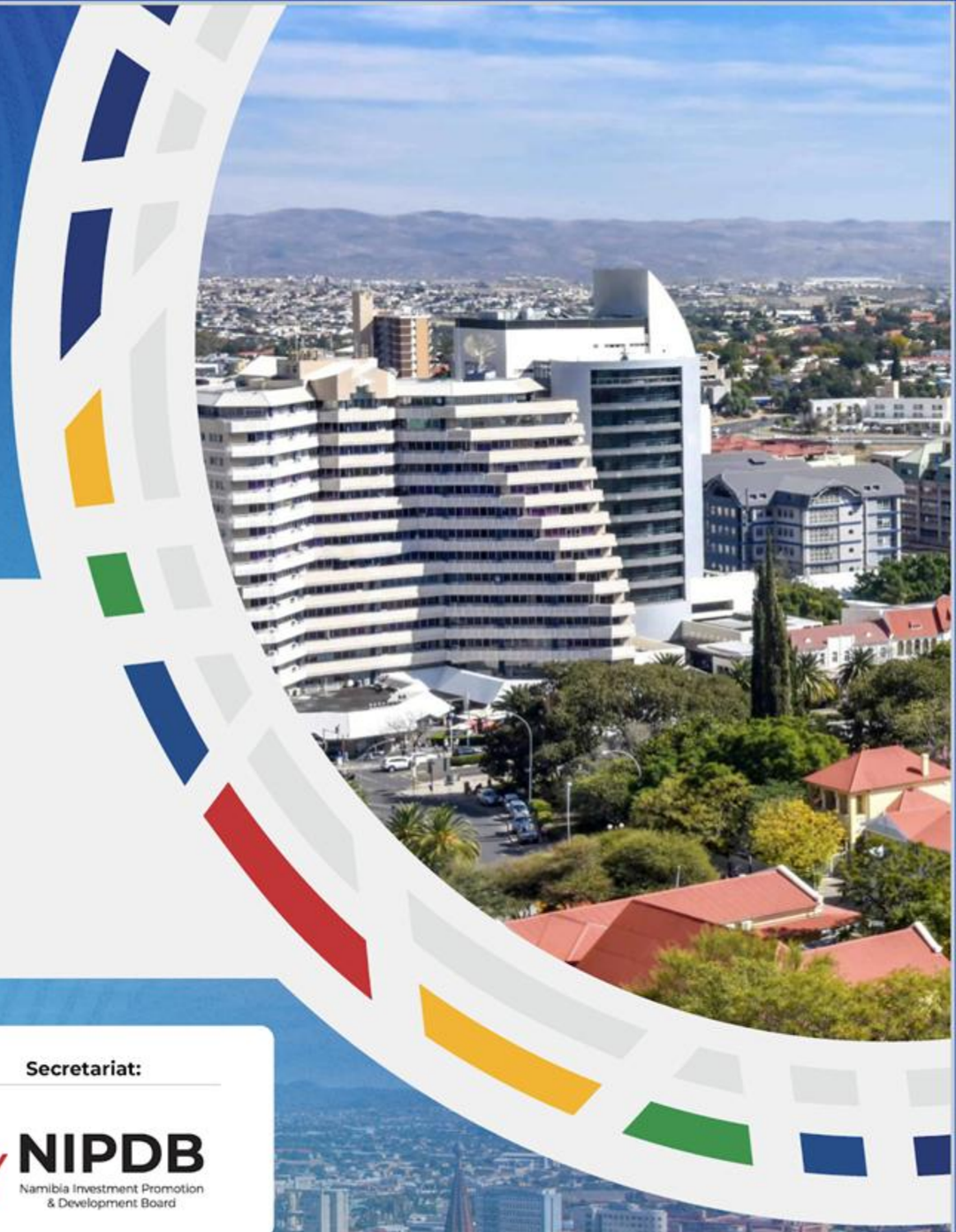
NamPPF
Namibia Public-Private Forum



MINING AND ADJACENT SECTORs

NAMIBIA PUBLIC-PRIVATE FORUM | 23 – 24 October 2025

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Hosted by:

Republic of Namibia
National Planning Commission

Secretariat:

NIPDB
Namibia Investment Promotion & Development Board

WORKING GROUP [# 5] SCOPE AND FOCUS

SCOPE:

- Structured platform for evidence-based dialogue, policy coordination, and partnership-driven reform to unlock Namibia's mineral potential in support of sustainable job creation, local value addition, and global competitiveness.
- Its scope encompasses the entire mineral value chain, from **exploration** and **extraction** through **beneficiation** and **export**, along with the critical enabling ecosystem of **services, institutions, and communities** that support mining operations across Namibia.

