



HUMAN IMPACT

National Industrial
Participation Programme

Report 2008



the dti

Department:
Trade and Industry
REPUBLIC OF SOUTH AFRICA

National Industrial Participation Programme

Report 2008



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Overview 2007/08

Of all the national government departments, the Department of Trade and Industry (**the dti**) is increasingly the most influential in the growth and trajectory of the South African economy. Within **the dti** lies the Enterprise and Industry Development Division (EIDD) which, as its name implies, plays a key role in implementing the mandate of **the dti** to give effect to government's economic policies.

These economic policies are guided by the broader goal of halving poverty and unemployment in South Africa by 2014, which means a growth rate of at least 6% per annum. How to achieve that growth rate is set out in the Accelerated and Shared Growth Initiative for South Africa (AsgiSA). The emphasis is not just on further growth, but on shared growth, which means that the disadvantaged majority needs to be actively brought into the mainstream – the bridge between the first and second economies in South Africa. To do this, AsgiSA identifies the obstacles to further and equitable growth. Here is where the National Industrial Participation Programme (NIPP) has a role to play.

The NIPP provides government and industry in South Africa with strategic points of leverage, which they would otherwise not have, to shape the direction of the economy in desired ways. The NIPP itself leverages government procurement arising out of large international purchases, by requiring

HUMAN IMPACT



Objectives of the NIPP

1. Sustainable economic growth
2. Establishment of new trading partners and markets
3. Foreign investment into South Africa
4. Exports of South African "value added" goods and services
5. Job creation
6. Human resource development
7. Technology transfer
8. Economic advantages to previously disadvantaged communities

Human Impact of the NIPP

16 500 direct jobs created.

international contractors to develop and invest in projects which can provide long-term economic benefits to South Africa.

In practice, as the selection of NIPP projects in this report shows, this has some very beneficial outcomes. First is that the NIPP addresses directly a key binding constraint on the growth of the South African economy, namely the shortage of suitably skilled labour, with the emphasis on the 'suitable' part of the equation.

Second, the NIPP obligors have played a key role in supporting projects that assist in government's massive R370 billion investment in infrastructure and logistics, such as the Gautrain. Other examples include, for instance, Eskom turbines, telecoms equipment, South African Airways, aerospace manufacturing and alternative energy resources. The twofold outcome is that government infrastructure projects benefit from NIPP obligor expertise and investment, and the spinoff of NIPP obligor commitments leads to a wide range of high technology transfer and manufacture.

Third, the NIPP assists the provinces in their special projects to accelerate and share growth, for instance via agro-processing and rural tourism initiatives. This benefits the poorer provinces in particular.

Overview 2007/08





Overview 2007/08

Fourth, when it comes to the priority sectors identified by AsgiSA as eminently suited to both faster and shared growth, NIPP investments can make all the difference as a catalyst. This applies across priority sectors ranging from Tourism to Agro-Processing, to Metals Beneficiation, and to Wood, Pulp and Paper industries.

Finally, the NIPP plays a very useful role alongside **the dti-linked institutions**, from the Industrial Development Corporation (IDC) to the National Empowerment Fund (NEF), in assisting with access to finance and to venture-capital, in particular for small and medium sized enterprises, so important to black economic empowerment. The selection of projects outlined below underscores this reality.

The National Industrial Policy Framework (NIPF), which follows on the broad guidelines of AsgiSA, sets out a vision for South Africa's industrialisation trajectory that underscores the NIPP's strategic significance. Thus the NIPP assists in facilitating the diversification of the South African economy beyond the current reliance on traditional commodities and non-tradable services. In addition, the NIPP assists in the longer-term intensification of South Africa's industrialisation process and its movement towards a knowledge economy.

The Industrial Policy Action Plan (IPAP) also identifies the lead sectors for the economy, and here the NIPP can and does play a significant role, namely Capital and Transport Equipment and Metal Fabrication, Automotives and Components, Chemicals, Plastics Fabrication, Pharmaceuticals, Forestry, Pulp and Paper, and Furniture. NIPP projects are under way in almost all of these sectors, often providing a catalyst that helps to drive the sector as a whole, both directly through investment, skills and technology transfer, and indirectly through integration into global supply chains and access to new markets.

In the Aerospace Sector, a key benefit is the integration of South African suppliers into global supply chains, along with offsets in terms of training, research collaboration and technology transfer.

Other IPAP priority sectors in which NIPP commitments have had an impact are Diamond Beneficiation and Jewellery, and Agro-Processing, to name but two. Also at the level of cross-cutting priorities identified by IPAP, such as industrial financing, support for research and development and innovation and technology, improved infrastructure and logistics, and skills development linked to sector strategies, the NIPP is an invaluable asset to South Africa.

The human impact of these developmental and catalytic investments is enormous, especially for those directly affected, such as the rural poor. The NIPP has created some 16 500 direct jobs. That is the human impact that forms the theme of this report – what it means for ordinary people to have their lives transformed by projects that would otherwise not exist. When the economy benefits, whether through product diversification or preferred access to international supply chains, for the human beings involved, their life choices are transformed. The project studies that follow in this report tell this tale.



Most foreign companies that faced obligations related to South Africa's arms deal are nearing the completion of their obligations. Thales, for instance, has now discharged its obligations in full. Others have milestones of up to three years to go (e.g. BAE-SAAB). Some are progressing faster than their milestones; others have some catching up to do. All are closely monitored by the NIPP secretariat within

the dti and by an inter-governmental committee made up of **the dti**, National Treasury, the Department of Defence and the Department of Foreign Affairs. Increasingly, attention is now shifting to non-defence obligors, with several new ones coming on stream (here the Gautrain project has had an impact). The Auditor-General conducts audits annually and Parliament and the Portfolio Committee on Trade and Industry is regularly updated.

