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Meetings, Workshops and Conferences

Visit to SAPP Offices by Zimbabwe Minister of Energy and Power Development

The Honourable Minister of Energy and Power Development, Honourable July Moyo, visited the SAPP Offices to familiarise himself with the activities of SAPP on 2 July 2025.



Visit to SAPP Offices by Honourable Minister of Energy and Power Development, Zimbabwe

Visit to SAPP Offices by the SADC Ministers responsible for Energy and Water

The SADC Ministers responsible for Energy and Water visited the SAPP Coordination Centre in Harare on 3 July 2025 on the side-lines of their Joint Ministerial meetings. They were accompanied by the African Union Commissioner for Infrastructure and Energy, H.E. Lerato Mataboge and the SADC Executive Secretary, H.E. Elias Magosi.

SADC Energy and Water Ministers Meetings

The Joint SADC Energy and Water Ministers' meetings were held in Harare, Zimbabwe, on 4 July 2025. They were preceded by the Senior Officials meetings and High-Level Ministerial Dialogues on the Just Energy Transition and Congo River Water Transfer. The agenda for the



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Energy Ministerial meeting focused on how to improve power supply in the SADC region, key activities for security of energy supply, performance of the regional electricity market, optimisation of river basin water flows, progress on establishment and operationalisation of the Regional Transmission Infrastructure Financing Facility (RTIFF), regional energy sector regulatory activities and the promotion of new and renewable energy sources and regional developments in oil and gas sector among other things.



SADC Energy and Water Ministers in Harare, Zimbabwe

SAPP 30-Year Anniversary Celebrations

The SAPP 30-year Anniversary Gala Dinner celebration took place at the Rainbow Towers Hotel in Harare, Zimbabwe, and was officially opened by the Zimbabwe Minister of Energy and Power Development, Honourable July Moyo. Remarks were also made by the SADC Executive Secretary, H.E. Elias Magosi and other stakeholders. The SAPP Executive Committee Vice-Chairman and Executive Chairman of EdM, Mr Joaquim Ou-chim delivered the Vote of Thanks at the event.

The occasion was graced by selected SAPP legends from each of the SAPP members, who are individuals who were considered to have made a significant contribution to SAPP over the past 30 years.



Zimbabwe Honourable Minister of Energy and Power Development at the Gala Dinner



SADC Executive Secretary, H.E. Elias Magosi at the Gala Dinner



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SAPP JICA Coordination Meeting

SAPP and the Japan International Cooperation Agency (JICA) held the Joint Coordination Committee meeting at the SAPP Offices in Harare on 18 July 2025 to review progress on their cooperation activities.



SAPP and JICA Team at the SAPP CC Offices in Harare

SAPP Power Quality Working Group Meeting

The SAPP Power Quality Working Group (PQWG) met from 14 to 15 August 2025 in Gaborone, Botswana. The Working Group tracked the performance of the interconnected power system in terms of power quality. It was noted that the monitored parameters of harmonics and voltage regulation were within limits. However, a few voltage dips were reported caused by line faults and switching operations. Also, voltage unbalance was observed on two interconnections.



Some members of PQWG at the meeting in Gaborone, Botswana.

Telecommunications Working Group (TWG) Meeting

The SAPP Telecommunications Working Group (TWG) held a meeting in Blantyre, Malawi, hosted by ESCOM. The Working Group discussed various requirements for telecommunications, SCADA, and cyber security in the SAPP interconnected power system. During the meeting, representatives of Kafue Gorge Regional Training Centre (KGRTC) of Zambia presented a training programme on cyber security, targeting electric power utilities, to be offered at KGRTC. The meeting was officially opened by ESCOM's Director of Market and System Operator, Mr. Charles Kagona. In his remarks, he noted that the meeting came at a good time when preparations of interconnecting Malawi to Mozambique were at an advanced stage. Meeting participants were taken to Phombeya Substation where the interconnector from Mozambique terminated.



Some TWG Members at Phombeya Substation in Malawi

Protection Coordination Task Team Meeting

Following high-impact SAPP interconnected power system disturbances of 2021/2022, the



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SAPP Operating Sub-Committee (OSC) formed the SAPP Protection System Coordination Task Team (the Task Team) to:

- Evaluate protection system performance on interconnectors; and,
- Review and coordinate protection settings on interconnectors and minimize impact and number of power system disturbances.

The Task Team held a workshop in Lusaka, Zambia from 29 to 30 July 2025 covering obtaining data on protection systems on all interconnectors and under-frequency load-shedding schemes of all interconnected power utilities. The Task Team reviewed the performance of these protection systems, focusing on recent major power system disturbances as case studies. A number of changes in special protection schemes were agreed for immediate implementation. On 31 July 2025, the Task Team visited the 330 kV ZESCO Leopards Hill Substation outside Lusaka and the new 750 MW Kafue Gorge Lower Power Station.



Some Members of the SAPP Protection System Coordination Task Team at Kafue Gorge Lower

Crime Prevention Working Group Meeting

The SAPP Crime Prevention Working Group (CPWG) monitors and reports on theft and vandalism of electricity infrastructure in the region and recommends mitigatory action. The CPWG held a meeting in Harare, Zimbabwe from 6 to 7 August 2025. Reported statistics showed that SAPP member utilities continued losing millions of US Dollars due to theft and vandalism.

To facilitate action on agreed strategies, such as cross-border patrols, the CPWG recommended that SAPP should be working hand-in-hand with law-enforcement agencies, including the national police and InterPol, and the SADC Secretariat to combat theft and vandalism. A representative from the SADC Secretariat at the CPWG meeting presented efforts being made by the Secretariat to combat infrastructure crime, including the drafting of security policies. The Regional InterPol Bureau held a planning meeting for a regional operation, called *Operation Usalama XI* in Maputo, Mozambique, from 11 to 12 August 2025. SAPP was invited and the CPWG Chairperson attended the meeting.



Some members of CPWG at the meeting in Gaborone, Botswana

TICAD 9 High-Level Visit

The Japan International Cooperation Agency (JICA) as part of its cooperation with SAPP and other African Power Pools organised a visit to various Japanese companies in Japan, which included Toshiba, Hitachi, Japanese Power Exchange (JPEX), Tokyo Electric Power Services Company (TEPSCO), the Organisation of Cross-Regional Coordination of Transmission System Operators in Japan (OCCTO), and others. The visit was attended by Government Officials and Power Pool representatives from Africa and took place from 14 to 23 August 2025 on the side-lines of the 9th Tokyo International Conference on African Development (TICAD 9). The participants were exposed to the latest Japanese technologies in various areas.

