

**Theme:**  
**Local procurement and sustainable supply chains**

**Title:**  
**"Challenges and solutions in overcoming local procurement strategies for mining in Africa"**

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## **Abstract**

In recent years, the continent of Africa has seen an abundance of resource development. The government is looking to capitalize on the development of these resources both through payments and for communities and their people. Including the socio-economic prospects, there are business opportunities with the supply chain as an important aspect to derive direct benefits.

Delivering on commitments to socio-economic development demands is tough, and sometimes, requires complex policy choices. Public policy decisions that influence extractive industry activities in specific areas, such as local procurement can help support economic and social development. Developing regulatory solutions to local procurement practices has become a crucial challenge facing resource rich Sub-Saharan African countries. Mining companies operating in Africa have increasingly pursued means to acquire greater quantities of goods and services from local suppliers. Companies seek to cut costs to their operations, while simultaneously assisting communities with their economic and social development. Local procurement provides a means to transform the local economy through creating robust and sustainable businesses. However, mining companies face challenges to procure locally given the low capacity of communities in which they usually operate; i.e. where communities lack labour skills, networks, or communities where goods are simply non-existent. The absence of local business capacity forces companies to develop programs that build business capabilities from the ground up. Additionally, the regulations in most Sub-Saharan African countries lack a definition of 'local content', which in turn makes it increasingly difficult to determine who and what is 'local'. Governments must have a stronger role in helping to ensure that benefits from mining activities are more equitably distributed by determining what types of local content regulations are the most effective.

This paper examines the regulations on local procurement in the Republic of South Africa and Namibia and the strategies put in place by mining companies within these countries to procure local goods and services. It analyses the extent to which local content regulations are effective in making mining companies purchase more goods and services within their host countries, and looks to the challenges of local procurement in context of communities in mining.

**Keywords:** local procurement, mining, regulations, communities

## **Premise**

This report presents the findings from the first of a research project seeking to address and examine the relationship between local procurement regulations and mining company practices in the South African and Namibian mining sector.

The E3 Plus Toolkit produced by the Prospectors and Developers Association of Canada (PDAC) states that “In sourcing and procurement, knowledge of quality control and assurance and of the IFC Framework is more common among suppliers and contractors with a higher level of development and capacity. Suppliers (i.e., local small businesses), in less developed areas and with less access to management and technical knowledge, will rarely meet the above criteria”. (E3 Plus toolkit)

The development of more effective procurement practices offers an unmatched opportunity for mining companies to become partners in the development of prosperous communities both during and well beyond the life of the mine.

Local content is a problematic area in any setting. There are challenges for mining companies to procure locally especially from small enterprises. Even if there is an absence of regulations or requirement by legislation, our research has confirmed that mining companies are still pursuing this voluntarily as part of their corporate responsibility standards, and in some cases going above and beyond the necessary legal requirements.

## **Challenges**

Helping to start businesses through opportunities to procure is promising but keeping them stable and sustainable is a challenge. Additionally, as mining projects have a limited operational time-life, preparing an enterprise for life post-mine closure should also be included. For the purpose of this research project, two countries were chosen; one with mining regulations pertaining to local procurement requirements for the mining sector, and the second country without regulations.

Of a group of eight emerging economies (Brazil, Chile, Colombia, Malaysia, India, Russia, Georgia, and South Africa), South Africa, with the exception of Chile and Colombia, has the highest business failure rate. (TEA rates of six selected emerging economies between 2006 and 2014. Source: Gem global reports 2006, 2008, 2010, 2012 and 2014.) Ravi Govender, Head of Small Enterprises at Standard Bank, says although statistics vary, on average about 50% of all start-up businesses in South Africa fail within 24 months due to the inability and inexperience of their owners. (October 09 2014)

Lack of skills, literacy, and experience create challenges for both sides of the process. Most of these can result in a community failing to take advantage of the positive opportunities that can come with having mining companies within its region. Corruption in procurement is killing small businesses as their bids are overlooked by procurement officials because they cannot afford "to pay the bribe price", says Small Business Development Minister Lindiwe Zulu, 2015

One answer is a Joint Venture relationship with small companies or entrepreneurs, but this can lead to unhealthy donor-recipient relationships resulting in communities depending upon the mining companies never being responsible for their own business or developing their own capacity.