Defence

Obligor	Contract	Obligation Value	Performance To Date (NIP Credits Awarded)	Outstanding Obligation Value
BAES	Hawk / Gripen	\$7,200,000,000	\$6,335,000,000	\$865,000,000
GFC Thyssen ¹	Corvettes	\$2,047,000,000	\$1,610,596,276	\$436,403,724
GSC Ferrostaal ²	Submarines	€2,852,460,454	€1,692,839,846	€1,159,620,608
Thales	Combat suites	\$652,408,990	\$700,736,671	0
Agusta LUH	Light Utility helicopter	\$767,930,000	\$774,674,530	0
Agusta Westland	Super Lynx	£108,644,495	£41,667,890	£66,976,605
Denel	GBADS	\$17,500,000	\$15,456,653	\$2,043,347

1. ThyssenKrupp is currently investing in four projects that will fulfil the bulk of their investment obligation by the end of 2008.
2. The balance of the obligation due by MAN Ferrostaal has been affected by the company's withdrawal from one project (Precision Strip) and its current new investments (Hasso Plattner Capital Africa Fund, A Berth in Cape Town and a load out facility in Saldanha) where funds have been committed but not yet claimed. This will change the picture of their performance by over €1 billion.



Non-Defence

Obligor	Contract	Obligation Value	Performance To Date (NIP Credits Awarded)	Outstanding Obligation Value
Eurocopter	South African Police	\$13,923,107	\$13,923,107	0
Boeing	SAA	\$237,500,000	\$237,500,000	0
SAFRAN	SAA	\$33,600,000	\$29,485,070	\$4,114,930
AIRBUS	SAA	\$452,846,000	\$286,008,144	\$166,837,856
Areva	ESKOM Nuclear Koeberg Maintenance - AREVA	\$68,554,942	\$57,504,509	\$11,050,433
Sumitomo	ESKOM : Upgrade Arnot Power Station	\$84,634,064	\$34,685,877	\$49,948,187
Damen shipyards	DEAT	\$5,580,000	\$5,580,000	0
Prodiba	DOT	\$8,680,000	\$3,290,000	\$5,390,000
FAROCEAN	DEAT	\$4,800,000	\$4,800,000	0
Jan de Nul	NPA	€9,480,000	€1,400,000	€8,08,000

New Obligations

Some of the major new obligations

Obligor	Contract	Obligation value	1 st Milestone due date
Beretta	SAPS	€2,5M	2010
MBDA	ARMSCOR	€18M	2010
Bombela consortia	Gautrain	R1,88bn	TBA
Ford Motor Co SA	Fleet vehicles	R65M	2010
General Motors SA	Fleet vehicles	R70,2M	2010
Liebherr Crane Containers	SAPO	€24,76	2009
MARS	Spoornet	US\$25,22M	2009
Nissan SA	Fleet vehicles	R29,74M	2010
Toyota SA	Fleet vehicles	R65M	2010
Siemens	Turbines for Eskom	+/-R1,130bn	TBA
Ericsson	Telecomm equipment for Telkom	US\$ 22M	TBA
Honeywell	Eskom	US\$14M	TBA
Amadeus	SAA	US\$21M	TBA



Impact Indicators

160 suppliers benefit during first year of the programme

784 components identified and so far 276 approved for manufacture

Technology transfer

Investment of R137 million

Capital investment in supplier tooling and machinery

Nissan South Africa

Nissan Impacts on Local Automotive Component Manufacture

South African partners: 160 local manufacturers

Nissan South Africa (NSA) is meeting its NIPP obligations through its "localisation programme", launched in May 2007, which sources automotive components from local manufacturers for export to Nissan worldwide. The benefit to local manufacturers of automotive components is that, with Nissan's support, they are linked into international supply chains, bringing in new business and new sources of foreign exchange. The human impact is job creation, technology transfer and skills and management training.

NSA has approved the manufacture of 276 components by 160 suppliers across the country, making everything from heaters to car seats and tyres, for Nissan Taiwan, Nissan Trading Corporation in the US, Mexico and Europe, Nissan International Europe and Nissan South Africa plants in Gauteng.

Nissan assists local manufacturers with technology transfer and skills and management training at the NSA Training Centre, along with other support and mentorship. The projected investment value of the project is some R137 million.



Impact Indicators

Value-add: increased local content and improvement of trade balance

Technology transfer

Training

Investment of R3.7 million

Projected sales: R17 million

Toyota Motor Corporation

Local content for Export Vehicles

South African partners: Toyota

South Africa, Toyota Tsusho

Automotive component manufacturing has been boosted by the Toyota Motor Corporation's (TMC) NIPP obligation. Roof panels for Fortuner SUV vehicles are manufactured at Toyota SA in Durban. These are fitted to locally produced vehicles which are exported to Africa.

TMC has invested R3.7 million in the project and Japanese experts provide on-site technical training from TMC. Production commenced in April 2008. The project boosts Toyota South Africa's drive to achieve higher local content of its vehicles as part of its long term strategy to become a high volume exporter of vehicles.

The human impact is sustainable jobs, technology transfer and training.



Impact Indicators

R163 million investment in technology, machinery and equipment

1 million more catalytic converters exported by 2010

New export markets

R6.7 billion projected for sales over the next five years 2007-2011



Ford South Africa

Platinum Value-Add

South African partners: Faurecia, Tenneco, Emcon

South Africa's export industry initially revolved around extracting raw materials, moving them to the coast and exporting them to rich countries, allowing our export clients to enjoy the benefit of adding value to our products. To sustain and grow our economy to the levels now required, government in South Africa now seeks to add value to our own commodities at home, deriving maximum benefits in revenue earned and jobs created.

South Africa is the world's leading producer of platinum and one opportunity for value-add here is in the use of platinum in the catalytic converters fitted to every new vehicle worldwide. Ford Motor Company, as part of its NIPP obligations, has seized this opportunity and joined with local manufacturing companies Faurecia South Africa, Tenneco South Africa and Emcon South Africa, to export one million more catalytic converters a year by 2010.

Ford is assisting with identifying new markets abroad in Asia, South America and the European Union, using the latest Diesel Particular Filter technology.

The human impact is sustainable jobs and technology transfer.

Impact Indicators

- Export sales
- Technology transfer
- Jobs
- Geographic spread

Volvo

Catalytic Exhausts Manufactured for Export

South African partners: Fleetguard South Africa, Johnson Matthey, NGK

Volvo is proactively participating in the NIPP and facilitating the purchase of specialist heavy-duty vehicle components manufactured in Cape Town, Pretoria and Johannesburg. Fleetguard South Africa is manufacturing after treatment systems for heavy diesel engines, using Volvo technology, for export to Volvo Power Train in Sweden. Similarly NGK in Cape Town and Johnson Matthey in Johannesburg are manufacturing components for Volvo.

Volvo has invested R45 million in new facilities for the South African suppliers and production commenced in 2006.

