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Request for Quotation

RED IRON ORE DUST STUDY: FIRST-PHASE RAPID ASSESSMENT

Economic Case and Technical Mitigation Options

Request for quotation closing date: [21 October 2026]

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The Saldanha Bay IDZ Licencing Company SOC Ltd (Trading as Freeport Saldanha) is a joint initiative of the Department of Trade, Industry & Competition (dtic), the Western Cape Government's Department of Economic Development & Tourism (DEDAT) and the Saldanha Bay Municipality (SBM).

Anchored for Growth.

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1. BACKGROUND TO THE SCOPE OF WORK

The Saldanha Bay IDZ Licencing Company SOC Ltd t/a Freeport Saldanha was formally awarded an Operator's Licence on 31 October 2013 and is responsible for operating and managing the Saldanha Bay Industrial Development Zone, a designated Special Economic Zone (SEZ), in terms of the Special Economic Zones Act, 2014 (Act 16 of 2014) (SEZ Act). Freeport Saldanha is South Africa's first SEZ to be located within a port and aims to become the premier industrial location on South Africa's West Coast for manufacturing, services and export-led investment that drives economic growth and creates sustainable jobs.

Freeport Saldanha therefore has a strategic interest in ensuring that conditions within and around the SEZ support sustainable industrial development, investment attraction, business operations and the long-term competitiveness of the Saldanha Bay industrial ecosystem. The red iron ore dust issue must be considered not only from an environmental and operational perspective, but also in relation to Freeport Saldanha's broader mandate to facilitate investment, promote industrial development and contribute to economic growth within the region.

The presence and deposition of red iron ore dust has emerged as a concern with implications extending beyond environmental management and general housekeeping. Visible dust deposition, potential contamination of operational areas and products, and associated perceptions of environmental and operational risk may have implications for business operations, investment decisions, investor confidence and the attractiveness of Saldanha Bay as a location for certain priority economic activities.

While existing compliance and monitoring mechanisms may address applicable health, safety and environmental requirements, these parameters do not necessarily capture the full range of potential economic consequences associated with visible dust deposition, contamination risk, product-quality considerations, operational disruption, investor perceptions and reputational exposure. Of relevance is the potential impact on industries and investment opportunities that are sensitive to contamination, including activities involving containerised and perishable products. The extent and significance of this risk require evidence-based assessment rather than assumption.

2. Problem statement

Red dust generated by port and related industrial activities may be constraining the economic development and strategic growth potential of Freeport Saldanha. The study therefore needs to establish whether the current dust profile is limiting investment, diversification and the development of higher-value economic activities within the port and zone, and whether practical and economically feasible interventions can reduce these constraints while maintaining the port's core iron ore export function.

a. Why the issue matters

- Fruit and other perishable exports may face market, product quality and reputational risks if visible red dust contamination is associated with export cargo or containers.
- Existing and potential investors in ship repair, rig repair, wind turbine components, sensitive manufacturing and other industrial activities have differing perceptions of the problem, but some appear to regard it as a material constraint.
- Visible dust can affect air-conditioning filters, equipment, painted steel surfaces, stored materials and the general perception of operational cleanliness.
- The current licensing and compliance position may be sufficient from a health and safety perspective, but still insufficient from an economic development, investor confidence and product handling perspective.
- A clearer evidence base is needed before Freeport Saldanha approaches Transnet Group, TPT, TNPA, the licensing authority or potential investors with proposals for change.

3. Interface with container terminal development

The issue has an important interface with the longer-term consideration of container terminal development at Saldanha. However, this study must remain distinct from a container terminal feasibility assessment, which would require consideration of a substantially wider range of factors, including market demand, cargo volumes,

logistics costs, marine infrastructure, terminal equipment, rail and road connectivity, environmental authorisations, capital requirements, operating costs and private-sector participation. These matters fall outside the scope of this study, although the study may identify areas where red dust presents a potential constraint or risk to future containerised cargo operations.

