200,000 registered job seekers and is growing by 3,000 job seekers per day. They service over 2,000 employer sites across South Africa, including employers such as PEP Stores, Woolworths, City of Cape Town, TFG, McDonald's, KFC and many more. They have placed over 8,000 low-income

individuals in sustainable job opportunities over the past 2,5 years. The aim is to place another 20,000 in the next 18 months.

The Lead category winner is Louw Barnardt, Co-founder and Managing Director at Outsourced CFO. Louw co-founded the award-winning finance firm, Outsourced CFO (OCFO), at the end of 2013. Under his leadership as managing director, the company has grown from two desk spaces to seventy people in just under nine years, posting more than an average of 50% growth per year. Outsourced CFO now serves clients from over 25 different countries, and their staff operate from six provinces in South Africa and three continents.

Within OCFO, Louw has spearheaded the creation of the leadership and strategic frameworks on which the company is built. His vision in the arenas of marketing and sales, and his passion for strong execution, have led to the creation of a scalable business that is currently doubling every fifteen months. As a firm, Louw co-created OCFO to not just be a business built on integrity and flawless ethics but a meaningful place of work with an incredible culture and unmatched capabilities to accelerate the careers and personal growth of all of its employees.

Outside of OCFO, Louw and his team have set up Founders Foundation NPC, a non-profit vehicle that runs various programmes and initiatives for young and previously disadvantaged entrepreneurs who are starting out on their journey. Together with corporate partners, they have helped to secure more than R80 million in funding opportunities for young entrepreneurs and have supported more than a hundred and fifty entrepreneurs with financial mentorship.

The Gamechanger award winner, Boitumelo Kuzwayo, is the deputy head of department: commercial accounting and senior lecturer at the University of Johannesburg, one of the largest mid-tier accounting firms in South Africa.

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Zimbabwe proposes incentives for \$1bn solar projects



Zimbabwe finance minister Mthuli Ncube

Zimbabwe has proposed incentives to accelerate 1,000 megawatts of privately owned solar energy projects worth about \$1bn, finance minister Mthuli Ncube announced on Monday, 19 December, as the country scrambles to plug an electricity deficit that threatens to compound its economic woes.

The southern African country is currently generating about a third of its 2,000MW peak power demand and experiencing up to 18 hours of power outages daily after its main Kariba hydropower plant cut electricity generation due to low water levels. The country's ageing coal plants are prone to frequent breakdowns, impacting mines, industry and households.

Zimbabwe's drive towards generating 1,100MW from renewable energy sources by 2025 has been slowed by lack of investment by independent power producers (IPPs) spooked by the country's currency volatility and uneconomic tariffs.

The Zimbabwe dollar has rapidly lost value, plunging from around 2.5 to the US dollar when it was reintroduced in February 2019 after a decade of dollarisation, to 673.42 against the greenback currently. The country's power tariffs have also failed to keep track of inflation, which was 255% in November.

Investor concerns

IPPs, many of which require foreign cash to fund development of solar energy plants, have cited the inability to remit dividends and service foreign loans due to Zimbabwe's chronic foreign currency shortages as key investor concerns.

Ncube said the government was guaranteeing viable tariffs and power purchase agreements to allay the IPPs' fears.

"A key ingredient to the successful implementation of the solar IPPs projects is a bankable government implementation agreement with an economic tariff," Ncube said in a statement.



He added that the central bank would also guarantee the payment of dividends and foreign loan repayments to external investors and lenders.

power projects with sizes ranging from 5MW to 100MW and a cumulative capacity of 998MW at a cost of \$1bn.

Ncube said the guarantees would cover 27 solar

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Embracing Disruption: A Glimpse into Mining Indaba 2024 in Cape Town



Save the dates! From February 5th to 8th, 2024, Cape Town, South Africa, will once again serve as the distinguished host for the continent's preeminent mining event: Mining Indaba. Anticipation is running high for this year's assembly, promising an even more electrifying experience as industry leaders grapple with the theme, "Embracing the Power of Positive Disruption: A Bold New Future for African Mining."