Focus Areas: Unlocking growth opportunities and job creation within a 4-year time frame

1

Upstream Exploration & Extraction

Large-scale and artisanal mining operations discovering and extracting Namibia's vast mineral wealth

2

Midstream Processing & Services

Supporting industries, equipment suppliers, logistics providers, and technical services enabling operations

3

Downstream Mineral Beneficiation

Value addition through local processing, manufacturing, and transformation of raw minerals

4

Export & Market Access

Competitive positioning in global markets while maximizing domestic economic impact and job creation

ALIGNMENT WITH NATIONAL DEVELOPMENT STRATEGIES

Mining serves as a **cornerstone of Namibia's economic transformation agenda**, driving inclusive growth, competitiveness, and citizen empowerment **through strong linkages** with manufacturing, energy, and services sectors.



SWAPO Manifesto Implementation Plan

- Identifies mining as # **1 Critical Economic Enabler** -local content, beneficiation, and value addition;
- Targets: Increase mineral beneficiation from **<10% → 25%** by 2030, supported under the N$85.7 billion SMIP allocation;



NDP6 (2025–2030) Economic Targets

- Increase the processed mineral exports **46.6% (2024) → 57% (2030)**;
- Increasing local equity participation from 51% to 60%;
- Attract **N$30 billion** in new mining investments (2025–2030);



Namibia Vision 2030, SADC Vision 2050

African Mining Vision

- Emphasise responsible, green, and inclusive mining, aligned with sustainable industrialisation and energy transition.



NamPPF Job Creation Theme

Theme on Job Creation & Competitiveness, positioning mining as a driver of inclusive growth, job creation, and industrial linkages

LARGE SCALE MINING

LARGE SCALE MINING – ECONOMIC CONTRIBUTION (2024)

13.3%
GDP Contribution

Mining sector's share of Namibia's national economy in **2024**

N$7.3B
Fiscal Revenue

Generated from corporate taxes, royalties, Levy and PAYE

20,800
Direct Employment

Workers in large-scale mining operations



N$48B
Foreign Exchange Earnings

In **2024**, large-scale mining accounted for over half of Namibia's foreign exchange earnings, demonstrating its critical role in economic stability,

145,900
Indirect Jobs

Employment multiplier of 7 effect across the economy



LARGE SCALE MINING – AMBITIOUS GROWTH PIPELINE

Over the next four years, Namibia's mining sector is positioned for significant expansion through new projects and strategic expansions representing over **US$2,865 billion in combined capital expenditure**, **with direct job creation potential exceeding 18,148 positions.**

Gold Sector Growth

Osino Resources Twin Hill Mine: New gold mine entering production phase

Navachab underground expansion project

B2Gold underground expansion project

Uranium Sector Expansion

Bannerman's Etango Project: Major uranium development with substantial employment potential

Reptile Mineral Resources: Expanding uranium operations with enhanced processing capacity

Rössing Uranium Expansion: Expanding mining operations to increase the life of mine (Z20) project

Husab Leach Project

Husab mine expansion

Infrastructure and Processing

Sinomine Tsumeb Smelter: Converting facility for refining multi & recycled metals

Husab - NamWater Desalination Plant

Critical water infrastructure enabling mining growth & Husab mine expansion

Integrated Marine Phosphate Sector

Approval of marine phosphate mining has the potential to create 50,000 (5,000 direct and approx. 45,000 indirect jobs) through the establishment of a fully integrated phosphate sector

Zinc Sector Development

Skorpion Zinc (Refinery Conversion): Converting existing operations to enhance zinc processing and beneficiation capacity

Timely regulatory approvals, streamlined visa processes for specialized skills, and strengthened local workforce capacity through enhanced vocational training and NamPower to expedite electricity supply solution and include **Vedanta in negotiations with Eskom remain key enablers** for realizing these investments and maximizing their employment and economic multiplier effects.

LARGE SCALE MINING – KEY CONSTRAINTS & RECOMMENDATIONS

Policy Uncertainty & Permit Approvals

51% local ownership/ free carry (no policy to support statement), finalisation of outstanding legislation, delays in approvals, permits and licences

Recommendations: Resolve Pending/outstanding policy and legislative matters & streamline licencing processes

Infrastructure Deficits

Water scarcity, power constraints & affordable electricity, and poor rail connectivity limit expansion potential.