The human impact is job creation, geographic spread and technology transfer.



Impact Indicators

US\$32 million in new exports

Diversified export markets

Value added locally

Up to 70 new jobs created

Local technology developed and commercialised



Sumitomo

Armour for Arabia

South African partners: Armoured Systems and Projects

Sumitomo Corporation, as part of its obligations within the NIPP, is assisting South Africa's Armoured Systems and Projects (AS&P) to manufacture armoured vehicles for the Saudi Arabia Ministry of the Interior. Using base vehicles supplied by Daimler Germany, AS&P provides value-add and the completed vehicles are exported to Saudi Arabia.

Sumitomo provides finance and manages shipping logistics both for the acquisition from Daimler and the export of the vehicles from South Africa. Thus AS&P is able to overcome its cash-flow problems and is guaranteed a market for its product.

The human impact is sustainable jobs created and technology transfer.

Impact Indicators

Funding for technology innovation and expansion

SME funding support

20 new jobs already created

Assistance with finding foreign buyers for products

MAN Ferrostaal

Funding for SME Start-ups

South African partners: South African Management Company

MAN Ferrostaal, together with Hasso Plattner Ventures Africa (HPVA), a leading international provider of venture capital, launched a €29 million start-up fund in early 2008 for South African emerging entrepreneurs in the fields of information technology and green industries which supply alternative sources of energy.

Of the anticipated R48 million to be invested during the first year of the fund, R18 million has already been approved for two projects. New entrepreneur beneficiaries of the Fund will also receive help with market access via HPVA and MAN Ferrostaal's international business network.

The human impact is entrepreneur support, job creation and boosting of alternative energy supply.



Impact Indicators

Technology transfer

New industry sector and new export market

15% BEE ownership

914 direct jobs in construction phase

720 new jobs in operational phase

Forex of US\$40 million per annum

R200 million investment

Geographic spread of jobs and investment

MAN Ferrostaal

Oil Rigs Made in South Africa

South African partners: Grinaker LTA, Atlantis Marine Projects

Saldanha Bay is ideally located for the construction of oil platforms for use along the west coast of Africa. MAN Ferrostaal invested R200 million to build a fabrication yard for this purpose, now operated by Grinaker LTA and involving Atlantis Marine Projects.

Technology transfer ensures that the local fabrication meets Northsea and ANSI offshore standards. Fabrication skills training is provided by Grinaker Offshore Fabrications and includes specialist welding and boilermaking.

Clients are being sourced with the assistance of MAN Ferrostaal. For the first time, South Africa is a player of significance in the oil rig industry, just as demand worldwide is expanding, driven by high fuel prices.

The human impact is job creation and technology transfer, and black economic empowerment in an economically depressed area.



Deputy President Phumzile Mlambo Ngcuka opened the launch of the Saldanha Bay Oil Rig Fabrication Project



MAN Ferrostaal

Growing Jobs in Rural Areas

South African partners: Tshivhase Tea Project

Impact Indicators

100% BEE and community-owned

3,000 jobs created in high unemployment area

New technology transfer

Value of project to community: upwards of R32.4 million per year

Deep rural areas of South Africa's poorest provinces suffer the worst effects of unemployment and poverty. For these places every job is precious and a lifeline for many others. Hence the significance of the Tshivhase Tea Project in rural Limpopo Province, wholly owned by the local community, which would not exist if it were not for the NIPP.

MAN Ferrostaal provided R20 million for this agro-processing project, to grow, process and package Tshivhase green and black teas, a new South African brand of tea. New technology transfer has been introduced for tea processing, packaging and water purification.

The human impact is job creation, technology transfer and community empowerment in a rural area.



Impact Indicators

Jobs in poor areas

Growth in local aquaculture

Investment of R29 million

55% BEE

New technology development and skills transfer

350 tons of abalone exported per annum

58 jobs created so far

Projected sales: R300 million up to 2016

MAN Ferrostaal

Aquaculture Start-up

South African partners: Benguela Abalone Group

South Africa's abalone (perlemoen) commands premium prices in the Far East. The result is that our resources of abalone have been poached near to extinction, with grave ecological and socio-economic consequences. The solution lies in aquaculture, to protect the resource, to provide jobs in high unemployment fishing villages and to bring foreign exchange into the country.

Here MAN Ferrostaal is helping via financial support to the Benguela Abalone Group, which has established abalone farms and hatcheries on the West Coast at St Helena Bay and Port Nolloth. The project benefits local communities and ensures the properly managed cultivation of a natural resource, which eases pressures on the survival of our wild stocks and even contributes to replenishing the depleted wild stocks in South Africa's coastal waters. In the process, South Africa's emerging aquaculture business is getting an invaluable start-up in a sector that is booming worldwide.

The human impact is job creation and community empowerment in economically depressed areas.



ThyssenKrupp / German Frigate Consortium

Green Industry Investment

South African Partners: EC Biomass

In the Eastern Cape, German Frigate Consortium (GFC), as part of its NIPP obligation, has partnered with EC Biomass Fuel Pellets to establish a production facility for biomass pellets manufactured from agricultural waste materials such as sawdust residue, wood chips, bark and tree off-cuts.

Located in the Coega Industrial Development Zone in the Eastern Cape Province, the project has an investment and technical transfer value of US\$16 million. 60 jobs have been created in an economically depressed area and EC Biomass is 40% black empowered.

Impact Indicators

Growth in South Africa's recycling industry

Technology transfer

60 jobs in the Eastern Cape and
40% BEE empowerment

Investment of US\$16 million in
Biomass fuels

100% value add

Improved efficiencies

SA Partners: Nampak Glass

In Gauteng, GFC has assisted Wiegand Glass to buy into Nampak Glass. Glass technology is being transferred via the German company to strengthen Nampak's capacity. Wiegand Glass has upgraded production by introducing new technologies and equipment and assisted with technical leadership. Wiegand Glass has invested US\$68 million in the project, with a sales projection of US\$135 million.

The human impact is technology transfer, black economic empowerment and sustainable job creation, especially in economically depressed areas.

Impact Indicators

Investment of US\$68 million in glass manufacturing

Sales projection for Nampak:
US\$135 million



Impact Indicators

BEE

New products for new markets

Long-term export projects

Integration into global supply chains

40 new jobs created so far

Training

Latest international technology

Project sales: R50 million

Bombardier

Value-Add for Local Steel

South African partners: SWASAP

High fuel prices have refocused attention worldwide on alternatives to road transport and the demand for railway transport is again on the increase.