Mining Indaba has consistently proven to be an indispensable platform for deal-making, knowledge sharing, and shaping the trajectory of the African mining landscape. This year, the stakes are higher than ever, as the industry stands at a crucial juncture, navigating challenges and seizing opportunities presented by technological advancements, climate change concerns, and evolving societal demands.

Embracing the Winds of Change

The chosen theme for 2024 encapsulates this pivotal moment, urging industry stakeholders to proactively embrace change rather than shying away from it. Disruption, though often unsettling, can serve as a catalyst for progress. Mining Indaba 2024 aims to be the crucible where this positive disruption is forged, fostering dialogue and collaboration that will propel the industry into a sustainable and prosperous future.

Key Discussions on the Horizon

Several focal points will drive discussions at Mining Indaba 2024:

1. **The Role of Technology:** In-depth sessions will explore how automation, artificial intelligence, and data analytics are transforming mining operations, enhancing efficiency, safety, and environmental impact.



2. **Sustainability in the Spotlight:** Scrutiny over the mining industry's environmental footprint will be addressed with discussions on responsible mining practices, green technologies, and community engagement strategies for a more sustainable future.

3. **Investing in a New Era:** Given the global shift toward clean energy, the conference will delve into investment opportunities in critical and battery metals, as well as the evolving landscape for traditional commodities like gold and platinum.

4. **Building Strong Communities:** Mining's impact on local communities will be a focal point, addressing social responsibility, skills development, and ensuring mining benefits all stakeholders.

A Platform for Connection and Collaboration

Beyond formal sessions, Mining Indaba 2024 serves as a breeding ground for networking and collaboration. The event brings together a diverse range of stakeholders, from government officials and mining executives to investors, entrepreneurs, and civil society representatives. This unique mix fosters cross-pollination of ideas, forging partnerships that can drive positive change throughout the African mining ecosystem.



More Than Just a Conference

Mining Indaba 2024 transcends business deals and industry trends. It's about shaping the future of African mining to ensure it contributes to a more sustainable, equitable, and prosperous continent. The event's commitment to youth development, education, and social impact initiatives underscores its dedication to building a better future for all.

Whether you're a seasoned mining professional, a curious investor, or simply passionate about Africa's development, Mining Indaba 2024 is an event you can't afford to miss. It's an opportunity to be part of the conversation, witness the winds of change, and actively contribute to shaping the future of this vital industry.

Mark your calendars, book your flights, and get ready to embrace the power of positive disruption at Mining Indaba 2024!



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Southern Africa is Ideal for Solar Power Generation

southern Africa, and in particular, its dry interior, really among the world's best sites for solar energy generation, as is often claimed?

Harvesting solar energy
Sunlight is ultimately a stream of photons. Think of photons as little arrows, each carrying a small quantum of energy. Upon striking a solar panel or some other solar device, the photon will be annihilated, and a fraction of its energy will be converted to heat or electricity.

To maximize the energy collected by the solar device, you try to intercept as many photons as you can. To achieve that you position the panel so that it blocks the path of as many photons as possible; which happens when the panel directly faces the sun.

A panel lying flat on the ground, therefore, maximizes its photon catch when the sun is directly overhead. At noon the sun is closest to overhead in the tropics, so these latitudes also generally have the warmest climate.

Climate

There is a common misconception that the hottest areas are also most suited for solar power generation. But tropical regions often have a lot of clouds as well.

Coastal areas also tend to be more cloud prone, and so some of the warmest cities in southern Africa, such as Durban (eThekweni) in South Africa or Maputo in Mozambique, are not top solar sites.

Around the northern and southern edges of the tropics, we find regions with some of the driest climates, which normally implies less cloud cover. In southern Africa, these arid regions are the Namib, Kgalagadi and Karoo (semi)deserts and adjacent areas.

These experience the sun nearly overhead around noon in the summer. Solar devices here can catch more energy in winter by tilting slightly towards the equator.





In southern Africa, solar panels usually perform best if they are tilted 20-30 degrees towards the north, meaning that they directly face the noon sun during the March and September equinoxes.

Those angles also closely match the inclination angles of a typical domestic roof – so solar panels lying flat on a north-facing roof are often already at their optimal tilt.

Atmosphere

Unlike many of the world's arid regions, like the Sahara and parts of central Asia, the southern African dry areas experience comparatively low levels of dust. One result is good long-range visibility: light is able to move through the atmosphere freely.