Recommendations: Upgrade desalination capacity, address aging water infrastructure and delays to conclude water supply agreements, funding for railway infrastructure

Skills Gaps and Institutional Capacity Constraints

Challenges with standard of training at VTC's
Capacity constraints within key Ministries (MIME, MEFT, AG , difficulty by mines to bring in required skills for new and expansion projects due to red tape in applying for work permits and visas

Recommendations: Strengthen VTCs, resolve capacity issues at MIME and MEFT, streamline work permit and visa process

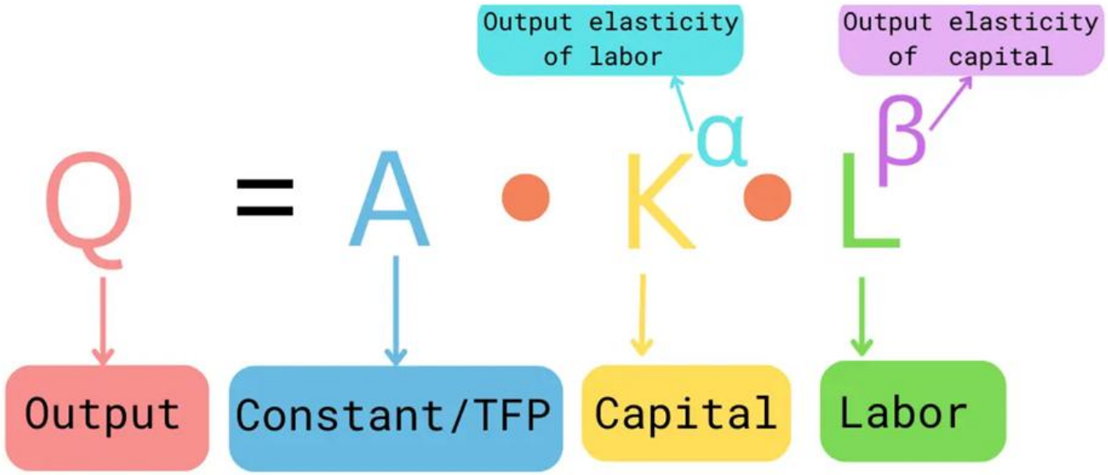
Limited Manufacturing to advance mineral Beneficiation and value addition

Exports are dominated by unprocessed ores (less than 10% value addition), while the export of dimension stone remains limited and adds minimal value

Recommendations:. Make serviced/unserviced land available, accelerate the Mineral Beneficiation Strategy through SEZ incentives and regulation, address infrastructure deficits.

ARTISANAL AND SMALL-SCALE MINING (ASM) / MICRO, SMALL, AND MEDIUM ENTERPRISES (MSME)/ WOMEN & YOUTH

COBB-DOUGLAS PRODUCTION FUNCTION



Total factor productivity (TFP):
a constant that measures overall efficiency or technology

ASM - ECONOMIC ROLE AND FORMALIZATION CHALLENGES

Supports

~10,000 **Miners**	~ 25,000 **Dependents**

- Particularly in rural regions such as Kunene, Erongo, and //Karas

- The sector features a diverse commodity base, transitioning from traditional **semi-precious stones** and **gemstones** (aquamarine, topaz, amethyst) toward higher-value and **critical minerals such as copper**.

- These operations provide **critical livelihoods and significant social-economic impact** but face significant formalization challenges:
  - **Remains largely informal and fragmented**
  - **Complex to regulate and manage**
  - **Limited access to finance and equipment**
  - **Practices are hampered by outdated technology and safety procedures.**
  - **There is limited market access and value-chain integration.**

ASM mining sustains over 35,000 livelihoods across rural Namibia; however, without **formalisation, finance, and market access**, its full economic and industrial potential remains untapped.


