Executive Summary

Operators Summary

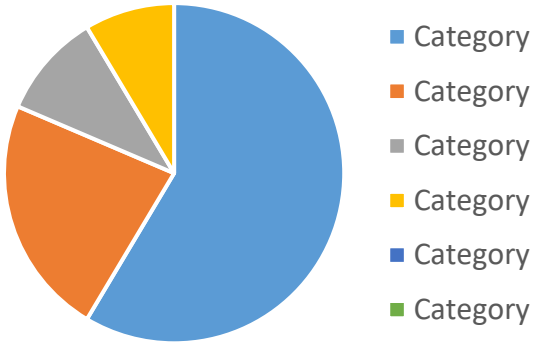
- South Africa is the key rail market in the region, accounting for 60% of track, 73% of locomotives, 36% of wagons, 58% of haulage capacity, and around 80% of Capex and Opex in the region. However, the utilities in South Africa are beset with a range of problems, including lack of finance, corruption, ageing fleets and damage to infrastructure.
    - Operations in countries such as Angola, Tanzania and Namibia, as well as Mozambique are increasingly competing with South Africa's for cargoes to and from the landlocked regions of Southern Africa.
    - However, as individual rail operators, they are still very small by comparison at this stage.
- Most operators in the region are struggling financially from years of underinvestment and increased competition from road haulage. There are efforts in several countries to legislate for bulk goods to be carried only on rail, but a lack of rolling stock in many cases is preventing this – Zambia, Zimbabwe and Mozambique are all in this conundrum.
- A new surge in mining and agricultural development in the region, as well as demands for consumer imports is seeing renewed interest in rail. Competition for hinterland cargoes in Southern Africa is also stimulating investment in port and rail infrastructure in several countries:
    - Rail lines in Angola, Tanzania and Mozambique are currently attracting the most investment, as they look to divert traffic away from South Africa's ports, roads and rail networks, which have suffered from neglect and criminality in recent years, increasing costs and risks.
    - The rapid growth of mining activity in the southern provinces of the DR-Congo is driving much of this and will see investment in the DRC's networks as well.
- Countries such as Botswana, Namibia, Eswatini, Zimbabwe and Zambia all rely heavily on transit cargoes, resulting in risks associated with planning and finance for new operations. However, as the region integrates and cargo demands rise, this risk should recede somewhat.

Corridor Summary

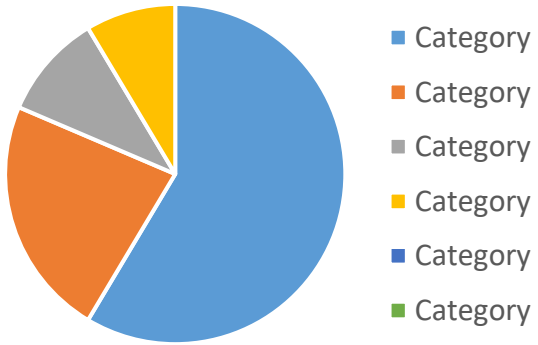
- Most corridors in the region are conceptual or operational, rather than being developed.
- The North-South Corridor (NSC) is the prime example of this and revolves more around co-operation between utilities than developing new integrated rail infrastructure.
- Angola and Namibia have some interesting developments, as does Tanzania, although largely linking into Central Africa.
- Rail corridors in the region are developed incrementally, rather than as single projects, with the bulk of activity being extending existing rail infrastructure to meet new demands.
    - As such, whilst it is useful to understand the dimensions of these corridors, suppliers need to drill down into the individual components of corridors, rather than try to approach them as single opportunities.
    - This may require interaction with rail operators and regulators across a number of countries in total, but in many instances, just one rail company for an actual project.

Executive Summary

Regional total #Locomotives	2,416
Engine Types	D E H O
Regional CAPEX (Yr XXXX)	US$4.3Bn



Regional OPEX (Yr XXXX)	US$1.9Bn



Regional total track in KMs'	51,110
Gauge	B N M S
Total regional capacity tonnes	349Mtpa
Number of wagons	34,495

Project pipeline

1. XX
2. XX
3. XX
4. XX
5. XX

Top five challenges

1. XX
2. XX
3. XX
4. XX
5. XX

Est. Personnel	67,874
Client Base	AG AM CT M O

Corridors

1. XX
2. XX
3. XX

Insert Map

Background

- In addition to an overview of key rail utilities in Southern Africa, a 10-year view of exports of key rail equipment is provided to add granularity to the opportunity and the UK's position as supplier to the region.
- The Trade overview uses UN Comtrade data as a source, as this is standardised and includes data from 95% of reporting countries, including all key manufacturing countries.
- It reveals that exports to the region have declined significantly since the middle of the last decade, largely as a result of scaling back of new projects as mining demand slowed.
- It is expected that this will show signs of recovery as new build and expansion in some markets increases in 2022 and beyond – especially in Tanzania, Angola and South Africa, as well as potentially in Mozambique, DR-Congo and Namibia.

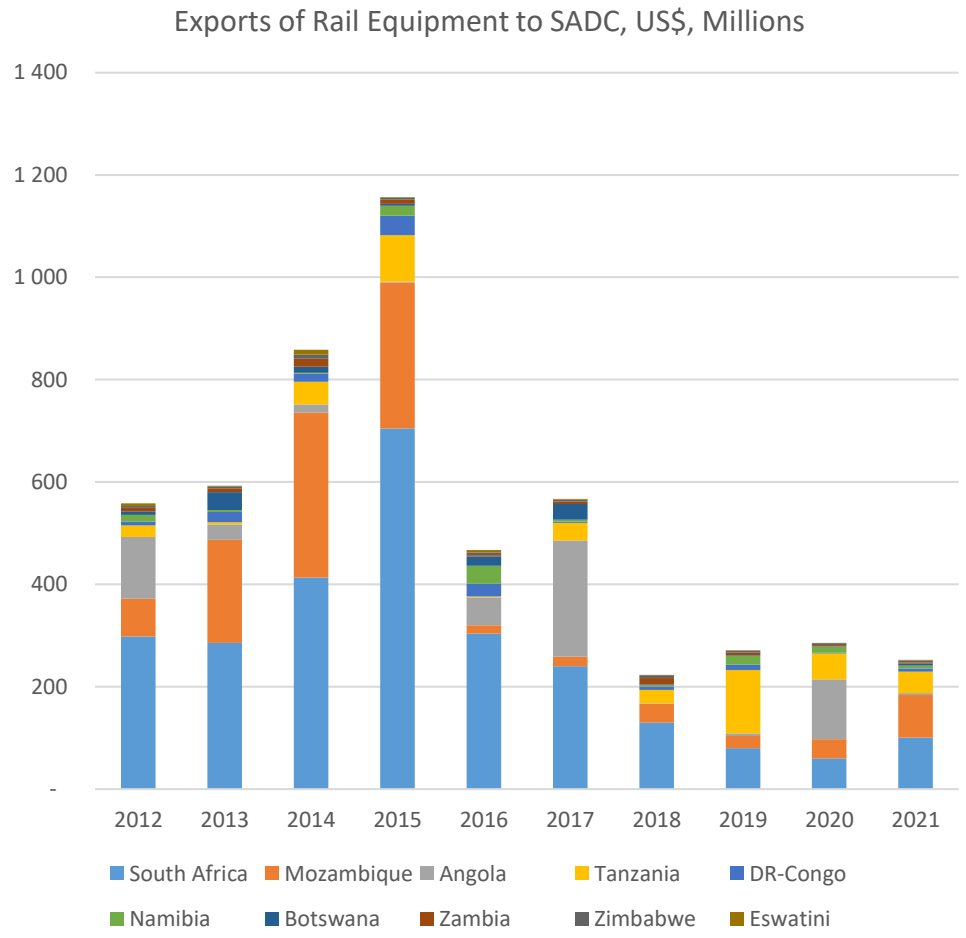
Background

- The basket of tariff headings includes:

730210	Iron or steel, railway or tramway track construction material; rails
730230	Iron or steel, railway or tramway track construction material; switch blades, crossing frogs, point rods and other crossing pieces
730240	Iron or steel, railway or tramway track construction material; fish-plates and sole plates
730290	Iron or steel, railway or tramway track construction material; n.e.c. in heading no. 7302
853010	Signalling, safety or traffic control equipment; for railways or tramways (excluding those of heading no. 8608)
860110	Rail locomotives; powered from an external source of electricity
860120	Rail locomotives; powered by electric accumulators
860210	Rail locomotives; diesel-electric powered
860290	Rail locomotives and locomotive tenders; other than diesel-electric powered
860310	Railway or tramway coaches, vans and trucks; self-propelled, powered from an external source of electricity (excluding those of heading no. 8604)
860390	Railway or tramway coaches, vans and trucks; self-propelled, powered other than from an external source of electricity (excluding those of heading no. 8604)
860400	Railway or tramway maintenance or service vehicles; whether or not self-propelled (eg workshops, cranes, ballast tampers, trackliners, testing coaches and track inspection vehicles)
860500	Railway or tramway coaches; passenger coaches, luggage vans, post office coaches and other special purpose coaches, not self-propelled (excluding those of heading no. 8604)
860610	Railway or tramway goods vans and wagons; tank wagons and the like, not self-propelled
860630	Railway or tramway goods vans and wagons; self-discharging, not self-propelled, excluding those of item no. 8606.10
860691	Railway or tramway goods vans and wagons; covered and closed, not self-propelled
860692	Railway or tramway goods vans and wagons; open, with non-removable sides of a height exceeding 60cm, not self-propelled
860699	Railway or tramway goods vans and wagons; n.e.c. in heading no. 8606, not self-propelled
860711	Railway or tramway locomotives or rolling stock; parts, driving bogies and bissel-bogies
860712	Railway or tramway locomotives or rolling stock; parts, bogies and bissel-bogies (excluding driving bogies and bissel-bogies)
860719	Railway or tramway locomotives or rolling stock; parts, axles and wheels, and parts thereof
860721	Railway or tramway locomotives or rolling stock; parts, air brakes and parts thereof
860729	Railway or tramway locomotives or rolling stock; parts, brakes (other than air brakes) and parts thereof
860730	Railway or tramway locomotives or rolling stock; parts, hooks and other coupling devices, buffers and parts thereof
860791	Railway or tramway locomotives; parts n.e.c. in heading no. 8607
860799	Railway or tramway rolling stock; parts n.e.c. in heading no. 8607
860800	Railway or tramway track fixtures and fittings; mechanical (including electro-mechanical) signalling, safety or traffic control equipment for railways, tramways, etc; parts thereof

Global Exports of Product Basket to Region

- Exports to the region grew sharply from 2012 to 2015, reaching US$1.16bn in 2015, before declining thereafter – 2018 to 2021 has seen far more modest levels.
- Initial surge was based on South African recapitalisation of rolling stock and investment in Mozambique's mining-led rail developments in the centre and north of the country.
- Angola has also seen sporadic investment in the sector, and can expect higher levels of investment as the country concessions key rail and port infrastructure.
- Tanzania will also see increased activity as the Standard Gauge Railway projects ramp up.
- Other countries have struggled to invest in infrastructure and rolling stock in recent years, largely as bulk export projects slowed in the latter part of the decade, but this could change with a renewed surge in mining activity in Botswana, Namibia, Zambia, Zimbabwe and DR-Congo, especially around copper, cobalt and other battery minerals.
- 2022 figures should be up on 2021 as a result, with the outlook for the next five to ten years improved as well, on the back of commodity trade (minerals and agricultural), upgrades to key ports allowing greater inbound trade, and linking of 'stranded' resources and regions into the regional rail network.
- Data from key exporters including Austria, France, India, Malaysia and a number of smaller exporters is not yet available for 2022, but it would appear that global exports to the region last year would be the highest since 2017.



Based on AfDB data

Key Suppliers of Rail Equipment to Region

- China is the key supplier, with 32% of the market overall, but only 24% since 2018 – large rolling stock contracts account for bulk of supply;
- USA is also key supplier of rolling stock to SA, with 21% overall, dropping to 14% since 2018;
- SA is largest import market and 3rd largest regional supplier – some goods destined for SA are probably re-exported. SA share is steady at ~11%;
- Austria a consistent supplier in 4th place with 7% overall, rising to 10% in last four years;
- Brazil's share largely based on rolling stock to projects in Angola and Mozambique in early part of decade, share is 1% in last four years;
- Italy only other consistent supplier to region, with 3% overall, but rising to 10% once early rolling stock figures are removed in last four years;
- UK share is very small at this juncture, at just 1% overall and in the last four years;

Exports to Southern Africa of Rail Equipment (US$, Million)												
Rank	Supplier	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	Total
	Total	558	593	858	1,156	467	567	223	271	285	253	5,232
1	China	187	103	256	670	72	138	37	95	73	43	1,673
2	USA	110	113	212	178	87	271	36	16	84	12	1 117
3	South Africa	72	118	114	93	46	54	24	28	21	41	609
4	Austria	69	59	55	48	23	8	21	39	22	18	360
5	Brazil	12	64	21	18	182	35	3	5	2	3	344
6	Italy	7	13	14	12	5	20	11	28	36	24	169
7	Japan	0	41	47	11	0	1	19	38	-	-	157
8	India	5	8	26	17	3	4	2	3	4	42	113
9	Germany	18	5	9	19	13	3	4	4	6	4	86
10	Spain	9	4	27	38	1	1	2	1	0	0	83
13	UK	9	10	18	4	2	1	2	3	2	3	55
	Others	61	56	60	49	34	32	63	13	35	63	465

Key Products Exported

- Diesel locomotives are the key export to the region, and together with electric locomotives accounted for 31% of the total over the decade, although only 14% in the last three years.
- Rail supply remains key, as does exports to Southern Africa of coaches, wagons and the like.
- Parts for locomotives, wagons and the like are a consistent source of exports to the region, whilst exports of signalling and control equipment, switch blades, , crossing pieces and the like averaged around US$32 million a year to the region over the decade.