## **Context of South Africa**

South African society is still in a state of conversion almost two decades after the peaceful transition from apartheid to democracy. For a large number of people, the dream of “uplifting the quality of life of all South Africans” proclaimed by the African National Congress (ANC) has so far yet to become a reality (ANC, 2016). A significant amount of the population feels excluded from progress despite the emergence of a new black middle class. Poverty and growing inequality is beginning to pose a threat to social stability of the country. Violence and crime are already impeding the country’s economic and social development.

The Republic of South Africa is perceived to be the economic and political frontrunners for Africa, and therefore, has critical influence over the continent’s political stability. For many years, the South African economy has enjoyed sustained growth post-apartheid. However, the global economic crisis of 2009 resulted in a significant slowdown of growth having lost more than a million jobs, while the trend continues (Industrial Development Corporation, 2013). People most negatively affected are those with little education and no training – almost half the population. These people have extremely limited options to partake in the formal labour market. At the same time, the lack of a well-qualified workforce is the main factor limiting the continued development of the economy as those with primary education have been in significant decline since the start of the millennium (Industrial Development Corporation, 2013).

Recently, South Africa’s mining sector has faced increased economic shocks. While the global mining sector is facing its largest downturn in the last 20 years, South Africa is feeling this change particularly hard due to the importance of mining in its economy. Mining firms in Africa’s most industrialized economy are struggling due to weakening commodities prices for the country’s platinum, gold, iron ore, and coal exports. Falling commodity prices have led to more than 80,000 job losses and more job cuts are likely to occur in 2016. (The Wall Street Journal, 2015). The Mining Industry Association of Southern Africa (MIASA) “notes with concern, the large scale retrenchments in the region as a consequence of depressed commodity prices on international markets” (Ed Stoddard, 2106). The association claims that unless urgent action is taken, a further 50,000 employees face the risk of losing their jobs. (Ed Stoddard, 2106) In an attempt to generate employment, the South African government has placed special attention on the mining sector’s ability to procure the vast amounts of its goods and services needed for operations locally, rather than importing them from abroad. For that reason, the government has created specific legislation to give preferred supplier status in the procurement of capital goods, services, and consumables to Historically Disadvantaged

South Africans (HDSA). (World Bank, 2012) HDSAs are all persons and groups who have been discriminated against on the basis of race, gender and/or disability. Providing a regulatory environment that requires the procurement of local goods and services can greatly increase employment opportunities in the mining sector for countless South Africans.

## **Overview of the local procurement regulations in South Africa**

The Republic of South Africa has had legislation focused specifically on local procurement requirements for the mining sector since 2004 which falls under the Mining Charter Act. Under these regulations, all mining companies have to meet the set minimum procurement requirements if they are tendering for goods, works, and service contracts. Mining companies are required to provide an annual scorecard each year based on the Mining Charter, which lays out requirements for local content, employment, and company ownership to Historically Disadvantaged South Africans (HDSA) (World Bank, 2014). The term HDSA “refers to South African citizens, category of persons or community, disadvantaged by unfair discrimination before the Constitution of the Republic of South Africa, 1993 (Act No. 200 of 1993) came into operation which should be representative of the demographics of the country” (CCSI, 2015). Generally speaking, the mining sector considers “local” to mean those communities (municipal, and or informal settlements) that are directly impacted from mining operations. However, the Mining Charter does not define what it is to be ‘local’, but instead requires a specific percentage of procurement from mining operations to be obtained from HDSA suppliers and companies. As a result, the Mining Charter targets for the procurement of capital goods, services and consumables for HDSA’s are as follows:

- The Mining Charter targets for capital goods started out at 5% of discretionary procurement in 2010, increasing to 40% by 2014;
- The Mining Charter targets for services started out at 30% of discretionary procurement in 2010, increasing to 70% by 2014; and
- The Mining Charter targets for consumables started out at 10% of discretionary procurement in 2010, increasing to 50% by 2014.

