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Meetings, Workshops, and Conferences

SAPP Executive Committee Meeting

The 58th SAPP Executive Committee meeting was held in Swakopmund, Namibia, on 10 April 2025. The meeting was officially opened by the Deputy Minister of Mines and Energy of Namibia. The meeting focused on the following, among other activities:

- Status of the demand and supply situation in SADC,
- Update on generation and transmission projects,
- Status of the Regional Transmission Infrastructure Financing Facility (RTIFF),
- Update on the SAPP market performance and how to address the low trade volumes,
- Financial matters for SAPP, and
- SAPP membership reviews.

Women in Energy Network Meeting

The SAPP participated in the Women in Energy Network (WEN) meeting that was held in Lusaka, Zambia. SAPP received a certificate of appreciation as a strategic partner of WEN-Africa, acknowledging its commitment to advancing gender inclusion in the African energy sector and supporting the mission and objectives of WEN-Africa.



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ZTK Interconnector Implementation Meeting

The SAPP participated in the commissioning and sign off the Zambia Tanzania Kenya Transmission Interconnector project, Zambia section on 11 April 2025. The meeting was held in Lusaka, Zambia and hosted by the Government of Zambia and ZESCO. The implementation agreement was signed by the Government of Zambia, the World Bank, the EU and ZESCO. The Project reached financial close on 29 January 2025.



Planned 400 kV Mozambique – Malawi Interconnection Preparedness

The 400 kV Mozambique – Malawi interconnection project is expected to be commissioned in September 2025. To facilitate smooth handover of the project from implementation to operation, SAPP Coordination Centre, in conjunction with ESCOM, organized a

site visit of the Phombeya Border Substation in Malawi and a workshop from 09 to 11 April 2025. The workshop was held in Blantyre, Malawi. Participants came from ESCOM, EDM, HCB, ZESA and SAPP Coordination Centre. A checklist on power system operations and energy trading readiness was discussed and targets were set for outstanding activities.



Some members of the ESCOM Management and workshop participants on the Mozambique-Malawi interconnection readiness in Blantyre, Malawi.



Mozambique-Malawi interconnection workshop participants at Phombeya Border Substation

High-level Meeting on Accelerating Priority Power Projects in Africa

AUDA NEPAD together with the African Development Bank (AfDB), Trade and Development Bank held a High-Level Meeting in Nairobi, Kenya on 2-3 April 2025, with Philanthropic Organisations and DFIs on “Accelerating Preparation of Priority Power Projects in Africa”.

The Power Pools represented, SAPP, EAPP, WAPP and CAPP made presentations on priority projects. The Philanthropic organisations, Global Energy Alliance for People and Planet (GEAPP) and Children Investment Fund Foundation (CIFF) represented at least 12 different Philanthropic



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organisations that want to finance and fast-track power projects that will develop and uplift their key stakeholders.

The objective of the high-level meeting was to discuss and agree on concrete measures for accelerating project preparation for power projects from concept to bankability to realise the full potential of the continental initiatives of the African Single Electricity Market (AfSEM), Continental Power Systems Masterplan (CMP) and Mission 300 as well as promoting community empowerment approaches for grid-connected mini-grids to rapidly increase electricity access and socioeconomic development in underserved communities.

The "Nairobi Roadmap" was developed and approved to accelerate Africa's development aspirations through Philanthropic support and this will be presented at the G20 Energy Transition Ministerial Meeting in September 2025 as part of Africa's blueprint for power sector transformation. The roadmap outlines priorities to:

- Strengthen synergies among initiatives like the African Single Electricity Market and Mission 300.
- Introduce innovative financial instruments.
- Mobilize philanthropic and blended finance.



System Planning

SAPP Pool Plan Update

The Consultant for the SAPP Pool Plan update was appointed in April 2025, and the initial kick-off meeting was held. The Consultant was appointed with financial support from GIZ Get.Transform. Upcoming activities include the

kick-off meeting with the Planning Sub Committee and Environmental Sub Committee scheduled for 14th May 2025.