HS Code	Description (Reduced)	Total: 2012-2021	Share	Total: 2018-2021	Share
Total		5,232	100	1,032	100
860210	Diesel Locomotives	1,114	21	138	13
730210	Iron or steel; rails	619	12	202	20
860719	Parts, axles and wheels, and parts thereof	577	11	118	11
860110	Electric (external source) Locomotives	540	10	5	1
860791	Locomotive Parts n.e.c. in HS-8607	355	7	60	6
860500	Coaches, not self-propelled (excl, HS-8604)	231	4	19	2
860692	Goods vans & wagons; open, non-removable sides etc, not self-propelled	206	4	8	1
860799	Rolling stock parts n.e.c. HS-8607	195	4	67	7
730290	Iron or steel, track construction material; n.e.c. in HS-7302	157	3	78	8
860310	Coaches, vans and trucks; self-propelled, external electric (excl. HS-8604)	133	3	0	0
860800	Railway or tramway signalling and control equipment parts	130	2	64	6
860699	Goods vans and wagons; n.e.c. in HS-8606, not self-propelled	129	2	39	4
860390	Coaches, vans & trucks; self-propelled, not external electricity (excl. HS-8604)	122	2	50	5
860400	Maintenance etc vehicles; (eg workshops, cranes, trackliners, testing & inspection etc.)	111	2	32	3
860730	Locomotives or rolling stock; parts, hooks, other coupling devices, buffers, parts	101	2	13	1
853010	Signalling, safety or traffic control equipment; (excl. HS-8608)	90	2	35	3
730230	Iron or steel switch blades, crossing frogs, point rods and other crossing pieces	87	2	25	2
860290	Rail locomotives and locomotive tenders; other than diesel-electric powered	80	2	19	2
860721	Locomotives or rolling stock; parts, air brakes and parts thereof	69	1	23	2
860610	Goods vans and wagons; tank wagons and the like, not self-propelled	52	1	3	0
860729	Locomotives, rolling stock; parts, brakes (other than air brakes) and parts thereof	43	1	16	2
860712	Locomotives, rolling stock parts; bogies & bissel-bogies (excl. driving bogies & bissel-bogies)	24	0	5	0
860711	Locomotives, rolling stock; parts, driving bogies and bissel-bogies	22	0	4	0
730240	Iron or steel, track construction material; fish-plates and sole plates	20	0	3	0
860630	Goods vans & wagons; self-discharging, not self-propelled, excl HS-8606.10	17	0	5	1
860691	Goods vans & wagons; covered and closed, not self-propelled	3	0	0	0
860120	Rail locomotives; powered by electric accumulators	3	0	1	0

Botswana Railways

Number of Locomotives	34
Engine Type	D / E / **H** / O
Engine supplier	General Electric and General Motors
CAPEX (2022/3)	Not Stated
Top five	1. No Capex expenditure at present. Lack of finance
OPEX (2021/2)	US$0.37 million
Regular parts and components including technical within a FY	1. Rail and parts (US$0.24mn) 2. Locomotive Parts (US$0.1Mn) 3. Fixtures, fittings & parts (US$0.12mn)

Track in KMs'	888
Gauge	B / **N** / M / S
Capacity tonnes	Unstated – volumes have dropped from 2Mtpa to 1Mtpa over last decade
Number of Wagons	1164

Project pipeline

1. Mmamabula - Lephalale
2. Mosetse- Kazaungula- Livingstone
3. Dry Port Facility Gobabis
4. Trans Kalahari
5. Mahikeng-Swartruggens

Top five challenges

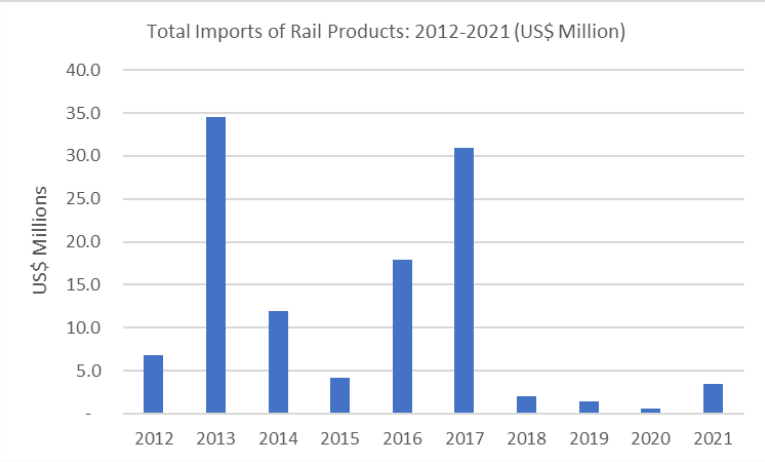
1. Lack of finance for Capex and Opex
2. Restrictions and regulatory challenges
3. Ageing rolling stock
4. Maintenance backlog
5. Theft and Vandalism in South Africa

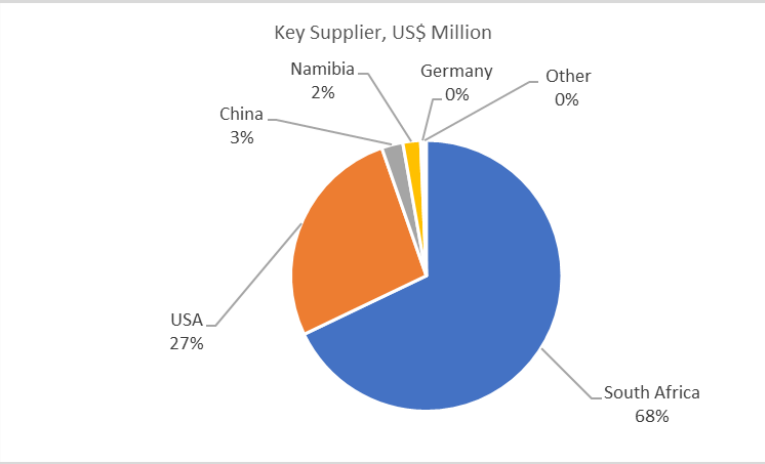
Country	Botswana
Established	1987
Est. Personnel	601
Website	https://www.botswanarailways.co.bw/
Ownership	**S** / PP / P / C / O
Client Base	**AG** / A M / **CT** / **M** / **O**

Corridors

1. Trans Kalahari – no finance at present, coal driven
2. Ponta Techobanine – no finance at present, coal driven
3. Kazungula – key project, by environmentally sensitive

Botswana Rail Imports





- Small market, small rail company – imports averaged US$11.4mn a year over last decade
- Locomotives and Rolling Stock are key imports;
- Rail and signalling & safety equipment relatively large;
- Potential for development of links to SA/Zambia?
- Local procurement ensures SA suppliers get orders – local partners in Botswana, proximity of supply

Key Import Products: 2012-2021 (US$ Million)		
Tariff	**Product**	**US$, Million**
860699	Goods vans & wagons; n.e.c. in HS8606, not self-propelled	48.8
860210	Locomotives; diesel-electric powered	29.1
860500	Passenger coaches, luggage vans, post office coaches etc	8.9
860719	Locomotives or rolling stock; parts, axles & wheels, & parts	8.6
730290	Iron/steel, railway track material; n.e.c. in HS7302	3.4
860630	Goods vans/wagons; self-discharge, etc. Excl. HS8606.10	2.8
730210	Iron/steel: rails	2.8
860791	Locomotives; parts n.e.c. in HS8607	1.7
860729	Locomotives/rolling stock; parts, brakes (not air brakes) & parts	1.6
860799	Rolling stock; parts n.e.c. in HS8607	1.0
860290	Locomotives & tenders; other than diesel-electric powered	1.0
860721	Locomotives or rolling stock; parts, air brakes & parts	0.8
730240	Iron or steel; fish-plates & sole plates	0.7
860800	Track fixtures & fittings: signalling, safety or traffic equip	0.6
853010	Signalling, safety or traffic control equipment; (excl HS8608)	0.5
730230	Iron/steel, switch blades, crossing frogs, point rods etc	0.4
860110	Locomotives; powered from an external source of electricity	0.4
860730	Locos/rolling stock; parts, hooks/other coupling, buffers, parts	0.3
860390	Coaches, vans & trucks; self-propelled, etc	0.1
860712	Locomotives or rolling stock; parts, bogies & bissel-bogies etc	0.1
860711	Railway locomotives, rolling stock; parts, driving & bissel-bogies	0.1
860691	Goods vans & wagons; covered & closed, not self-propelled	0.1
860120	Locomotives; powered by electric accumulators	0.1
860400	Railway maintenance vehicles; whether/not self-propelled	0.0
860610	Tank wagons etc, not self-propelled	0.0
860310	Coaches, vans, trucks; self-prop, external elec (excl. HS8604)	0.0
Total		**113.9**

Caminho de Ferro Benguela

Number of Locomotives	Total	Operation	Recoverable	
			Yes	No
	72	21	40	11

Engine Type				
	D	E	**H**	O

Engine supplier	
	GE U20C – 8; GE 30ACi – 50; CKD 8F – 8; Diesel SL/60T Manobra - 6

CAPEX (2023-2026)	
	Concession to spend US$450 million on rolling stock, line upgrades – 35 locos, 1,555 wagons

Top five	
	1. China Railway 20 has completed line upgrade 2. Evenly split between rolling stock, traction equipment and line maintenance. 3. Requirement for passenger rail? 4. Station rehabilitations and upgrades.

OPEX (2022)	
	Not Stated – new concession yet to begin

Top five	
	1. Priorities include: 2. Fitting out of workshops, maintenance yards. 3. Staff training. 4. Rehabilitation of rolling stock that is recoverable. 5. Establishing rail track manufacturing facility?

Track in KMs'	1,344

Gauge				
	B	**N**	M	S

Capacity tonnes	24Mtpa, - ave 0.24 Mpta in 2020-2022

Number of Wagons	567 – 391 are operational, with the balance recoverable

Project pipeline
1. Acquisition of: a) Passenger Carriages b) Wheel Maintenance machine c) Workshop Tools and Spare Parts 2. Entry into operation of the 3 Multiple Diesel Units 3. Launch of the "Camacove" Train in the Lobito - Luau section

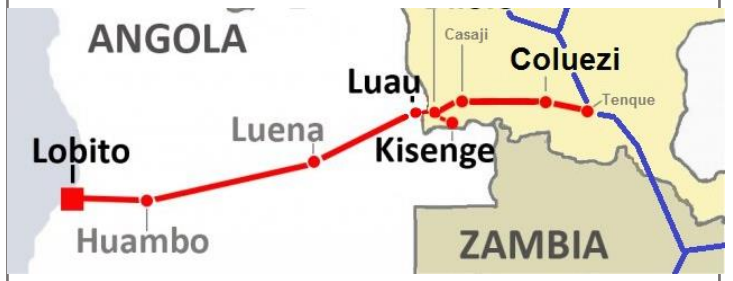
Top five challenges
1. Insufficient operational rolling stock 2. Rolling stock wheel wear 3. Vandalization of Infrastructure (removal of fixtures, crossings, destruction of railway signaling stations, etc.) along the line. 4. Capacity of line to carry DRC cargoes 5. Lack of reliable connection with SNCC in DRC

Country	Angola
Established	1899
Est. Personnel	1325
Website	https://www.facebook.com/profile.php?id=100057527767117

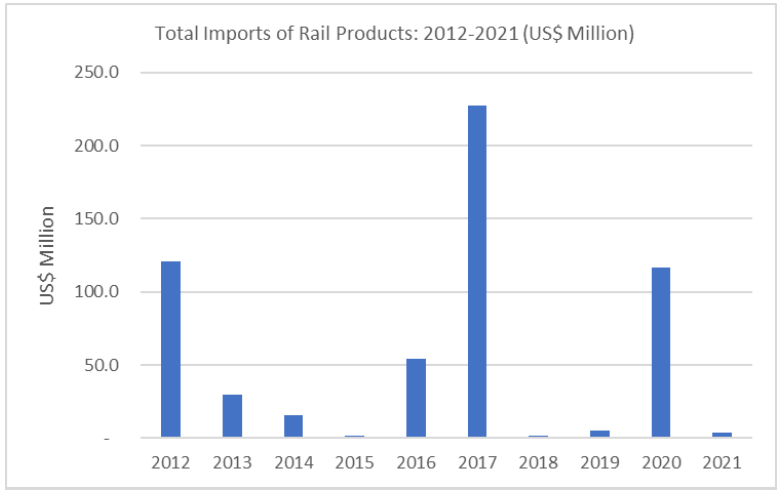
Ownership					
	S	PP	P	**C**	O

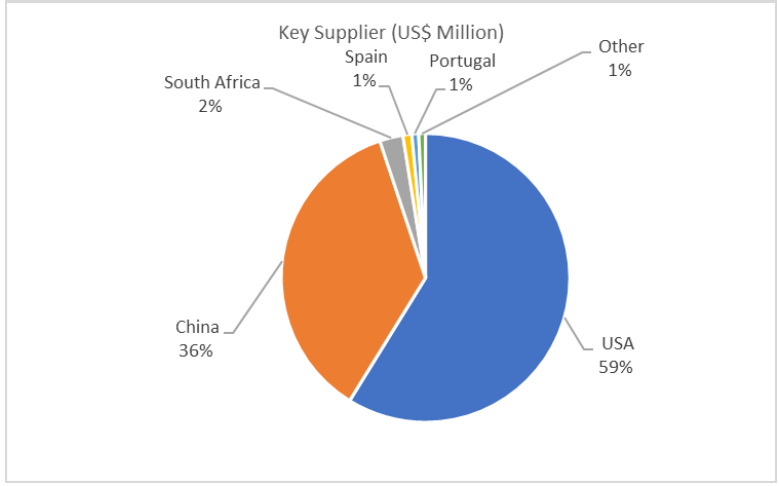
Client Base					
	AG	A M	**CT**	M	**O**

Corridors
1. Lobito Corridor: Linking Angola to Kolwezi in DR-Congo and potentially Solwezi in Zambia in the future



Angola Rail Imports





- Relatively large market by regional standards – large recaps;
- Averaged US$58mn in imports per year, but unevenly spread;
- Locomotives and Rolling Stock are key imports;
- Rail and signalling & safety equipment relatively large;
- Expect large orders as upgrade of Benguela Rail takes place;
- US locos, Chinese track construction dominate;

Key Import Products: 2012-2021 (US$ Million)		
Tariff	**Product**	**US$, Million**
860210	Locomotives; diesel-electric powered	362.4
860500	Passenger coaches, luggage vans, post office coaches etc	67.9
860390	Coaches, vans & trucks; self-propelled, etc	46.8
730210	Iron/steel: rails	40.1
860699	Goods vans & wagons; n.e.c. in HS8606, not self-propelled	8.2
853010	Signalling, safety or traffic control equipment; (excl HS8608)	5.9
860800	Track fixtures & fittings: signalling, safety or traffic equip	5.7
730230	Iron/steel, switch blades, crossing frogs, point rods etc	5.2
860400	Railway maintenance vehicles; whether/not self-propelled	5.2
730290	Iron/steel, railway track material; n.e.c. in HS7302	4.6
860610	Tank wagons etc, not self-propelled	4.0
860799	Rolling stock; parts n.e.c. in HS8607	3.8
860692	Goods vans/wagons; open, non-removable sides >60cm, etc	3.8
860719	Locomotives or rolling stock; parts, axles & wheels, & parts	3.4
860791	Locomotives; parts n.e.c. in HS8607	3.1
730240	Iron or steel; fish-plates & sole plates	2.4
860721	Locomotives or rolling stock; parts, air brakes & parts	1.7
860630	Goods vans/wagons; self-discharge, etc. Excl. HS8606.10	0.9
860691	Goods vans & wagons; covered & closed, not self-propelled	0.8
860729	Locomotives/rolling stock; parts, brakes (not air brakes) & parts	0.3
860730	Locos/rolling stock; parts, hooks/other coupling, buffers, parts	0.3
860110	Locomotives; powered from an external source of electricity	0.1
860120	Locomotives; powered by electric accumulators	0.0
860712	Locomotives or rolling stock; parts, bogies & bissel-bogies etc	0.0
860310	Coaches, vans, trucks; self-prop, external elec (excl. HS8604)	0.0
860290	Locomotives & tenders; other than diesel-electric powered	0.0
Total		**576.8**

Eswatini Railways

Number of Locomotives	46
Engine Type	D, E, **H**, O
Engine supplier	18 General Electric; 28 General Motors (see spreadsheet)
CAPEX (2019-2022)	US$50.56 million
Top five	1. Eswatini Rail Link – $1.2bn (Own funding of $52m in last two years) 2. ICD – $0.6bn (own funding of $42 in last two years)
OPEX (2021/22)	US$17.6 million

Top five		
	Total expenditure	17,608,948
	Wages, Loans, Insurance, Sundry	13,920,093
	Maintenance	2,423,126
	Perway material	447,431
	Strategic planning	245,144
	Safety & security	226 764
	Training & education	131,866
	Protective clothing	129,039
	Accident compensation	85,485