With the NIPP obligation of Bombardier Transportation for its involvement in the Gautrain project, South Africa is now manufacturing railway axles with locally made steel for the world's leading provider of rail equipment and services, headquartered in Germany.

Bombardier has selected local BEE manufacturing company SWASAP to manufacture railway axles, which are supplied to the London Underground and North East London Railways in the UK. Further opportunities for export are being opened up via Bombardier projects in Europe, North America, India, Japan and China.

The human impact is technology transfer, skills training, and sustainable job creation.



Impact Indicators

R100 million investment

New markets for South African exports

R300 million in forex

Value-added via recycling of steel scrap steel

Addition of R119,7 million to the South African economy

Murray & Roberts

Steel for the Middle East

South African partners: CISCO

As part of the NIPP obligation incurred by Murray & Roberts through their participation in the Gautrain project, a number of potential new export markets for reinforced steel have been identified, mainly in the Middle East.

Murray & Roberts has assisted Cape Town Iron & Steel Works (CISCO) in Kuilsriver in the Western Cape Province with a R100 million investment in a new Electric Arc Furnace and an upgraded rolling mill. This will enable CISCO to produce an additional 190,000 tons of reinforced steel bars for the construction industry, 20,000 tons for the local market and the rest for export. Steel scrap is used for the manufacture of this product, thereby also enhancing South Africa's green profile.

Since the project's inception in April 2006 CISCO has exported some 87,000 tons of reinforced steel to the value of almost R300 million.

The human impact is sustainable job creation.





Impact Indicators

- New jobs in deep rural South Africa
- Sustainable economic development
- 100% BEE
- Community-based
- Up to 5,000 jobs to be created



Bouygues TP

Tourism for Rural Jobs

South African partners: Hlanganani Community, Limpopo Province LED Programme

NIPP obligor Bouygues TP, which is involved in the Gautrain project, is assisting with the establishment of the new Hlanganani community-based tourism destination in Limpopo Province. The venture will boost eco and heritage tourism along with cultural, sports and agri-tourism and take advantage of the resort's proximity to nearby national game reserves, such as the Kruger Park and the Mapungubwe National Park. The aim is to use tourism as a catalyst for job creation, human development and income generation in rural areas.

Other stakeholders in the project are the Development Bank of Southern Africa and Limpopo Province's Local Economic Development Programme. Bouygues TP is helping to make Hlanganani a reality through financial support, starting with financing the study phase, purchasing assets and a R10 million grant to the project. This translates into the human impact of life-transforming job opportunities for the local community and local suppliers. An estimated 5,000 jobs will be created, which will benefit more than 20,000 people.

Impact Indicators

- US\$30 million for SME support
- Subsidised venture capital
- Transforming South Africa's small business landscape
- Job creation
- Thales fulfills all its NIPP obligations

Thales

R240 Million for SME Start-ups

South African partners: IDC,
Société Générale

As one of its concluding obligations under the NIPP, Thales, together with Société Générale and the Industrial Development Corporation (IDC), in 2008 launched a US\$30 million fund for small and medium-sized enterprises.

The Fund will run over three years and be used for higher-risk ventures which can't easily obtain funding through conventional commercial channels. What is more, the facility is given at a discount of nearly 2% to the current cost of funding in South Africa, a de facto subsidy from Thales. This brings Thales' total obligor contribution to US\$600 million, fulfilling all its NIPP obligations and milestones under its arms-related offsets.

This follows on from the earlier IDC/Thales soft-financing for SMEs, launched in 2005, which supported 49 SMEs and created more than 5,500 jobs.

The human impact is entrepreneur support and large-scale job creation.



Impact Indicators

- Projected sales: €118.68 million
- 450 jobs
- Growth in exports in aerospace sector
- Skills and technology transfer



Airbus

South Africa Joins International Aerospace Supply Chain

South African partner: Denel Saab Aerostructures

Airbus is meeting its NIPP obligations through contracts with Denel Saab to design and manufacture components for the Airbus A400 military aircraft. The project is set to establish Denel Saab as an internationally competitive supplier in the aerostructure market, with exports going mainly to Europe and the US.

The project will create some 165 short-term jobs and 185 long-term jobs, with an additional 100 jobs for skilled artisans to be created. Airbus is providing training in design processes, quality processes and software and configuration management systems.

Sales projections up to 2018 are close to €120 million and significant growth potential exists as Airbus is doing strategic planning for 200 more aircraft.

The human impact is technology transfer and skills training, along with both short-term and sustainable job creation.

Boeing

Growth in Aerospace Manufacturing

South African partners: Denel Aviation, Aerosud

Impact Indicators

- Skills and equipment transfer
- Training of personnel
- Upgrading of quality systems
- 60+ jobs created and more to follow
- Projected sales for Denel of R35 million up to 2011
- Projected sales for Aerosud of US\$9.8 million per annum
- BEE ownership of up to 28% and sourcing of services from BEE suppliers

Boeing, as part of its NIPP obligation, has partnered with Denel Aviation for the manufacture of Boeing NC machine components for 747, 737 and 777 aircraft for export. Boeing has supported Denel Aviation with training in engineering and operations, enabling the company to develop an internationally competitive centre of excellence for NC machining. Sales to the value of R5 million are projected for 2008 with long-term projections up to 2011 of R35 million in sales.

Aerosud Aviation is manufacturing interior parts for Boeing commercial aircraft, such as interior panels and thermoformed plastic fittings. Aerosud's investment of R22.5 million is expected to result in annual sales of US\$9.8 million per annum. And Boeing is also opening up opportunities for Aerosud to supply Boeing interior components to the rest of Africa.

Boeing has supported its partners with the transfer of machinery for work packages, training of specialist skills at Boeing's premises in Seattle, USA, and courses and assessments in lean manufacturing – all of which have helped to build Aerosud's capacity to meet its commitments in South Africa and the rest of Africa.

The human impact is skills training, black economic empowerment and sustainable job creation.



