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| Port Market Study: Port of Mossel Bay (PoMSB) **Semi-structured interview guide:****Offshore Key Stakeholders** |  July 2025Version 2.0 |

# Introduction

As part of the Port of Mossel Bay Market Study commissioned by Transnet National Ports Authority (TNPA), Move Beyond Consulting (MBC), in collaboration with Rebel Ports & Logistics, has been appointed to undertake a comprehensive assessment of the port's market dynamics, future demand potential, and strategic growth pathways.

A key component of this study is the **Stakeholder Engagement Plan**, which aims to foster inclusive participation, enhance collaboration, and gather critical insights from a wide range of stakeholders. These include existing and potential port users, government and regulatory bodies, industry representatives, civil society organisations, and other relevant actors in the port and logistics ecosystem.

Through structured interviews and surveys, the project team seeks to collect qualitative and quantitative data relating to:

* Port usage experiences,
* Operational and regulatory dynamics,
* Investment considerations and barriers,
* Sustainability and green transition priorities,
* Opportunities for innovation, industrial support, and market expansion.

Please see the attached Project Letter from TNPA for service context.

We are committed to ensuring that the stakeholder engagement process adheres to ethical standards. In line with this, we request your **informed consent** based on the following principles:

* **Voluntary Participation**: Your involvement in this engagement is entirely voluntary. You may withdraw your participation at any time without consequence.
* **Confidentiality and Anonymity**: All responses will be treated with strict confidentiality. Anonymity. Identifiable information will not be shared outside of the research team (MBC and Rebel), and findings will be anonymised or aggregated in all reporting.
* **Queries and Further Information**: If you have any questions or would like to follow up, please do not hesitate to contact your interviewer directly or Dr. Meena Lysko, the research team lead, at mbc.mlysko@gmail.com.

Please submit your completed form to mbc.mlysko@gmail.com

Do you agree to participate in this study?

[ ]  Yes [ ]  No

Do you agree to this interview being recorded?

[ ]  Yes [ ]  No

## Background information of the interviewer/s

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| **Please complete the table below before the interview** |
| **Question** | **Answer** |
| Date  | Click or tap to enter a date. |
| Time  |  |
| Venue/ Format of interview |  |
| Name of interviewer/s from the project team | [ ] Dr Meena Lysko [ ] Ms Mpho M Monyane[ ] Mr Rhulani Madale | [ ]  Dr Henriette van Niekerk[ ]  Angelique du Toit[ ]  Johan-Paul Verschuure |

## Respondent Profile

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| **To understand the background and relevance of your organisation to this study, please provide the following general information** |
| **No.** | **Name** | **Company** | **Position/ designation** | **Involved in offshore or port-linked activities in Mossel Bay?** |
| 1 |  |  |  | Choose an item. |
| 2 |  |  |  | Choose an item. |
| 3 |  |  |  | Choose an item. |

# A. Sector Profile

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| **This section helps classify your company’s core activities and customer base in relation to the port.** |
|  | **Primary business activities?** *(tick all that apply)* |
|  | [ ] Offshore oil production[ ]  Offshore gas production[ ]  Oil or gas transport/logistics[ ]  Marine support (e.g. bunkering, rig supply, towage)[ ]  Ship repair/maintenance[ ]  Exploration/drilling services[ ]  Bunkering operations[ ]  Other (please specify): Click or tap here to enter text. |
| 1.
 | **What types of clients do you primarily serve?** |
|  | [ ]  Local[ ]  Regional (Southern Africa)[ ]  International |
|  | **Mode for transport of goods to/from port?** |
|  | [ ]  Road[ ]  Rail[ ]  Coastal shipping[ ]  Pipeline[ ]  Other (please specify): Click or tap here to enter text. |