4. Legislative and policy context

Freeport Saldanha is governed by the SEZ Act, which provides the legislative framework for the designation, promotion, development, operation and management of SEZs in South Africa. The entity is aligned to the following policy and strategic frameworks:

a. **National:** National Development Plan (NDP) 2030; Medium-Term Development Plan (MTDP) 2024–2029; Spatial Industrial Development Strategy (SIDS); National Spatial Development Framework (NSDF); National Infrastructure Plan (NIP) 2050 (Phases 1 and 2); and Comprehensive Maritime Transport Policy (CMTP).

b. **Western Cape:** Provincial Strategic Plan (PSP) 2025–2030; Growth for Jobs (G4J) Strategy; Provincial Spatial Development Framework (PSDF); Western Cape Infrastructure 2050 suite; Joint District and Metro Approach (JDMA); Western Cape Climate Change Response Strategy (WCCCRS): Vision 2050; and Department of Economic Development and Tourism 5-Year Strategy 2025–2030.

c. **Saldanha Bay Municipality:** Fifth-Generation Integrated Development Plan (IDP) 2022–2027 (third review and amendment); and Local Economic Development (LED) Strategy 2022–2027.

The study must also take account of the regulatory framework governing dust emissions and port operations, including:

a. National Environmental Management Act, 1998 (Act 107 of 1998) (NEMA).

b. National Environmental Management: Air Quality Act, 2004 (Act 39 of 2004) (NEM:AQA), including the atmospheric emission licensing regime for listed activities.

c. National Dust Control Regulations, 2013 (GN R827 of 1 November 2013), which set dustfall standards for residential areas (600 mg/m²/day) and non-residential areas (1 200 mg/m²/day).

d. National Ambient Air Quality Standards for particulate matter (PM10 and PM2.5).

e. National Ports Act, 2005 (Act 12 of 2005), which sets out the role of TNPA as port authority and landlord; and

f. Occupational Health and Safety Act, 1993 (Act 85 of 1993), to the extent relevant to workplace dust exposure.

5. PURPOSE

Freeport Saldanha invites quotations from suitably qualified and experienced service providers to undertake a rapid, evidence-based and decision-oriented Red Iron Ore Dust Study.

The purpose of the study is to establish whether red iron ore dust materially constrains the economic, investment, operational and strategic potential of Freeport Saldanha and the Port of Saldanha, and to identify practical mitigation options that could unlock higher-value activities while preserving the port's core iron ore export function.

Our goal is to obtain a credible evidence base that enables Freeport Saldanha to engage constructively with Transnet Group, Transnet Port Terminals (TPT), Transnet National Ports Authority (TNPA), the relevant atmospheric emission licensing authority, the Saldanha Bay Municipality, the West Coast District Municipality, the Western Cape Government, iron ore producers and exporters, investors and other affected or interested stakeholders.

If the evidence shows the case is weaker than expected, the study will still provide value by clarifying the limits of the issue and preventing claims that cannot be supported.

This is a first-phase study. It is not intended to resolve every engineering, environmental, regulatory or commercial question associated with red dust. It should adopt an 80:20 approach that is rigorous enough to provide a credible evidence base while remaining proportionate to the eight-week timeframe. The findings should enable Freeport Saldanha to determine:

a. the materiality of the red dust-related economic and strategic constraint.

b. the sectors, activities, and investment opportunities most affected.

c. the sources and pathways requiring intervention.

d. the mitigation options that warrant further consideration.

e. the indicative scale of investment required; and

f. whether more detailed technical, environmental, regulatory, or commercial investigations should proceed as a subsequent phase.

6. SCOPE OF WORK AND DELIVERABLES

The appointed service provider will be expected to work with Freeport Saldanha's project manager, project sponsor, technical steering group and Supply Chain Manager. All engagements with Transnet Group, TPT, TNPA, licensing authorities and other public bodies must be coordinated with, and agreed in advance by, the Freeport Saldanha project manager.

