

Day 1 4 November 2025

Keynote

07:30-09:00 **Connect morning networking session**

Registration

09:30-09:35 **Opening remarks by chairperson/welcome by conference organisers**

09:35 – 09:40 **Welcome address EIUG**

Murendeni Matshinyatsimbi, Chairman, Energy Intensive Users Group of Southern Africa (EIUG)

09:45 – 09:55 **NTCSA and the market reform**

Monde Bala, Interim CEO, National Transmission Company of South Africa

09:55 – 10:05 **Approaches to financing resilient power and water operations**

Deerosh Maharaj, Executive Head - Energy, Infrastructure & Mining, Standard Bank

10:05 -11:00 **Panel Discussion: Resilient operations – water & energy in an integrated risk framework**

As resource insecurity grows, driven by climate variability, regulatory pressure, and infrastructure constraints, companies must move beyond siloed approaches. The discussion will surface practical insights from mining, agri-processing, and manufacturing leaders on aligning sustainability goals with risk management strategies that protect both water and energy assets.

Moderator: *Rethabile Melamu, CEO, South African Photovoltaic Industry Association*

Key focus areas:

- How climate and regulatory risks are converging across water and energy systems
- Integrating water and energy resilience into enterprise risk and ESG frameworks
- Lessons from drought-prone and energy-constrained regions
- Strategies for operational continuity in the face of water and energy disruptions
- Cross-sector collaboration models (for example, energy-water-food nexus in agri-processing)

Panellists:

- *Nandha Govender, General Manager: Water and Environmental Operations, Eskom*
- *Ramateu Lefty Monyokolo, Chairperson, AWSISA and Rand Water*
- *Dr Ayanda Nteta (FCIPS), Supply Chain Executive, Mondi Group**
- *Marilyn Maduka, Sustainability Director, AB INBEV*

11:00 – 11:45 **Refresh and Connect**

Refreshment break and networking



Projects transforming South Africa for energy-intensive users

Session overview

This showcase highlights five high-impact commercial and industrial energy projects across South Africa. Each case will reveal the business model, technology application, financing structure, and outcomes to date. Gain a pan-African view of what's working and where opportunities lie for replication and innovation.

Key Focus Areas:

- Understanding successful deployment models
- Evaluating different technologies and outcomes
- Lessons for replication, innovation and scaling
- Pan-African perspectives from real-world projects

11:45-12:25 **Project Spotlight: NOA Group x Pan African Resources – Unlocking Aggregated Power for Industrial Growth**

As energy-intensive sectors, such as mining, need to decarbonise and stabilise supply, partnerships between renewable energy aggregators and industrial power users are enabling growth. This spotlight showcases how NOA Group and Pan African Resources are pioneering a model for sustainable, reliable power that supports productivity and long-term energy resilience in the mining sector. Through innovative energy aggregation and commercial structuring, NOA is demonstrating how renewables can enhance energy security, competitiveness and environmental performance in one of South Africa's most energy-demanding industries.

Key Outcomes:

- How energy aggregation is unlocking access to clean power for industrial users
- Insights into structuring commercial models that enable scale and flexibility
- The role of partnerships in driving energy reform and accelerating South Africa's transition to a sustainable energy future
- Insights into the policy and infrastructure shifts needed to scale aggregated renewable energy

Andrew Taylor, Head of Trading, Noa Group

12:25-12:50 Project Spotlight: Pioneering solar wheeling - the Tronox experience

Tronox signed one of South Africa's largest private wheeling project, with two solar plants in Lichtenburg delivering 200 MW of clean power into Eskom's transmission network. The project sets a new benchmark for corporate renewable energy procurement in Africa, reducing over 558,000 tons of CO₂ annually, strengthens grid stability and delivered major socio-economic benefits.

Outcomes

- Demonstrate how private wheeling meets high-load industrial energy needs
- Show the impact of regulatory reforms on large-scale renewable investment
- Share technical, financing and operational lessons from Africa's largest corporate PPA

Mpho Mothoa, Vice President: Operations – Asia, Pacific and South Africa, Tronox Holding

12:50-13:00 Q&A

13:00-14:00 Recharge and Connect

Lunch and networking



Corporate C&I energy storage projects – lessons and insights

14:00 –15:10 Scene setter: How European companies are optimising energy costs and maximising the value of solar installations

Simon Steffgen, Senior Expert Commercial & Industrial Applications, BVES Energy Storage Systems Association

Q&A: What lessons can be transferred to the South African market?

Across Europe, energy-intensive companies have been refining strategies to extract maximum value from solar installations by combining smart storage integration. This panel will explore how these approaches deliver cost savings, reduce peak demand exposure and unlock new revenue streams, which of these lessons are transferable to the South African context.