A TICAD 9 side event entitled "*HICKARE Africa: Harnessing Innovation, Co-creation, and Knowledge for Accessible and Resilient Energy for Africa*" was organised, meaning "*Lighting up*



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Africa". The participants included African Union Commission, AUDA-NAPAD, SAPP, AfDB and World Bank.



Participants at the OCCTO, Japan



Minister of Energy and Power Development of Zimbabwe, Government Officials, Power Pool Representatives and TEPCO Officials

SADC Just Energy Transition Workshop

The SAPP Chief Engineer (Planning and Operations) attended the SADC Just Energy Transition workshop that was held in Windhoek, Namibia, from 5 to 7 August 2025. The workshop was organised by the SADC Secretariat in partnership with the United Nations Economic Commission for Africa (UNECA).

From an economic perspective, the Just Energy Transition presents SADC countries with a pathway to enhanced fiscal stability and improved international competitiveness. A roadmap for the delivery of the Just Energy Transition Policy Framework was developed.

65th SAPP Meetings

The 65th SAPP meetings were hosted by the National Transmission Company of South Africa (NTCSA) in Johannesburg, South Africa. The Management Committee meeting was officially opened by the South African Deputy Minister of Electricity and Energy, Hon. Samantha Graham-Maré.



South African Deputy Minister of Electricity and Energy at the official opening of the 65th SAPP meetings



Delegates at the official opening of the 65th SAPP meetings

21st APUA Congress

The 21st Association of Power Utilities in Africa (APUA) took place in New Cairo, Egypt from 28 October to 3 October 2025. The sessions covered as pre-congress events included:

- Utility CEO Governance and Leadership Forum
- Human Capital development
- Innovation Forum
- African Women in Energy Forum
- Technical and Commercial Losses Reduction Strategies
- Cybersecurity for Power Utilities
- Youth Development



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The AfSEM Forum which is made up of the African Power Pools held its meeting on the sidelines of these meetings with SAPP handing over the chairmanship to WAPP.



Delegates at the APUA Congress in Egypt

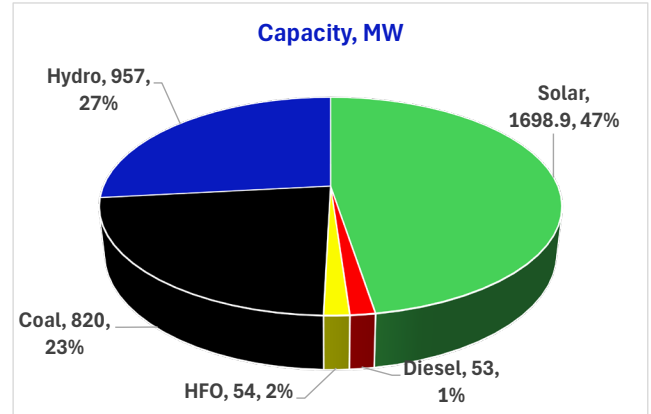


The SAPP CC Executive Director speaking at the APUA Congress in Cairo.

System Planning

Generation Planning Working Group

The SAPP Generation Planning Working Group (GPWG) met in Livingstone, Zambia, in August 2025 and updated the status of generation projects in the SADC region during the meeting. The pie chart below illustrates the types of technology, their capacities, and the percentage contribution commissioned in 2024, with solar energy accounting for 47%.



Members of the Generation Planning Working Group during the site tour of Victoria Falls Power Station

SAPP Pool Plan Update

GET.transform, a component of the Global Energy Transformation Programme (GET.pro), founded by the European Union (EU) and the EU member states of Germany, Sweden, the Netherlands and Austria and implemented by Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH, has procured consultancy services for updating the SAPP Generation and Transmission Master Plan, the SAPP Pool Plan. The draft inception report has been produced.

The SAPP Pool Plan Data Assumption Books to be used for the development of the SAPP generation and transmission network master plan were presented to the GPWG for review and adoption.



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Several online capacity building programs have been undertaken for the SAPP Planning Sub-Committee members, the SAPP Generation Planning and Integrated Demand Side Management Working Group Members.

Meeting with Get.invest for Project Structuring Support

On August 7, a meeting took place between Get.invest, AUDA-NEPAD, and SAPP-PAU to explore potential collaboration opportunities. Get.invest is providing support to SAPP and its utility partners to advance the pipeline of bankable and investment-ready infrastructure projects in the region, particularly those that require financial structuring assistance to reach financial close. Some projects were submitted for immediate support.

Get.invest will explore opportunities to enhance the capacity of project sponsors to ensure alignment on key project cycles and financing processes.

Integrated Demand Management Working Group

The SAPP Integrated Demand Management Working Group (IDMWG) convened in Johannesburg, South Africa, from August 21 to 22, 2025, to discuss and provide updates on Integrated Demand Management (IDM) initiatives.

On September 3, 2025, updates were presented to the Planning Sub-Committee in Johannesburg. The following IDM initiatives have been implemented by member countries:

- Development and implementation of Minimum Energy Performance Standards (MEPS) have been successfully achieved in Tanzania and Zimbabwe.
- There is increasing awareness of energy efficiency programs being implemented in many countries.
- Prepayment energy meters are being installed for low, medium, and high voltage customers throughout the DRC, especially in regions such as Kinshasa, Katanga, and Kongo Central.

- Advanced net metering has been implemented for 736 large power users in Zimbabwe, resulting in the creation of a 75 MW virtual power plant.
- The government of Zimbabwe has engaged a consultant to conduct energy efficiency audits on government facilities, which have demonstrated potential savings averaging 35-40%.



Members of the Integrated Demand Management Working Group during their meeting held at the SAPP Project Advisory Unit Offices in Sunninghill, Johannesburg, South Africa

Update on SAPP Projects

In the quarter under review, the PAU managed six regional energy projects. These projects, as shown in Table 1 below, are at different stages of progression in the project development cycle.

Table 1: SAPP-PAU ENERGY PROJECTS

No	Project Name	%Progress	Status
1	Angola - Namibia 400kV Transmission Interconnector	94	Legal & Financial Structuring ongoing
2	Baynes - Tombwa 400kV Transmission Line (Angola)	0	Procurement of Consultants services
3	Baynes Hydropower Plant 400kV Transmission Lines	48	Feasibility/ESIA Studies Ongoing
4	Luapula River 789MW Hydropower Plant	0	Procurement of Consultants services
5	Malawi-Zambia 400kV Transmission Interconnector	89	Feasibility/ESIA Studies ongoing
6	Mozambique-Tanzania 400kV Interconnector	0	Procurement of Consultants services

Angola-Namibia Interconnector

In the quarter under review, overall progress on the project stands at 95%, and is attributed to the following:

- Completion of EPC Tender Packaging (Technical and Financial proposals) on the Angola transmission section.