The study will be undertaken through two integrated workstreams. The purpose is not simply to identify the presence of dust, but to determine whether feasible interventions could materially reduce the economic and strategic constraints associated with the current dust profile.

a. Specifications:

- Workstream 1: Economic and Strategic Assessment
    - Define the economic and strategic problem created by red dust, including its implications for Freeport Saldanha, the Port of Saldanha and the wider regional development agenda.
    - Assess the potential economic and opportunity costs of red dust, including implications for investment attraction, investor confidence, existing businesses, future development opportunities and priority economic sectors.
    - Assess sector and commodity sensitivity to red dust, including perishable exports, containerised cargo, sensitive manufacturing, ship and rig repair, renewable energy components and other activities where cleanliness standards may be material.
    - Assess the operational and product-quality implications of red dust, including contamination risk, equipment and infrastructure impacts and air-filtration requirements.
    - Distinguish between established evidence, stakeholder perceptions and risks requiring further investigation.
    - Assess and establish the extent, severity and spatial distribution of the red dust problem.
- Workstream 2: Technical Mitigation Assessment
    - Identify the likely sources, generation points and pathways of red dust at a high level, with emphasis on port operations and transfer points. Upstream stages (mine and rail) are considered only insofar as ore characteristics and in-transit losses affect dust at Saldanha.
    - Assess the contribution of location, prevailing wind conditions and exposure

characteristics to the distribution and impact of red dust, including whether certain activities or locations may have lower exposure.

- Benchmark international and relevant local approaches to dust management in comparable port, mining, bulk-handling and industrial environments, and identify lessons applicable to Saldanha Bay.
- Identify and screen practical mitigation options across the dust-generation and transfer chain that could materially reduce exposure or contamination without undermining the core iron ore export function.
- Assess the indicative cost, feasibility and likely effectiveness of mitigation options, including implementation requirements, dependencies, constraints, sequencing and responsible parties.

- Integration, stakeholder engagement and recommendations
  - Identify the institutional and stakeholder interfaces relevant to implementing interventions.
  - Develop an evidence base and engagement pack to support Freeport Saldanha's engagement with stakeholders.
  - Identify critical information and evidence gaps and recommend appropriate follow-on investigations.
  - Provide clear, practical recommendations and an implementation pathway covering immediate actions, medium-term interventions and potential future workstreams.
  - Establish whether the evidence supports progression to a more detailed second phase and identify the investigations that would be required.
  - Prepare and facilitate a stakeholder validation workshop to test findings, fill evidence gaps and build support for the case for action.

Key questions, methodology components and minimum content requirements for each deliverable are set out in Annexure A.

7. Scope boundary

The study should be tightly scoped to avoid becoming a broad port planning exercise. Adjacent issues, including container terminal development, manganese handling, Boegoebaai port development considerations and alternative sites such as the Small Craft Harbour, are relevant but should not dilute the first phase.

In scope for the red dust study	Out of scope for the first phase, but to be noted
Economic and opportunity cost of red dust for Freeport Saldanha, the port and priority sectors.	Full container terminal feasibility study, including detailed demand, tariff, marine, landside, equipment and financial modelling.
Sector and commodity sensitivity to dust, including market perception and product contamination risk.	Detailed environmental impact assessment or strategic environmental assessment.
Technical diagnosis of red dust sources and broad mitigation options from mine to ship, with emphasis on port operations and transfer points.	Detailed engineering design of dust suppression, extraction, enclosure or recovery systems.
International benchmark review and lessons from comparable ports and operators.	Formal procurement process for a private-sector container terminal operator.
High-level location and wind exposure considerations, including whether some activities may be less exposed in alternative sites.	Full manganese health hazard assessment, although manganese should be flagged as a related future workstream.
Stakeholder engagement strategy and evidence pack for Transnet Group, TPT, TNPA, the licensing authority, municipalities, investors and sector bodies.	Formal regulatory challenge or licence review, unless later approved as a follow-on action.