Discussion to include:

- Understand how to align battery storage with time-of-use tariffs, wheeling mechanisms and on-site renewables for optimal cost reduction
- Learn about different ownership and financing models, including joint ventures and cooperatives, and their applicability in South Africa
- Identify practical ways to maximise the performance and ROI of installed battery systems
- Explore opportunities in ancillary services and leveraging dynamic energy pricing to create additional value streams

Moderator: *Tshwanelo Rakaibe, Senior Researcher: Energy Centre, Council for Scientific and Industrial Research*

Panelists:

- Murendeni Matshinyatsimbi, Chairman, Energy Intensive Users Group of Southern Africa (EIUG)
- Joanne Dean, Chairperson, South African Energy Storage Association (SAESA) Executive Director, Energy Carbon Management
- Tjaart Visser, Integrated Power System Reliability Services (IPSRS) Engineer, National Transmission Company South Africa (NTCSA)

15:15-16:00 Refresh and Connect
Refreshment break and networking



Exploring alternative energy resources

16:00 – 17:00 Small Modular Reactors: A breakthrough for distributed baseload power or an overhyped distraction?

Overview:

Small Modular Reactors (SMRs) are gaining global attention as a promising solution to deliver distributed, low-carbon baseload power with potentially lower risk, reduced upfront investment, and faster deployment compared to traditional nuclear plants. But do they represent a viable option for South Africa's industrial energy future or are they a potentially expensive distraction from proven renewables and storage technologies?

Moderator: Princess Mthombeni, Nuclear Scientist, Founder, Nuclear4Africa

This discussion brings together leading voices from industry, technology and policy to tackle the hard questions:

- Can SMRs truly offer cost-effective, scalable solutions for intensive energy users?
- The role of private sector ownership option in nuclear procurement?
- What about public acceptance, regulatory readiness, waste management and geopolitical risk?
- Should South Africa be an early mover or steer clear?

Panelists:

- Lungile Mashele, Energy Economist and Advisor: Nuclear and Hydro Projects, National Transmission Company South Africa
- Sengiphile Simelane, Group Executive: Power & Industry, The South African Nuclear Energy Corporation (Necsa)
- Nomso Kana, Nuclear scientist, South Africa
- Prof Pat Naidoo, Research and Innovation Chair: Green Economy, University of Johannesburg



Gas-to-Power: Bridging Energy Security and Decarbonisation

17:00-17:45 Session Overview:

As South Africa accelerates its transition toward a lower-carbon energy future, gas-to-power is emerging as a key enabler of energy security and industrial resilience. This session examines how gas can serve as a flexible, lower-emission alternative to coal, providing stable baseload and peaking capacity while supporting industrial users' decarbonisation goals. It will unpack the evolving gas-to-power landscape, infrastructure readiness, investment opportunities, and regional supply developments critical to unlocking the full potential of gas in South Africa's energy mix.

Moderator: Dr. Titus Mathe, CEO, South African National Energy Development Institute

Key Focus Areas:

- The role of gas-to-power in ensuring reliable, cleaner energy for South Africa's industries
- Infrastructure, import terminals, and transmission readiness for large-scale gas integration
- Cost dynamics, competitiveness, and price volatility in regional and global gas markets
- Regulatory reforms and policy frameworks enabling private sector participation in gas-to-power projects
- Opportunities in regional gas exploration and cross-border supply development

Panelists:

- Craig Morkel, Chairperson, Gas Economy Leadership Team, South African Oil & Gas Alliance (SAOGA)
- Sifiso Msabala, Group Chief Operations Officer (Acting), Central Energy Fund (CEF)
- Aubrey Mzobe, Senior Manager Projects: Group Capital Division, Eskom Holdings

17:45

A social pause: Connect networking function

Join us for a drink to celebrate the end of day 1 and get to know your peers

Day 2 5 November 2025



Leadership for Energy Security – From risk to resilience

09:30 – 10:45

Business Leaders Panel: Leadership for Energy Security – From Risk to Resilience

Position Statement: Understanding business energy priorities

Moderator: *Phemelo Mitchell, Senior Business Developer, Pele Green Energy*

Session Overview:

Energy security has become a strategic imperative for South African businesses. This high-level panel brings together leaders from energy-intensive sectors to discuss how bold, future-oriented leadership is shaping their response to the changing energy landscape.

Key Themes and Discussion Points:

- **Leadership mindset:** Understanding how leaders reframing energy from a technical issue to a strategic one
- **Energy as competitive advantage:** Real examples of how energy strategies are driving business continuity and growth.
- **Scaling private energy investment:** The role of leadership in enabling private procurement, embedded generation, and partnerships.
- **Cross-sector collaboration:** How industries can work together to co-invest, co-innovate and co-advocate for energy resilience.

Panelists:

- *Mike Teke, Group CEO and co-founder, Seriti Resources Holdings*
- *Dr Ayanda Nteta (FCIPS), Supply Chain Executive, Mondi Group*
- *Jaco Human, Chief Executive Officer, Industrial Gas Users Association of Southern Africa*

10:45 – 11:15

Refreshment break



Market design in flux

11:15-11:50

Power Shift Part 1:

Fire Side Chat: How the market reform should look like and what is required to make it work.