Neuschwaben, Erongo


Okatumba, Erongo


Spitzkoppe, Erongo

ARTISANAL & SMALL – SCALE MINING : OPPORTUNITIES

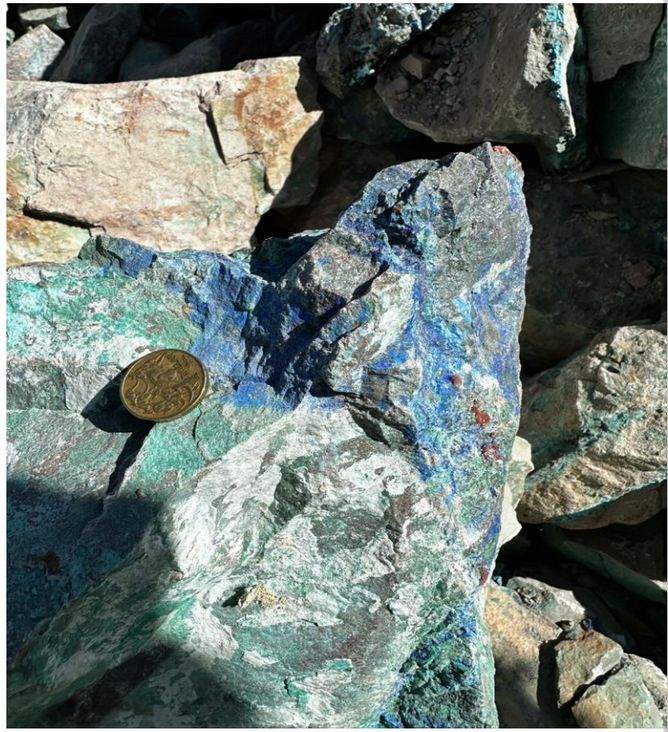
Mineral Beneficiation & Value Addition

- **Kunene Frontier Corridor** - Represents Namibia's next strategic mineral and energy frontier, with vast untapped resources that can expand the nation's mining footprint.

- **Semi-precious and dimension-stone value chains** offer targeted opportunities for local growth and enhanced value additions.

- Establishment of **regional Cutting, Polishing, and Processing Centres** to support beneficiation and industrial linkages.





ASM– KEY CONSTRAINTS & RECOMMENDATIONS

Regulatory Complexity

The current regulatory system fails to accommodate Artisanal and Small-Scale Miners (ASM), trapping them in the informal sector due to complexity and high costs.

- ❑ Licensing is centralized and costly, with complex registration/renewal for mining claims and ECCs, which effectively locks out informal miners.
- ❑ Administrative demands impose high costs and time investments that operators with limited literacy or technical skills are ill-equipped to handle.
- ❑ High administrative demands and limited support for documentation and land access prevent ASM operators from formalizing their activities.



Limited Access to Land and ESG challenges

Limited access to land and data remains a major constraint for ASM operators.

- ❑ **Land:** Legal access is difficult, especially on communal/private land dominated by EPL holders.



Limited Geological Survey & Institutional Support for ASM

- ❑ The limited capacity of the national geological survey and laboratory constrains the availability of geological information and testing services for minerals and support ASM sector.

MSME INTEGRATION & LOCAL VALUE CHAIN DEVELOPMENT

MSMEs are an essential and growing part of the mining industry value chain, driving local economic growth and regional development.

- ❑ They are vital for advancing inclusive regional development alongside LSM, primarily by driving local economic activity and creating jobs, especially for youth and women.
- ❑ The number of mining-linked MSMEs has grown over the past five years, tied to new mine developments (e.g., lithium exploration), **expansion of mining supplier databases,** and greater efforts to localize procurement and value chains.
- ❑ **Scale:** Available (though conservative) data shows thousands of MSMEs are active in or adjacent to the mining sector's value chains, with high concentrations in specific mining towns and significant involvement in transportation, services, and value addition.
- ❑ Mining-related MSMEs supplied over N$24 billion in goods and services to the sector in 2024 — from logistics and catering to maintenance and construction.

Challenges faced by Mining-Related MSMEs

Access to finance

Since it's a capital-intensive industry, access to finance remains the most critical barrier for enterprises.

Skills and technology gaps, preventing their participation in higher-value contracts.

Shortages of technical and managerial talent.
.Low access to modern process technologies.

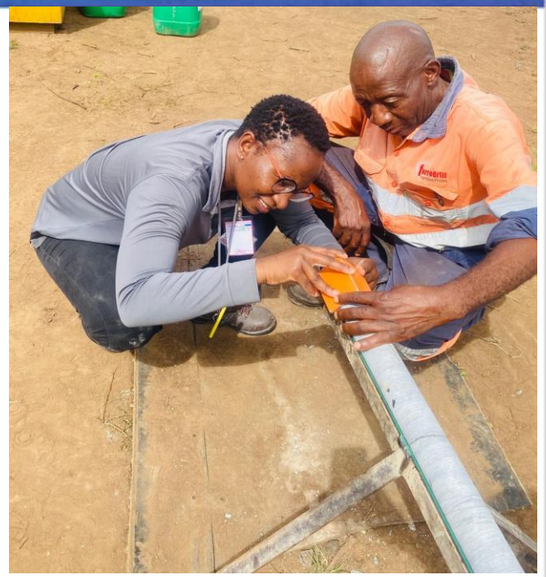
Infrastructure and connectivity constraints

Unreliable rural power, underdeveloped rail networks, and high logistics costs creating operational bottlenecks.