8. DELIVERABLES

The successful bidder will be expected to deliver the following within eight (8) weeks of the inception meeting:

- **D1 – Inception report (end of Week 1):** refined methodology and work plan, comparator ports, stakeholder interview list, data request list, scoring approach and key risks and assumptions.
- **D2 – Interim progress briefing (end of Week 4):** baseline evidence pack, data gap register and emerging findings, presented to the steering group.
- **D3 – Draft report (end of Week 6):** answering the key questions and covering the required content set out in Annexure A.
- **D4 – Stakeholder validation workshop (Week 7):** preparation, facilitation, presentation and a written workshop record.
- **D5 – Final report and engagement pack (end of Week 8):** incorporating steering group and workshop comments, with an executive summary of no more than five pages and a close-out presentation.
- Completion of all key project phases, including:
    - Inception
    - Baseline evidence review
    - Economic and sector sensitivity analysis
    - Technical pathway review and benchmarking
    - Options and implementation pathway
    - Stakeholder validation
    - Final reporting and handover
- Defined review and formal sign-off at key milestones. The steering group will review D1, D3 and D5, and Freeport Saldanha will return consolidated comments within five working days of receipt.
- Short written progress updates (maximum two pages) every two weeks, covering progress, emerging findings, data received and outstanding, and any risks or issues requiring Freeport Saldanha's intervention.
- Reports in editable Microsoft Word and PDF format, with supporting data and models (for example, the multi-criteria scoring and cost estimates) in editable Microsoft Excel format.
- Full handover of all deliverables, data, models and working materials, which become the property of Freeport Saldanha upon completion and final payment.

9. MANDATORY REQUIREMENTS

Bidders must meet the following minimum requirements:

- Demonstrated experience in economic, investment or sector-opportunity assessments, preferably in port, logistics or SEZ environments.
- Demonstrated technical expertise in dust and air quality management for bulk materials handling, preferably at iron ore or other mineral export terminals.
- A company profile, including details of at least three comparable assignments completed within the past five years, with client references.
- Familiarity with South African port governance and the air quality regulatory framework.
- A proposed core team comprising, at a minimum, a project lead and integrator, an economist leading Workstream 1, a dust, air quality or bulk-handling engineering specialist leading Workstream 2, and supporting analysts as required, with CVs and time allocation for each team member. Key personnel may not be replaced without Freeport Saldanha's written approval.
- A clear outline of the bidder's understanding of the assignment and the proposed approach, methodology and work plan, including how the two workstreams will be integrated. Bidders may propose an alternative to the indicative methodology in Annexure A, provided it addresses all

specifications and key questions.

- Demonstrated experience in stakeholder engagement and facilitation at executive level.
- Demonstrated ability to deliver within the eight-week timeframe.
- A declaration of any actual or potential conflict of interest, including current or recent work for Transnet Group, TPT, TNPA, iron ore producers or suppliers of dust-control technologies.

10. STUDY STANDARDS AND CONDITIONS

Bidders are required to ensure that the proposed study meets the following standards and conditions:

- **Evidence standards:** findings must distinguish between measured evidence, reported incidents, stakeholder perceptions and assumptions. Assumptions must be stated clearly and gaps recorded in a data gap register.
- **Regulatory comparison:** where monitoring data are available, dustfall results must be compared against the National Dust Control Regulations, any licence-specific limits and, where identifiable, thresholds relevant to sensitive sectors.
- **Level of detail:** assessments must remain at an indicative level and must not constitute detailed engineering design, an environmental impact assessment or a detailed business case.
- **Data:** Freeport Saldanha will issue formal data requests to Transnet Group, TPT, TNPA, the municipalities and other data owners and will facilitate introductions. Freeport Saldanha cannot guarantee the availability or completeness of third-party data. New primary dust monitoring is not required in this phase.
- **Site access:** site observations within the port require access permits and safety inductions from TNPA and/or TPT. The service provider must comply with all applicable health, safety and security requirements and allow for the associated lead times.
- **Confidentiality and data protection:** all information obtained is confidential and may be used only for this assignment. Personal information of interviewees must be processed in accordance with the Protection of Personal Information Act, 2013 (Act 4 of 2013) (POPIA).
- **Independence:** the service provider must remain technology-neutral and may not use the assignment to promote proprietary products or services. Market sounding of technology providers must not grant preferential access.
- **Ownership:** all deliverables, data, models and working materials become the property of Freeport Saldanha upon completion and final payment.