Impact Indicators

Investment: R176 million

Projected sales for 2008:

R75 million

Technology transfer from The Netherlands

100% value add

32 jobs

27% BEE

Development of local economy

Agusta Westland

Green Fuel Technology Boosts Rural Economy in KZN

Agusta Westland has facilitated funding of R75 million from The Biotech Group into a biomass fuel production plant in Howick in KwaZulu Natal. The total projected investment into the plant is estimated at R176 million. Wood pellets for fuel are produced from waste such as sawmill residue and used for fuel in a range of applications, from power plants to domestic use. The product is exported to Europe and is expected to bring R75 million in forex over the next financial year.

Agusta Westland facilitated start-up funding and The Biotech Group provided the skills transfer and training and supply of equipment. The project has brought jobs to a rural area and a boost to the local economy, especially with a 27% BEE partnership.

The human impact is technology and skills transfer, black economic empowerment and job creation in a rural area.



Areva

High Tech Skills Development from Green Charcoal to Nuclear Energy

South African Partners: Necsa,
Silicon Smelter

AREVA, as part of its obligor commitments under the NIPP, has been engaged in initiatives for high-level skills transfer.

Impact Indicators

High tech skills training and transfer in energy sector

Training of 140 candidates during 2007/08

20 people trained in nuclear project leadership

Jobs in rural areas

Environmental well-being

Economically viable alternative to fuel wood or wood charcoal

Protection of the eco system

Development of local economy

Technology expansion into Africa

One initiative is the formation of Arecsa Human Capital, in a joint venture between the Nuclear Energy Corporation of South Africa (Necsa) and AREVA. Arecsa funds, manages and delivers specialized high tech training to South African employees in the fields of high technology energy supply. Eurocopter has also contributed funding to the project. AREVA trained 117 people on location in South Africa during 2007/08 at a cost of €250,000. A further 140 people will be trained during 2008/09.

AREVA is also contributing to South African nuclear skills development through a post-graduate training project for producing expertise in Strategy and Management Project Leadership in high technology sectors. 20 candidates have already completed an 18 month high-level training course at Sorbone University in Paris in conjunction with Areva University in France.

AREVA has also assisted with the establishment of a green coal production facility in Limpopo Province, providing an eco-friendly boost for local economic development. Here AREVA has invested in the award winning technology of Pro-Natura International (PNI), a local NGO that developed a process for making a green charcoal fuel out of carbonised vegetable material. AREVA funded the manufacture of



the required plant equipment and selected engineering company local Necsa to manufacture the carboniser plant and related equipment. Silicon Smelter was selected to produce the green charcoal fuel at a site in Polokwane. The plant has the capacity to produce 2,400kg of green coal per day. The collection of biomass for charcoal production will create indirect jobs within the community and production will get underway by late 2008. Plans are in the pipeline for supplying plant equipment to Senegal.

The human impact is high-level skills transfer and training, jobs and empowerment for rural communities and long-term environmental protection.

Impact Indicators

R1 billion contribution to GDP

R215 million investment in the development of local young ICT expertise over next five years

A 'Silicon Valley' for technology incubation in Gauteng

200 direct jobs and 800 indirect jobs over next five years

Address critical skills shortages

Creating a South African software industry

Support for IT SMEs

Cisco Systems

A Silicon Valley for South Africa

Cisco Systems is investing R215 million in a Technology Centre at the Innovation Hub in Tshwane which will become the collaboration point for a number of technologies aimed at incubating software, design and network engineers and creating local ICT intellectual property and at generating start-up ventures in this knowledge-intensive sector.

The Cisco Innovation Hub Technology Centre (CIHTC) has a number of programmes, including an Innovation Lab, which runs incubation projects to develop commercially viable technology solutions and create business opportunities. CIHTC Training programmes include the Cisco Global Talent Acquisition Programme and aim at training more than 120 network engineers a year (there is a shortage of some 30,000 professional network engineers in South Africa). Also in the pipeline for the Centre are a Cisco Entrepreneur Institute to support new entrepreneurs in technical fields and a Cisco GTAP Software Development Programme.

The human impact is skills transfer and training and high-tech job creation, along with innovation and entrepreneur development.



Impact Indicators

- Addressing skills shortages in sector of power generation
- Knowledge transfer and latest technology
- Creation of teaching jobs
- World-class training available for potential Siemens employees
- Support for AsgiSA goals



Siemens AG

World Class Technology Training

South African partners: Lephalele FET College

Siemens AG (Germany) is investing R20 million in practical technical training facilities at Lephalele Further Education and Training College in Limpopo Province. Lephalele was chosen because of its location on the doorstep of Eskom coal supplier and the mega power generation plant being built in that area.

The College has received state-of-the-art equipment to train 356 students in 2008, rising to 573 students in 2009, in information technology, mechanical, electrical, fitting and turning, electronics and engineering skills, in eight workshops and one IT lab. These NQF-certified courses provide the very latest in technology training for South Africa's energy supply sector and provide an underlying stepping stone for growing local value-add industries. Graduates of the Lephalele programmes can expect to be employed by companies in the electrical and mechanical technology sub-sections in the local power generation, transmission, distribution and transport infrastructure industries, as well as the Petro-chemical and mining industry sectors where significant "skilled resource gaps" exist.

The human impact is high technology skills training.

Impact Indicators

45% BEE ownership

Skills training

219 successful job placements in first six months

Oracle

ICT Skills Training

South African partners: Oracle Corporation SA, IBM, Cisco Systems, Microsoft, Novell, Makeda Consortium

Oracle is investing in the establishment of the e-Skills Academy of South Africa, an independent training organisation focused on the accelerated delivery of major ICT skills courses to help to reduce the crippling skills shortage in this sector. The project included a special focus on training for previously disadvantaged individuals.

Oracle's involvement has been to invest in research and development and product development, along with technology transfer, business support and market development.

Within the first 6 months of operation from January 2008, the human impact of the e-Skills Academy was that 219 previously unemployed individuals were trained and have since found jobs.



Oracle

iFactory mobile Obsession

South African partners: Oracle Corporation SA, BEE partners

Impact Indicators

70% BEE ownership

16 new jobs

Projected local sales: R3,8 million

Projected export sales:

R190,4 million

Oracle Corporation USA assisted Oracle Corporation SA to develop a groundbreaking software product using wireless technology. The iFactory mobile Obsession enables systems applications to be used in handheld terminals for the management of Financials, Sales, Supply Chains, Service Delivery, and more – in short wherever business takes place on the ground, so to speak, away from the office and out of reach of the desktop computer.