Track in KMs'	301km
Gauge	B, **N**, M, S
Capacity tonnes	12 million tonnes; 6.04Mt moved in 2022 (incl. transit traffic)
Number of Wagons	75

Project pipeline

1. Eswatini Rail Link (ESRL) Project
2. Transit Hub with TFR and CFM
3. ICD Expansion
4. Sidings

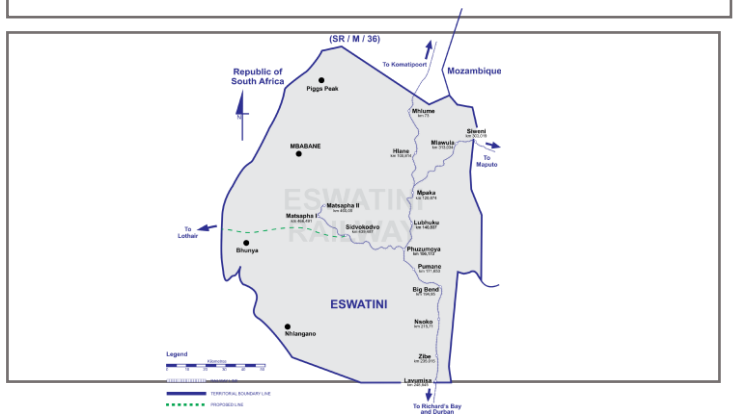
Top five challenges

1. Heavily reliant on transit traffic (70% of revenue)
2. Access to capital
3. Vandalism and cable theft domestically and in SA
4. Obsolete technology
5. Retention of Intellectual Capacity

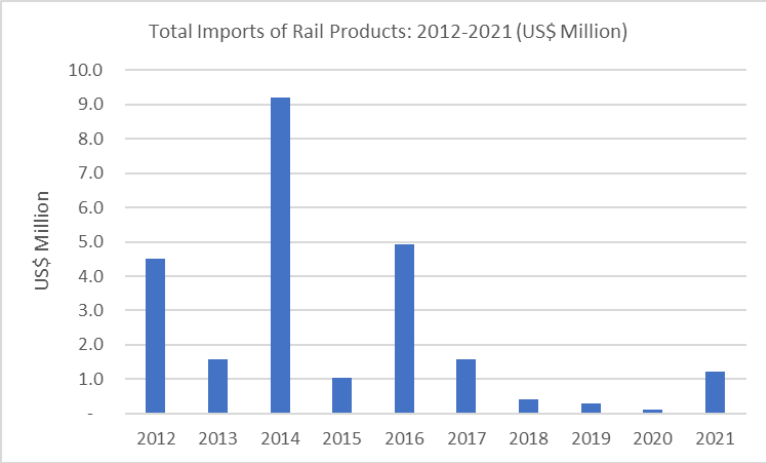
Country	Eswatini
Established	1879
Est. Personnel	358
Website	https://eswatinirail.co.sz/
Ownership	**S**, PP, P, C, O
Client Base	**AG**, AM, CT, **M**, **O**

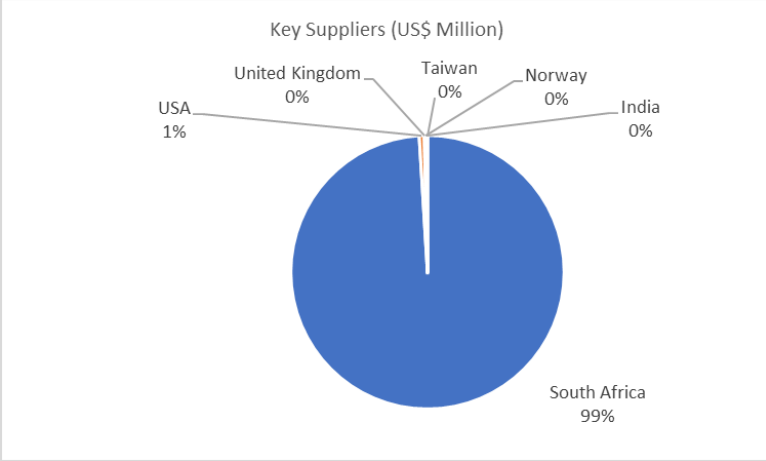
Corridors

1. ESRL: The joint inter-railway venture with Transnet Freight Rail (TFR), will build a new 150-kilometre-long railway line from Lothair (South Africa) to Sidvokodvo (Eswatini) via the Goba corridor to create a dedicated general freight business (GFB)



Eswatini Rail Imports





- Tiny market, with bulk of spend on goods wagons and tanks;
- Average imports of only US$2.5mn per annum;
- Little in the way of rail expansion over the period;
- Some small projects in the pipeline;
- South Africa supplies almost all requirements to Eswatini Rail;

Key Import Products: 2012-2021 (US$ Million)		
Tariff	**Product**	**US$, Million**
860699	Goods vans & wagons; n.e.c. in HS8606, not self-propelled	13.4
860610	Tank wagons etc, not self-propelled	2.2
730210	Iron/steel: rails	1.9
730290	Iron/steel, railway track material; n.e.c. in HS7302	1.3
860290	Locomotives & tenders; other than diesel-electric powered	1.2
860210	Locomotives; diesel-electric powered	1.0
730230	Iron/steel, switch blades, crossing frogs, point rods etc	0.8
860719	Locomotives or rolling stock; parts, axles & wheels, & parts	0.7
860799	Rolling stock; parts n.e.c. in HS8607	0.5
860791	Locomotives; parts n.e.c. in HS8607	0.3
860400	Railway maintenance vehicles; whether/not self-propelled	0.2
860730	Locos/rolling stock; parts, hooks/other coupling, buffers, parts	0.2
860712	Locomotives or rolling stock; parts, bogies & bissel-bogies etc	0.2
730240	Iron or steel; fish-plates & sole plates	0.2
853010	Signalling, safety or traffic control equipment; (excl HS8608)	0.2
860729	Locomotives/rolling stock; parts, brakes (not air brakes) & parts	0.2
860721	Locomotives or rolling stock; parts, air brakes & parts	0.1
860800	Track fixtures & fittings: signalling, safety or traffic equip	0.1
860711	Railway locomotives, rolling stock; parts, driving & bissel-bogies	0.0
860120	Locomotives; powered by electric accumulators	0.0
860110	Locomotives; powered from an external source of electricity	0.0
860691	Goods vans & wagons; covered & closed, not self-propelled	0.0
860390	Coaches, vans & trucks; self-propelled, etc	0.0
860310	Coaches, vans, trucks; self-prop, external elec (excl. HS8604)	0.0
Total		**24.9**

Mozambique Railway (CFM)

Number of Locomotives	CFM South – 29, (23 operational) CFM Centre – 19 (15 operational) CFM North – 110: 85 GE Dash 9-BBW
Engine Type	D E H O
Engine supplier	General Electric (recent, not defined for others)
CAPEX (2021/22)	US$30.14 million
Top five	1. Rail track and accessories (US$29.9mn) 2. Rolling stock (US$0.23mn – 2020/22 – US$5.16mn) 3. Future: 4. Standard Bank- Moçambique finance to CFM - US$22.4mn for acquisition of 300 wagons with high side 5. Acquisition of 20 locomotives for CFM Sul and CFM Centro (US$70mn)
OPEX (2021/22)	Consolidated Group (incl. Ports) US$99mn
Top five	1. Specialized works (US$13mn) 2. Maintenance and repair (US$11mn) 3. Surveillance and security (US$5.68mn) 4. Maintenance and repair materials (US$4.45mn) 5. Exchange of rolling stock (US$2.37mn)

Track in KMs'	3130
Gauge	B N M S
Capacity tonnes	69.5Mtpa; total of 18.9Mt in 2021 (10.6Mtpa by CFM, balance 3rd parties
Number of Wagons	CFM South – 1,200 (1.165) CFM Centre – 845 (651) CFM North – 1,962

Project pipeline

1. Chitama-Macuse Railway, 639km
2. Acquisition of rolling stock for bulk freight (CFM-S)
3. Doubling of Ressano de Garcia Line (CFM-S)
4. Restoration of operational capacity, after cyclones IDAI and Ana ((CFM-C)
5. Rehab of Machipanda Line, financed by (BCI, Standard Bank, FNB and Absa) over 3 years (CMF-C)
6. Acquisition of rolling stock, financed by Exim Bank (CFM-C)
7. Link railways north-south (India proposal)

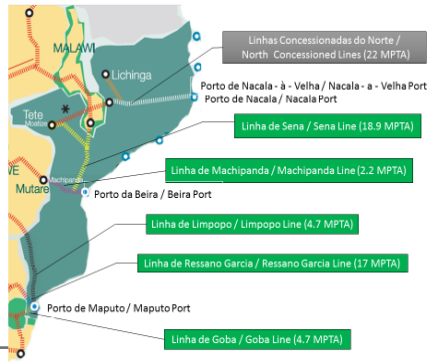
Top five challenges

1. Lack of integrated national rail network
2. Connectivity challenges with key neighbours
3. Reliance on transit cargoes from SA and Zimbabwe
4. Funding
5. Maintenance and rolling stock

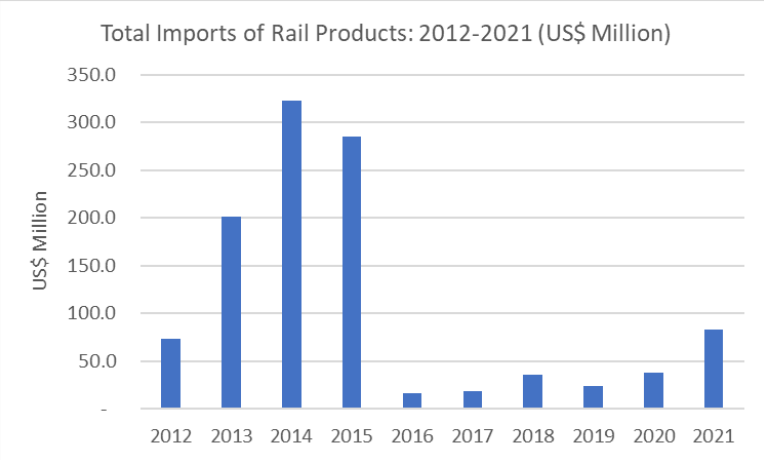
Country	Mozambique
Established	1931
Est. Personnel	Not Stated
Website	https://www.cfm.co.mz/index.php/en/
Ownership	S PP P C O
Client Base	AG A M CT M O

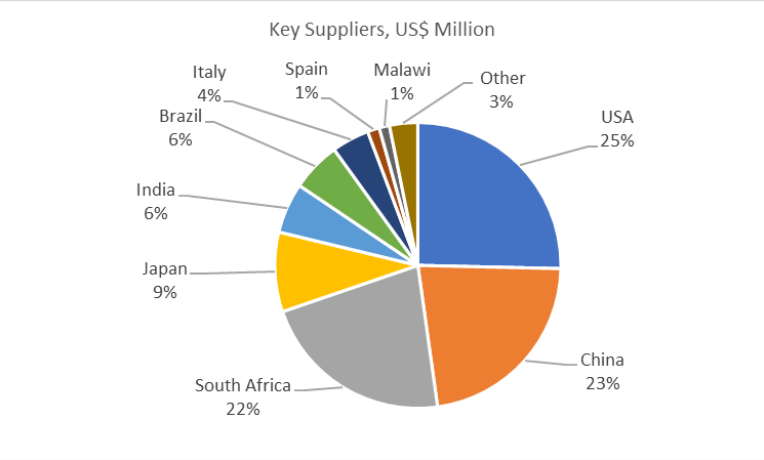
Corridors

1. CFM South
2. CFM Central
3. CFM North



Mozambique Rail Imports





- Relatively large market by regional standards, complicated by three rail lines and multiple concessionaires;
- Over US$100mn a year in imports;
- 'Pit to Port' lines driven by coal mining from 2012 to 2015;
- Spread of suppliers reflects multiplicity of contracts, origin of developers and contractors;
- Strong project pipeline, funding an issue for some projects;
- Prone to flooding – emergency repairs a feature in centre and north

Key Import Products: 2012-2021 (US$ Million)		
Tariff	**Product**	**US$, Million**
860210	Locomotives; diesel-electric powered	374.5
860692	Goods vans/wagons; open, non-removable sides >60cm, etc	196.4
730210	Iron/steel: rails	145.6
860500	Passenger coaches, luggage vans, post office coaches etc	46.0
860699	Goods vans & wagons; n.e.c. in HS8606, not self-propelled	37.8
730290	Iron/steel, railway track material; n.e.c. in HS7302	34.1
860400	Railway maintenance vehicles; whether/not self-propelled	32.1
860791	Locomotives; parts n.e.c. in HS8607	30.5
860800	Track fixtures & fittings: signalling, safety or traffic equip	28.7
730230	Iron/steel, switch blades, crossing frogs, point rods etc	28.6
860799	Rolling stock; parts n.e.c. in HS8607	28.3
860290	Locomotives & tenders; other than diesel-electric powered	24.3
860719	Locomotives or rolling stock; parts, axles & wheels, & parts	15.8
860712	Locomotives or rolling stock; parts, bogies & bissel-bogies etc	13.1
730240	Iron or steel; fish-plates & sole plates	11.5
860630	Goods vans/wagons; self-discharge, etc. Excl. HS8606.10	11.4
860721	Locomotives or rolling stock; parts, air brakes & parts	11.0
860711	Railway locomotives, rolling stock; parts, driving & bissel-bogies	7.9
860610	Tank wagons etc, not self-propelled	6.6
860729	Locomotives/rolling stock; parts, brakes (not air brakes) & parts	6.4
853010	Signalling, safety or traffic control equipment; (excl HS8608)	4.8
860730	Locos/rolling stock; parts, hooks/other coupling, buffers, parts	1.3
860390	Coaches, vans & trucks; self-propelled, etc	0.8
860120	Locomotives; powered by electric accumulators	0.3
860691	Goods vans & wagons; covered & closed, not self-propelled	0.0
860110	Locomotives; powered from an external source of electricity	0.0
860310	Coaches, vans, trucks; self-prop, external elec (excl. HS8604)	0.0
Total		**1,098.2**

National Railways of Zimbabwe

Number of Locomotives	166
Engine Type	D **E** H **O**
Engine supplier	General Motors
CAPEX (2018-2023)	US$400mn over five years (not fully secured)
Top five	1. Refurbishment and procurement over three phases of: 2. Refurb 132 locomotives, + 43 new 3. Refurb 2,761 wagons + 1,280 new 4. Refurb 144 coaches, + 56 new 5. 250 track caution removals 6. Yard lighting to 100% by Phase 3 7. Train control and lighting systems upgrades: entry-level track warrant system; Integrated & Centralised Train Control System
OPEX (2022)	US$20 million from PSIP Fund
Top five	Key Spend: 1. Salaries 2. Fuels 3. Maintenance spares 4. Utilities 5. Statutory obligations

Track in KMs'	2,760km
Gauge	B **N** M S
Capacity tonnes	18Mtpa – currently 2.3Mtpa
Number of Wagons	7023

Project pipeline

1. Lions' Den- Kafue Railway link
2. Harare – Moatize
3. Harare Chitungwiza light commuter rail

Top five challenges

1. Finance – lack of capital for both Capex and Opex for maintenance of existing fleet and track
2. Age of equipment and derailment on track – 10% of line susceptible
3. Skills development and retention
4. Competition from road transport
5. Inflation eroding budgets