Transmission Pricing

The SAPP continued with the development of a cost-reflective nodal transmission pricing methodology. During the period under review, engagements were made with the CEC and HCB to set up consultation dates to further familiarise the two members with the transmission pricing methodology.

SAPP JICA Technical Cooperation

The following capacity-building programs were held under the SAPP JICA Technical Cooperation arrangement:

- Basic knowledge of Interconnections
- Fundamentals of Project Management
- Generation planning and demand forecasting

Update on SAPP Projects

Angola-Namibia Interconnector

The ANNA Interconnector Project activities continued with the commercial, legal, regulatory and financial structuring with a view to reaching financial close and procurement of an EPC contractor for the construction and commercial operation of the interconnector assets. The interconnector will connect Angola to the SAPP, through a 366km, 400kV transmission line with Namibia network. The interconnector will tie the Lubango Substation via the Cahama Substation in Angola to the Kunene Substation in Namibia.

In the month under review, ongoing activities on the Project included updating of the Angola transmission corridor Tender Documents which include the following:

- **Volume 1;** Bidding Procedures.
- **Volume 2;** Works Requirements.
- **Volume 3;** Conditions of Contract and Contract Forms.



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Progress Update Summary:

The Transaction Advisor updated the tender documents through an iterative process and exchange with stakeholders, including the World Bank and RNT. The latest updated version was released to the World Bank and RNT on 24 April 2025. RNT provided comments on this version and finalisation is pending World Bank comments and the terms for financing.

Next Steps:

- Confirmation of investment funding by the Government of Angola.
- Loan Agreement between the Government of Angola and the World Bank.
- Inputs on specific contractual terms and conditions, as well as information on the tender evaluation criteria.
- Provide support to RNT towards financial close.
- Support NamPower on any capital structuring requirements.

Overall Progress Picture

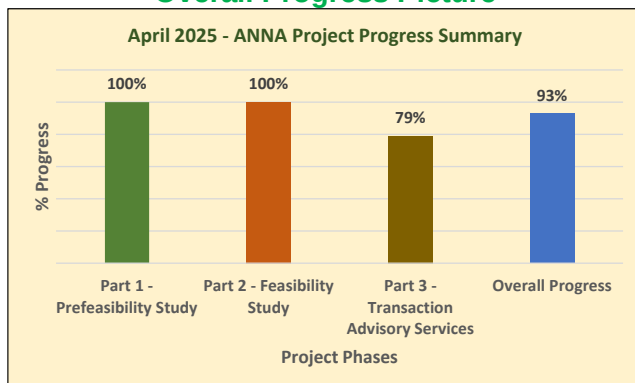


Figure 1: ANNA Transmission Interconnector Project

Baynes HPP Transmission Lines Project

The Project is for the integration of the proposed Baynes Hydropower Plant to the Angola and Namibia transmission network, through a 275km and a 175km, 400kV lines terminating at Cahama and Kunene substations, respectively.

Technical Study Progress Summary:

In the month under review, Part 2 project activities included the following.

- **Data Collection:** SAPP, RNT and NamPower provided data sets to the Consultant conducting the studies.
- **LiDAR and Geotechnical surveys:** Preparations for ground control placements are in progress and are pending confirmation of availability of demining services on the Angola transmission corridor.
- **Infrastructure Preliminary Design:** Preliminary design and drawings of the switching station are being developed based on the discussions held with NamPower on 25 March 2025 and with RNT on 26 March 2025.
- **Power System Analysis:** A reference case analysis file has been developed for the Project.
- **Commercial Structure:** Three options of proposed commercial structures were presented and discussed with RNT and NamPower on 11 April 2025.
- **Training and Skills Transfer:** The first session of capacity reinforcement in Planning, Design and Construction of transmission lines has been confirmed to take place on 5 to 9 May 2025, targeted for at least 12 participants from RNT, NamPower and SAPP respectively.