Oracle SA's involvement has been to invest R6.5 million in research and development and product development, along with technology transfer, business support and market development. Oracle USA has assisted with international marketing opportunities.

The human impact is black economic empowerment, entrepreneur support and job creation.



Appendix

NIPP Project List 2008

Eastern Cape – 21 Projects		
Beneficiary Company	Project Description	Status
Aberdare SA	Export of fibre optic cables	W
Bel-Essex Corporation	Investment made by Bel-Mec to establish greenfield high pressure die casting plant	I
Borbet SA	Export of wheels – Hummer H3 and Corsa	I
BWS IDC Colombus	Establishment of a cold rolling mill to produce metal sheets	W
Calsonic Kansei	Export of catalytic converters	I
Cape Mohair Alpha Tops	Spinning of mohair knitting yarn	I
Condomi	Investment into Condomi	I
Eberspaecher	Export of catalytic converters	I
EC Biomass IDC	Manufacture of wood pellets	I
Faurecia	Export of catalytic converters	I
Flexider	Manufacture of flexible couplings	I
Goodyear SA	Export of tyres – Hummer H3	I
Magwa Tea	Investment to resuscitate tea estate	I
Mario Levi	Construction and upgrade of leather tanning facilities	I
NMMU, Festo	Establishment of mechatronics facility and know-how at a tertiary institution	I
Package Tourism Mcarthus Baths	Package tourism investment to upgrade pools in Port Elizabeth	I
Rehau	Sourcing of bumpers for E Class after market	I
Tenecco	Export of catalytic converters	I
Storms River Adventure	Cultural kitchen tourism	I
TSW	Export of aluminium wheels	I
Welfit Oddy	Expansion of steel tank container facility	I
Northern Cape – 1 Project		
Beneficiary Company	Project Description	Status
Gold Chain Technology	Manufacture of gold and silver jewellery	I
Free State – 2 Projects		
Beneficiary Company	Project Description	Status
Harmony Gold	Investments in plant and machinery for gold beneficiation	I
SARM	Investment for manufacture of gold chains by SA Royal Manufacturers	W

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Gauteng – 113 Projects

Beneficiary Company	Project Description	Status
Acerinox	Export of stainless steel to Scandinavia	I
Aerosud	Manufacturing of Electrical VU sets for Airbus A319 and A320 Manufacturing of galley systems Design of work packages worth US\$90m, including know-how transfer, building capability on manufacturing and engineering, tooling production or transfer and adaptation, and training Assistance in entering international commercial market	I
Aerosud	Investment in capital equipment for manufacture of parts for civil aerospace (windows, composites) Machinery transfer for work packages Training, courses in lean manufacturing, building capacity to participate in initiatives in South Africa and the rest of Africa	I
African Explosives	Additional investments to automate process to be more competitive	I
Al Steel Sourcing	Sourcing of electric motors through Nouvo Pignone from GEC Alstom SA 1	I
Alcatel Altech	Export of engineering services	I
Alcatel Altech	Export of goods	I
Alcatel Altech	Export of research and development	I
Alcom Matoma Motorola SA	Service centre for radio products	I
Alcom Matoma Motorola	Supply, delivery, installation of digital trunked radio	I
Alstom	F3 Motors	I
Alstom	Export promotion of electrical equipment components	I
Alstom	HVITC high voltage track circuits	I
Alstom	Manufacture and export of C1 points electrical	I
Alstom	Use of SA engineers for planning and design of railway signalling equipment	I
Alstom	Railway rolling stock	I
Ampaglas Modek GE Plastics	Investment in Ampaglas for manufacture of polycarbonate roof sheeting, using GE lexan brand Increased exports	I
AMS	Product Life Cycle Management by AMS	I
ANDT Centre	Services various sectors non-destructive facilities	I
ARECSA	Training in the energy sector. Various role players in the energy sector send their employees to attend courses of strategic importance selected from the training manual.	I
Automotive Leather Seat Covers	Export of automotive leather seat covers	I

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Avalloy, Minerals Corp Abante and RR	New and expansion in production of superalloys and nickel ingots and rods Rolls Royce assisting Avalloy in quality process and also marketing their product world wide	I
Avanticall (previously Trimica)	Investment to establish a call centre	I
Aventis	Clinical Trials - Triclinium	I
BELL EQUIP	Export of articulated dump trucks	I
Black Stone Tek	Investments to expand and increase capacity of the facility	I
Cat-A-Trac	Manufacture of handheld device for the detection of cataracts	I
Cavidi Tech	Viral diseases testing	I
Cisco Innovation Hub	Establishment and operation of technology centre	I
Compass Group	Strategic exports of value-added goods and services	I
CSIR	SAFRAN (SNECMA) Technology transfer in aerospace. CSIR assisted in developing a technology for non-destructive testing under high temperature and high pressure	I
CSIR	Research and development in thermal spray coatings – phase one	I
Denel	Boeing transferred some capital equipment for manufacture of parts	I
Dispack DSU	Purchase of 50% of shares Investment in tech transfer and training Expansion of business	I
DJ.T Festo	Establishment of mechatronics facilities and know-how at a tertiary institution	I
Eaton Aeroquip	Manufacture and export of transmission oil pipes for Daimler Chrysler	I
Electrolux	Investment into Electrolux expansion	I
Ericsson South Africa	Regional hub activities for export of telecomm equipment to ROA.DECT and GSM	I
e-Skills Academy Oracle	ICT training	I
Ethos	IT Fund	I
Eurolamine	Export of steel products	I
Evertrade Medical	Treatment of medical waste Manufacture of medical containers, syringes	I
Ferisa South to South DEC	Investment into Ferroman	W
Ferrochrome	Investment into production of ferrochrome	I
Flame Electrical	Investment	W
Flextech	Expansion of mechanical cable assembly plant for mechanical automotive cables	I