# B. Operational Data

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| **This section gathers quantitative data and economic drivers to support the development of an econometric demand model.** |
| 1.
 | **If applicable, please provide the annual volume of activity for offshore oil (bbl) for 2021/2022/2023/2024/Forecast 2025.** *(estimates acceptable)* |
|  | 2021: Click or tap here to enter text.2022: Click or tap here to enter text.2023: Click or tap here to enter text.2024: Click or tap here to enter text. |
|  | **If applicable, please provide the annual volume of activity for Offshore gas (m³ or GJ) for 2021/2022/2023/2024/Forecast 2025.** *(estimates acceptable)* |
|  | 2021: Click or tap here to enter text.2022: Click or tap here to enter text.2023: Click or tap here to enter text.2024: Click or tap here to enter text. |
|  | **If applicable, please provide the annual volume of activity for Fuel supplied (bunkering) in tonnes for 2021/2022/2023/2024/Forecast 2025.** *(estimates acceptable)* |
|  | 2021: Click or tap here to enter text.2022: Click or tap here to enter text.2023: Click or tap here to enter text.2024: Click or tap here to enter text. |
|  | **If applicable, please provide the annual volume of activity for Vessel calls related to operations for 2021/2022/2023/2024/Forecast 2025.** *(estimates acceptable)* |
|  | 2021: Click or tap here to enter text.2022: Click or tap here to enter text.2023: Click or tap here to enter text.2024: Click or tap here to enter text. |
|  | **If applicable, please provide the annual volume of activity for Cargo moved via Mossel Bay Port related to operations for 2021/2022/2023/2024/Forecast 2025.** *(estimates acceptable)* |
|  | 2021: Click or tap here to enter text.2022: Click or tap here to enter text.2023: Click or tap here to enter text.2024: Click or tap here to enter text. |
| 1.
 | **Average value per unit of product/service for Oil (USD/bbl)?** |
|  | Click or tap here to enter text.  |
|  | **Average value per unit of product/service for Gas (USD/mmBtu or GJ)?** |
|  |  Click or tap here to enter text. |
|  | **Average value per unit of product/service for Bunkering service rate (ZAR/tonne)?** |
|  |  Click or tap here to enter text. |
|  | **Are your operational volumes sensitive to GDP growth (SA or global)?** |
|  | [ ]  Yes[ ]  NoIf yes, please indicate sensitivity[ ]  low[ ]  medium[ ]  high |
| 1.
 | **Are your operational volumes sensitive to Oil/gas global price index?** |
|  | [ ]  Yes[ ]  NoIf yes, please indicate sensitivity[ ]  low[ ]  medium[ ]  high |
|  | **Are your operational volumes sensitive to FX rate (ZAR/USD)?** |
|  | [ ]  Yes[ ]  NoIf yes, please indicate sensitivity[ ]  low[ ]  medium[ ]  high |
|  | **Are your operational volumes sensitive to Interest rate?** |
|  | [ ]  Yes[ ]  NoIf yes, please indicate sensitivity[ ]  low[ ]  medium[ ]  high |
|  | **Are your operational volumes sensitive to Regulatory changes (local)?** |
|  | [ ]  Yes[ ]  NoIf yes, please indicate sensitivity[ ]  low[ ]  medium[ ]  high |
|  | **Does seasonality affect your operations?** |
|  | [ ]  Yes[ ]  NoIf yes, indicate which months are peak: Click or tap here to enter text. |
|  | **Are there any untapped market opportunities you foresee for Mossel Bay in the offshore sector?**  |
|  | Click or tap here to enter text. |
|  | **How dependent is your growth plan on improved infrastructure or service delivery at the Port of Mossel Bay?** |
|  | [ ]  Very dependent – growth will not occur without it[ ]  Moderately dependent – will affect scope/timing[ ]  Not dependent – plans are independent of the portPlease elaborate: Click or tap here to enter text. |
|  | **Does the effectiveness of the services rely on proximity to the Port of Mossel Bay? Please elaborate.** |
|  | [ ]  Yes[ ]  No[ ]  Maybe Please explain: Click or tap here to enter text. |