Country	Zimbabwe
Established	1897
Est. Personnel	3587
Website	www.nrz.co.zw/
Ownership	**S** PP P C O
Client Base	**AG** A M CT **M** **O**

Corridors

1. North-South Corridor (Multiple linkages)

Beitbridge Bulawayo Railway

Number of Locomotives	8-11
Engine Type	D **E** H O
Engine supplier	GPR Leasing Africa
CAPEX (Yr XXXX)	Not Stated or Provided. CEO will provide directly to DBT
Top five	1. No major Capex at this stage
OPEX (Yr XXXX)	Not Stated or Provided. CEO will provide directly to DBT
Top five	

Track in KMs'	350
Gauge	B **N** M S
Capacity tonnes	3Mtpa - moving around 800,000 tons per annum at present
Number of Wagons	100, also use wagons from SA, Zambia

Project pipeline

1. Integrating of operations in North-South Corridor

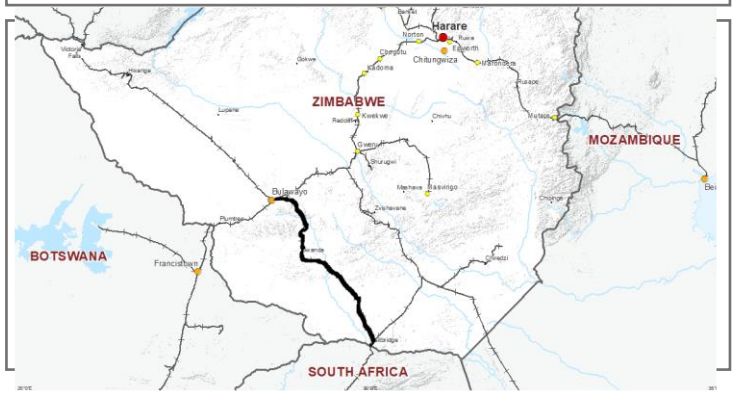
Top five challenges

1. Zimbabwe's economic situation
2. Competition from road and other rail lines in region
3. Lack of domestic rail service capacity
4. Skills development and retention
5. Cargo volumes

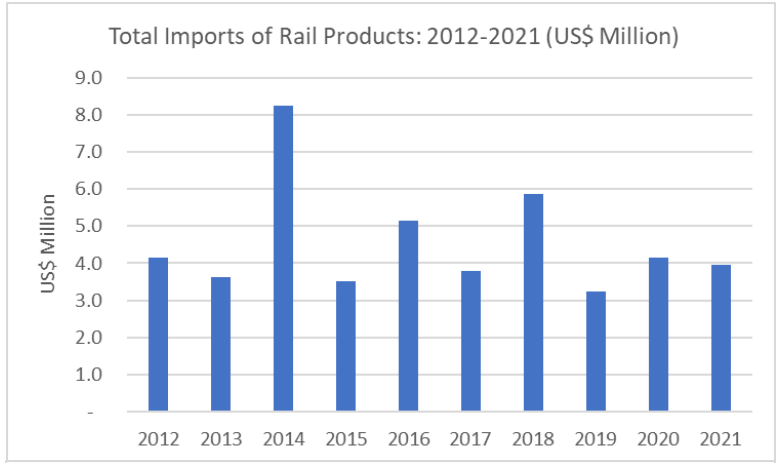
Country	Zimbabwe
Established	1999
Est. Personnel	160
Website	https://bbr.co.zw/
Ownership	S **PPP** P C O
Client Base	**AG** A M **CT** **M** **O**

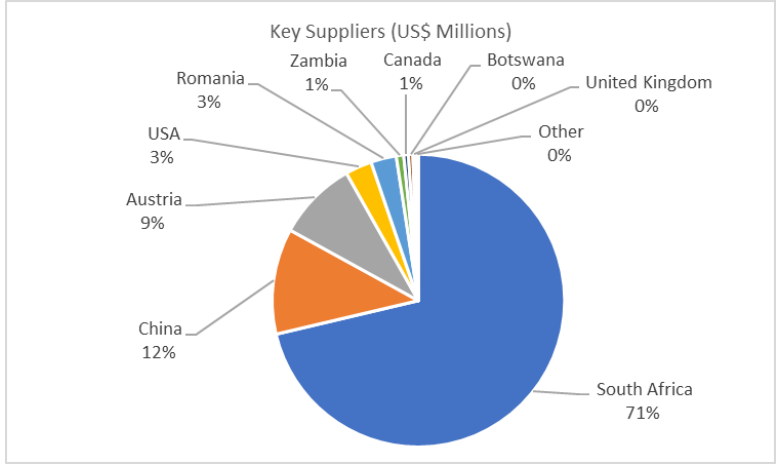
Corridors

1. North-South Corridor



Zimbabwe Rail Imports





- Small budgets, inadequate rolling stock hamper service;
- Country imports on average US$4.6 million of rail equipment a year;
- Years of under-investment have crippled much of NRZ capacity – BBR still operates relatively well;
- Rail links to SA, Mozambique, Botswana, Zambia make Zimbabwe key link in North-South Corridor;
- RSA is key supplier, but Chinese involvement growing;

Key Import Products: 2012-2021 (US$ Million)		
Tariff	**Product**	**US$, Million**
730210	Iron/steel: rails	7.2
860791	Locomotives; parts n.e.c. in HS8607	6.6
860799	Rolling stock; parts n.e.c. in HS8607	5.0
860400	Railway maintenance vehicles; whether/not self-propelled	4.7
860719	Locomotives or rolling stock; parts, axles & wheels, & parts	4.1
860390	Coaches, vans & trucks; self-propelled, etc	2.9
730290	Iron/steel, railway track material; n.e.c. in HS7302	2.8
860290	Locomotives & tenders; other than diesel-electric powered	1.9
860120	Locomotives; powered by electric accumulators	1.4
860500	Passenger coaches, luggage vans, post office coaches etc	1.3
860210	Locomotives; diesel-electric powered	1.2
860711	Railway locomotives, rolling stock; parts, driving & bissel-bogies	1.0
860110	Locomotives; powered from an external source of electricity	1.0
860729	Locomotives/rolling stock; parts, brakes (not air brakes) & parts	0.8
860699	Goods vans & wagons; n.e.c. in HS8606, not self-propelled	0.7
730240	Iron or steel; fish-plates & sole plates	0.6
860800	Track fixtures & fittings: signalling, safety or traffic equip	0.5
860730	Locos/rolling stock; parts, hooks/other coupling, buffers, parts	0.5
860630	Goods vans/wagons; self-discharge, etc. Excl. HS8606.10	0.4
860721	Locomotives or rolling stock; parts, air brakes & parts	0.4
853010	Signalling, safety or traffic control equipment; (excl HS8608)	0.3
860712	Locomotives or rolling stock; parts, bogies & bissel-bogies etc	0.2
860692	Goods vans/wagons; open, non-removable sides >60cm, etc	0.1
730230	Iron/steel, switch blades, crossing frogs, point rods etc	0.0
860310	Coaches, vans, trucks; self-prop, external elec (excl. HS8604)	0.0
Total		**45.7**

Societe Nationale des Chemins de Fer du Congo

Number of Locomotives	38-42
Engine Type	D E **H** O
Engine supplier	CRN-Dalian supplied locomotives, with US-made engines from 2004 to 2015. They comprise: CK1F2 x 4; CKD8C4 x 10; CKD8C1 x 20; Unstated x 4
CAPEX (Yr 2023/4)	US$60 million
Top five	1. Emergency rehabilitation of rolling stock and track, including signalling equipment
OPEX (Yr 2021/2)	Not Stated
Top five	1. Very little actual Opex 2. In 2021/2 key imports were: 3. Passenger carriages (US$4.2m) 4. Rolling stock parts (US$1.2m) 5. Track (US$1m) 6. Signalling etc equipment (US$0.2m)

Track in KMs'	3,641km
Gauge	B **N** M S
Capacity tonnes	3Mtpa (largely inoperable)
Number of Wagons	4-5,000

Project pipeline

1. Large recapitalisation requirement to feed in Lobito Corridor (Phase 1 – emergency rehab – is US$60m)
2. Potential infusion of US$100m by Lobito Rail consortium
3. Raise axle capacity from 16 tons to 22 tons to be compatible with Angolan rail

Top five challenges

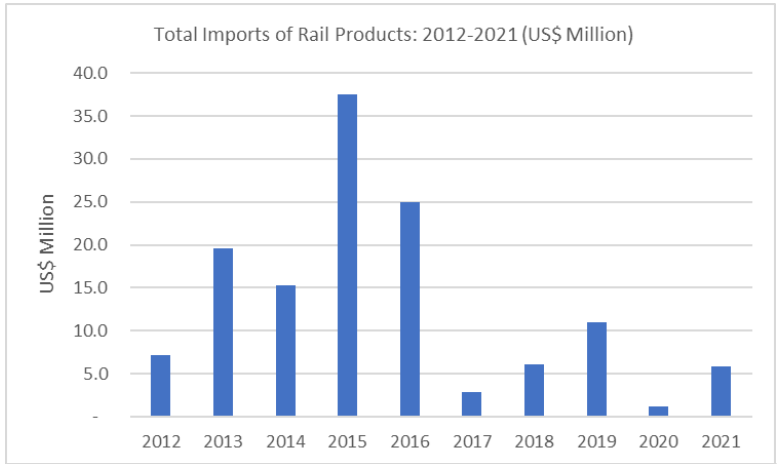
1. Despite US$500mn investment from 2008-2015, most of the infrastructure and rolling stock is dysfunctional
2. Lack of funding needed to upgrade rolling stock and track
3. Historical mismanagement of assets
4. Competition from road freight
5. Skills shortage, vandalism of infrastructure

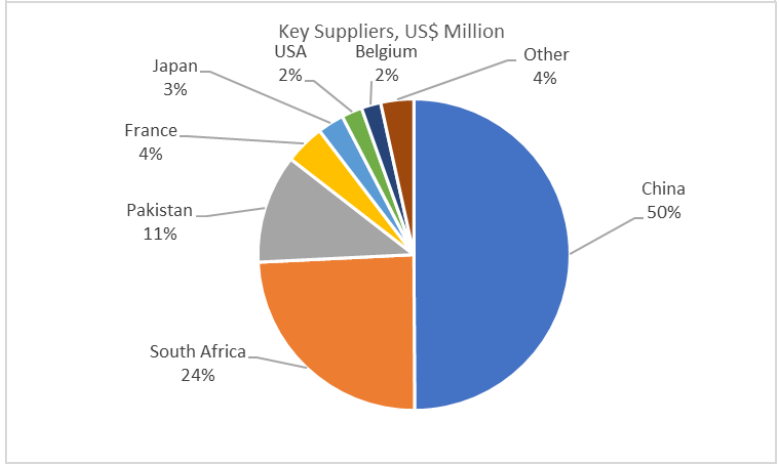
Country	Democratic Republic of Congo
Established	1902
Est. Personnel	4,000
Website	https://www.snccsa.com/
Ownership	S PP P C O
Client Base	**AG** A M CT **M** **O**

Corridors

1. North-South Corridor
2. Dar es Salaam Corridor (NSC)
3. Lobito Corridor

DR-Congo Rail Imports





- World Bank-funded refurb of SNCC from 2008 to 2015 saw (relatively) large outlays;
- Rail system badly neglected since, needs major finance injection;
- Opening of Lobito link will see some emergency funding for track, signalling and loan of rolling stock;
- Last two years has seen almost no maintenance or rehabilitation of infrastructure

Key Import Products: 2012-2021 (US$ Million)		
Tariff	Product	US$, Million
860210	Locomotives; diesel-electric powered	54.1
730290	Iron/steel, railway track material; n.e.c. in HS7302	21.3
730210	Iron/steel: rails	14.7
860500	Passenger coaches, luggage vans, post office coaches etc	14.6
860799	Rolling stock; parts n.e.c. in HS8607	6.3
860791	Locomotives; parts n.e.c. in HS8607	3.6
860400	Railway maintenance vehicles; whether/not self-propelled	3.5
860719	Locomotives or rolling stock; parts, axles & wheels, & parts	2.7
860699	Goods vans & wagons; n.e.c. in HS8606, not self-propelled	2.7
853010	Signalling, safety or traffic control equipment; (excl HS8608)	1.8
860729	Locomotives/rolling stock; parts, brakes (not air brakes) & parts	1.4
860610	Tank wagons etc, not self-propelled	1.0
860290	Locomotives & tenders; other than diesel-electric powered	0.8
860711	Railway locomotives, rolling stock; parts, driving & bissel-bogies	0.8
860800	Track fixtures & fittings: signalling, safety or traffic equip	0.5
860730	Locos/rolling stock; parts, hooks/other coupling, buffers, parts	0.5
860712	Locomotives or rolling stock; parts, bogies & bissel-bogies etc	0.4
730240	Iron or steel; fish-plates & sole plates	0.4
860721	Locomotives or rolling stock; parts, air brakes & parts	0.3
730230	Iron/steel, switch blades, crossing frogs, point rods etc	0.1
860120	Locomotives; powered by electric accumulators	0.0
860310	Coaches, vans, trucks; self-prop, external elec (excl. HS8604)	0.0
860390	Coaches, vans & trucks; self-propelled, etc	0.0
860691	Goods vans & wagons; covered & closed, not self-propelled	0.0
Total		**131.7**

Tanzania Railway Limited

Number of Locomotives	30 (in 2020), down from 45
Engine Type	D E H O
Engine supplier	Not Stated
CAPEX (Yr XXXX)	Not stated
Top five	1. XX 2. XX 3. XX 4. XX 5. XX
OPEX (Yr XXXX)	Not stated
Top five	1. XX 2. XX 3. XX 4. XX 5. XX

Track in KMs'	2707
Gauge	B N M S
Capacity tonnes	2.16Mtpa – 340,000 tons in 2020; 3.1m passengers
Number of Wagons	380 serviceable in 2020, down from 1,200 in 2013

Project pipeline

1. Tanzania Standard Gauge Railway Network
2. Tanga-Arusha–Musoma Standard Gauge Railways Line
3. Mtwara – Mbambabay –Mchuchuma/Liganga Standard Gauge Railway Line
4. Mtwara – Mbambabay –Mchuchuma/Liganga Standard Gauge
5. Second Tanzania Intermodal and Rail Development Project (TIRP-2) (US$150m)

Top five challenges

1. Shortage of rolling stock
2. Outdated rolling stock
3. Poor infrastructure
4. Shortage of qualified staff
5. Lack of adequate funding

Country	Tanzania
Established	1977
Est. Personnel	Not stated
Website	https://www.trc.co.tz/pages
Ownership	S PP P C O
Client Base	AG A M CT M O

Corridors

1. North-South Corridor

Insert Operator Logo

TAZARA (Tanzania-Zambia Railway Authority)

Number of Locomotives	17
Engine Type	D E H O
Engine supplier	CSR CK6 diesel locomotive; GE U30C Diesel Electric; CSR Qishuyan SDD20 diesel locomotive
CAPEX (Yr XXXX)	Not stated
Top five	1. XX 2. XX 3. XX 4. XX 5. XX
OPEX (Yr 2021/2)	Revenue of US$24mn (down from US$31mn in 2020/1)
Top five	1. XX 2. XX 3. XX 4. XX 5. XX