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- Significant progress on the preparation of Early Market Engagement activities for the Angola side. The EME will be undertaken by RNT and supported by the project Consultant, to obtain feedback from interested regional and international EPC Contractor firms, on the finalised Tender documents, thereby strengthening the proposed technical and financial bids developed under the project.
- The project held a MANCO meeting on 5 August 2025, to review and discuss progress and recent developments on the Angola section.
- Investment in the Angola section has been split into two portions. The 200km, 400kV section from Lubango substation to Cahama substation, will be financed through the loan agreement between the Government and the World Bank.
- The portion between Cahama substation and the Namibia border will most likely fall under a Public-Private-Partnership (PPP) or Special Purpose Vehicle (SPV) financing agreement. The World Bank has procured a separate Transaction Advisor to structure this latter portion and facilitate for the electrification of the project area in Angola, to promote urbanisation and the agro-industry.

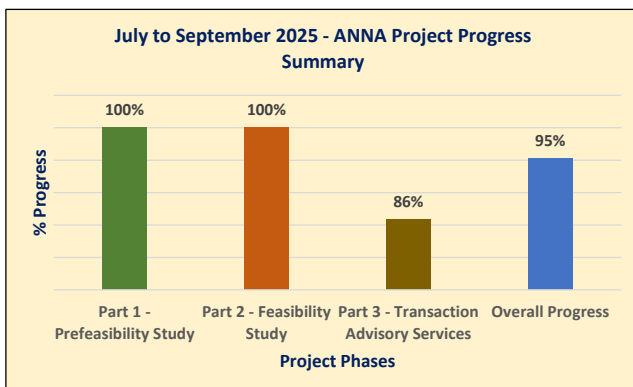


Figure 1: ANNA Project Q2, 2025 Progress Report

Table 2: JULY - SEPTEMBER 2025 PROGRESS SUMMARY

Angola - Namibia Transmission Interconnector	Completion Status		
	Jul-25	Aug-25	Sep-25
Overall Project Progress	93%	94%	95%
D1 - Part 1 - Prefeasibility Study	100%	100%	100%
D2 - Part 2 - Feasibility Study	100%	100%	100%
D3 - Part 3 - Transaction Advisory Services	79%	83%	86%
D3.1 - Joint Investment Agreement (JIA)	100%	100%	100%
D3.2 - ENV: Commitment Register	100%	100%	100%
D3.3 - ENV: Term of Reference for RAP	100%	100%	100%
D3.4 - Kunene Preliminary design Update	100%	100%	100%
D3.5 - Updated Market Analysis	100%	100%	100%
D3.6 - Updated Financial Model	100%	100%	100%
D3.7 - Project Information Memorandum (PIM)	100%	100%	100%
D3.8 - ENV: Environmental and Social specification	100%	100%	100%
D3.9 - Procurement Strategy and Tender Docs	50%	95%	100%
D3.10 - Tender Clarifications and Evaluation	50%	50%	80%
D3.11 - Contract Preparation and Procurement Support	50%	50%	50%
D3.12 - Negotiate Fin Terms Support Fin Close	0%	0%	0%

Baynes HPP Transmission Lines Project

In the quarter under review, overall progress on deliverables reached 49%, attributed to activities centred on the following:

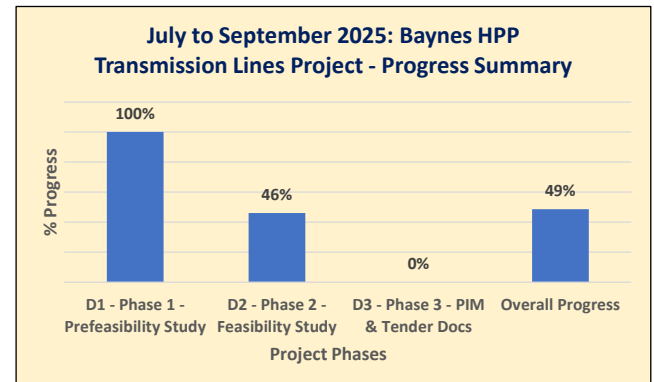


Figure 2: Baynes HPP Project Q2, 2025 Progress Report

Table 3: JULY - SEPTEMBER 2025 REPORT

Baynes HPP Transmission Lines Project	Completion Rate		
	Jul-25	Aug-25	Sep-25
Overall Project Progress	34%	47%	49%
D1 - Phase 1	67%	100%	100%
D1.1 - Inception Report-Technical	100%	100%	100%
D1.2 - Draft Preliminary study Report	100%	100%	100%
D1.3 - Final Preliminary Study Report	0%	100%	100%
D2 - Phase 2	35%	40%	46%
D2.1 - Draft Technical Feasibility Study Report	50%	60%	62%
D2.2 - Final Technical Feasibility Report	20%	20%	30%
D3 - Phase 3	0%	0%	0%
D3.1 - Final Conceptual Design, Tender Documents & PIM	0%	0%	0%

LiDAR and Geotechnical Studies:

- On the Angolan side, LiDAR approvals and permitting by aviation authorities is delayed, the authorities in Cahama region are yet to grant final decision.
- On the Namibian side, LiDAR survey has again been postponed in September 2025, due to an outstanding letter of consent to be



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issued to the service provider by NamPower, and therefore the Namibian Civil Aviation Authority (NCAA) are yet to grant flying permission over the project area.

- Desktop Geotechnical assessments were completed on 30 August 2025. Assessments covered the entire transmission corridor between Cahama in Angola and Kunene in Namibia. A key challenge observed on the Angolan side is steep sloped hills, which has potential to delay actual excavation works of soil profile sampling.
- The Consultant indicated that land mines are a secondary challenge, as demining teams in Angola have sufficient experience and equipment to assure safety in the project area.

Power System Analysis:

- Steady-state, contingency analysis and dynamic simulations have been completed and are documented in draft reports.
- Reference Case (2032) updated with SAPP provided information. Dynamic Simulation setup and future models for 2035 and 2040 planning horizons have been developed.