11. PRICING AND COST BREAKDOWN

Bidders are required to provide a detailed and transparent fixed-price quotation in South African Rand, inclusive of VAT. The quotation should, at a minimum, include the following:

- Professional fees per deliverable (D1 to D5).
- Hourly or daily rates and the number of days allocated to each team member.
- Disbursements, including travel to Saldanha Bay and on-site engagements.
- Stakeholder validation workshop preparation and facilitation costs.
- Any data acquisition or other third-party costs, where applicable.
- Applicable hourly or daily rates for out-of-scope work.

Proposed payment milestones [to be confirmed by Supply Chain Management]: 20% on approval of D1, 30% on approval of D3 and 50% on approval of D5.

12. ELIGIBILITY REQUIREMENTS

The following documents/proof must be submitted with your response to the request for quotation. Failure to provide the required proof will result in your response being non-responsive.

- Active registration on the National Treasury Central Supplier Database.

- Submit a fully completed WCBD4 document.
- A valid B-BBEE certificate.

13. EVALUATION

Quotations will be evaluated on functionality, price and specific goals in accordance with Freeport Saldanha's Supply Chain Management policy and the Preferential Procurement Policy Framework Act, 2000 (Act 5 of 2000) and its regulations. [Evaluation criteria and weightings, the minimum functionality threshold and the indicative budget are to be inserted by Supply Chain Management.]

ANNEXURE A: RED IRON ORE DUST STUDY – CLARIFICATIONS TO PROJECT DELIVERABLES

This annexure expands on and clarifies the technical and methodological expectations associated with the deliverables outlined above. All bidders must factor these clarifications into their technical and financial proposals. The methodology below is indicative.

Component	Purpose	Key activities	Output
A. Existing information review (shared)	Avoid duplicating work and establish the baseline.	Collect TNPA planning material, port development framework references, previous dust studies, licence conditions, monitoring reports, complaints data, operational diagrams and any previous international benchmarking by Transnet or others.	Baseline evidence pack and data gap register.
B. Economic and opportunity cost assessment (Workstream 1)	Define the economic problem in terms that matter to Freeport Saldanha, the port and the region.	Identify affected sectors and commodities, estimate realistic volumes and investment values where possible, capture employment and value-add potential, and assess non-financial strategic value such as investor confidence and green port positioning.	Economic impact and opportunity cost note.
C. Sector sensitivity and multi-criteria screening (Workstream 1)	Move beyond anecdote by ranking the sectors most affected by red dust.	Interview priority investors, exporters, logistics providers, ship or rig repair firms, wind component actors and food export representatives. Apply the scoring matrix in Annexure D.	Sector sensitivity matrix and priority list.
D. Technical dust pathway review (Workstream 2)	Identify where dust is generated and where interventions could work.	Map major sources and transfer points, review fines content and material handling practices, consider wind patterns and location exposure, and distinguish operational measures from engineering interventions.	Technical diagnosis and intervention map.
E. International benchmark and solution scan (Workstream 2)	Test whether other comparable ports operate more cleanly, and why.	Review comparable bulk-handling ports and operators, including examples from Australia, Brazil and China and relevant DP World terminals. Identify emission controls, enclosure, spraying, extraction, filtration, compaction, briquetting and clean port practices.	Benchmark summary and shortlist of applicable solutions.
F. Options and implementation pathway (shared)	Convert evidence into an action plan.	Develop a short list of quick wins, medium-term upgrades and major capital options. Estimate cost ranges, implementation owners, potential revenue or savings, regulatory implications and engagement route.	Options paper and recommended roadmap.