Overall Progress Picture

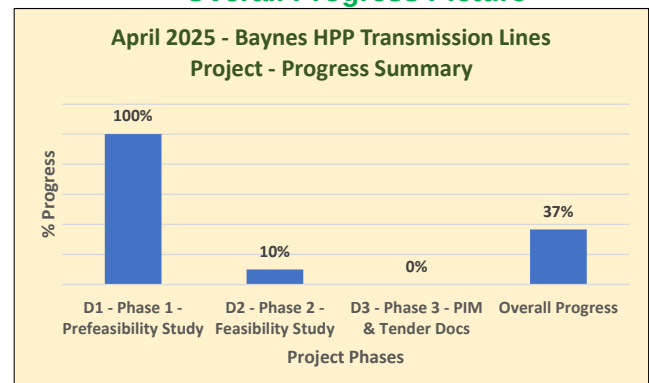


Figure 2: Baynes HPP Transmission Lines Project

Malawi – Zambia Interconnector Project

The Project is for a Technical Feasibility study and an ESIA study, for the interconnection of the Malawi network to the Zambia network, through a 192km, 400kV transmission interconnector. The interconnector will tie Nkhoma substation in Malawi to Chipata West substation in Zambia.



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In the month under review, project activities focused on finalising the Draft Final Feasibility Study Report. Technical and economic and financial analyses were undertaken by the Consultant in collaboration with the project stakeholders.

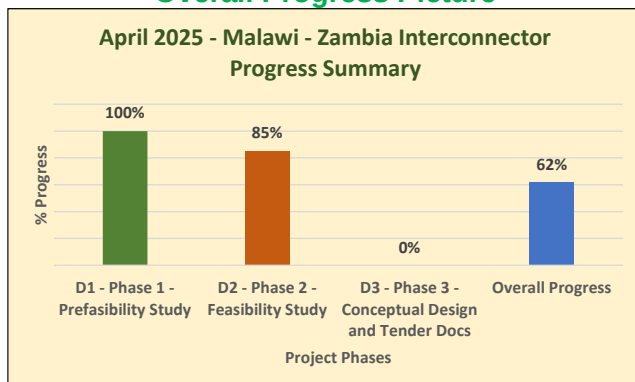
Technical Study Progress Summary:

- Confirmation of technical, economic and financial assumptions and inputs presented in the Draft Feasibility Study Report relevant to the economic analysis was completed in April 2025.
- Provisional cost estimates of the Environmental and Social Management Plan (ESMP) and Resettlement Action Plan (RAP) (obtained from INTEC GOPA) were used in calculations to estimate Economic and Financial analyses outputs.
- Preliminary cost estimates for the Chipata West 400kV switching station have been completed based on recent market pricing.

Next Steps:

- Network analysis – Static analysis modelling.
- Network analysis – Static load flow studies, contingency studies and short circuit analysis.
- Network analysis – Transient stability analysis, inter- area oscillation analysis.
- Detailed Economic and Financial analysis.

Overall Progress Picture



ZIZABONA

The Project aims to update the 2017 Feasibility Study Report, and ESIA reports, with a view to updating the technical designs of the transmission line and substation installations, as

well as estimating the overall economic and financial costs and benefits.

Progress Update Summary:

- On 1 April 2025, a bilateral meeting was held between ZESCO and the Technical Study Consultant to discuss and review market study assumptions. The meeting achieved its objectives and received support from the project sponsor.
- On 3 April 2025, a bilateral meeting was held between BPC and the Technical Study Consultant to discuss and review market study assumptions. The meeting achieved its objectives and received support from the project sponsor.
- On 4 April 2025, a bilateral meeting was held between NamPower and the Technical Study Consultant to discuss and review market study assumptions. The meeting achieved its objectives and received support from the project sponsor.

Baynes HPP Transmission Lines Project

Technical Studies

The Technical Consultant submitted a payment term modification request on 09 April 2025; this is being reviewed and will be sent to the AfDB for a “No Objection”.