Training and Skills Transfer:

- Training of technical personnel from RNT and NamPower, in Long-Term Power System Planning, took place in South Africa, at University of Stellenbosch, from 14 to 18 July 2025.

Status of Ongoing ESIA Studies

The ESIA studies have made progress with two key deliverables completed during this period. The Inception Report received approval on August 14, 2025, and the Stakeholder Engagement Plan has also been finalized.

Malawi – Zambia Interconnector Project

In the quarter under review, overall progress on deliverables reached 89%, attributed to completion and submission of the Final Feasibility study report, Geotechnical factual investigation report and draft final Conceptual design report.

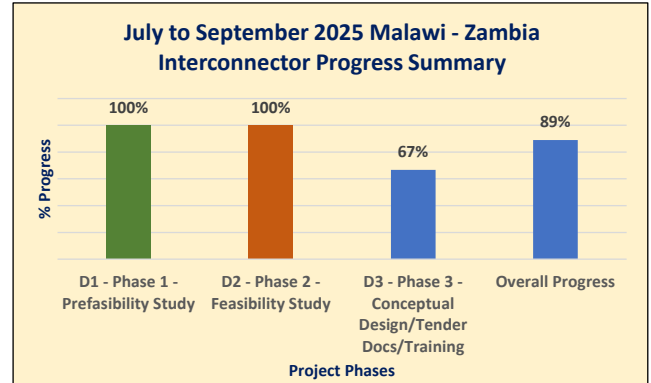


Figure 3: MAZA Project Q2, 2025 Progress Report

Table 4: JULY - SEPTEMBER 2025 REPORT

Malawi-Zambia Transmission Interconnector Project	(%) Completion Rate		
	Jul-25	Aug-25	Sep-25
Overall Project Progress	78%	83%	89%
D1 - Phase 1	100%	100%	100%
D1.1 - Draft Inception Report	100%	100%	100%
D1.2 - Final Inception Report	100%	100%	100%
D1.3 - Draft Preliminary Design Report	100%	100%	100%
D1.4 - Final Preliminary Design Report	100%	100%	100%
D2 - Phase 2	100%	100%	100%
D2.1 - Draft Feasibility Report	100%	100%	100%
D2.2 - Final Feasibility Report	100%	100%	100%
D2.3 - Geotechnical Investigation Report	100%	100%	100%
D3 - Phase 3	35%	50%	67%
D3.1 - Draft Conceptual Design Report	35%	50%	100%
D3.2 - Final Conceptual Design Report and Tender Documents	35%	50%	34%

- The final technical feasibility study report was validated and approved on 23 July 2025, at a workshop held in Lilongwe, Malawi. ESCOM, ZESCO, SAPP, Studio Pietrangeli, Swedfund and other key project stakeholders attended the validation workshop.
- A draft final conceptual design report was submitted to project stakeholders for review and comment on 8 August 2025.
- The Consultant received all comments from project stakeholders, consolidated and updated and submitted the final report on 28 August 2025.
- Ongoing activities include preparation of draft tender documents for Engineering, procurement and Construction of the transmission interconnector.

Status of Ongoing ESIA Studies

In Malawi, significant progress has been made on socio-economic surveys, with 76% of the line corridor now surveyed and over 2,000 assets documented. The census data revealed substantial impacts, including 183 affected



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structures of which 133 are residential, along with extensive vegetation impacts comprising 27,875 fruit trees, 15,000 indigenous trees, and 32,000 exotic trees.

The survey activities were carefully designed to engage with communities through multiple steps, including consulting with community leaders, mobilizing Project Affected Persons for asset inventorying, verifying control station locations, tracing and marking wayleave boundaries, obtaining consent from affected persons, conducting GPS-based land measurements, and performing structured interviews with Project Affected Persons.

However, the surveys have faced delays due to several challenges.

- In Lilongwe District, formal objections from several plot owners have necessitated additional consultation and resolution efforts.
- The survey commencement in Mchinji District was postponed due to difficulties in identifying traditional authority boundaries for the Ndawambe, Pinda, and Simphasi areas.
- Survey activities were suspended during the national elections period. These delays in social survey data collection have consequently affected the ESIA Report update timeline.

Regarding Zambia, the draft ESIA report was completed in July 2025, followed by a validation workshop held in Lusaka on July 23-24, 2025. This workshop focused on the Environmental and Social Impact Assessment and Resettlement Action Plan for the Malawi-Zambia 400 kV Transmission Interconnector Project.

The RAP tools were also finalised and disclosed.

- The Entitlement Matrix was disclosed to the public during consultation meetings, and RAP surveys were conducted from August 17 to September 11, 2025.
- Stakeholder engagement meetings were held from 17 to 22 August 2025, to disseminate the Grievance Redress Mechanism and Entitlement Matrix, as well as a census and asset inventory of Project

Affected Households conducted from August 25 to September 11, 2025.

ZIZABONA Interconnector Project

Progress Summary:

- On 28 August 2025, NamPower and the Consultant held a virtual meeting to review and discuss the NamPower network model, grid topology, generation and transmission development up to the planning year of 2040.
- The draft final Market Study report was resubmitted by SAPP to the project utilities (ZESA, ZESCO, BPC, NamPower), for their review and comment on 4 August 2025.
- The Consultant has planned to start detailed network analysis once the market study report has been approved by the project sponsors.
- The updated line route and substation report has recommended double-circuit transmission lines across the project.

ESIA studies:

Outstanding Deliverables and Expected Actions:

The consultant has updated the ESIA reports and comment matrices for both Zambia and Zimbabwe. Outstanding comments on the updated draft ESIA are expected by 6 October 2025. The Botswana ESIA report and its accompanying comment matrix will be available for stakeholder review in November 2025. Nampower is yet to confirm whether there is any requirement for an ESIA in relation to the new line route in Namibia.

Procurement of Consulting Services

- **Baynes – Tombwa Transmission Studies:**
The studies are awaiting clearance from the African Development Bank (AfDB) to proceed. The studies will include a technical prefeasibility study, and environmental and social scoping deliverables.
- **Luapula River Hydropower Plant Project:**
The Request for Proposal (RFP) has been issued to shortlisted bidders and procurement



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clarifications on TORs (technical and ESIA) has been undertaken.

- **Mozambique – Tanzania Interconnector:** RFP procurement evaluation stage for the selection of services providers; for the technical feasibility study and the ESIA study commenced.