Track in KMs'	1,860
Gauge	B N M S
Capacity tonnes	5 million per annum; breakeven is 600,000 tons, 2021/22 delivered 210,161
Number of Wagons	850 – 47 passenger; 803 freight

Project pipeline

Top five challenges

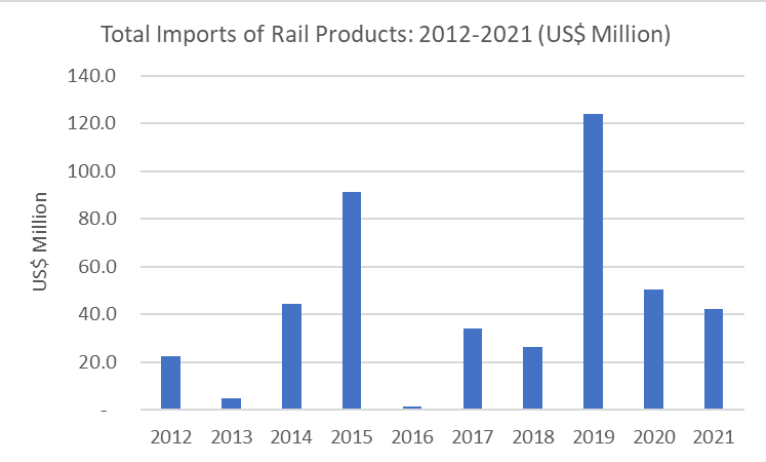
1. Cargo volumes
2. Competition from other rail and road solutions
3. Trained personnel
4. Maintenance of infrastructure

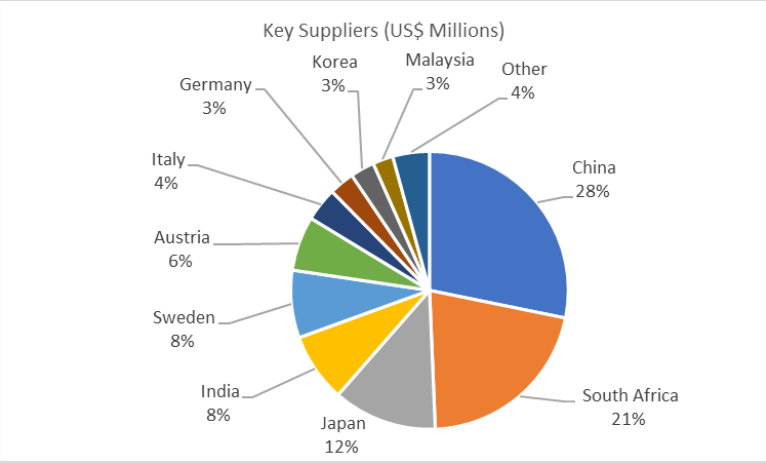
Country	Tanzania
Established	1976
Est. Personnel	2881
Website	https://www.tazarasite.com/
Ownership	S PP P C O
Client Base	AG A M CT M O

Corridors

1. TAZARA Corridor
2. North-South Corridor

Tanzania Rail Imports





- Two key rail companies, linking Tanzania to hinterland;
- Many years of neglect, but strong push to revitalise, expand rail network – will come through in later trade data;
- Averaging US$44mn a year in imports;
- Major project basket being delivered;
- China, RSA are key suppliers, but many other countries active in Tanzania as well – Turkey may emerge as well;

Key Import Products: 2012-2021 (US$ Million)		
Tariff	**Product**	**US$, Million**
730210	Iron/steel: rails	77.1
860390	Coaches, vans & trucks; self-propelled, etc	71.2
730290	Iron/steel, railway track material; n.e.c. in HS7302	59.0
860800	Track fixtures & fittings: signalling, safety or traffic equip	45.7
860400	Railway maintenance vehicles; whether/not self-propelled	33.0
860610	Tank wagons etc, not self-propelled	27.7
860210	Locomotives; diesel-electric powered	25.9
853010	Signalling, safety or traffic control equipment; (excl HS8608)	22.3
860791	Locomotives; parts n.e.c. in HS8607	18.1
860500	Passenger coaches, luggage vans, post office coaches etc	17.8
860290	Locomotives & tenders; other than diesel-electric powered	17.4
860799	Rolling stock; parts n.e.c. in HS8607	5.6
860699	Goods vans & wagons; n.e.c. in HS8606, not self-propelled	4.4
730230	Iron/steel, switch blades, crossing frogs, point rods etc	3.5
860719	Locomotives or rolling stock; parts, axles & wheels, & parts	2.9
730240	Iron or steel; fish-plates & sole plates	1.9
860691	Goods vans & wagons; covered & closed, not self-propelled	1.8
860721	Locomotives or rolling stock; parts, air brakes & parts	1.8
860729	Locomotives/rolling stock; parts, brakes (not air brakes) & parts	1.5
860730	Locos/rolling stock; parts, hooks/other coupling, buffers, parts	1.0
860711	Railway locomotives, rolling stock; parts, driving & bissel-bogies	0.6
860692	Goods vans/wagons; open, non-removable sides >60cm, etc	0.2
860712	Locomotives or rolling stock; parts, bogies & bissel-bogies etc	0.1
860630	Goods vans/wagons; self-discharge, etc. Excl. HS8606.10	0.1
860120	Locomotives; powered by electric accumulators	0.1
860110	Locomotives; powered from an external source of electricity	0.0
860310	Coaches, vans, trucks; self-prop, external elec (excl. HS8604)	0.0
Total		**440.7**

Transnamib Holding Limited

Number of Locomotives	42
Engine Type	D E H O
Engine supplier	General Electric
CAPEX (Yr 2022)	None – no funds available
Top five	1. None
OPEX (2022)	US$48 million
Top five	1. Fuel US$9mn 2. Employment US$22mn 3. Repairs & Maintenance US$2.5mn 4. Operating Leases US$3mn 5. Municipal Expenses US$2.5mn

Track in KMs'	2687
Gauge	B N M S
Capacity tonnes	2,7 million, averaging 1.6Mt at present
Number of Wagons	1669

Project pipeline

1. Upgrade rail infrastructure by 770 kilometre to SADC standard: 770 km to be done
2. PPP's to be developed for commuter train services: •Windhoek to Katutura, Rehoboth, Okahandja & Hosea Kutako International Airport
3. Construction of rail from Ondangwa-Oshakati: 30 km
4. Construction of rail from Grootfontein-Katima Mulilo: 700 km to connect Namibia with Zambia border
5. Construction of railway between Gobabis-Gaborone: 200 km to be done to connect Namibia with Botswana border

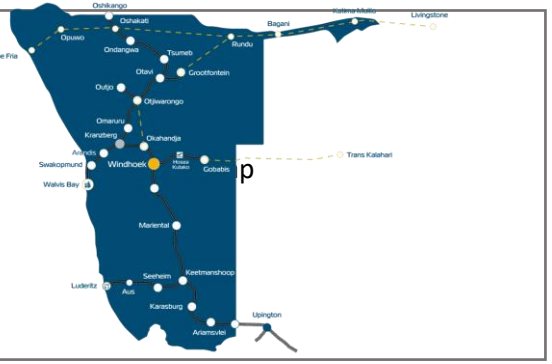
Top five challenges

1. Lack of funds for Capex
2. Long distances for small volumes
3. Failure rate of locomotives increased five-fold to almost 40 faults per 100,000km in last financial year
4. Backlog in maintenance, rehab and development of infrastructure
5. Building Human capacity

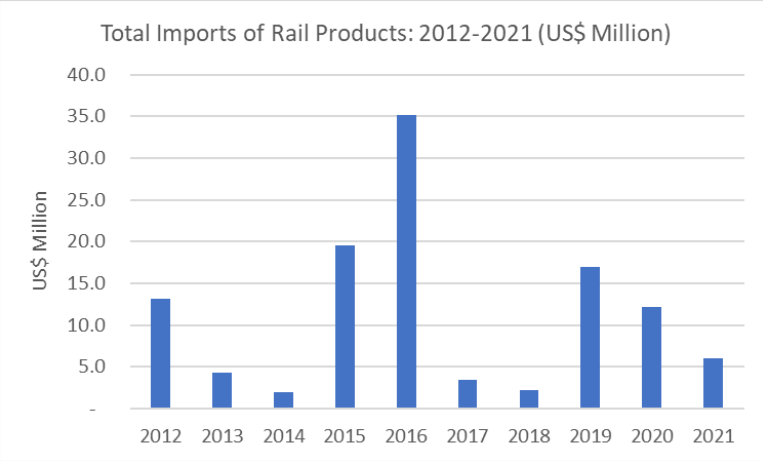
Country	Namibia
Established	1895
Est. Personnel	1200
Website	https://www.transnamib.com.na/
Ownership	S PP P C O
Client Base	AG A M CT M O

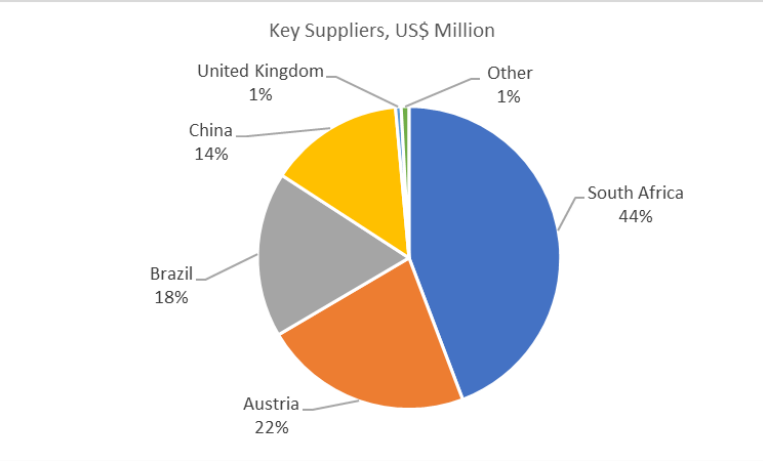
Corridors

1. Trans-Caprivi
2. Trans Cunene
3. Trans-Kalahari



Namibia Rail Imports





- Small budgets for large distances and small volumes;
- Transnamib working hard to double volumes, income;
- Linkages to SA, Botswana, Zambia key – not all in place yet;
- SA largest supplier, but also involvement of others in sector;

Key Import Products: 2012-2021 (US$ Million)		
Tariff	**Product**	**US$, Million**
730210	Iron/steel: rails	31.0
860210	Locomotives; diesel-electric powered	26.7
730290	Iron/steel, railway track material; n.e.c. in HS7302	17.6
860610	Tank wagons etc, not self-propelled	10.1
860799	Rolling stock; parts n.e.c. in HS8607	6.0
860692	Goods vans/wagons; open, non-removable sides >60cm, etc	5.7
730230	Iron/steel, switch blades, crossing frogs, point rods etc	4.4
860290	Locomotives & tenders; other than diesel-electric powered	3.3
860791	Locomotives; parts n.e.c. in HS8607	2.2
860719	Locomotives or rolling stock; parts, axles & wheels, & parts	1.9
860729	Locomotives/rolling stock; parts, brakes (not air brakes) & parts	1.2
860800	Track fixtures & fittings: signalling, safety or traffic equip	1.1
860721	Locomotives or rolling stock; parts, air brakes & parts	0.8
860310	Coaches, vans, trucks; self-prop, external elec (excl. HS8604)	0.7
860711	Railway locomotives, rolling stock; parts, driving & bissel-bogies	0.6
730240	Iron or steel; fish-plates & sole plates	0.5
860400	Railway maintenance vehicles; whether/not self-propelled	0.3
860730	Locos/rolling stock; parts, hooks/other coupling, buffers, parts	0.3
860630	Goods vans/wagons; self-discharge, etc. Excl. HS8606.10	0.2
860712	Locomotives or rolling stock; parts, bogies & bissel-bogies etc	0.2
860390	Coaches, vans & trucks; self-propelled, etc	0.1
860500	Passenger coaches, luggage vans, post office coaches etc	0.1
853010	Signalling, safety or traffic control equipment; (excl HS8608)	0.1
860110	Locomotives; powered from an external source of electricity	0.0
860699	Goods vans & wagons; n.e.c. in HS8606, not self-propelled	0.0
860691	Goods vans & wagons; covered & closed, not self-propelled	0.0
Total		**114.9**

Transnet Freight Rail

Number of Locomotives	1656 (down from 2,215)
Engine Type	D E **H** O
Engine supplier	General Electric
CAPEX (2022/23)	US$441 million

Top five	US$ (Million)
Infrastructure	172.5
Locomotives	103.5
Wagons	165.6
Total	441.1

OPEX (2022/3)	US$1,559.6bn

Top five	US$ (Millions)
Energy	345.6
Maintenance	158.4
Materials	13.4
Personnel	803.0
Other	239.2

Track in KMs'	31,000 – 5,500km of core track
Gauge	B **N** M S
Capacity tonnes	200Mtpa, operating at ~50% or less at present
Number of Wagons	7,900

Project pipeline

1. Boegoebaai Port, Rail and Infrastructure
2. Eswatini Railway Line (SRL) Project
3. Concessioning of Durban-Gauteng Container Line
4. Mmamabula-Lephalale Line

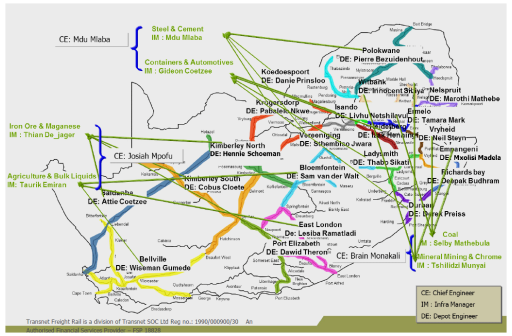
Top five challenges

1. Financial sustainability risk
2. Funding risk
3. Rail network infrastructure risk
4. Security risk
5. Rolling stock risk: Unavailability and unreliability of locomotives (including the impact of 1 064 locomotive renegotiations)
6. Procurement Risk
7. Contract Management risk
8. ICT Risk

Country	South Africa
Established	1910
Est. Personnel	38,000
Website	https://www.transnetfreightrail-tfr.net/Pages/default.aspx
Ownership	**S** PP P C O
Client Base	**AG** A M **CT** M O

Corridors

1. North-South Corridor (Regional)
2. NorthCor
3. OreCor
4. CapeCor
5. CentralCor
6. ContainerCor



Passenger Rail Agency of South Africa

Number of Locomotives	30, plus lease from TFR; 154 to be delivered from 2022-2025
Engine Type	D E H O
Engine supplier	General Electric
CAPEX and Opex (2022/23 to 20224/25)	US$2.8bn

PRASA has suffered a virtual collapse in the last decade and will undergo a major recapitalisation programme

Capital Budget for MTEF Period (US$ MIllion)	Total
Total	2,803
Rolling Stock Fleet Renewal	1,231
Line Recovery and Extension	396
Signalling and Telecoms	308
Depot Modernisation	288
Overhaul of Metrorail coaches	282
Rolling Stock, Locos and shunting vehicle maintenance	73
Station Revitalisation	71
Other Property Management	52
Other	44
Asset Protection	28
Overhaul of Smeyl coaches	28

Track in KMs'	2,228
Gauge	B N M S
Capacity tonnes	Passenger only
Number of Wagons	4,554Coaches: 1,311 motor & 3,424 trailer; 1,350 to be refurbished 2022-2025

Project pipeline

1. Gauteng-KwaZulu Natal High-speed Railway
2. Cape and Gauteng Line Recovery Programmes
3. Moloto Rail Programme
4. Rolling Stock Renewal Programme