ESIA Studies

The kick-off meeting was held with the Environmental Consultant on 16 April 2025 to officially start the assignment. The first progress meeting is planned for 06 May 2025.

International Panel of Experts

The Independent Panel of Experts (IPOE) for the Baynes Hydro Power Project will comprise of 5 Experts. Three Experts have been procured and two are still outstanding, being the Hydrologist and Mechanical Engineer. The delays in procurement have largely been due to the contractual clauses. The African Development Bank (AfDB) will consider revising the liability



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contract clause on the IPOE's to assist the Project to procure the two missing members.

Baynes – Tombwa Transmission Project

Negotiation meetings for the Baynes Tombwa project were held on 10 April 2025. Draft Contract and minutes of the negotiations were submitted to the African Development Bank (AfDB) for a “No Objection”.

Luapula Hydro Project

The Expression of Interest (EOI) evaluation kick-off meeting was held on 03 April 2025 for both the Technical and Environmental assignments. The consolidation meeting for Technical proposals was held on 15 April 2025 and on 16 April 2025 for the Environmental component.

The evaluation reports were submitted to the AfDB on 25 April 2025.

Malawi – Zambia Interconnector Project

The Environmental Consultant submitted a cost variation, which is under review. Discussion meetings were held between SAPP, Swedfund, and the Consultants on 24 April 2025.

Several working meetings were held to finalize the survey instruments, the entitlement matrix, and the RAP management for the Malawi portion of the transmission line.

In Zambia, the collection of baseline data was initiated during this period.

Mozambique – Tanzania Interconnector Project

The approval and “No Objection” to proceed with issuing the Technical Expression of Interest (EOI) was received on 10 April 2025 from the AfDB. The revised Request for Proposal (RFP) for both the Technical and Environmental Studies were submitted for “No Objection” to the AfDB on 22 April 2025.

Regional Transmission Infrastructure Financing Facility (RTIFF)

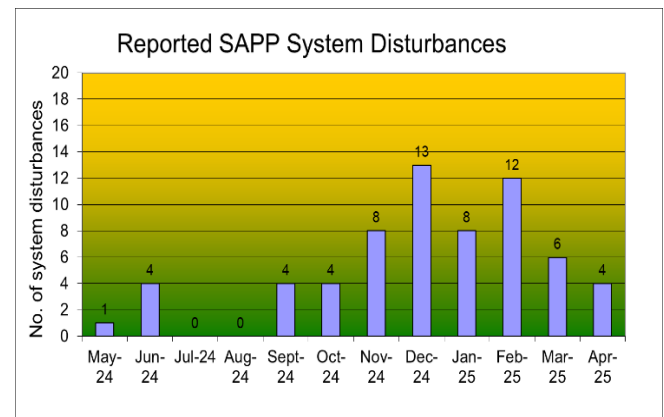
Progress on the Regional Transmission Infrastructure Financing Facility (RTIFF) during April 2025 was modest. The key development was confirmation from the African Legal Support Facility (ALSF) of the legal counsel and ALSF's willingness to provide capacity building to key teams involved with the RTIFF facility. In parallel, the Southern African Power Pool (SAPP) Secretariat is currently reviewing the draft engagement letter submitted by ALSF, which outlines the proposed terms and scope of legal services.

No additional technical or governance milestones were finalized in April, but preparatory work is ongoing to ensure legal structuring efforts can proceed once the engagement is formalized.

System Operations

SAPP System Disturbances

In April 2025, four (4) system disturbances were reported. They were all power frequency excursion events, caused by the tripping of generators in South Africa. Refer to the figure below for the general outlook of SAPP system disturbances in the last twelve months.



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Power Supply – Demand Situation

The table below shows the power supply and demand situation for April 2025 in SAPP member utilities.