1. Inception report (D1)

- Refined methodology and work plan, including how Components A to F will be integrated.
- Shortlist of comparator ports and operators, agreed with Freeport Saldanha.
- Stakeholder interview list, including priority investors, exporters, logistics firms, ship and rig repair interests, wind component firms, sensitive manufacturing prospects, municipal stakeholders and port users.
- Data request list for TPT, TNPA, Transnet Group, the municipalities and other data owners, covering dust monitoring, licence conditions, operational layouts, prior studies, complaints and port planning material.
- Confirmed scoring scale and scoring direction for each criterion in Annexure D (for example, whether high implementation dependency increases or reduces priority).
- Key risks and assumptions.

2. Interim progress briefing (D2)

- **Existing evidence:** what do existing monitoring data, complaints, licence conditions, operational

records and other available evidence indicate about the scale, timing, direction, frequency and location of the red dust problem? The service provider should assess the quality, availability and limitations of this information and confirm the applicable atmospheric emission licence(s), the issuing licensing authority, and the associated conditions and monitoring obligations.

- **Sources and pathways:** where is red dust generated, transported and deposited across the relevant logistics chain? The assessment should consider, at a high level:
    - ore characteristics at source (such as moisture and fines content) that influence dust generation at the port;
    - rail transport, including in-transit losses from loaded wagons;
    - wagon handling and tippler operations;
    - transfer points and conveyors;
    - stockyards and reclaimers;
    - ship-loading operations; and
    - adjacent handling and operational areas.

3. Draft report (D3)

The draft report must answer the following key questions:

- **Economic activity and investment impact:** what economic activity, investment, cargo flows and employment opportunities may be excluded, delayed, reduced or made more costly by red dust within and around the Port of Saldanha and associated industrial areas? Both existing activities and future investment opportunities should be considered, with the nature and scale of impact identified where reasonably possible.
- **Sector and commodity sensitivity:** which sectors, commodities, products and activities are most sensitive to red dust, and what dust-related conditions create a material constraint? Where possible, identify levels or reductions in dust exposure that would materially change viability; where evidence is insufficient, identify the information required.
- **Benchmarks:** what do relevant international and local benchmarks indicate on dust-management practices, clean-port standards, practical dust-reduction measures, emission or deposition standards, monitoring and reporting, operational controls and voluntary industry practices? The focus should be on practices transferable to Saldanha Bay rather than a broad literature review.
- **Practical mitigation measures:** which interventions could deliver meaningful reductions in the short, medium and longer term? Distinguish between operational or procedural measures, lower-cost interventions, capital-intensive interventions, and measures that could recover value through fines recovery, reduced product loss or improved efficiency.
- **Cost, benefit and implementation:** for each significant option, provide where reasonably possible:
    - description of the intervention and the problem or source addressed;
    - expected reduction or benefit;
    - indicative capital and/or operating cost;
    - implementation timeframe and technical requirements;
    - operational implications, dependencies, risks and limitations;
    - potential value-recovery opportunities; and
    - relevant institutional responsibilities.
- **Stakeholder case for action:** what evidence, institutional arrangements and stakeholder coalition would be required to motivate action by Transnet Group, TPT, TNPA, the licensing authority, the municipalities and other parties? Identify the key evidence required, the stakeholders whose participation is needed, areas of shared interest, institutional dependencies, barriers to implementation and a practical engagement pathway.

At a minimum, the draft report must also answer:

- What is the current known and perceived impact of red dust on Freeport Saldanha's target sectors and the port's broader development potential?
- Which activities are excluded outright, which are made more costly, and which are mainly affected by perception or reputational risk?
- What level of dust reduction would be sufficient for priority sectors, and how can this be tested without requiring unrealistic zero-dust assumptions?
- Which practical measures could reduce dust by meaningful increments, relative to a defined baseline (for example 30, 50 or 70 percent), and what would each order of reduction likely require?
- Which solutions can be implemented through operational improvements, which require capital investment, and which could generate revenue or savings through recovered fines?
- What governance, commercial, licence or regulatory levers could motivate implementation by the relevant parties?