Suppliers are required to submit both a ‘declaration of local content’ and proof of verification (certificate/report from an accredited verification authority) (CCSI, 2015). Penalty of non-compliance by mining companies is potential cancellation or suspension of mining licences. However, there is no evidence that this has been enforced. The government publishes little to no information about its mining contracts or its licensing practices. Supplier verification procedures for public procurement are administered by the Local Content Verification Office in line with the South African Technical Specification (SATS) 1286. (World Bank, 2014)

Strengthening of the legislation around the Mining Charter is needed. Mining Charter targets were required to be met by 2014. In 2015, the mining industry was reviewed for compliance, but the

future of the Charter is yet unclear. The Charter seeks to substantially expand opportunities for HDSAs to enter the mining industry. For example it requires certain levels of demographic representation at management levels. Yet, it is also unclear how the Broad-Based Black Economic Empowerment (BBB-EE) Amendment Bill, which went into effect in October 2015, will apply to the mining sector in the future. (CCSI, 2015)

### **Case: Mining company review of their procurement process/strategies and challenges: Royal Bafokeng Platinum, S. Africa**

The Bafokeng people (Bafokeng meaning 'People of the dew', or 'People of the grass') trace their history back to the year 1140 AD. After having their land taken away from them through colonization, today the Bafokeng have regained a portion of their traditional territory by purchasing it back (Royal Bafokeng Nation, 2016). Kgosi August Mokgatle reigned from 1834 to 1891. Pooling community resources, Kgosi August started buying back the land the Bafokeng had occupied for centuries from European colonialists. Thirty-three years after Mokgatle's death, a part of the reef containing the world's largest deposit of Platinum Group Metals (PGM) was discovered under Bafokeng land. Owing to Mokgatle's purchasing of the land, the Bafokeng were eventually able (post-apartheid) to claim royalties from platinum mining industry mines within the nation. (Royal Bafokeng Nation, 2016). The Merensky Reef is located in the North West, Limpopo, Gauteng, and Mpumalanga provinces of South Africa, which together with an underlying layer, the Upper Group 2 Reef (UG2), contains most of the world's known reserves of platinum group metals. The region has a long and well established history of mining that dates back some 100 plus years. Royal Bafokeng Platinum (RBPlat) has a joint venture with Anglo American Platinum (Amplats) and Royal Bafokeng Holdings (RBH) known as the Bafokeng Rasimone Platinum Mine (BRPM) Joint Venture, which has been producing platinum concentrate since December 1999 in the Merensky Reef. (RBPlats Annual Report, 2014).

### **Achieving Supply Chain Management Improvements**

Supply chain management plays an important role in ensuring stable costs for RBPlat, which the company claims to have achieved in 2013 (RBPlat Annual Report, 2014). In 2014, the joint venture mining operation sought to achieve the highest efficiency possible for their procurement processes by exceeding their targets for discretionary procurement from businesses considered to be Historically Disadvantaged South Africans (HDSA). These achievements have been an important part of the commitments enshrined in the Mining Charter of South Africa since 2011. In 2014, RBPlat acquired 63.36% of its capital goods from HDSA suppliers, which amounted to R970 million and exceeded Mining Charter targets by 23.36%; 71.22% of the company's services from HDSA suppliers, which exceeded the Mining Charter target by 1.22%; and acquired 79.68% of their consumables, exceeding the Mining Charter target by 29.68% (RBPlats Annual Report, 2014).

RBPlats achieved significant efficiencies in their supply chain management by analysing existing procurement processes. Doing so helped RBPlat to understand where they could improve procurement processes, as well as cost management. They achieved these efficiencies by means of:

- Successfully renegotiating contract pricing and implementing their total cost of ownership supply chain strategy. RBPlat's strategic sourcing function managed to realize significant cost savings;
- Checking the accuracy of invoicing by volume contractors, which resulted in better control of expenditures;
- Codifying of all the items in stock to eliminate duplication and ensure efficient buying. Establishing this system helped to categorize spending and improve reporting and decision-making;
- Registering new suppliers on their system, signing contracts with them, verifying their information, which included checking that they complied with their policies on labour practices and environmental management. In total RBPlat has taken over 197 supplier contracts from the main contractor; and
- RBPlat's supply chain management hosted an open day for suppliers in 2014. Its purpose was to update suppliers on their procedures and the processes they need to follow in order to access HDSA procurement opportunities. (Bafokeng Platinum Social Capital Report, 2014)

## **Challenges to improving capacity for HDSA**

Procuring from local HDSA businesses can assist with alleviating poverty and can create employment. However, procuring from local suppliers does often come at a higher price. This is mostly due to the fact that small businesses do not always have the purchasing power, skills training, or resources that might make them competitive in the tendering process. To assist local enterprises, RBPlat works with Royal Bafokeng Enterprise Development (RBED), which acts as a liaison between RBPlat and HDSA small businesses. The organisation has appointed a Black Empowerment and Enterprise Development Manager in 2014. The Manager is responsible with assisting small enterprises with their development and help local HDSA businesses manage tender processes, contract negotiations and pricing. (BRPlats Annual Report, 2014) In 2014, RBPlat appointed a black empowerment and enterprise development manager whose role it was to assist enterprises with their development and help HDSA businesses manage their tender processes, contract negotiations, and pricing. (RBPlats Annual Report, 2014) The purpose of the RBED is to:

*“Identify opportunities to assist emerging and established local entrepreneurs with making their business more sustainable by increasing their capabilities and competitiveness.”*  
(Bafokeng Platinum Social Capital Report, 2014)

In short, the Royal Bafokeng National has successfully joint ventured with a major mining industry partner, while simultaneously they have achieved greater procurement requirements than those placed on them by government regulations. RBPlats have streamlined their supply chain, while making it possible for local businesses to improve their own capacity in order to acquire the means to obtain tenders from RBPlat. While the South African mining sector continues to struggle to achieve HDSA, RBPlats is seeking the means to employ as many South Africans as possible and build sustainable businesses.

## **Context of Namibia**

Namibia is a constitutional multiparty democracy and free and fair elections are held regularly (ADB, 2014) since independence in 1990. It was achieved after a century of colonialism and resistance to foreign occupation (FTC, 2016). It also marked the transition from “white controlled” rule to a democratic society (SAHO, 2015).

The political stability and sound economic management have helped anchor economic growth of the country (WB, 2015). The economy of Namibia continues to grow faster than the 4.3% long-term trend. A preliminary estimate of gross domestic product (GDP) growth of 4.5% was reported in 2014. The economy of Namibia depends heavily on the extraction industry and processing of minerals for export. Mining itself accounts for 11.5% of GDP (ASC, 2015). Namibia is the fourth-largest exporter of non-fuel minerals in Africa. Namibia’s mining industry includes the production of diamonds, uranium, copper, magnesium, zinc, silver, gold, lead, semi-precious stones and industrial minerals (KPMG, 2015). However, African Development Bank states in their “NAMIBIA COUNTRY STRATEGY PAPER 2014-2018” that “Although Namibia’s reliance on its minerals, particularly diamonds, has allowed it to achieve significant development. However, this progress has not been shared equally throughout the country. This is due to the capital intensive nature of mining, weak backward and forward linkages with other sectors and lack of beneficiation”.

Socioeconomic challenges such as income inequality, land redistribution, poverty, and high unemployment persist despite the country’s positive growth record (WB, 2015). Namibia has been addressing a number of constraints it faces in promoting inclusive and sustainable economic growth to overcome these problems (WB, 2015). The government of Namibia is looking to motivate a more

equitable and socially just distribution of income: The New Equitable Economic Empowerment Framework (NEEEF). NEEEF consists of policies designed to restructure the private business sector to achieve equity in the economic ownership of productive assets- while creating employment and achieving greater equity in society (NEEEF, 2015).

## **Overview of the local procurement regulations in Namibia**

The Government of Namibia is working on creating the environment and framework needed for the promotion of private industry investment in the mining sector as it recognizes that the exploration and development of the mineral resources and wealth could best be undertaken by the private sector (MPN, 2002). “This will include competitive policy and regulatory frameworks, security of tenure and the provision of national geoscientific data to further stimulate exploration and mining. In the same vein the Government will expect the industry to take on the challenge of social responsibility in terms of planning for closure, community involvement and empowerment of formerly disadvantaged people” (MPN, 2002).

The Ministry of Mines and Energy (MME) of Namibia plays an important role in facilitating, as well as regulating the responsible development of the minerals sector for the benefit of all Namibians. The MME is in charge of keeping the legal framework in line with global best practice (MPN, 2002).

All mining related activities in Namibia are regulated by the Minerals (Prospecting and Mining) Act of 1992. It contains all the guiding principles and the framework to pursue the development of the mining sector, while communicating the values of the Namibian people (KPMG, 2015).