Regional Transmission Infrastructure Financing Facility (RTIFF)

From 24th to 26th September 2025, the SAPP Legal Working Group (LWG) and Finance Working Group (FWG) participated in a capacity-building workshop on Fund Operations and Management, conducted by the SAPP RTIFF Legal Counsel in Johannesburg, South Africa.

This workshop followed the August 2025 virtual sessions, during which both Working Groups deliberated on the RTIFF Fund Structure and governance documentation. Recognizing the need for a deeper understanding of Fund Management principles and operational modalities, the Groups resolved to leverage the ALSF grant to strengthen their capacity in this area.

The training sessions provided comprehensive insights into the Private Equity Fund Ecosystem, including key provisions of constitutive documentation, fund lifecycle management, and governance arrangements. These learnings have equipped the Working Groups with the technical capacity necessary to refine the RTIFF Fund's operational framework.

System Operations

SAPP System Disturbances

July 2025: In the month of July 2025, four (4) system disturbances were reported. In the first one, the Zimbabwe power system blacked out following the tripping of the interconnector from South Africa due to a faulty line. Other interconnectors from Zimbabwe to Mozambique North and to Zambia also tripped due to operation of special protection schemes. In the second one,

a generation unit tripped from 450 MW in South Africa. The power system frequency fell from 49.79 Hz to a minimum of 49.48 Hz. The third one was a high-frequency incident caused by fast ramping up of generation in anticipation of increased demand. Power frequency reached 50.513 Hz because of surplus power. The fourth one was a high frequency incident. The bus coupler circuit breaker tripped in Mozambique North, power swings were triggered in the central corridor, and subsequently the interconnector between South Africa, Botswana and Zimbabwe tripped while transferring about 700 MW, leading to cascaded tripping of equipment in Zimbabwe.

August 2025: In the month of August 2025, six (6) SAPP system disturbances were reported. The first two were low-frequency excursion incidents, caused by tripping of generators in South Africa and in Zambia. In the third one, an interconnector tripped in the central corridor due to undamped power swings. The fourth one was a high-frequency excursion incident caused by surplus generation during the morning peak period. The last two were characterised by tripping of transmission equipment in Zimbabwe and in Zambia due to faulty equipment.

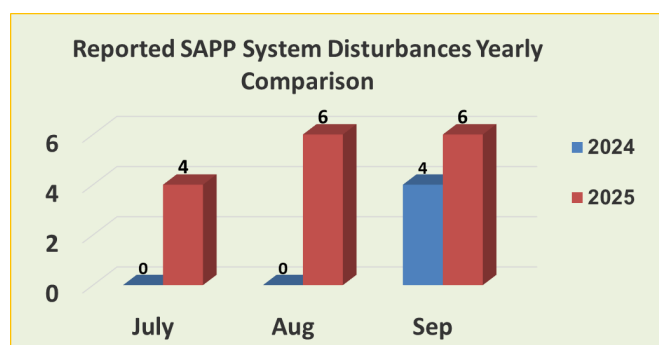
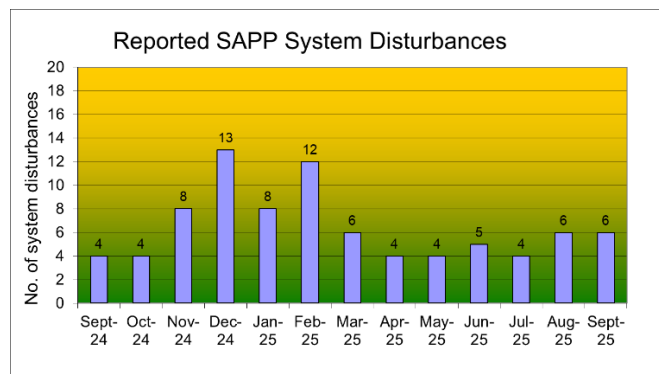
September 2025: In the month of September 2025, six (6) SAPP system disturbances were reported. The first two were low frequency incidents due to tripping of a generator in South Africa from 699.54 MW and from 520 MW. The power system frequency fell from 49.85 Hz to a minimum of 49.45 Hz for the first one, and from 49.97 Hz to 49.48 Hz in the second one. In response to the power frequency deviation, instantaneous demand response operated in South Africa and three pumped storage units increased generation, to control power frequency back to the normal band. In the third and fourth disturbances, the 400 kV Botswana - Zimbabwe tie line tripped due to protection system malfunction. In the fifth one, the 220 kV Zambia - Dr Congo interconnectors tripped on distance protection. In the 6th one, the southern network of DR Congo blacked out and power frequency rose from 50.21 Hz to 50.52 Hz in the main SAPP network. Refer to figures below for an outlook of reported SAPP



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system disturbances in the last 12 months and yearly comparison.



Power Supply – Demand Situation

The table below shows the power supply and demand situation for the quarter.

Country, Utility	Available (MW), during time of peak	Firm Imports ^{2,4}	Potential Peak Demand (MW) ¹	Estimated Load Shed (MW)
South Africa, Eskom	32,849	-	30,291	-
Botswana, BPC	590	50	684	-
Eswatini, EEC	60	200	214.5	-
Mozambique, EDM and HCB ^{2,3}	2,246	-	1,140	-
Namibia, NamPower	543.5	350	666	-
Zambia, ZESCO, CEC	2,205	175	2,597	600
Zimbabwe, ZESA	1,505	50	2,153	300
Lesotho, LEC	78	130	193	-
DR Congo, SNEL ²	2,034	50	2,176	200

Notes: ¹Potential Peak Demand without load shedding.
²Estimated figures
³EDM load excludes MOZAL, which has been included in Eskom demand.

SAPP Outages

The table below presents key SAPP outages implemented in the quarter.