The draft report must contain the following components:

- a baseline report on the current red dust issue, including known data, monitoring, licensing, complaints, operations and planning context;
- a sector and commodity impact assessment that ranks affected activities using the multi-criteria approach in Annexure D;
- an opportunity cost estimate covering cargo, investment, employment, value-add and strategic fit where evidence allows;
- a technical options scan covering operational controls, engineering controls, enclosure, spraying, extraction, filtering, stockpile management, transfer point management, fines handling, and dust recovery or briquetting opportunities;
- an international benchmark note summarising relevant ports, operators, standards, practices and lessons for Saldanha; and
- a short list of priority interventions with indicative cost range, implementation complexity, owner, likely impact, risks and next step.

4. Stakeholder validation workshop (D4)

- Held with Freeport Saldanha and the steering group and facilitated by the service provider, to test findings, fill evidence gaps and build a coalition around the case for action.
- The service provider is responsible for preparation, facilitation, the presentation and a written workshop record. [Venue and logistics to be provided by Freeport Saldanha – confirm.]

5. Final report and engagement pack (D5)

- Final report incorporating steering group and workshop comments, with an executive summary of no more than five pages.
- Stakeholder engagement and advocacy pack for Transnet Group, TPT, TNPA, the licensing authority, the municipalities, investors and other partners, provided as a standalone document.
- Recommendations covering immediate actions, medium-term interventions and potential future workstreams.
- A recommendation on whether to proceed to a detailed second phase (for example, dust monitoring enhancement, dispersion assessment, engineering pre-feasibility, cost-benefit analysis and regulatory engagement).
- Close-out presentation to Freeport Saldanha.

ANNEXURE B: STAKEHOLDER ENGAGEMENT CONTEXT AND KEY RISKS

The study will only create change if it speaks to the interests of the parties that can act. TPT is likely to be the direct operational actor for dust-generating activities, but the incentive to change may sit at Transnet Group or TNPA level, especially where the argument concerns broader port development, diversified revenue, investor confidence or global port competitiveness.

Stakeholder	Interest to address	Proposed engagement
Transnet Group	Strategic value of a more diversified, competitive and future-ready Port of Saldanha.	Executive-level briefing supported by the economic case and options paper.
TPT	Operational feasibility, cost, licence compliance, productivity and possible value recovery from fines.	Technical working session on dust sources, mitigation measures, cost and implementation responsibility.
TNPA	Port development, private-sector participation, planning alignment and long-term asset value.	Planning and strategy discussion, including the interface with containerisation and alternative locations.
Licensing authority	Whether economic and development impacts should be considered alongside health and safety compliance.	Evidence pack once the study has a sufficient technical and economic basis.
Municipalities and province	Economic development, employment, land use, infrastructure and investor confidence.	Coalition building and coordinated advocacy.
Investors and exporters	Practical thresholds, market concerns, contamination risk and willingness to invest if dust is reduced.	Targeted interviews and validation workshop.
Iron ore producers and exporters	Ore characteristics (moisture and fines content), product loss, cost-sharing for mitigation and reputational exposure in export markets.	Engagement in coordination with TPT, including data requests on ore characteristics.
Affected communities and civil society	Amenity, perceived health impacts, property and quality of life.	Engagement through existing municipal and air quality forums, and communication of findings once validated.
Technical solution providers	Practical mitigation technologies, cost, implementation time and innovation potential.	Market sounding, without granting preferential access.