Top five challenges

1. Lack of locomotives
2. Contractual disputes (locomotives)
3. Financial instability
4. Network and station vandalism
5. Retention of skills

Country	South Africa
Established	1990
Est. Personnel	14696
Website	https://www.prasa.com/
Ownership	S PP P C O
Client Base	AG A M CT M O

Corridors

1. None, all internal networks

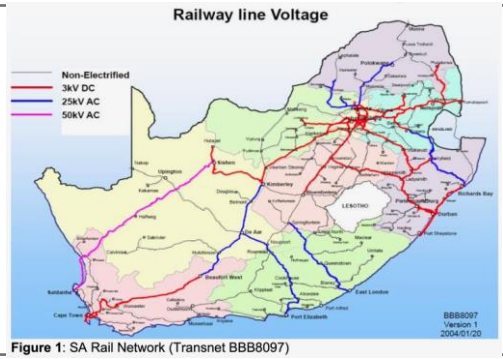


Figure 1: SA Rail Network (Transnet BBB8097)

Gautrain Management Agency

Number of Locomotives	24
Engine Type	D **E** H O
Engine supplier	24 Bombardier Electrostars
CAPEX (2022)	US$158m
Top five	1. Not stated
OPEX (2021/22)	Roughly US$80 million per annum.
Top five	Not stated

Track in KMs'	80
Gauge	B N M **S**
Capacity tonnes	N/A – Passenger only
Number of Wagons	96 Passenger carriages

Project pipeline

1. Gautrain Expansion Project

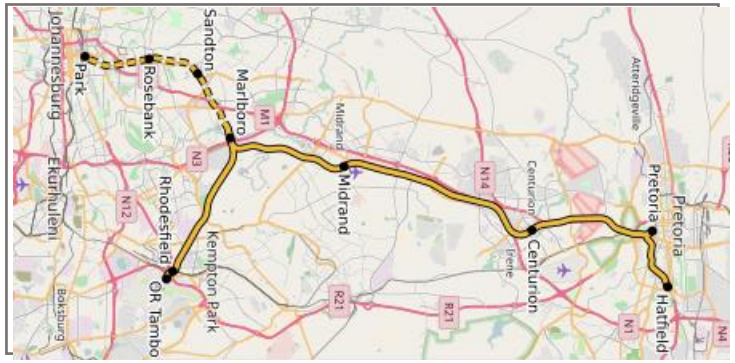
Top five challenges

1. End of concession in 2026
2. Slow growth in passenger numbers
3. Cyber security
4. Inability to meet funding plans
5. Political and social unrest risks

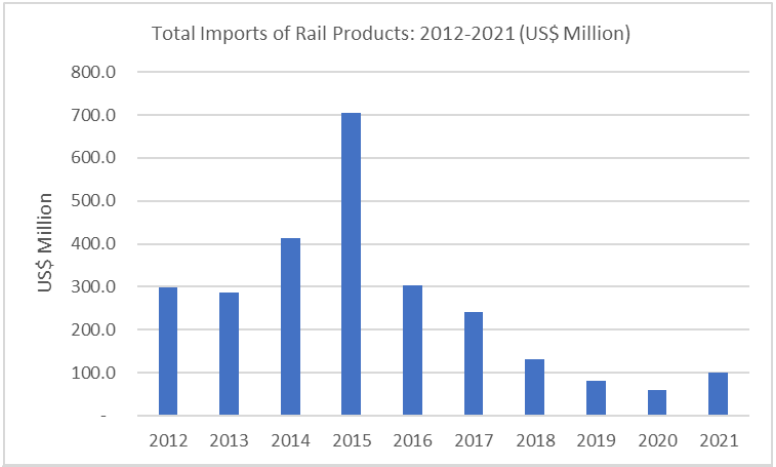
Country	South Africa
Established	2012
Est. Personnel	225
Website	https://gma.gautrain.co.za/pages/Home.html
Ownership	**S** PP P C O
Client Base	AG A M CT M **O**

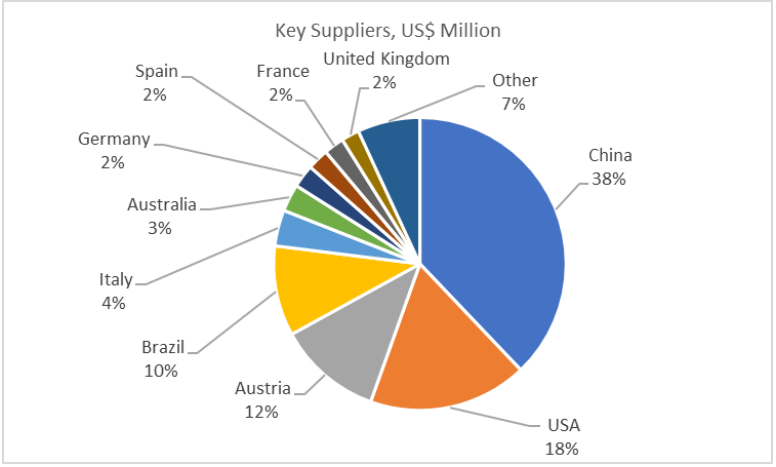
Corridors

1. None – standalone passenger high-speed rail line



South Africa Rail Imports





- Largest rail network in Africa, top 10 in world;
- Traditionally a strong domestic supply side – but weakened in recent years by imports of rolling stock;
- Imports of roughly US$260m a year, but dramatic drop in 2nd half of decade;
- Exports of US$57m a year – SA is key regional rail supply hub;
- Many global rail suppliers based in SA, some import, some manufacture locally;
- Urgent need for recap of some track, rolling stock;
- Theft, vandalism a recent major problem, lack of money for Capex, Opex also an issue

Key Import Products: 2012-2021 (US$ Million)		
Tariff	**Product**	**US$, Million**
860110	Locomotives; powered from an external source of electricity	537.6
860719	Locomotives or rolling stock; parts, axles & wheels, & parts	529.1
730210	Iron/steel: rails	290.9
860791	Locomotives; parts n.e.c. in HS8607	284.1
860210	Locomotives; diesel-electric powered	235.4
860799	Rolling stock; parts n.e.c. in HS8607	134.9
860310	Coaches, vans, trucks; self-prop, external elec (excl. HS8604)	132.4
860730	Locos/rolling stock; parts, hooks/other coupling, buffers, parts	94.3
860500	Passenger coaches, luggage vans, post office coaches etc	70.1
853010	Signalling, safety or traffic control equipment; (excl HS8608)	53.9
860721	Locomotives or rolling stock; parts, air brakes & parts	51.4
860800	Track fixtures & fittings: signalling, safety or traffic equip	43.5
730230	Iron/steel, switch blades, crossing frogs, point rods etc	43.4
860729	Locomotives/rolling stock; parts, brakes (not air brakes) & parts	28.7
860400	Railway maintenance vehicles; whether/not self-propelled	27.6
860290	Locomotives & tenders; other than diesel-electric powered	27.3
860711	Railway locomotives, rolling stock; parts, driving & bissel-bogies	10.3
730290	Iron/steel, railway track material; n.e.c. in HS7302	9.0
860712	Locomotives or rolling stock; parts, bogies & bissel-bogies etc	6.6
860699	Goods vans & wagons; n.e.c. in HS8606, not self-propelled	4.7
730240	Iron or steel; fish-plates & sole plates	0.9
860120	Locomotives; powered by electric accumulators	0.4
860630	Goods vans/wagons; self-discharge, etc. Excl. HS8606.10	0.2
860692	Goods vans/wagons; open, non-removable sides >60cm, etc	0.2
860390	Coaches, vans & trucks; self-propelled, etc	0.2
860610	Tank wagons etc, not self-propelled	0.1
Total		**2,617.2**

Zambia Railways Limited

Number of Locomotives	25 owned; 10 leased (14 operational)
Engine Type	D, E, **H**, O
Engine supplier	General Electric and General Motors
CAPEX (2021/22)	None – negotiating with IDC of Zambia and Team Sweden Rail
Top five	1. New Wagons – US$33m; 300 new wagons by 2024; 2. Purchase 4 & hire 6 locomotives by 2024 (US$16m); 3. Revamp of "whole stretch and of signalling and train telecoms – US$25 million; 4. Reduce derailments from 107 in 2020 to 50 by 2025
OPEX (2021/22)	US$30 million
Top five	

Opex, 2021 (US$)	
Total	30,121,941
Manpower Costs	10,921,412
Other	7,718,647
Fuel & Lubricants	5,018,706
Administration	4,215,882
Repairs & Maintenance	2,247,294

Track in KMs'	1,248
Gauge	B, **N**, M, S
Capacity tonnes	5Mtpa: averaging less than 1Mtpa
Number of Wagons	1,745 (942 operational)

Project pipeline

1. Rehab of main line between Livingstone and Copperbelt, approximately 945 km.
2. New locomotives and wagons; signalling upgrades and training / capacity building.
3. Rehab works (±4 years) to minimise track disruption: track & sleeper replacement, ballast laying, improvement of bridges, culverts, crossings etc
4. Construction of sleeper factory, worker camps and material stocking yards
5. State of art ERTMS Level 2 system

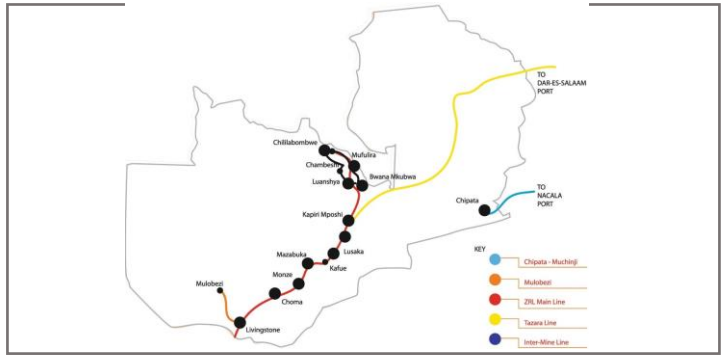
Top five challenges

1. Lack of CAPEX to roll out programs and plans
2. Loss of cargoes to road competition
3. Diversion of freight to other routes and ports (regional challenges)
4. Infrastructure degradation – freight trains moving at only 25km/h compared to 80km/h capacity

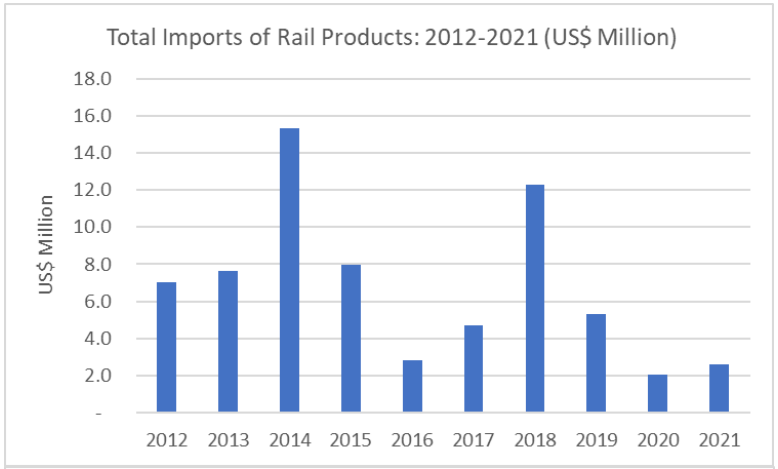
Country	Zambia
Established	1982
Est. Personnel	841
Website	https://zrl.com.zm/
Ownership	**S**, PP, P, C, O
Client Base	**AG**, A M, **CT**, M, **O**

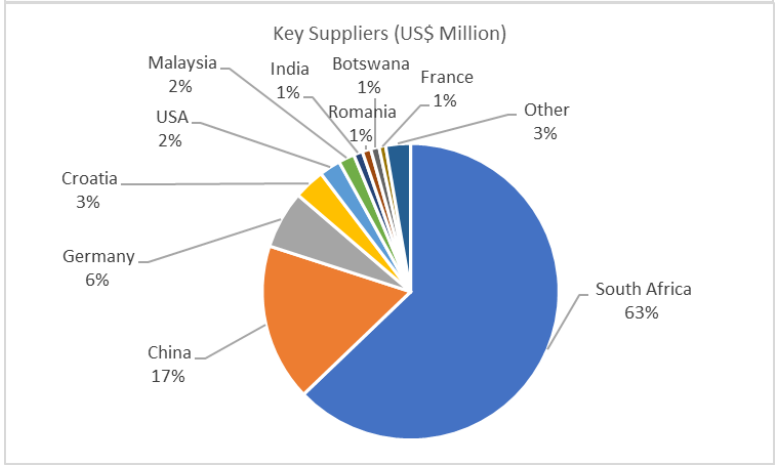
Corridors

1. Victoria Falls Bridge to Kitwe (848 km
2. The Mulobezi Line (162 km)
3. The Chipata- Mchinji Line (24 km)



Zambia Rail Imports





- Finance and location have long been constraints to rail
- Imports of only US$6.8m a year – huge need for recapitalisation
- Linkages with neighbours urgently required – key to success of North-South Corridor, but funding for many rail companies is inadequate
- 'Land linked' to DRC, Tanzania, Malawi, Mozambique, Zimbabwe, Botswana, Namibia and Angola – thus key to regional rail linkages
- South Africa dominant supplier – rolling stock, rail and parts

Key Import Products: 2012-2021 (US$ Million)		
Tariff	**Product**	**US$, Million**
860699	Goods vans & wagons; n.e.c. in HS8606, not self-propelled	8.7
860719	Locomotives or rolling stock; parts, axles & wheels, & parts	7.8
730210	Iron/steel: rails	7.7
860791	Locomotives; parts n.e.c. in HS8607	4.8
860400	Railway maintenance vehicles; whether/not self-propelled	4.5
860500	Passenger coaches, luggage vans, post office coaches etc	4.4
860800	Track fixtures & fittings: signalling, safety or traffic equip	4.0
730290	Iron/steel, railway track material; n.e.c. in HS7302	3.8
860799	Rolling stock; parts n.e.c. in HS8607	3.8
860210	Locomotives; diesel-electric powered	3.7
860712	Locomotives or rolling stock; parts, bogies & bissel-bogies etc	3.5
860290	Locomotives & tenders; other than diesel-electric powered	3.0
860730	Locos/rolling stock; parts, hooks/other coupling, buffers, parts	2.0
860729	Locomotives/rolling stock; parts, brakes (not air brakes) & parts	1.3
860110	Locomotives; powered from an external source of electricity	1.2
730240	Iron or steel; fish-plates & sole plates	0.7
860711	Railway locomotives, rolling stock; parts, driving & bissel-bogies	0.7
860630	Goods vans/wagons; self-discharge, etc. Excl. HS8606.10	0.5
860721	Locomotives or rolling stock; parts, air brakes & parts	0.4
860390	Coaches, vans & trucks; self-propelled, etc	0.3
860120	Locomotives; powered by electric accumulators	0.3
730230	Iron/steel, switch blades, crossing frogs, point rods etc	0.3
860310	Coaches, vans, trucks; self-prop, external elec (excl. HS8604)	0.2
860610	Tank wagons etc, not self-propelled	0.1
853010	Signalling, safety or traffic control equipment; (excl HS8608)	0.0
860691	Goods vans & wagons; covered & closed, not self-propelled	0.0
Total		**67.8**

DRC to South Africa: North-South Corridor

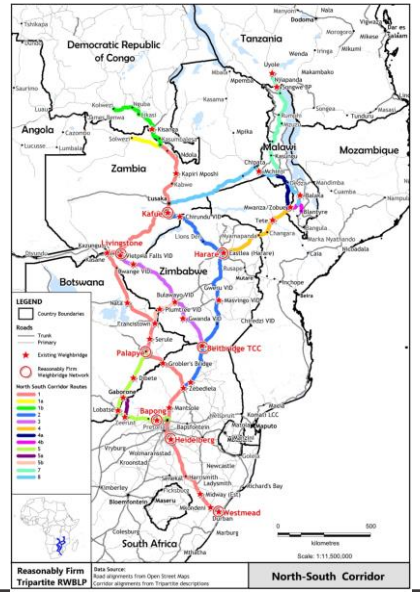
MIDLANDS UK

Basic information	
Project Name	North-South Corridor
Project value	None – it is a conceptual project aimed at creating a seamless rail corridor from Kolwezi in DR-Congo to Durban, South Africa
Project Owner	Regional Rail Companies
Country/Region	SADC – South Africa, Eswatini, Botswana, Zambia, Zimbabwe, DR-Congo (with interest from others)
Buyer Type	None
Level of engagement	Stalled.
Competition	None
Partner	NBF, DBSA
Linked to	Tazara, CFM, CFB, Transnamib
Date of next milestone	**Undetermined**
Company Name	Afri-ID, NBF

Background: The North-South Rail Corridor (NSC) includes a rail network of over 4,000km, from Durban in South Africa through Botswana, Zimbabwe and Zambia, to the DR-Congo. It is the region's key international rail gateway for transporting inbound and outbound cargo. It is the spine of the rail network in the region, and includes ancillary lines linking both the Indian and Atlantic Oceans through Angola, Namibia, Mozambique and Tanzania. A memorandum of understating was signed between the rail operators on the North-South Rail Corridor which includes Zambia Railways Limited (ZRL); Grindrod/Beitbridge-Bulawayo Railways (BBR); Société Nationale des Chemins de fer du Congo (SNCC); National Railways of Zimbabwe (NRZ); Eswatini Railway (SR); Transnet SOC and Botswana Railways (BR) in 2017 to develop a common rail platform.