WOMEN AND YOUTH: NAMIBIA'S UNTAPPED MINING POWER

CURRENT REPRESENTATION:

- Women make up just **18%** of Namibia's mining workforce, and only **10%** have held executive roles since 2009, with **even lower representation in technical positions and leadership.**
- **Youth participation is minimal**, with few structured pathways from education to employment.
- Despite progress, **systemic barriers persist** — from unconscious bias and lack of



WHY THIS MATTERS

- **Innovation and sustainability thrive** in inclusive environments — critical as Namibia expands uranium and gold operations and reopens strategic mines.
- **Youth bring digital fluency, adaptability, and new perspectives** — vital for modernising mineral value chains and advancing local beneficiation.
- Mining's GDP contribution rose to **13.3% in 2024**, signalling growth — but without inclusion, this boom risks **entrenching inequality**.
- **Empowering women and youth isn't charity — it's strategy.** It's how Namibia can unlock innovation, expand its talent pool, and **lead Africa in sustainable mining transformation.**



ASM / MSME / WOMEN & YOUTH: OPPORTUNITIES & RECOMMENDATIONS

Formalise & Upgrade ASM and MSME

- ❑ Establish a fast-track, low-cost licensing window for ASM with clear environmental safety standards, model contracts, predictable timelines
- ❑ Develop and implement an *ASM Land Access Framework* to ensure secure, transparent access and better coordination with landowners and EPL holders to prevent conflicts.
- ❑ Provide geoscience access: user-friendly geological maps, digitized catastral info and a help-desk to guide ASM to viable deposits
- ❑ Set up shared processing hubs for ASM, reducing costs, improving recovery rates and product quality
- ❑ Create mining extension services: mobile teams that deliver training in safe practices, ore grading, processing and rehabilitation, and broker off-take agreements.

Finance & De-risk participation

- ❑ Launch an equipment-leasing and working capital facility for **ASM and MSMEs, backed by partial guarantees**. Pair every loan with mandatory safety & business training.
- ❑ Offer performance-based grants or tax rebates to encourage formalisation, environmental compliance, and the adoption of cleaner technologies.
- ❑ Introduce tax incentives for mining-related equipment imports to strengthen local content development and boost value addition by reducing the cost of processing and manufacturing metal products locally.
- ❑ Pilot digital traceability for gemstones and industrial minerals to improve market access and prices while strengthening compliance

❑ ASM & Mining-Related MSME are the connective tissue between national projects and local prosperity.
❑ They create jobs where people live, develop suppliers for LSM and seed new businesses across the value chain.

ASM / MSME / WOMEN & YOUTH: OPPORTUNITIES & RECOMMENDATIONS

Put women & youth at the center of capacity building

- ❏ Implement targeted training partnerships and collaboration with universities and vocational training centres (VTCs) to build technical and entrepreneurial capacity.
- ❏ Set target (not quotas) for women and youth in technical training, apprenticeships and supplier development programs linked to LSM.
- ❏ Support women and youth-led MSMEs

Linkage with LSM

- ❏ **Local content with teeth:** reserve a share of service contracts for compliant local MSMEs; provide pre-bid training and supplier development so local MSME's can meet standards.
- ❏ **Offtake and mentorship**: encourage LSM to enter into offtake agreements with qualified ASM operators for specific materials, and to mentor them on safety and quality.

❏ Formalizing ASM and Financing MSME's expand labour and entrepreneurship.
❏ Empowering women and youth and improving skills, safety and technology boosts productivity

CALL TO ACTION: MULTI-STAKEHOLDER COMMITMENT

1) Approve the establishment of an **inclusive Multi-Stakeholder Task Force** under NDP6, bringing together all mining value chain stakeholders and lawmakers to drive coordinated sector development. The Task Force will coordinate training, local content, and enterprise development programs, and **strengthen institutional capacity and monitoring**.

2) Task the AG, NPC, MIME, MEFT, MAWLR, and relevant SOEs to restore policy certainty and resolve **licensing and approval delays** within six months. **Finalise the Minerals Bill, NIPFB, SEZ Regulations, and NEEEF/B,** and develop and adopt a National ASM and DMS Policy with simplified, gender-responsive licensing and traceability standards to **Formalise the ASM** by mid-2026. A progress report every two months should be submitted to Cabinet via the Office of the Prime Minister or NPC.

3) Assign the MIME, NPC, BoN, MoF, ECB, NamPower, NamWater, NamPort and NIPDB to present a joint investment and financing plan for corridor infrastructure and PPPs within six months, aligned with NDP6.

4) Allocate **dedicated funding** in 2026 budget to support the **formalisation** of Artisanal and Small-Scale Mining (ASM) and to **strengthen the Geological Survey of Namibia and its laboratories** for enhanced geological data, research, and analytical capacity — underpinning resource mapping, exploration readiness, **investment promotion and evidence-based local beneficiation**.





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THANK YOU

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