Risk	Implication	Mitigation
Scope creep into full container terminal feasibility	The study becomes too large, slow and expensive.	Maintain a clear boundary: red dust first, containerisation as an interface only.
Insufficient data on actual dust levels or sector thresholds	Findings may remain anecdotal.	Use existing monitoring, targeted interviews, international benchmarks and clear data gap reporting. Recommend monitoring upgrades if needed.
Delays in obtaining data from Transnet entities and other data owners	Analysis is delayed or relies on incomplete information.	Issue formal data requests in Week 1 through the steering group, agree confidentiality terms early, and proceed with the best available evidence while recording gaps.
TPT or TNPA resistance	Recommendations may not translate into action.	Frame the case around shared interests, including port competitiveness, revenue diversification, licence risk and practical low-cost options.
Solutions prove more expensive or less effective than expected	The case for action may weaken.	Use staged decision gates and do not overclaim in the first phase.
Sensitive political or commercial implications, including alternative port or Boegoebaai considerations	Stakeholder engagement could become defensive.	Acknowledge related implications but keep the first phase focused on improving Saldanha's own competitiveness.

Risk	Implication	Mitigation
Investor expectations rise before evidence is tested	Reputational risk if the study cannot support action.	Communicate the first phase as a diagnostic and options assessment, not a promise of immediate implementation.

ANNEXURE C: INDICATIVE PROGRAMME

The following indicative programme sets out the end-to-end process, including Freeport Saldanha's internal steps and the service provider's eight-week assignment. Timing is expressed in programme weeks from approval of these Terms of Reference and will be confirmed at inception.

Step	Action	Lead	Timing	Decision or output
1	Confirm the internal sponsor, project manager and technical steering group, including Freeport Saldanha, relevant Western Cape Government representatives, and technical or economic advisers as required.	Freeport Saldanha	Week 1	Confirmed governance structure.
2	Approve the study problem statement: red dust as an economic and strategic constraint, with containerisation treated as an interface rather than the full scope.	Sponsor and steering group	Week 1	Signed-off scope boundary.
3	Finalise and approve these Terms of Reference, structured as two linked workstreams.	Project manager	Week 1 to 2	Approved Terms of Reference.
4	Issue data requests to TPT, TNPA, Transnet Group, the municipalities and other data owners.	Project manager with steering group	Week 1 to 2	Formal data request pack.
5	Identify and approach priority stakeholders for interviews.	Economic workstream lead	Week 2 to 4	Interview schedule and evidence log.
6	Commission the rapid assessment. If procurement timing is tight, consider separate specialists for the economic and technical tracks, with one integrator responsible for the final report.	Sponsor and procurement	Week 2 to 3	Service provider appointed.
7	Complete the rapid 80:20 analysis, including benchmark scan, sector sensitivity matrix, dust pathway map and initial options list.	Service provider	Week 3 to 8	Draft rapid assessment report.
8	Hold a stakeholder validation workshop to test findings, fill evidence gaps and build a coalition for action.	Freeport Saldanha and steering group, facilitated by the service provider	Week 9	Validated findings; final report issued in Week 10.
9	Prepare a decision memorandum for engagement with Transnet Group, TPT, TNPA and the licensing authority.	Project manager and sponsor	Week 10 to 11	Decision memorandum and engagement pack.
10	Decide whether to proceed to a detailed technical and economic validation phase.	Sponsor, steering group and partners	Week 12	Go, no-go or revise decision.

ANNEXURE D: PROPOSED MULTI-CRITERIA SCREENING FRAMEWORK

Criterion	What it measures	Indicative weighting
Dust sensitivity	How strongly the sector, commodity or activity is affected by visible dust, contamination, filtration load or cleanliness requirements.	25%
Economic value	Potential investment, cargo value, revenue, employment, value-add and local procurement impact.	25%
Strategic fit	Alignment with Freeport Saldanha priorities, port diversification, green port positioning and regional development objectives.	20%
Feasibility	Likelihood that the activity could proceed if dust levels were reduced to a realistic threshold.	15%
Reputational and market risk	Risk that visible dust affects market confidence, consumer perception or investor willingness to commit.	10%
Implementation dependency	Extent to which the activity depends on changes by TPT, TNPA, Transnet Group or regulators.	5%