OUTAGES IMPLEMENTED	
DATE	EQUIPMENT DESCRIPTION
04JUL25	Maputo–Mozal 400/132 KV Transformer 1
04JUL25	132 kV Normandie - Mahamba line
11-12 JUL25	400 kV Matimba-Phokojie-Insukamini interconnector
08JUL25	400/220 kV Aggeneis Transformer 1
10JUL25	400 kV NTCSA-EDM interconnector
19JUL25	275 kV Komatipoort – RGarcia line
22-23 JUL25	330 kV Kariba South – Kariba North interconnector.
24JUL25	330 kV Songo – Bindura interconnector
27JUL25	330 kV Songo – Bindura interconnector
05-08 AUG25	400/132 kV Maputo – Mozal transformer
05-08 AUG25	400 kV Arnot – Maputo interconnector
07AUG25	400 kV Aries - Kokerboom interconnector
18-24 AUG25	400 kV Aries – Aggeneis line
05-08 AUG25	400/132 kV Maputo – Mozal transformer for maintenance
05-08 AUG25	400 kV Arnot – Maputo interconnector for maintenance
07AUG25	400 kV Aries - Kokerboom interconnector for maintenance
18-24 AUG25	400 kV Aries – Aggeneis line for maintenance
26AUG25	330 kV Kariba South (ZESA) - Kariba North (ZESCO) Interconnector #1 for commissioning of special protection schemes.
27AUG25	330 kV Kariba South (ZESA) - Kariba North (ZESCO) Interconnector #2 for commissioning of special protection schemes.
19SEP25	400/132 kV Maputo Mozal transformer for maintenance.
21SEP25	330 kV Dema (ZESA) - Warren (ZESA) transmission line for clearing critical defects on auto-synch equipment and bus bar isolators and opportunistic maintenance.
1718SEP25	400 kV Maputo bus bar 1 and 2 for isolator maintenance.
22-26SEP25	400 kV Camden – Normandie line for maintenance.

Electricity Trading

Traded Volumes

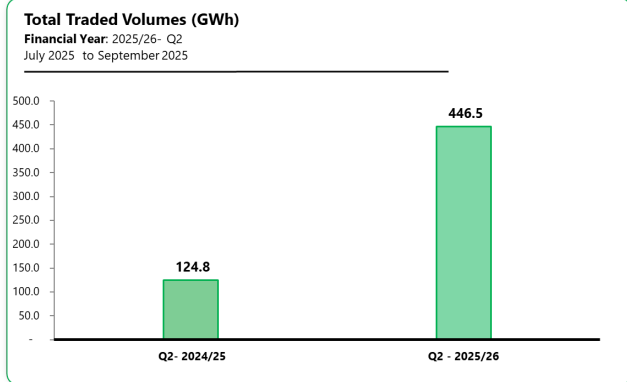
During the second quarter of the 2025/26 financial year, a total of 446.5 GWh were traded as compared to 208.1 traded during the first



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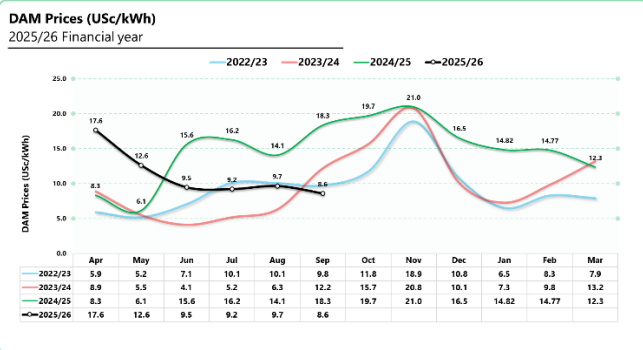


quarter of 2025/6. 124.8 GWh was traded during the same period in the previous financial year.



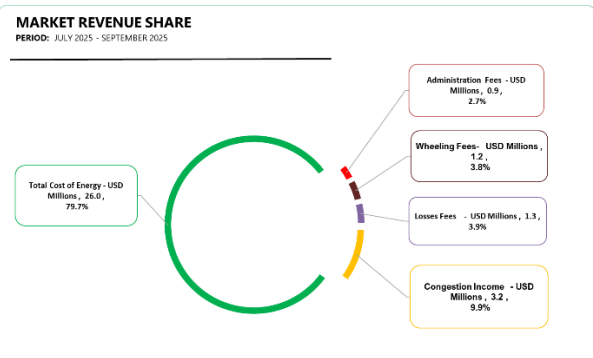
Market Energy Prices

During the third quarter, the average market clearing price have generally been lower than the same period during the previous financial year.



Market Revenues

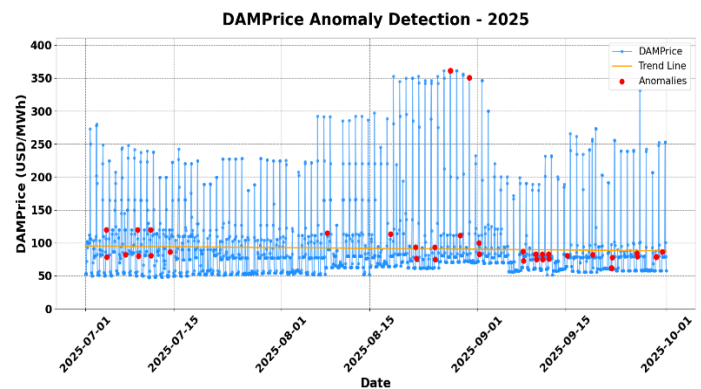
During the second quarter of 2025/26 financial year, a total revenue of 32.6 million was recorded as compared to 20.5 million recorded during the same period in the last financial year.



Market Surveillance

Market Monitoring and Surveillance

During the period under review, the Market Surveillance Unit observed anomalies in DAM clearing prices. Upon analysis, it was confirmed that these anomalies were not indicative of market manipulation or insider trading. Instead, the price fluctuations were attributed to the natural dynamics of supply and demand. Overall, DAM prices remained relatively stable throughout the period.



Average DAM Clearing Prices by Quarter

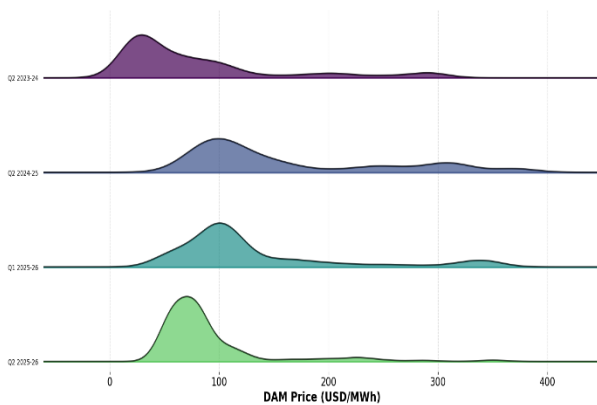
The DAM price distribution for Q2 2025–26 shows a distinct shift compared to previous quarters. While the average prices have decreased relative to Q1 2025–26 and Q2 2024–25, the distribution for Q2 2025–26 features a higher peak, indicating a stronger concentration of prices around the central value. Additionally, the thinner tail suggests a reduced occurrence of extremely high prices, pointing to increased price stability during the quarter. This contrasts with the broader and flatter distributions observed in earlier quarters, which exhibited greater price variability and more frequent high-price events.