GEMCO	Investment to enable licensing for manufacture, sale and use of advance dental prosthesis	I
Geratech	Additional funding to improve operations in the manufacture of zirconium chemicals and zirconium oxides	I
Glass and Aluminium	Investment into plant and equipment for manufacture of value-added products	I
Gold Loan	Creation of a 1000kg Gold Loan scheme	W
Grintek	Investment by SAAB in Grintek	I
Hall Longmore	Export of Hall Longmore pipes to Europe	I
Hasso Plattner Ventures Africa	Venture capital fund specialising in high tech start up companies	I
HOSAF	Recycling of plastic bottles	I
IDC Calyon	Credit facility of US\$50m to finance SMME support programme	I
IDC Socielé Générale	Credit facility off US\$ 30m to finance SMME support programmes	
IFT Academy	Training and development	I
Industrial Park	Construction and development of industrial business park for training and skills development programme	I
Integrated Rail Systems	Manufacture of rolling stock components	I
Interoc Atlas Copco	Export of mining equipment	I
Johnsons Controls	Export of leather seat covers for use by Volvo	W
Kolbenco	Manufacturer and export of engine pistons for Daimler Chrysler	I
Kolbenco	Investment in establishment of a die casting foundry and two machining lines to manufacture pistons for Ford	I
Liebherr	Expansion in assembly of cranes, excavators, loaders, bulldozers, dump trucks and concrete mixer trucks	I
Malisela	Manufacture of Groundwire fibre optic cables	I
MAN Turbo	Investment into expansion of MAN SA operations of metal turbines	I
Marpless	Export of telephone booths and support and service Only local content claimed	I
MDM Ferroman	Engineering and consulting services	W
MDSI SA MDSI BV	Product-based software development, support and maintenance	I
NECSA Pro-Natura AREVA	Green Coal - Phase 01 A: carbonisation of vegetative material on a continuous basis and agglomeration of the carbon into balls, pallets or briquettes	I

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NEI Africa	Switch gear products	I
NF Die Casting	Manufacture of aluminium wheels for M-Class	I
NFD	Export of alloy wheels	W
Novamet Katana Foods Italian Plastics International	Collection and regeneration of recyclable plastics waste material for manufacture of pellets and cables	I
Nampak Wiegand	Upgrade of bottle manufacturing facility	I
Novamoda	Relocation of existing plant Creation of new clay preparation plant Debt relief facility	I
Novara	Development of a NOVALOY material used in the extrusion of plastic forms for various uses	I
Ondeo Dregemont	Export of locally manufactured components for water treatment plants to supply Ondeo-Degremont contracts in Africa	I
Paper Base Manufacturing	Investment to establish Espin factory for local sales of Pampers baby diapers	W
Plessey	Export of telecomms equipment towers, generators and wire	I
Pre Plan	Expansion of facility to meet export demands for building facades	I
Pyromet Techint	Manufacture of submerged arc furnaces	I
QMUSIC	Export promotion of business software products and training	W
Reid and Mitchell	Exports	I
Ringrollers Expansion	Manufacture of railway tyres, flanges and rings	I
Robotube Stemcor	Export of robor tubes through Stemcor	I
Rolls Royce Turbomeca Africa	Export of tay gearbox components	I
Rotek Engineering	Subcontracting by GE Power systems through TBL(UK) for service work to Eskom	I
Salmac Barloworld Robor	Extension of facility for manufacture of conveying and ornamental pipes	I
SAMES	Loan for capital expenditure for company in electronics sector	I
SANCO ILIMA	Investment into SANCO/ILIMA	W
Sasol	Sourcing of acetone through GLM - CU SI & Chemicals	I
Sicad	Manufacture of pressure sensitive tape	I

Siemens Waltloo	Local manufacture of MDF9120 connector strips for world markets	I
Siemens Waltloo	Software development in telecomms fixed and mobile networks	I
Sopranu	Investment into Supranu by SAAB ABB for soy protein manufacture	W
Sumitomo Corporation, Clover Cargo	Export of armoured vehicles to Saudi Arabia and assistance with delivery logistics	I
Swasap SA	Manufacture of railway axles	I
Swedish Match AB Leonard Dingler Ltd	Acquisition of Leonard Dingler & Brasant for the manufacture & distribution of tobacco products	I
Treacle Fund II	Investment opportunities in export-based businesses	I
TTS Electronics	Investment for the development, manufacture and marketing of SA-made electrical products for export	I
UCWP Railway Vehicles	Manufacture of railway rolling stock	I
Unisys	Increased exports of telecomms services	I
Walmart Nu World	GE-branded appliances manufactured by SA manufacturers sold to Walmart via GE agent Holmes Group	I
Y-Digital Works	Establishment of a software development house focusing on export markets Outsourcing software development to Y-Digital	W
EMCOM (formerly Zeuna Starker)	Export of catalytic converters	I
Kwazulu Natal - 27 Projects		
Beneficiary Company	Project Description	Status
ABB	ABB procurement and exports of ABB switchgear Partnership with ABB Zurich	I
ADEPT	Development and manufacture of a range of aviation engines for light aircraft	I
Altube	Establishment and expansion of aluminium tubes facility	I
Bell Equipment	Residual Value Insurance obtained to enable export of Bell trucks to Europe Provision of Residual Value Guarantees for the export of Bell trucks through SNECMA Export promotion	I

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Biological Control Products	Investment to fund expansion and commercialisation of the plant used to manufacture biological agents for agricultural pests	
Biotech Fuels	Manufacture of wood pellets and renewable fuels from wood, agro waste	
Capstone Quincy Group Zanetti	Manufacture of pillows, cushions, comforters and quilts	
Carbotek	Manufacture of carbon from wood Investment loan, exports	
Cataler SA	Export of catalytic converters	
Dorbyl Marine	Increase in exports of Dorbyl marine services	
Dunlop Industrial Products	Investments for the funding of the expansion of the joint venture	
Dunlop tyres	Investment via loans	
Durban Shipyard EB&H	Investment in floating dock for ship repair and engineering work	
Greenheat South Africa	Investment for expansion for manufacture of heating gel from organic products for export and local sales	
Hivex Ltd	Investment for product trials and commercialisation	
Hulett Aluminium Simotomo Corp	Assistance with export and marketing of Hulett Aluminium products	
IDC Calyon	Credit facility of US\$50m to finance SMME support programme	
Kgwanyape Energy Solutions	Manufacture and marketing of energy saving devices	
Pine Glade Chep	Export of kiln dried pallet components	
Pre-Stressed Bars	Collaboration with French company to set up a manufacturing facility in SA for the supply and distribution of "Freyssibar"	
Romox	Purchase and commissioning of new timber-drying kiln	
SA Biodproducts	Management buy-out by Zarara Energy and IDC, thus converting the current production capacity	
SHURLOCK	Market access and expansion for production of electrical components	
St Lucia Saw Mills Pine Glades	Export of kiln dried pallet components	
Natal Forest Products	Transfer of Drying Kiln for the manufacture of structural timber	
Toyota	Manufacture of roof panels	
Tyresafe	Investment into blending plant for manufacture of tyre sealant	