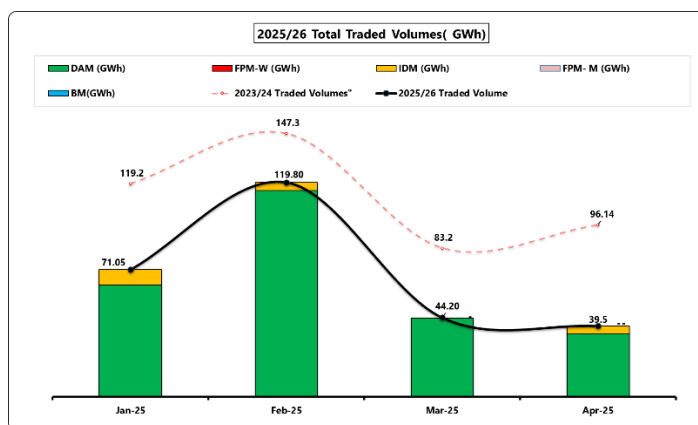
Country, Utility	Available (MW), during time of peak	Recorded Peak Demand (MW) ¹	Load Shed (MW)
South Africa, Eskom	32,000	31,014	-
Botswana, BPC	740	656	-
Eswatini, EEC	70	223.6	-
Mozambique, EDM and HCB ^{1,2,3}	2,246	1,024	-
Namibia, NamPower	489.5	618	-
Zambia, ZESCO, CEC	1,279	1,690	600
Zimbabwe, ZESA	1,505	1,590	500
Lesotho, LEC	104	158.8	-
DR Congo, SNEL ²	2,034	1,976	200

Notes: ¹Recorded peak demand – after load shedding
²Estimated figures
³EDM excludes MOZAL, which has been included in Eskom demand.

Electricity Trading

Traded Volumes

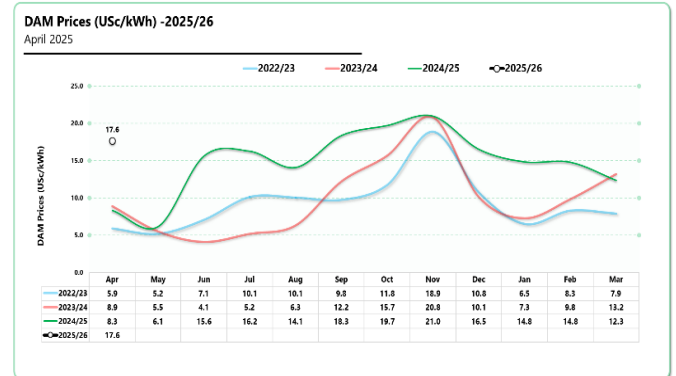
The total traded volumes in all the markets decreased by 11.9% to 39.5 GWh in April 2025, from the March 2025 volume of 44.2 GWh.



Monthly Traded Volumes (GWh) in FPM-M, FPM-W, DAM, IDM, and BM (January 2025 to April 2025).

Market Energy Prices

The monthly average DAM market clearing price (MCP) for April 2025 was 17.6 US\$/kWh. This was a 43% increase when compared to the March 2025 market-clearing price of 12.3 US\$/kWh.



DAM Monthly Average Market Clearing Prices from January 2025 to March 2025.

Market Revenues

In April 2025, the total revenue exchanged on the competitive market was US\$8.1 million, which represents a 98% increase from the US\$4.1 million exchanged in March 2025. This was due to an increase in prices. In April 2024, US\$8.6 million was exchanged on the competitive market.