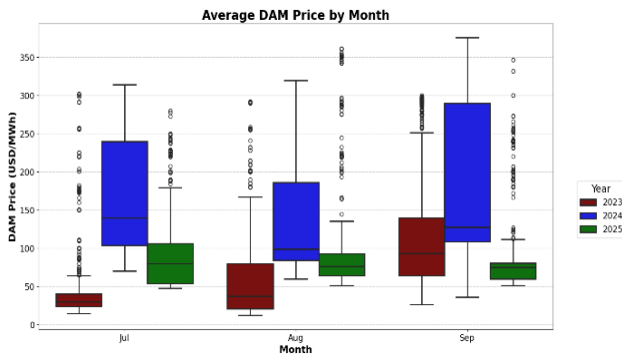
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DAMPrice Distribution by Quarter



Average DAM Clearing Prices for the Period July-September 2025 Monthly Analysis

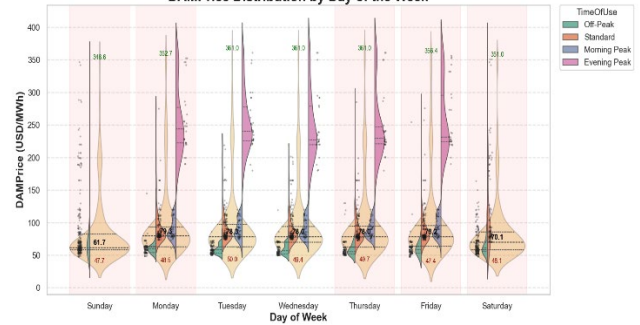


A comparative analysis of Day-Ahead Market (DAM) clearing prices for July, August, and September reveals that 2025 prices are consistently lower than those recorded in 2024, but generally higher than 2023, except for September, where 2025 prices are the lowest among the three years. This pattern suggests a moderation in DAM prices during Q2 2025–26, reflecting a shift toward more subdued and stable market conditions compared to the elevated pricing observed in the previous years.

Day of the Week Analysis

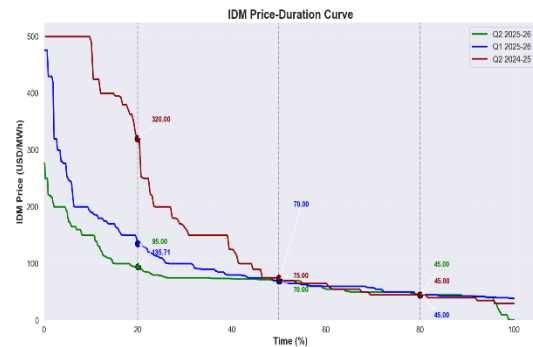
During the week, electricity prices in the Day-Ahead Market (DAM) were generally higher than on weekends. This reflects stronger power demand and more trading activity from Monday to Friday, when industries and businesses are operating. Prices were specifically higher during the Evening Peak.

DAMPrice Distribution by Day of the Week



In contrast, prices were lower during Off-Peak, Morning Peak and Standard periods. Sundays showed the lowest average prices, around US\$62/MWh, indicating reduced demand and less market pressure. Overall, the pattern suggests that electricity prices closely follow daily usage trends, rising when demand is strong and easing when the system is less active.

Average IDM clearing Prices



The IDM Price-Duration Curve displays price trends over time, showing that for Q2 2025–26, prices were lower than the previous period and same period last year with prices above USD95/MWh 20% of the times compared to USD136/MWh and USD320/MWh for Q1 2025–26 and Q2 2024–25 respectively.

Average DAM and IDM Volumes

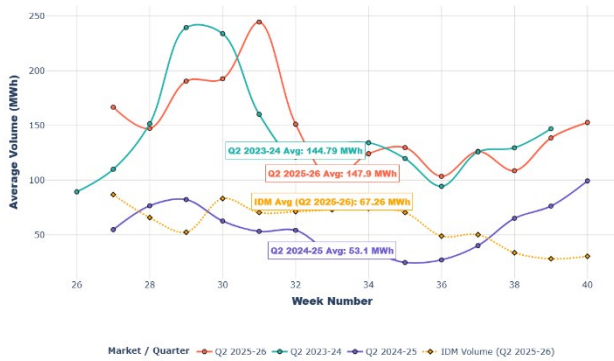
In Q2 2025–26, the average traded volume in the Day-Ahead Market (DAM) remained moderate at around 147.9 MWh, above the previous year's Q2 2024–25 level (53.1 MWh) and Q2 2023–24 (144.8 MWh).



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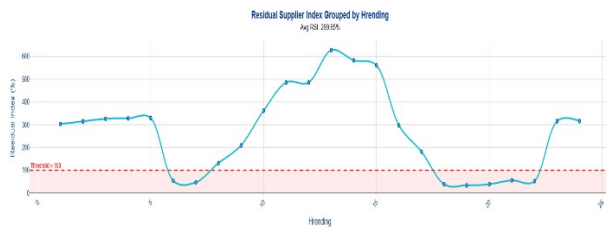


Weekly Average Traded Volume vs IDM Volume (Q2 Comparison)



The Intra-Day Market (IDM) volumes averaged 67.6 MWh in Q2 2025–26, which is noticeably lower than the DAM levels, highlighting reduced short-term balancing activity. This could indicate that market participants relied more on the day-ahead market for their positions, with less adjustment taking place closer to delivery.

Residual Supplier Index July to September 2025



The RSI measures the ability of the market to meet demand without the supply from a specific market participant.

RSI > 100%: The market can meet demand without the dominant market participant. — low market power.

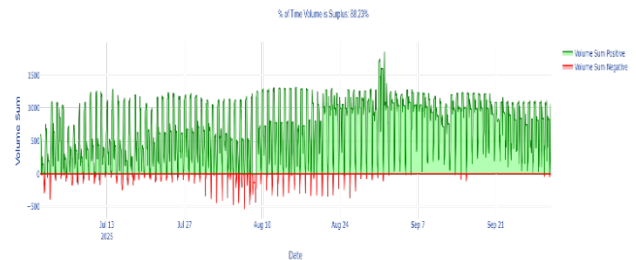
RSI < 100%: The dominant market participant is pivotal — its supply is necessary to meet demand, indicating high market power.

From the graph, there was no dominant market participant with market power during morning off-peak hours and evening peak hours.

Output Gap (MWhs)

The period between July – September 2025 had more times with volume surplus as compared to

other periods. There was volume surplus 88.23% of the times during the period.