However, a wide range of policy, legal, regulatory and institutional weaknesses place the country at a competitive disadvantage compared to South Africa (ADB, 2014). Weak Public-Private Partnership (ADB, 2014) and an absence of local procurement regulations are two areas of weakness for the Namibian mining sector. Namibia does not have legislation focused specifically on local procurement in the mining sector, but all the legal and regulatory guidelines are described in The MINERALS (PROSPECTING AND MINING) ACT of 1992. PART VIII, Article 50 of the Act contains the general terms and conditions of mineral licences and, as shown below, the guiding principles that will benefit the Namibian people:

“In addition to any term and condition contained in a mineral agreement and any term and condition contained in any mineral licence, it shall be a term and condition of any mineral licence that the holder of such mineral licence shall - (a) exercise any right granted to him or her in terms of the provisions of this Act reasonably and in such manner that the rights and interests of the owner of any land to which such licence relates are not adversely affected, except to the extent to which such owner is compensated...

- in the employment of employees, give preference to Namibian citizens who possess appropriate qualifications, expertise and experience for purposes of the operations to be carried on in terms of such mineral license;
- carry out training programmes in order to encourage and promote the development of Namibian citizens employed by such holder;
- with due regard to the need to ensure technical and economic efficiency, make use of products or equipment manufactured or produced, and services available, within Namibia;
- co-operate with other persons involved in the mining industry in order to enable such citizens to develop skills and technology to render services in the interest of that industry in Namibia;...”

Part VIII of the act contains and embraces all of the principles that drive mining companies to work for the benefit of the local economy and Namibians. However, there is not a specific set of minimum local procurement requirements, under these regulations, that mining companies have to meet.

### **CASE: Mining company review of their procurement process/strategies and challenges: Rio Tinto**

Rio Tinto Group is a British-Australian multinational metals and mining corporation with headquarters in London, United Kingdom. Aluminium, iron ore, copper, uranium, coal, and diamonds are some of the commodities in which the company has placed itself among the world leaders. Rio Tinto has operations on six continents, but is mainly concentrated in Australia and Canada. It owns its mining operations through a complex web of wholly and partly owned subsidiaries (Rio Tinto, 2016). In Namibia, Rio Tinto manages and owns a 68.58% stake of the Rössing mine, which is the world’s longest-running open pit uranium mine. It started operations in 1976 and it has produced the most uranium of any single mine (RUL, 2014).

The company shows in the Rio Tinto, Report to Stakeholders, (2014) that their sustainable development approach is distinctive, significant and the characteristic centre of their overall approach to business. Rio Tinto considers suppliers who match their standards to a sustainable supply chain, with a focus on safety, economic prosperity, social wellbeing, environmental stewardship, and strong governance. Also, it is stated that considerable socioeconomic benefits can be achieved through procuring products and services locally. Hence, Rio Tinto has been working with indigenous and local community suppliers to ensure that they have opportunities to supply the mining operations. The company has also developed the “Rio Tinto Procurement principles... to ensure that all procurement related activities are conducted with transparency and are understood by all key stakeholders” (Page 04 of the Rio Tinto, Report to Stakeholders). Such principles are Rio Tinto’s global statement of

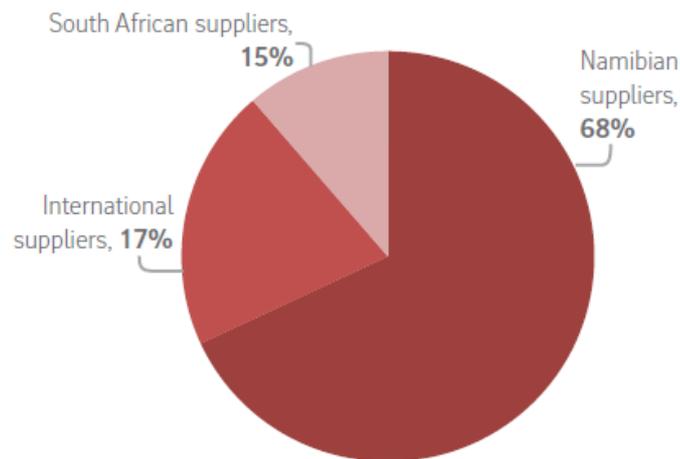
business conduct as it relates to the procurement function and it also covers the full scope of the procurement cycle including (the full document is available at [www.riotinto.com/library](http://www.riotinto.com/library)):

- “obtaining global and local sources of supply and initiating requests for goods and services;
- obtaining quotations covering price and availability from suppliers;
- placing orders for goods or services;
- receiving and accepting the goods and services; and
- authorising payments to suppliers”.