Limpopo – 4 Projects		
Beneficiary Company	Project Description	Status
Invensil Pechiney	Manufacture of Silicon Fume Dioxide	I
Invensil Pechiney	Silicon smelter upgrade furnace 2 Investment, sales	I
Lephalale	Lephalale Technical Skills Development Programme	I
Elim Communities	Investment into Hlanganani Tourism	I
Mpumalanga – 5 Projects		
Beneficiary Company	Project Description	Status
Columbus Steel	Export of stainless steel for Volvo Busses	I
Columbus Steel	Manufacture of stainless steel plates and sheets	I
Global Forest Products Mondi	Investments to upgrade sawmills and for remanufacturing plants	I
Greenhouse Farming	Establishment of 12 greenhouses in the Kriel district Job creation and upliftment of the community	I
Highveld Steel & Vanadium Nippon Denco Ltd	Manufacture of Ferro Vanadium Pentioxide	I
North West – 4 Projects		
Beneficiary Company	Project Description	Status
ATC	Manufacture and export of copper and fibre optic cables	W
Brits textiles Berlyn NCI	Manufacture of sisal reinforced components for local and export markets	W
Mersafe	Ferrochrome beneficiation	I
IFM	Ferrochrome beneficiation	I
Western Cape – 27 Projects		
Beneficiary Company	Project Description	Status
Arvin Meritor	Export of catalytic converters	I
Atlantis Daimler Chrysler	Investment in production and export of automotive engine blocks by Atlantis Foundry	I
Atlantis Daimler Chrysler	Expansion of Atlantis Foundry	I
Atlantis Forge	Manufacture of crank shafts	I

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Atlantis Training Centre	Establishment of the Atlantis Training Centre	I
Benguela Abalone Group	Expansion and acquisition of abalone farms	I
Cenere	Joint venture with Italian company for the manufacture of hollow and solid gold chains using unique Italian technology	I
Cisco	Manufacture of reinforced steel bars	I
CPUT Festo	Establishment of mechatronics facilities and know-how at a tertiary institute	I
Evertrade Medical	Treatment of medical waste Manufacture of medical containers, syringes	I
Far Ocean	Construction and supply of offshore patrol vessel for the protection of fisheries	I
Filk and Oro Africa	Joint venture in manufacture and export of gold jewellery	I
Freeplay	Baygen Power Freeplay 1 Investment	W
Glass and Aluminium	Investments in plant and equipment manufacture value-added products	I
Grinaker LTA	Construction and refurbishment of offshore oil and gas	I
Independent Wire	Establishment of a state-of-the-art galvanised wire producing plant	I
Intertrading Fruit Corporation	Export of grapefruit to Germany	I
Laroche	Investment in SA vineyard by French wine makers Laroche to improve processes and brand the SA wines under the Laroche name	I
Lesedi Nuclear Services Areva Framatome	R13.5m investment by Framatome (Areva) in 45% share of LNS nuclear maintenance services in the nuclear field	I
Rotorway	Establishment of assembly and distribution centre for light helicopters	I
SAP Wines	Branding of premium wines for export to the US	I
Silmar	Manufacture of platinum jewellery	I
Sinter Metals	Purchase of 74% of Sinter Metals by GKN from Dorbyl	I
Swedish Match AB	Acquisition of Leonard Dingler & Brasant for the manufacture and distribution of tobacco products	I
Total Energy Tenesa	Extension of solar panel manufacture	I
Worldfish UK	Develop and build the necessary equipment and operational manufacture of plastic cages	I

Reference table:

I	Implemented
W	Withdrawn

Acronyms

AS&P	Armoured Systems and Projects	MIDP	Motor Industry Development Plan
AsgiSA	Accelerated and Shared Growth Strategy for South Africa	NECSA	Nuclear Energy Corporation of South Africa
BAE	British Aerospace	NEF	National Empowerment Fund
B-BBEE	Broad-Based Black Economic Empowerment	NGO	Non-Governmental Organisation
BEE	Black Economic Empowerment	NHBCRC	National Home Builders Registration Council
CDSP	Customised Sector Development Plan	NIPF	National Industrial Policy Framework
CEI	Cisco Entrepreneur Institute	NIPP	National Industrial Participation Programme
CIHTC	Cisco Innovation Hub Technology Centre	NQF	National Qualifications Framework
CISCO	Cape Town Iron and Steel Works	NSA	Nissan South Africa
CKD	Completely Knocked Down	OEM	Original Equipment Manufacturer
CompTIA	Computer Technology Industry Association	PBMR	Pebble Bed Modular Nuclear Reactor
CSIR	Council for Scientific and Industrial Research	PDIs	Previously Disadvantaged Individuals
DEAT	Department of Environmental Affairs and Tourism	PE	Port Elizabeth
DoC	Department of Communications	PIAC	President's International Advisory Council on an Information Society
DoD	Department of Defence	PNI	Pro-Natura International
DoT	Department of Transport	R&D	Research and Development
DSA	Design South Africa	SA	South Africa
EP	Export Promoting	SAA	South African Airways
EU	European Union	SADC	Southern African Development Community
FDI	Foreign Direct Investment	SAISI	South African Iron and Steel Institute
FET	Further Education and Training	SAQA	South African Qualifications Authority
FMCSA	Ford Motor Corporation Southern Africa	SETA	Sector Education and Training Authority
GE	General Electric	SMEs	Small and Medium Enterprises
HPSA	Hasso Plattner Ventures Africa	SOE	State-Owned Enterprise
IBTA	International Business Training Association	the dti	The Department of Trade and Industry
ICT	Information and Communication Technology	TSAM	Toyota South Africa Motors
IDC	Industrial Development Corporation	UAE	United Arab Emirates
IPAP	Industrial Policy Action Plan	UK	United Kingdom
JHB	Johannesburg	UN	United Nations
KZN	KwaZulu-Natal	US	United States
LED	Local Economic Development	WTO	World Trade Organization
		ZAR	South African Rand