Key Focus Areas:

- This fireside chat outlines the proposed roadmap to address grid access and capacity limitations in South Africa
- EIUG's perspective on market reform, the opportunities and risks.
- The new reality for large electricity users in South Africa and long-term strategies for sustainability

Moderator: *Kay Walsh, Managing Director, Nova Economics*

Panellists:

- *Fhedzi Modau, Former Group Head: Energy and Climate Change, Implats*

11:50-12:30

Power Shift Part 2: Addressing barriers to successful market reform

South Africa's electricity market is undergoing a profound transformation. This session will bring together traders, regulators and industry leaders to unpack the barriers to a competitive and transparent power market.

Moderator: *Prof Vally Padayachee, Strategic Advisor, Association of Municipal Electricity Utilities (AMEU)*

Key Focus Areas:

- **Industry players and market Readiness:** Understanding the roles and responsibilities of traders, generators, buyers and regulators and how alignment can fast-track reform.

- Capacity Constraints: Exploring whether the system has the infrastructure, skills and institutions needed to support liberalisation and how to address gaps.
- Practical Implications: Consequences for participants across the value chain – from pricing structures and procurement models to compliance costs and risk allocation.

Panelists:

- *Mutenda Tshipala, Acting General Manager, Eskom Distribution Energy Trader*
- *Mark Beare, Advisor: Full Time Regulator Member, National Energy Regulator of South Africa (NERSA)*
- *Dr. Silas Mulaudzi, Energy Expert: Electricity Distribution Industry (EDI), South African Local Government Association (SALGA)*

12:30-13:30 Lunch



Panel Discussion: Future of electricity prices - how to ensure the survival and sustainability of the industry?

13:30 – 14:30 For large power users, the interplay between market reform, pricing transparency and the introduction of new cost structures such as grid availability charges could significantly impact operational viability and investment returns. This session explores future pricing strategies and debates how South Africa can balance pricing, investments, sustainability and affordability for its most energy-intensive industries.

MODERATOR: *Nellis Bester, Operations Director in South Africa & Geographic Leader, Ferroglobe PLC*

Key focus areas:

- **Market reform and price signals:** How structural changes in the electricity market could shape future pricing frameworks
- **New cost structures:** Assessing the implications of charges like grid availability fees, wheeling costs and balancing charges for intensive users.
- **Affordability vs. Sustainability:** Balancing the financial sustainability with the need for competitive tariffs for industry.
- **Investment signals:** Ensuring pricing mechanisms attract investment into new generation, transmission, and storage capacity while safeguarding industry survival.
- **International lessons:** What South Africa can learn from global experiences in liberalised electricity markets.

Panelists

- *Prof Prathaban Moodley, General Manager: Applied Energy R&D and Innovation, South African National Energy Development Institute*
- *Nqobile Gumbi, Senior Advisor: Pricing, Planning and Scheduling, National Transmission Company South Africa*
- *Terry Njuguna, Distribution Manager, Eskom*

14:30-15:00 Refreshment break



CBAM Considerations for intensive power users

SYMPOSIUM: CBAM Sectoral Response Deep-Dive – Iron & Steel, Aluminium and Cement

Session Overview:

The EU's Carbon Border Adjustment Mechanism (CBAM) is set to significantly reshape global trade dynamics for carbon-intensive sectors. For South Africa's iron & steel, aluminium and cement industries, major exporters and critical energy-intensive users, the stakes are particularly high. This session unpacks the sector-specific risks and trade impacts of CBAM across the value chain and practical company-level responses to start mapping strategies that can mitigate CBAM's disruptive impact.

14:30-14:40 TIPS Pathways Research

Presentation of research findings on CBAM's projected impact on cement and other EI sectors, with a focus on policy pathways and trade competitiveness.

Seutame Maimeme, Economist: Sustainable Development, Trade and Industrial Policy Strategies (TIPS)



Energy Intensive
Users Group SA ^{Est.} 1999

CONFERENCE PROGRAMME

- 14:40-14:50** **Manufacturing Circle Industry Response**
Insights into the manufacturing sector's coordinated response, industry readiness and advocacy on CBAM challenges.
Philippa Rodseth, Executive Director, The Manufacturing Circle
- 14:50-15:10** **Case Study**
Practical case study from EIUG member on adaptation strategies, including carbon footprint reduction, reporting readiness and competitiveness measures
Sanelisiwe Mdlalose, Environmental Sustainability Manager, Hulamin
- 15:10-15:30** **Moderated open floor discussion**
Interactive dialogue on mitigation strategies, sector-specific challenges and collective action opportunities for industry, policymakers and energy users.
- Refresh and Connect**
End of the Conference