Dust, smoke and haze in the atmosphere block part of the sunlight, like clouds do. While some of these conditions do occur for limited periods, the atmosphere over southern Africa generally has lower aerosol concentrations than in many other parts of the planet.

This is partly due to the large oceans on three sides of the region, which limits the importation of air contaminants from other continents.

High altitude

It is not only the contaminants in the air that block light, but to a small degree also clean air itself. About 20% of incoming photons from the sun's vertical beam that could be processed by solar panels do not make it all the way to the ground. The percentage gets even larger as the sun nears the horizon, when photons are taking a longer path through the atmosphere.

This is another reason why latitudes closer to the poles become ever less suitable sites for solar energy generation. The sun there never gets close to a point vertically above.

In southern Africa, however, with latitudes between about 15 and 35 degrees south, the sun is on average closer to the zenith. That makes higher solar energy yields possible.

Another advantage is that much of southern Africa is on a plateau between 1000-2000 meters above sea level. For example, at 1750 m above sea level, the city of Johannesburg has about 15% less atmosphere above it than a coastal location. It means that even under the clearest sky conditions sites on the plateau receive slightly more solar photons than coastal sites do.

Southern Africa – a solar hot spot?

All these factors create excellent conditions for the generation of solar energy in much of Southern Africa. Even the coastal, cloud-prone locations have enough sunshine to match most of the solar power generating sites in the northern hemisphere industrialized countries. And the western interior, with its extremely low cloud cover, high altitude and low aerosol concentrations, offers some of the best conditions in the world for solar energy.

Southern African countries have been slow in embracing solar energy. Ten years ago the cost was still prohibitive, but not anymore. Many new initiatives are springing up in practically all parts of the region. It is a trend that is set to continue and get even stronger.

Africa's Cobalt Producing Countries Impacted by the US's IRA



Mining companies and governments in Africa are calling for stronger trade ties with the United States after a new climate law set out incentives for U.S. carmakers sourcing battery materials from trade partners.

The \$430 billion Inflation Reduction Act (IRA) has been criticized by the European Union and South Korea, who say it could hurt their car industries. It could also negatively impact African nations that produce battery materials.



The United States has a Free Trade Agreement in place with only one African country, Morocco. Yet the continent is a key copper producer and the Democratic Republic of Congo produces most of the world's cobalt.

Battery materials and trade are set to be a focus at next week's U.S.-Africa Leaders' Summit in Washington where President Joe Biden will meet presidents of African countries including Congo.

"The IRA was intended to push out China, and what it's ended up doing is pushing out the DRC, and the EU, and South Korea," said Indigo Ellis, managing director at consultancy Africa Matters Limited, who will attend the Dec. 13-15 summit.





Under IRA, U.S. carmakers will get tax credits if they source at least 40% of battery materials domestically or from American free-trade partners. This risks carmakers replacing Congolese cobalt with Australian, Canadian, Moroccan, or U.S. cobalt.

Congo produced 74% of the world's mined cobalt last year while the next-biggest single producer, Australia, was responsible for just 3%, according to a Cobalt Institute report.

An adviser to Congo's President Felix Tshisekedi said a USA-DRC Free Trade Agreement "is an option for the medium to long-term, but in the short term other avenues will be explored".

A spokesperson for the U.S. Trade Representative (USTR) said "we look forward to discussing ways to strengthen and deepen our trade and investment ties with our partners throughout Africa" during the summit.

The IRA aims to boost U.S. mining and processing, which some companies fear could come at the expense of value-added processing in Africa.

"The West needs to work with us to build some value-add," said George Roach, CEO of Premier

African Minerals PREM.L, which has a lithium project in Zimbabwe.

His is one of many projects across sub-Saharan Africa aiming to produce battery materials like lithium, nickel, and graphite.

Joe Walsh, managing director at Australia-listed Lepidico LPD.AX, which is building a lithium mine in Namibia and a chemical plant in Abu Dhabi, said the IRA makes the United States a more attractive location for a planned second plant.

"The U.S. is not going to be able to incentivize the development of a significant battery raw material production base of its own without ruffling a few feathers along the way."