# D. Infrastructure & Future Demand

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| **This section explores infrastructure usage and potential demand scenarios under ideal port conditions.** |
|  | **What infrastructure do you use or require in Mossel Bay?** *(tick all that apply)* |
|  | [ ]  Offshore supply base[ ]  Fuel storage & blending[ ]  Deep-water berths[ ]  Heavy lift/crane capacity[ ]  Ship repair/yard services[ ]  Customs/clearance[ ]  Pilotage or towage[ ]  Environmental handling/waste[ ]  Other (please specify): Click or tap here to enter text. |
|  | **What are the top 3 constraints you currently experience at Mossel Bay?** |
|  | 1. Click or tap here to enter text.2. Click or tap here to enter text.3. Click or tap here to enter text. |
|  | **If applicable, please estimate your company’s potential demand through Mossel Bay for:** |
|  | Bunkering volume (tonnes/year): Click or tap here to enter text.Offshore service calls/year: Click or tap here to enter text.Cargo throughput (tonnes/year): Click or tap here to enter text.Other (please specify): Click or tap here to enter text. |
|  | **Do you anticipate any macroeconomic trends (local/international) affecting your offshore activity over the next 10 years?** |
|  | [ ]  Yes (please describe briefly): Click or tap here to enter text.[ ]  No |
|  | **Are there any limitations in draft, quay length, vessel size, or landside storage that constrain or may constrain your operations?** |
|  |  |
|  | **How do you assess the port's current pricing structure (tariffs, handling fees, marine charges)?** |
|  |  |
|  | **Do you have any recommendations for improving the implementation and stakeholder interface processes at PoMSB?** |
|  |  |
|  | **Do you face any constraints or bottlenecks that limit your current operations?** *(tick all that apply)* |
|  | [ ]  Limited dock space[ ]  Infrastructure condition[ ]  Skilled labour[ ]  Permitting/delays[ ]  Other (please specify): Click or tap here to enter text. |
|  | **How many full-time equivalent (FTE) jobs does your organisation currently support directly through activities in Mossel Bay?** |
|  | [ ]  0 to 5[ ]  6 to 20[ ]  21 to 50[ ]  more than 50[ ]  Prefer not to say |
|  | **How many new jobs would you expect to create if infrastructure and services at the port are improved?** |
|  | [ ]  1 to 5[ ]  6 to 20[ ]  21 to 50[ ]  more than 50[ ]  Too early to estimate |
|  | **How many indirect jobs or business opportunities could your project support through partnerships (e.g. SMMEs, cooperatives, training)?** |
|  | [ ]  0 to 5[ ]  6 to 20[ ]  21 to 50[ ]  more than 50[ ]  Too early to estimate |

# E. Strategic Outlook

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| **This section explores your outlook, expectations, and key macro or regulatory drivers of your future activity.** |
| 1.
 | **Over the next 5–10 years, your expected activity in Mossel Bay is expected to:** |
|  | [ ]  Increase significantly (>25%)[ ]  Increase moderately (5–25%)[ ]  Stable (±5%)[ ]  Decrease[ ]  Uncertain |
|  | **Which drivers will influence your growth in this region? (please rank the influence):** |
|  | Oil/gas price trends - Choose an item.Infrastructure upgrades - Choose an item. National/regional energy policy - Choose an item.Availability of skilled workforce - Choose an item.Trade routes/logistics cost - Choose an item.Environmental compliance - Choose an item.Currency and interest rates - Choose an item. Increased economic activity in the region - Choose an item.Better rail infrastructure for cost effective freight transportation and logistics - Choose an item.  |
|  | **Do you anticipate capital investment in Mossel Bay in the next 5 years?** |
|  | [ ]  Yes[ ]  No[ ]  PossiblyIf yes/possibly:Estimated value (ZAR): Click or tap here to enter text.Type of investment: Click or tap here to enter text. |
|  | **What proportion of your total costs relate to the following?** *(Please provide rough percentages to total cost base)* |
|  | Labour: Click or tap here to enter text. %Equipment/tools: Click or tap here to enter text. %Materials/parts: Click or tap here to enter text. %Overheads (electricity, space): Click or tap here to enter text. %Other (please specify): Click or tap here to enter text. |
|  | **Would the financial success of your project/s contribute to any of the following? Please explain?** |
|  | [ ]  Profitability of your business[ ]  Local community upliftment[ ]  National/regional economic growth[ ]  Job creation[ ]  Local education or schools[ ]  Skills development or training[ ]  Other: Click or tap here to enter text. |
|  | **Which sectors or communities beyond your business would benefit from increased offshore services at Mossel Bay?** |
|  | [ ]  Local SMMEs[ ]  Hospitality (accommodation, restaurants)[ ]  Other: Click or tap here to enter text. |
|  | **Are there international partners, financiers, or offtakers already linked to your project/s?**  |
|  | [ ]  YesIf yes, please briefly describe the nature of the relationship (e.g. offtake agreement, equity investment, joint venture, technical advisory)Click or tap here to enter text.[ ]  No |
| 1.
 | **Are there institutional investors, DFIs, or OEMs you typically work with to scale your business?** |
|  |  |
|  | **How does your business contribute towards green energy and decarbonisation?** |
|  | Click or tap here to enter text. |
|  | **Would you be willing to participate in a follow-up interview or stakeholder roundtable?** |
|  | [ ]  Yes[ ]  No[ ]  Will delegate to someone else If delegating, please provide contact information Name: Click or tap here to enter text.Contact email: Click or tap here to enter text.Contact number: Click or tap here to enter text. |

Please submit your completed form to mbc.mlysko@gmail.com