Rio Tinto’s approach complies with the Namibian “NEW EQUITABLE ECONOMIC EMPOWERMENT FRAMEWORK” (NEEEF) so they ensure that socio-economic benefits created through their local operations are distributed to those communities and individuals that were subjected most to exclusion in the historical past. “Procurement and enterprise development” is one of the pillars of empowerment to industry (NEEEF, 2015). In response, Rössing mine Community and Social Investment Steering Committee was established with an advisory and coordinating function, who is to ensure the implementation of its community and social responsibility intent in Namibia (RUL, 2014).

The Rio Tinto Rössing mine is located 12km from the town of Arandis in Namibia's Erongo Region. RT manages and owns a 68.58 per cent stake in the mine. In 1928, uranium was discovered in the Namib Desert. However, intense exploration did not take place until late 1950, when much more interest was shown in the area. Rio Tinto secured the rights to the Rössing deposits in 1966 and ten years later, Rössing Uranium - Namibia's first commercial uranium mine, began operations. Currently, it is the world's longest-running open pit uranium mine and has produced the most uranium of any single mine (Rio Tinto, 2016).

At RT’s operations in Namibia, local spending has been significant, which has led to a long chain of value creation throughout the economy. In 2014, the company spent N\$1.6 billion on goods and services (N\$1.9 billion in 2013), of which N\$1 billion was procured from registered Namibian suppliers. It represents 68 per cent of their total spend, mostly in the Erongo Region (RUL, 2014). The Rössing activities in Namibia have led to a long chain of value addition throughout the economy. In addition, either directly or through the Rössing Foundation, the company invested more than N\$21 million in neighbouring communities. The biggest contributions were made towards programmes which target, among others local economic diversification and strengthening through the support of small- and medium-scale enterprise development (RUL, 2014). The graph below represents the distribution of Rössing Uranium’s procurement spend for 2014 (RUL, 2014).



### **Challenges to improving capacity for previously disadvantaged suppliers**

Indogo et al, (2014) states that even though small and medium enterprises (SMEs) are significant contributors to the Namibian economy, they are underrepresented in the supply of goods and services both in the public and private sectors. Also, these SMEs face innumerable challenges that range from lack of finance, lack of skills, training and experience in running the business, financial knowledge, among many others. The Rössing Foundation has provided 15 SMEs with business development support in the form of advice on bookkeeping, taxation, and compliance. Other SMEs have received help from the Foundation to develop their business plans (RUL, 2014). However, new research scope and relevance on SME procurement in Namibia shows that larger corporations are still a long way from trusting smaller local companies with significant work-loads (Indogo et al, 2014).

### **Conclusion and recommendations**

Capacity Building and Technology Transfer is an ideal setting for establishing trusting relationships with local entrepreneurs, yet our suggestion is that there should be a way to build the managerial capacity of local entrepreneurs well beyond the mine suppliers and sub-contractors.

Local SME Participation Plan is a value-adding activity requiring collaborative efforts involving multiple functions within corporations, between corporations operating in the same area, Tier 1 contractors, community stakeholders, SME ‘brokers’, business support services and institutions. This activity goes above and beyond requiring a procurement professional to simply choose from the existing supplier base, and may involve the facilitation of new ventures/start-ups, joint ventures or supplier clusters. (Local SME Participation).

Programs that improve the suppliers’ capability to meet company needs are required. It has been found that even if not required by law, some mining companies are providing and implementing such programs. Putting in place a set program that can give them the experience and expertise would allow

them to provide better products or services to mining companies. It can also assist enterprises pursuing business with other companies, helping them to diversify.

By assisting the entrepreneurs to become strong and sustainable in the procurement practices, it would make it possible for Procurement Managers to achieve not only their own supply objectives but potentially transforming the relationship with the entire community.

Programs such as Entrepreneurial Development, a SEF program for community capacity building, ED recognizes that individuals have business ideas but may lack the knowledge to make their ideas ‘take off’. However, knowledge can be found and ED Facilitators become a valuable asset in the pursuit. Some 300 communities have been introduced to this methodology. Based on experience, the Facilitator should assist approximately 200 entrepreneurs per community per year creating an average of 10 to 15 new businesses resulting in 40 to 60 new jobs. The skills acquired by the Facilitator and volunteers last in perpetuity. The survival rate among newly created businesses supported by the program should sustainability rates above 80% after 5 years.

Getting it right has the potential to transform the local community into a long term partner in local development and as a supporter of mining activities not only for the direct job creation that it offers but also for the economic activity generated in the ‘non mining sector’.

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