Cases

During the review period, the Unit did not receive any tips or reports of suspicious activities that would necessitate further investigation or analysis. This lack of alerts indicates a stable operational environment, with no identified cases that required attention or intervention.

Environmental Corner

Environmental Management System Implementation

SAPP Members are proceeding with environmental management systems implementation as they aspire to enhance sustainable operations in the energy sector. During the period under review, members undertook training on environmental management, addressing findings from previous audits while some were working on policy and general management systems documentation review for consideration by Management. At the coordination centre, employees underwent two trainings facilitated by the Standards Association of Zimbabwe.

ESC Sustainability Workshop

On the 1st of July 2025, the ESC convened a virtual sustainability reporting workshop in conjunction with the International Financial Reporting Standards Foundation. The workshop was attended by forty-six participants from SAPP members across the region. There was high attendance due to the interest in sustainability matters, as well as extended invitations to other



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members in the safety, health, environment and quality functions who might not necessarily be members of the ESC.

The workshop sought to offer a platform for SAPP Members not only to strengthen their capacity in sustainability reporting but also to make material input to the content of the IFRS Standard on Electric Utilities and Power Generators, as it is currently under review. The following aspects were emphasized:

- Sustainability reporting in utilities and project development in general
- Aspects to cover when reporting, which includes various energy sources, socio-economic aspects and financing models
- Capacity building needs and how they can be addressed
- Significance of Solar and Wind technology project developer's standards

ESC Document Review Task Team

The Document Review Task Team held a virtual meeting on the 8th of August 2025. The meeting sought to evaluate progress on the revision of environmental management documentation for SAPP. It was noted that the Poly-chlorinated-biphenyls (PCB) Standard Operating Procedure and Risk Assessment Guide were finalised and submitted for approval to SAPP MANCO and EXCO. The team agreed that the ESIA Guidelines and SAPP Climate Change Strategy will be reviewed internally, and the work plan for this exercise will be circulated by the end of September 2025.

ESC Climate Change Task Team Meeting

On the 28th of August 2025, the Climate Change Task Team held a meeting focusing on renewable energy and carbon market feasibility studies. It was resolved that members of the ESC need to familiarise themselves with the nationally determined contributions (NDCs), renewable energy policies, and legislation in their respective countries. This knowledge will help the ESC in contributing effectively to the ongoing SAPP new markets feasibility studies, as most countries are at level 3 of NDC development.

Southern African Regional Climate Outlook Forum 31 (SARCOF-31)

SARCOF-31 was held in Lusaka from 8-11 September 2025. SAPP participated in the forum alongside government departments from SADC member states. The seasonal forecast presented revealed that the bulk of the region is likely to receive normal to above-normal rainfall for most of the period of October to December (OND) 2025 and January to March 2026 except Tanzania, DRC, Angola and the western fringes of Namibia where below-normal rainfall is expected. Temperature outlook for the entire 2025/26 rainfall season indicates that temperatures are expected to be mostly above long-term averages over the whole of the SADC, except for central parts of the region. This scenario is going to negatively affect hydro power generation in Tanzania, Angola, Zimbabwe, Zambia, Malawi, and Mozambique. Figure 1 below shows the seasonal outlook for October, November and December 2025 period.

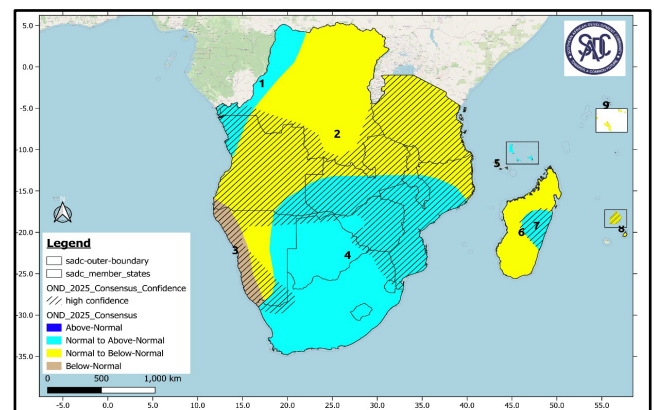


Figure 1: Rainfall forecast for October, November and December 2025

Although seasonal forecasts are based on likelihood SAPP members are encouraged to take the information seriously. Utilities must plan well in advance for the possible constrained supply of water for hydropower generation in the indicated parts of the region, which is likely to negatively impact the region.



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Upcoming Events - 2025

DATE	EVENT
26 Sept – 3 Oct 2025	21 st APUA Congress, Cairo, Egypt
28 Sept – 2 Oct 2025	IEEE PES/IAS Power Africa Conference (PAC 2025), Cairo, Egypt
29 Sept–3 Oct 2025	African Energy Week 2025, Cape Town, South Africa
8-9 October 2025	SAPP Finance Working Group Meeting, Angola
8-10 October 2025	EAPP - SAPP Coordination meeting, Arusha, Tanzania
14-17 October 2025	CIGRE Southern African Regional Conference, Pretoria, South Africa
21 October 2025	SADC Energy Thematic Group Meeting, Gaborone, Botswana
28-30 October 2025	14th International Forum on Energy for Sustainable Development, Skopje, Republic of North Macedonia
28-31 October 2025	Luanda Infrastructure Financing Summit, Luanda, Angola
3-7 November 2025	SAPP CC ISO 14001 and 9001 Documentation Review Workshop, Zimbabwe
6 November 2025	59th SAPP EXCO Meeting, Maseru, Lesotho
10-21 Nov 2025	COP30, Brazil
25-27 Nov 2025	Africa Energy Leadership Summit, Kigali, Rwanda
26-28 Nov 2025	Africa Investment Forum Market Days Event 2025, Rabat, Morocco
26-28 Nov 2025	Zimbabwe-Zambia Energy Projects Summit, Livingstone, Zambia
November 2025	SAPP Finance Working Group Meeting, Namibia
9 December 2025	64th SAPP CC Board Meeting, Harare, Zimbabwe
21 – 22 January 2026	SAPP Energy Traders and System Controllers Forum, Luanda, Angola
23-27 Feb 2026	2026 SADC Sustainable Energy Week, Victoria Falls, Zimbabwe
February/March 2026	66 th SAPP Meetings, Zambia
3 – 5 March 2026	Africa Energy Indaba, Cape Town, South Africa
23 – 28 August 2026	CIGRE Paris Session, Paris, France



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