Project objective: The NSC project is focused on the optimisation, rehabilitation and upgrade of the NSC railway network. The objectives are to provide support for the assessment of private sector participation options to introduce a block train service on the North-South Corridor. Significant milestones include:

- Successfully managed execution of NSC pre-feasibility study funded by the World Bank.
- Completed the NSC Feasibility study in Q4 2021.
- Commenced process of implementing transactions recommended by the NSC feasibility study.
- Successfully collected and disseminated transit time operational performance reports for the NSC.
- Completed stakeholder workshops around operational, pricing, & governance issues



Documents available

☐	Expression of Interest	☐	Request for proposals	☐	Request for Tender	☐	Event details/Links
☐	Request for Information	☐	Request for Quote	☐	Company profile/presentation	☐	Project Description

Stage of Development

X	**Concept**	X	**Feasibility**	☐	**Procurement**	☐	**Start-up and implementation**
X	**Pre-feasibility**	☐	**Engineering & Design**	☐	**Construction**	☐	**Operation and maintenance**

Project timeline in months: Not Applicable – see comments below

Top five procurement items based on project phase

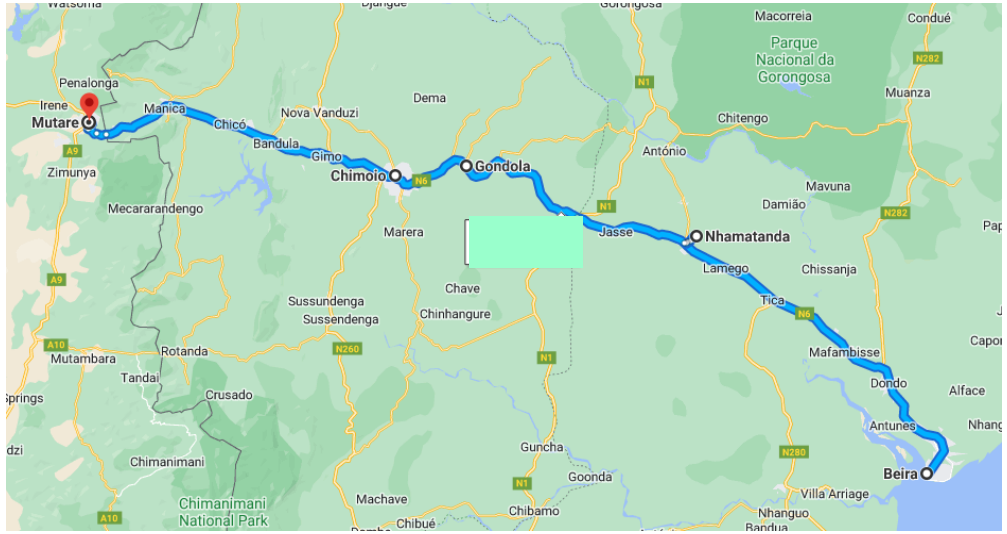
1. The North-South Corridor project appears to have stalled, with little evidence of a co-ordinated approach to the regional rail project. It is a highly ambitious project, aiming to provide seamless links from the Congolese Copperbelt to ports in the southern and eastern regions of Southern Africa, including Durban, Richards Bay, Beira, Dar es Salaam and Walvis Bay. The impetus for much of the original rationale has been overtaken by events, including the recently signed agreement for the Lobito Corridor Concession, the awarding of the container terminal concession to DP World in Dar es Salaam and improvements to handling capacity at Beira, as well as the diversion of trade away from South Africa's networks due to rail, port and vandalism issues.
2. Conceptual, no procurement at this stage

Machipanda Railway Corridor

MIDLANDS UK

Basic information	
Project Name	Machipanda Corridor
Project value	US$400 million
Project Owner	CFM
Country/Region	Mozambique/Zimbabwe
Buyer Type	State Utility
Level of engagement	Operational
Competition	
Partner	Beria Railroad Corporation/ Mozambique Ports and Railways (CFM) / NRZ / African Development Bank/ NEPA
Linked to	North South Corridor
Date of next milestone	**April 2023**
Company Name	CFM

Background: The Beira-Bulawayo railway, also called Machipanda railway, Beira-Harare-Bulawayo railway and Beira railway, is a railway that connects the city of Beira, Mozambique, to the city of Bulawayo, in Zimbabwe. It is 850 km long, in a 1067 mm gauge.
The Mozambique's Ports and Railways (CFM), began rehabilitation works on the Machipanda railway line in 2019. The 318 km rehabilitation project is valued at US$400 million and is set to be completed by Q1 2023.



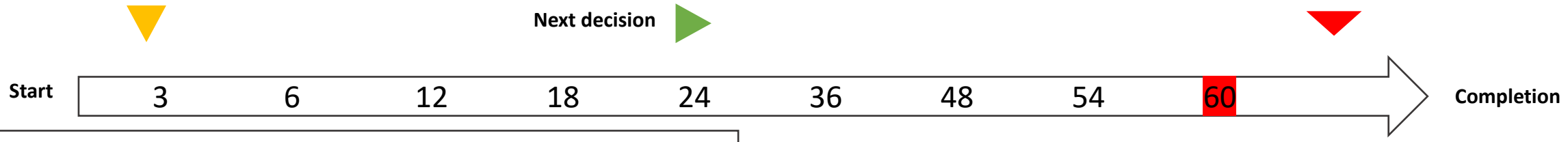
Documents available

X	Expression of Interest		Request for proposals		Request for Tender		Event details/Links
	Request for Information		Request for Quote	X	Company profile/presentation	X	Project Description

Stage of Development

	Concept		**Feasibility**		**Procurement**		**Start-up and implementation**
	Pre-feasibility		**Engineering & Design**	X	**Construction**		**Operation and maintenance**

Project timeline in months: 60 months, due for completion in Q3 2023



Top five procurement items based on project phase

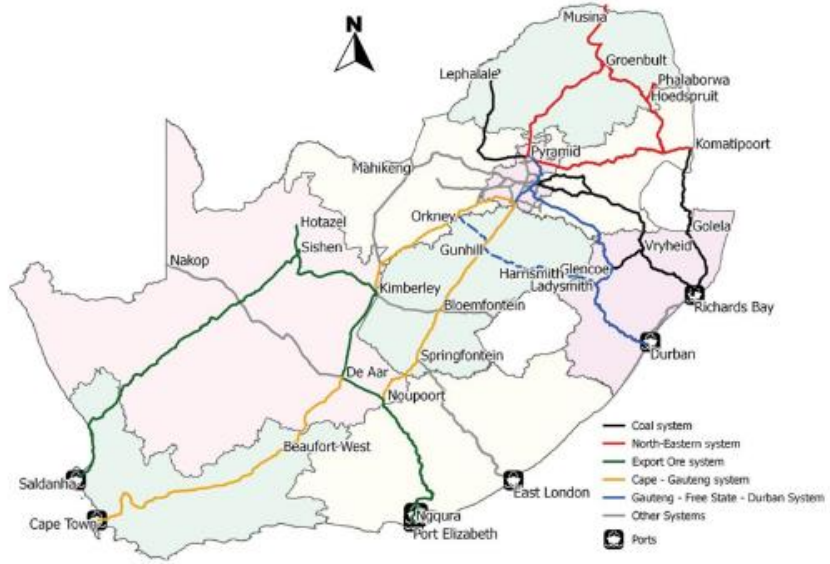
1. The US$400 million project includes the following:
2. Construction of railway stations
3. Construction of locomotive sheds
4. Construction of bridges and culverts
5. Construction of signal control rooms
6. Construction of operating cabins
7. Laying of transmission lines
8. Laying of railway tracks
9. Installation of signaling systems

Komatipoort - Richards Bay

MIDLANDS UK

Basic information	
Project Name	North-East Rail Corridor
Project value	Not Stated
Project Owner	Transnet Freight Rail
Country/Region	South Africa
Buyer Type	State Utility
Level of engagement	Operational
Competition	
Partner	Transnet Freight Rail
Linked to	Regional Rail networks in Mozambique, Eswatini, Zimbabwe
Date of next milestone	Unclear, project is being considered in smaller component parts.
Company Name	

Background: The North-East Rail Corridor is a completed railway line that spans from the Limpopo river at Beitbridge, in the Limpopo, through Komatipoort to Richards Bay on the East Coast and from Pyramid/Witbank (Reyton) to Komatipoort. The North-East Corridor links South Africa's rail freight business with the Southern African Development Community countries mainly through eSwatini, Zimbabwe, Mozambique, Zambia and the Democratic Republic of Congo. Commodities are transported through various border posts, or gates of entry, such as Komatipoort, Golela, Beitbridge, Livingstone and Sakania. The corridor has three main commodity transport links which include: Phalaborwa to Maputo and Richards Bay, predominantly transporting magnetite and rock phosphate; Witbank to Maputo, mainly transporting chrome and coal; and Intermodal (reefer containers) originating from Tzaneen, Musina and Bela-Bela destined for Durban. The total track is estimated to span over 1500km. It is also prone to flooding and was recently closed due to safety concerns.



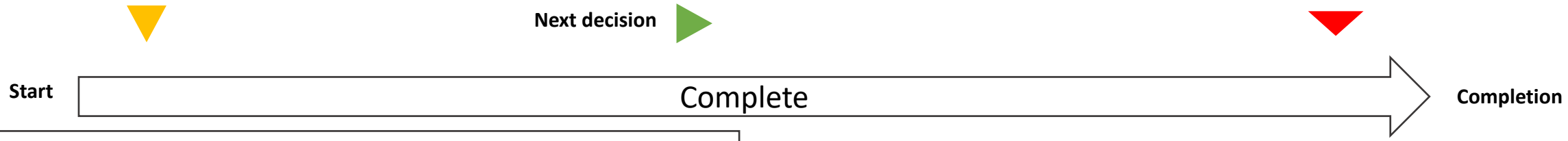
Documents available

☐	Expression of Interest	☐	Request for proposals	☐	Request for Tender	☐	Event details/Links
☐	Request for Information	☐	Request for Quote	X	Company profile/presentation	X	Project Description

Stage of Development

☐	**Concept**	☐	**Feasibility**	☐	**Procurement**	☐	**Start-up and implementation**
☐	**Pre-feasibility**	☐	**Engineering & Design**	☐	**Construction**	X	**Operation and maintenance**

Project timeline in months



Top five procurement items based on project phase

1. Operational: there are smaller extensions and upgrades being considered, but the project as a corridor is operational.

Ressano Garcia Railway (RGR)

MIDLANDS UK

Basic information	
Project Name	Ressano Garcia
Project value	Not Stated
Project Owner	CFM
Country/Region	Mozambique/South Africa
Buyer Type	State Utility
Level of engagement	Operational
Competition	XX
Partner	CFM Portos e Caminhos de Ferro de Moçambique, E.P / Transnet Freight Rail
Linked to	N/A
Date of next milestone	**N/A**
Company Name	XX

Background: The Ressano Garcia Railway (RGR) runs for 89 km between Maputo and the South African border, where it interconnects to the South African system linking to Gauteng and beyond. The network is interconnected with that of South Africa, Zimbabwe and Eswatini, and represents a key component of the Maputo corridor transport system. In 2006, an agreement led to the rehabilitation of the 89km railway line in 2008 at a cost of $20 million in infrastructure and $50 million in rolling stock.
In July 2022, CFM and TFR signed and agreement to eliminate the rail border. This sees exports of chrome and ferrochrome from South Africa direct to Maputo Port. The agreement sees consignments of 50 chrome and ferrochrome wagon loads hauled by two 43D diesel locomotives straight through to the Port of Maputo. The agreement allows CMF and TFR trains to travel across the border unhindered.

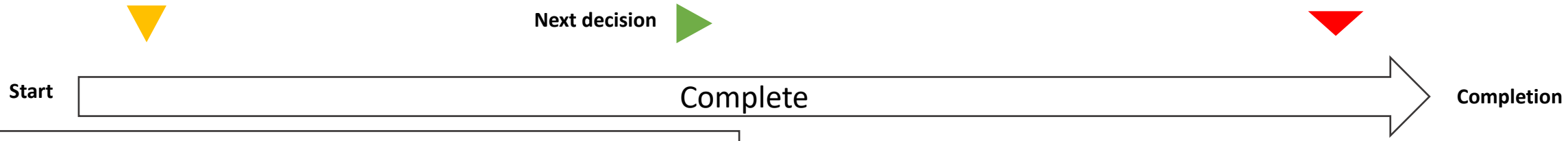
Documents available

☐	Expression of Interest	☐	Request for proposals	☐	Request for Tender	☐	Event details/Links
☐	Request for Information	☐	Request for Quote	X	Company profile/presentation	☐	Project Description

Stage of Development

☐	**Concept**	☐	**Feasibility**	☐	**Procurement**	☐	**Start-up and implementation**
☐	**Pre-feasibility**	☐	**Engineering & Design**	☐	**Construction**	X	**Operation and maintenance**

Project timeline in months: Operational, upgrades only



Top five procurement items based on project phase

1. Operations and Maintenance items only

Nacala Rail Corridor

MIDLANDS UK

Basic information	
Project Name	Nacala Rail Corridor
Project value	US$4,4 billion
Project Owner	CFM / Africa Development Bank (AfDB)
Country/Region	Mozambique
Buyer Type	State Utility
Level of engagement	Operational
Competition	XX
Partner	CFM / Africa Development Bank (AfDB)
Linked to	N/A
Date of next milestone	
Company Name	XX

Background: The construction of the Nacala Railway started in 1915, and the first 90 km to Monapo was opened for operation in 1924, but the project declined for lack of resources. In 2010, Brazilian mining company Vale managed established a new joint venture "Integrated Northern Logistical Corridor Society", for the administration of the railway, extending the Nacala Railway to its coal concessions at Benga-Moatize. The extension departed from the Nkaya interconnection station and continued to Moatize, being completed in 2017. The project includes an export terminal and a coal storage yard at the port of Nacala-a-Velha. The railway corridor spans a total of 912 kms.
In April 2022 Vale concluded the sale of its coal assets in Tete and the rail concession to Indian company, Vulcan for US$270 million as it exited the Mozambican coal sector.