Market Surveillance

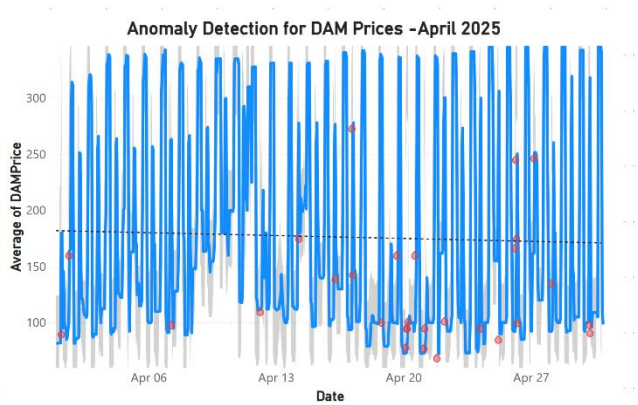
Market Monitoring and Surveillance

During the month under review, the MS Unit concentrated on monitoring and investigating reported anomalies. A comprehensive assessment revealed that these anomalies were non-malicious. The unit also examined the activities of the Market Operator and investigated possible instances of insider trading and market manipulation. The results confirmed that all trading activities within the market were in full compliance with regulatory standards, with no concerns raised.



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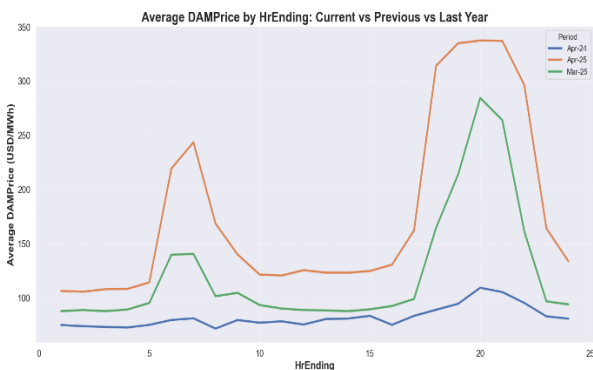




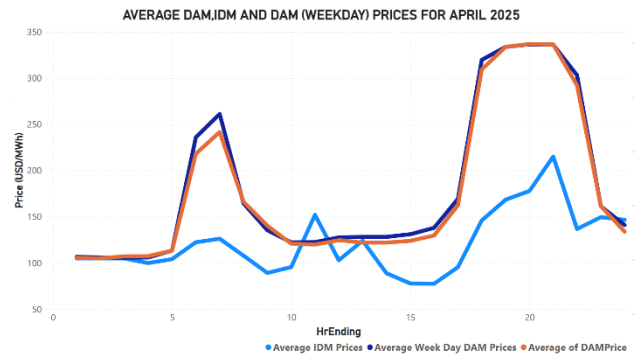
During the month under review, the average hourly Day-Ahead Market (DAM) prices trended downwards. Notably, anomalies were concentrated in the minimum price levels. Further analysis revealed that these anomalies were influenced by the prevailing dynamics of supply and demand within the market.

Average DAM Clearing Prices for April 2025, March 2025, and April 2024.

The average hourly DAM clearing prices for April 2025 were higher than those of March 2025 and April 2024 for all hours of the day.



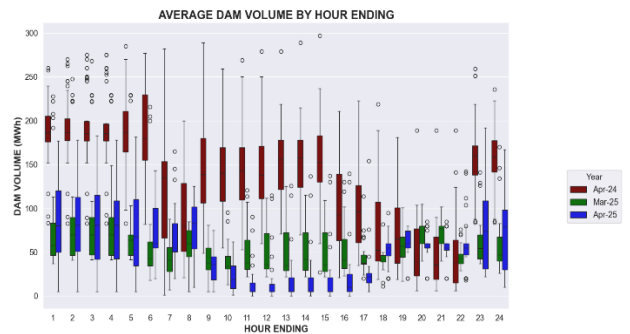
Average hourly IDM and DAM Prices for April 2025



The average weekday DAM clearing prices were tracking the average hourly DAM clearing prices. IDM market average hourly prices were on average lower than the DAM Clearing prices, except during the hours ending 11:00 hours.

DAM Market Volumes

The quantities traded on the DAM and IDM did not raise any form of suspicion and thus did not warrant any investigations. Utilities did not participate in the FPM and Balancing Markets.



During the month under review, unconstrained Day-Ahead Market (DAM) volumes were lower when compared to March 2025 and April 2024 figures. This reduction was more pronounced during the standard time of use.