Exploring Africa's Renewable Energy Potential by Region



Supportive renewables policies, rising energy demand and efforts to boost electrification rates are driving the development of renewable energy markets across the African continent. With favorable climatic conditions and renewable-friendly investment policies in tow, several sub-Saharan countries have successfully implemented diversified energy mix models which are set to drive the growth of renewables markets across their respective regions.

The top regional renewables energy markets to watch for in Africa in 2023 and beyond include:

North Africa

According to the International Renewable Energy Agency (IRENA), the North African market is set to dominate the continent's renewables penetration in 2023 and beyond, driven by massive solar, wind and green hydrogen projects deployment.

Egypt, Tunisia, Sudan, Algeria and Morocco have each set ambitious national renewable energy policies, with large-scale clean energy projects both underway and in the works. Morocco, for instance, is set to become a major green hydrogen exporter while Egypt could account for five percent of the global green



hydrogen market by 2040 – according to the World Bank.

With North African countries seeking to maximize the massive renewable energy potential across the Maghreb region, giant wind and solar energy projects, including Morocco's 7.5 GW Amun solar PV facility and Egypt's 560 MW Abydos solar PV and 505 MW Amunet wind projects, are underway.

Regional mechanisms such as the Regional Center for Renewable Energy and Energy Efficiency and the Pan-Arab Sustainable Energy Strategy – 2030 have the potential to drive private sector investments, encourage technical skills development and knowledge sharing, and enable North Africa to achieve its goal of deriving 12.4% of its energy from renewables by 2030, according to IRENA.



West Africa

With a growing number of West African countries establishing national renewable energy and energy access targets, the region is eyeing universal energy access on the back of heightened renewables rollout. According to



IRENA, the region's solar, wind and hydropower potential present opportunities for countries such as Ghana, Senegal, Ivory Coast, Mali and Guinea to boost the reliability of their energy mix. With annual average solar irradiation of 2100 kilowatt hours per square meter and wind speeds averaging 6 meters per second, West Africa's renewables potential is yet to be tapped to drive socioeconomic developments. According to a report released by Wärtsilä in late October, 2022, Nigeria has the potential to achieve 100% renewable energy by 2060, while Mauritania ranks among Africa's top deployers of solar and green hydrogen projects, with the \$40-billion Aman hydrogen and the 3GW Project Nour Solar PV already under construction.

Southern Africa

Representing Africa's third-largest energy market, Southern Africa accounts for approximately 25% of Africa's hydropower capacity, 41% of installed wind power and over 60% of the continent's utility-scale solar generation. With South Africa maximizing investments in solar, wind and in developing a green hydrogen economy, and Mozambique boosting its hydropower capacity whilst Botswana and Angola are kickstarting solar deployments, the region's renewables market is set to become one of Africa's fastest growing in 2023 and beyond. Namibia, with its massive investments in solar, wind and green hydrogen industries, is also set to play a key role in the expansion of the regional renewables market.

East Africa

The region's East African Centre of Excellence for Renewable Energy and Energy Efficiency,



coupled with project deployment and electrification efforts by countries such as Kenya, Rwanda, Uganda and Tanzania, are set to drive renewable energy industry growth. Developments in the region include TotalEnergies 120 MW solar PV capacity rollout in Uganda's Kapeeka, Iganga, Tororo, Kumi, Bukedea and Palisa areas, HDF Energy's installation of Uganda's first green hydrogen power plant and the International Finance Corporation's \$150 million in loan financing to support smart energy projects in Kenya. East Africa's geothermal sector, with Kenya ranking as the largest African producer of geothermal, followed by Ethiopia, has the potential to provide energy security, price stability, reductions in greenhouse gas emissions and renewables market expansion with countries in the region seeking to address chronic electricity shortages disrupting economic growth.



Central Africa

According to IRENA, the region's abundant solar and hydropower resources will drive the growth of the renewables market as countries such as Angola, Chad and the Democratic Republic of Congo optimize energy developments to boost consumer access to electricity. IRENA predicts Central Africa has the potential to generate 1 055 GW of electricity from solar and 31 GW from wind whilst the Delft University states that the region's hydropower potential ranges at 767 GW.

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