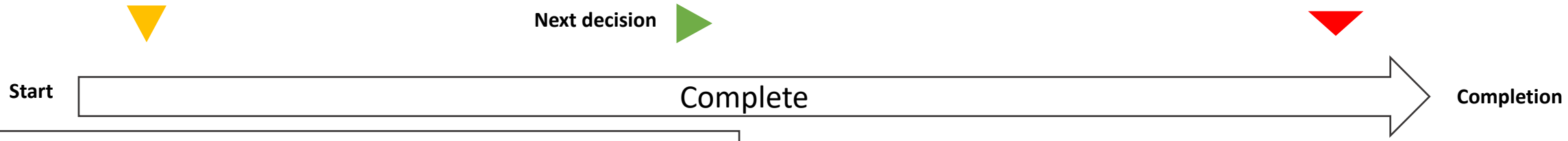
Documents available

☐	Expression of Interest	☐	Request for proposals	☐	Request for Tender	☐	Event details/Links
☐	Request for Information	☐	Request for Quote	X	Company profile/presentation	☐	Project Description

Stage of Development

☐	**Concept**	☐	**Feasibility**	☐	**Procurement**	☐	**Start-up and implementation**
☐	**Pre-feasibility**	☐	**Engineering & Design**	☐	**Construction**	X	**Operation and maintenance**

Project timeline in months: Operational



Top five procurement items based on project phase

1. Operational considerations.

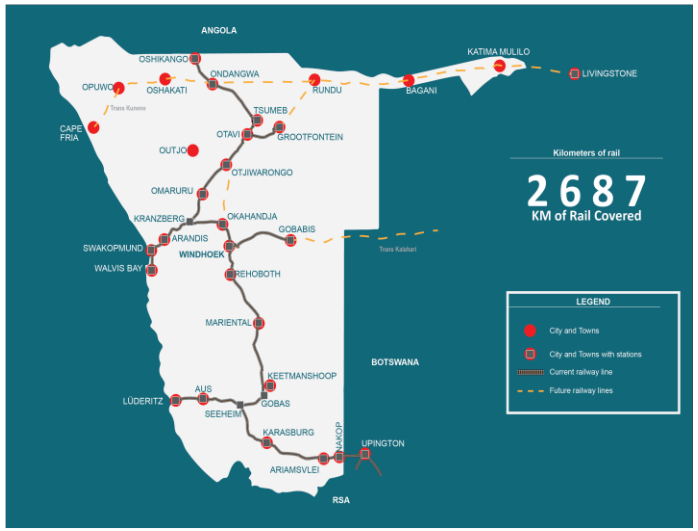
Trans-Caprivi

MIDLANDS UK

Basic information	
Project Name	Trans-Caprivi
Project value	Not Stated
Project Owner	Walvis Bay Corridor Group (WBCG)
Country/Region	Namibia
Buyer Type	State Utility
Level of engagement	Operational
Competition	Lobito Corridor
Partner	Transnamib, ZRL, Tsodilo Resources
Linked to	NSC
Date of next milestone	**Subject to Arbitration with Botswana Government**
Company Name	Tsodilo Resources

Background: The Trans Caprivi Corridor, operated by the Walvis Bay Corridor Group (WBCG), provides the shortest route between the Namibian west coast ports of Lüderitz and Walvis Bay and the vital transport hubs of Livingstone, Lusaka and Ndola in Zambia and Lubumbashi (in the southern DRC),as well as Zimbabwe. The Trans Caprivi Corridor is positioned to service the two-way trade between the SADC region and Europe, North and South America and the emerging Far East markets.
The infrastructure supporting the Trans Caprivi Corridor has been steadily developed and boasts the most efficient intermodal blueprint for the region, incorporating the ports, air, tarred roads and rail networks, as well as automated border post customs procedures .The TCC allows 5-7 days in transit to and from Lusaka, Harare and Lubumbashi. The railway corridor spans a total of 2,687km.

Transnamib and Tsodilo Resources have completed a final feasibility study for the construction of the Trans-Zambezi Railway extension from Grootfontein to Katima Mulilo via Rundu in Namibia and is part of a multinational railway line between Namibia and Zambia via the Zambezi region. The Study was conducted by M R Technofin Consultants Ltd (Canada) in conjunction with Namibian based Burmeister & Partners, Enviro Dynamics, Koep & Partners, University of Cape Town and 3TI Progetti. The Feasibility Study was co-funded by the Government of the Republic of Namibia and the African Development Bank. The key conclusion of the assignment is that the proposed 772km Greenfield line is viable from a technical, environmental, legal, financial, and economic standpoint and should move forward.



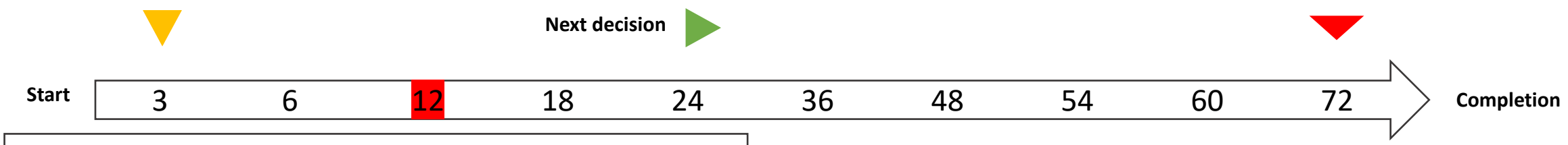
Documents available

☐	Expression of Interest	☐	Request for proposals	☐	Request for Tender	☐	Event details/Links
☐	Request for Information	☐	Request for Quote	X	Company profile/presentation	☐	Project Description

Stage of Development

☐	**Concept**	X	**Feasibility**	☐	**Procurement**	☐	**Start-up and implementation**
☐	**Pre-feasibility**	☐	**Engineering & Design**	☐	**Construction**	X	**Operation and maintenance**

Project timeline in months: To be determined by Tsodilo Resources Mine Plan development



Top five procurement items based on project phase

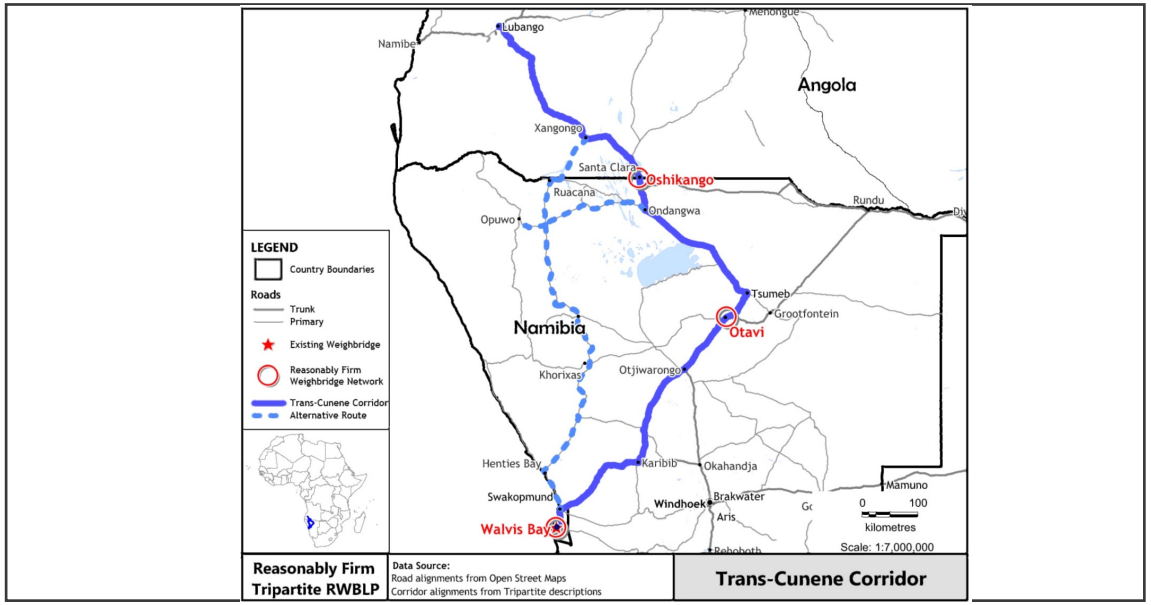
1. Feasibility complete – no further procurement at this stage. The final configuration of the rail line from the Tsodilo Resources iron ore development in Botswana will depend on the outcome of the final feasibility study for the development of that mine and the volumes anticipated. It has also been proposed that should the Walvis Bay line not meet with approval, a potential spur to the Lobito line will be considered.

Trans-Cunene

MIDLANDS UK

Basic information	
Project Name	Trans-Cunene
Project value	Not Stated
Project Owner	Namrail /Caminho de Ferro de Benguela (CFB)
Country/Region	Angola, Namibia
Buyer Type	State utility
Level of engagement	Operational
Competition	XX
Partner	Namrail /Caminho de Ferro de Benguela (CFB) / European Union
Linked to	N/A
Date of next milestone	
Company Name	XX

Background: In May 1997, the Republic of Namibia and the Republic of Angola formally agreed to create the Trans-Cunene corridor as a means of opening up northern Namibia and southern Angola to economic development opportunities. The Trans-Cunene Corridor's road infrastructure is complimented by the northern railway line, which comprises a long-established section, a recently completed section and a soon-to-be-completed section. The railway line doesn't deviate from the road route except to bypass Karibib. The Tran-Cunene railway corridor currently spans a total of 1551 km.
The rail link is complete on the Namibian side of the border, but the Angolan side is yet to be built. It would require an additional 40km of rail to be built in Angola.



Documents available

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☐	Request for Information	☐	Request for Quote	☐	Company profile/presentation	☐	Project Description

Stage of Development

☐	**Concept**	X	**Feasibility**	☐	**Procurement**	X	**Start-up and implementation**
☐	**Pre-feasibility**	☐	**Engineering & Design**	☐	**Construction**	X	**Operation and maintenance**

Project timeline in months: Undetermined, Angolan government yet to commit to project funding.

Top five procurement items based on project phase

1. XX
2. XX
3. XX
4. XX
5. XX

Trans-Kalahari

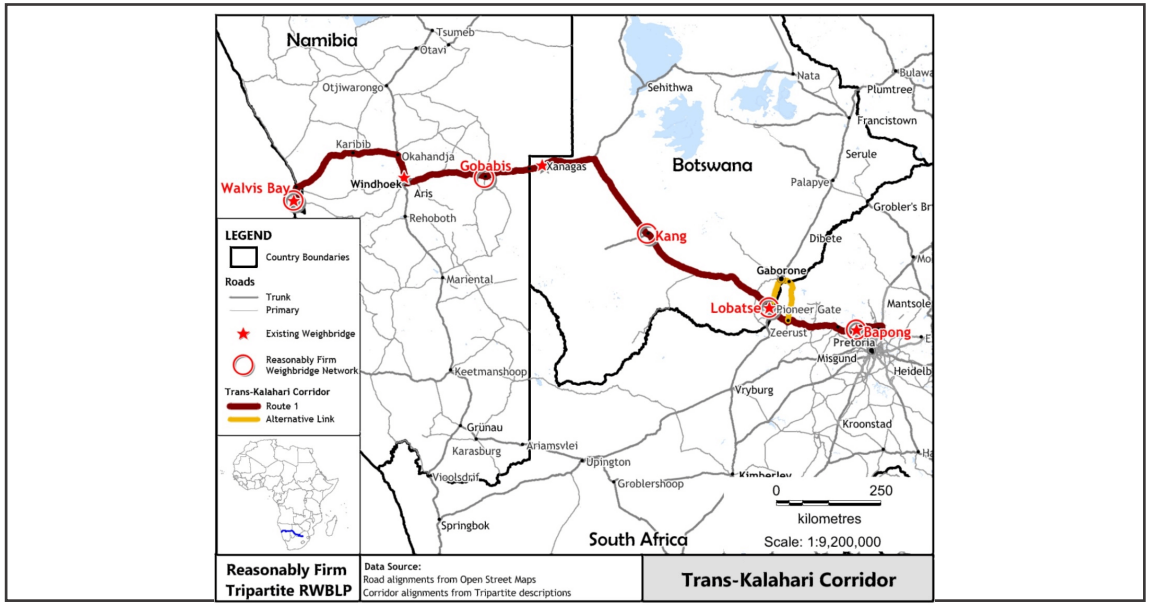
MIDLANDS UK

Basic information	
Project Name	Trans-Kalahari
Project value	US$9,2 billion
Project Owner	TransNamib/Botswana Railways
Country/Region	Namibia, Botswana
Buyer Type	State Utility
Level of engagement	Operational
Competition	XX
Partner	TransNamib/Botswana Railways
Linked to	N/A
Date of next milestone	
Company Name	XX

Background: The Trans-Kalahari railway corridor was first announced in 2010 when the Governments of Namibia and Botswana into a Memorandum of Understanding to facilitate its development. A project development plan study was undertaken in February 2015 by the consortium of Australian firms led by Aurecon, which identified all the risks and challenges associated with the project. The railway is expected to run from Mmamabula, Rasesa, towards Phuduhudu, following the Trans-Kalahari Highway through Mamuno border into Namibia, then Gobabis, Windhoek, Okahandja, to Walvis Bay as the final destination. Once completed railway will havecapcity of 200 train wagons carrying 8 400 tons of cargo.

In November 2022 the Task Team, consisting of representatives from Botswana Railways, TransNamib Holdings, and the two member states, were tasked with finding ways to expedite the Trans Kalahari Railway Line. From January 30 to February 3, 2023, the Botswana Railways Task Team visited Windhoek to develop a blueprint document with their Namibian counterparts that will guide the states in expediting the delivery of the project.

The total cost of the project is estimated at around US$9bn and is heavily reliant on coal exports from Botswana, which may make securing funding for the project difficult.



Documents available

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☐	Request for Information	☐	Request for Quote	☐	Company profile/presentation	☐	Project Description

Stage of Development

☐	**Concept**	X	**Feasibility**	☐	**Procurement**	☐	**Start-up and implementation**
☐	**Pre-feasibility**	☐	**Engineering & Design**	☐	**Construction**	☐	**Operation and maintenance**

Project timeline in months: Undetermined – project has stalled for the time being

Top five procurement items based on project phase

1. None as yet.

To be added and adjusted by researcher

Legend			
B Broad gauge	D Diesel	S State Owned	A Agriculture
M Metre Gauge	E Electric	PP Public Private Partnership	AM Automotive
N Narrow gauge	H Hybrid	P Private	P Container Freight
S Standard gauge	O Other	C Concession	C Mining
		O Other	O Other