Adherence to Transmission Capacity Allocation Criteria

On the 27th of April 2025, there was a generation outage where there was no generation from HCB into the SAPP CC network.



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MTP system Performance

The MTP system performed according to expectations during the month under review.

Environmental Corner

SAPP Stakeholder Engagement and Relationship Management

In line with SAPP's intention to develop a coordinated approach to identifying and managing the needs and expectations of its interested and affected parties (stakeholders), a consultant was engaged. An inception meeting was held on the 17th of April 2025 with SAPP Management and ESC members, where the consultant presented the inception report detailing the approach, tools of data collection, and understanding of the scope of the assignment. It was agreed that the approach should include, in addition to other activities, interviews with critical stakeholders such as the Ministry Officials as well as the representatives of the business community.

SAPP CC Environmental Management Programs

During the period under review, stationary and motorised equipment emissions monitoring was undertaken at the coordination centre. This monitoring programme was undertaken in line with the prescriptions of Environmental Management (Atmospheric Pollution Control Regulations) S.I 72 of 2009. The intention of the exercise is to come up with estimates of carbon emissions as well as develop action plans to enhance the sustainability of operations in that regard.

Transboundary Dialogue and Training on National Water Investment Programming in Africa 2025

Between 29-30 April 2025, ESC members participated in a workshop on transboundary water investment and programming. The expected outcomes of the workshop included the following:

- Increase understanding and knowledge of how to prepare Project Concept Notes for Green Climate Fund Investment.
- Ensure that basin and regional organizations and Member States have increased understanding of the linkages and alignments that are needed between climate-resilient investment, both at national and transboundary basin levels.
- Explore opportunities for mobilizing financial, technical, and strategic partners for enhancing climate-resilient water investment at national and transboundary basin levels identified.

Upcoming Events - 2025

DATE	EVENT
1-4 May 2025	International Association for Impact Assessment Conference, Bologna Italy
5-6 May 2025	SAPP-JICA PSS/E Training, Johannesburg, South Africa
20 - 22 May 2025	Enlit Africa, Cape Town, South Africa
17 - 20 June 2025	Africa Energy Forum, Cape Town, South Africa
24-26 June 2025	MSC Strategy Session, Johannesburg, South Africa
25 June 2025	SAPP-EAPP Interconnection Operations Working Group Meeting, Online, MS Teams
30 June - 4 July 2025	SADC Joint Energy and Water Officials and Ministers Meetings, Harare, Zimbabwe
3 July 2025	SAPP 30 th Anniversary Gala Dinner, Harare, Zimbabwe
July 2025	MTP Certification Training, Lusaka, Zambia
15-17 July 2025	EDM-ESCOM Interconnection Readiness - Site Visit of Matambo Substation and HCB Power Plant – Tete, Songo, Mozambique
14 -18 July 2025	JICA visit to SAPP, Harare, Zimbabwe
29-31 July 2025	Protection System Coordination Task Team meeting, Lusaka, Zambia (Venue TBC)
5-6 August 2025	Crime Prevention Working Group Meeting, Maputo, Mozambique (Venue TBC)



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13-14 August 2025	Power Quality Working Group Meeting, Gaborone, Botswana (Venue TBC)
16 - 24 August 2025	TICAD 9 High-Level Meeting, Japan
September 2025	65th SAPP Meetings, South Africa
8-10 September 2025	GEI Conference, Beijing, China
28 Sept – 2 Oct 2025	IEEE PES/IAS Power Africa Conference (PAC 2025), Cairo, Egypt
14-17 October 2025	CIGRE SA Regional Conference, Pretoria, South Africa
October 2025	59th SAPP EXCO Meeting, Lesotho
29-30 October 2025	SAPP-EAPP Interconnection Operations Working Group Meeting, Dar es Salaam, Tanzania
19-20 November 2025	SAPP Energy Traders and System Controllers Forum, ESCOM, Malawi (Venue TBC)
December 2025	64th SAPP CC Board Meeting, Harare, Zimbabwe



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