

CONTENTS

Meetings, Workshops and Conferences ..1

Visit to SAPP Offices by Zimbabwe Minister of Energy and Power Development	1
Visit to SAPP Offices by the SADC Ministers responsible for Energy and Water.....	1
SADC Energy and Water Ministers Meetings ..	2
SAPP 30-Year Anniversary Celebrations.....	2
EAPP – SAPP Coordination Meeting.....	3
Tanzania delegation visit to SAPP.....	3
SAPP JICA Coordination Meeting.....	3
Mozambique – Malawi Interconnection Readiness Workshop and Site Visit.....	4
Telecommunications Working Group (TWG) Meeting.....	4
Protection Coordination Task Team Meeting...	5
G20 Energy Transition Working Group Side Events	5

System Planning.....5

Ten-Year Infrastructure Investment Plan for Africa's Cross-Border Projects	5
High-Level Technical Meeting on the African Single Electricity Market (AfSEM) and the Continental Power System Master Plan.....	6
Meeting with Get.invest	6
Transmission Pricing in SAPP	6

Update on SAPP Projects.....6

Angola-Namibia (ANNA) Interconnector	6
Baynes HPP Transmission Lines Project.....	7
Malawi – Zambia Interconnector Project.....	8
Regional Transmission Infrastructure Financing Facility (RTIFF).....	9

System Operations

SAPP System Disturbances.....	9
Power Supply – Demand Situation	9
SAPP Outages	9

Electricity Trading.....10

Traded Volumes	10
Market Energy Prices	10
Market Revenues	10

Market Surveillance

Market Monitoring and Surveillance.....	10
Average DAM Clearing Prices for July 2025, June 2025, and July 2024	11
Balancing and Forward Physical Markets	11
DAM Market Volumes	11
Adherence to Transmission Capacity Allocation Criteria	11
MTP System Performance	11
Market Operator Activities.....	11
Meetings and Trainings	11

Environmental Corner12

Environmental Management System Implementation	12
Parliamentary Green Investment Dialogue ...	12
ESC Sustainability Workshop.....	12

Upcoming Events - 2025.....13

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.



Southern African Power Pool (SAPP)
24 Golden Stairs Road, P.O. Box EH52, Emerald Hill,
Harare, Zimbabwe,
Tel: +263-4-335517/335558 / 335468 Fax: +263-4-307023
Email: info@sapp.co.zw Website: www.sapp.co.zw



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 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 Vice-Chairman and Executive Chairman of EdM, Mr Joaquim Ou-chim delivered the Vote of Thanks at the event.



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



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



Southern African Power Pool (SAPP)
24 Golden Stairs Road, P.O. Box EH52, Emerald Hill,
Harare, Zimbabwe,
Tel: +263-4-335517/335558 / 335468 Fax: +263-4-307023
Email: info@sapp.co.zw Website: www.sapp.co.zw





SAPP Executive Vice-Chairman and Executive Chairman of EdM, Mr Joaquim Ou-chim at the Gala Dinner

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.



Engineer John Kabadi from Tanzania receiving his award during the Gala Dinner

EAPP – SAPP Coordination Meeting

EAPP and SAPP Secretariats held their quarterly coordination meeting in Addis Ababa, Ethiopia on 9 and 10 July. The meeting looked at the work plan on the readiness of the interconnection of the two power pools among other things.

Tanzania delegation visit to SAPP

A delegation from Tanzania comprising of representatives from the Ministry of Energy, the Energy Regulator and the National Power Utility (TANESCO) visited SAPP to appreciate requirements for interconnected power system operations and governance. They also visited ZESA during their mission.



Tanzania delegation at the SAPP CC

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



Southern African Power Pool (SAPP)
24 Golden Stairs Road, P.O. Box EH52, Emerald Hill,
Harare, Zimbabwe,
Tel: +263-4-335517/335558 / 335468 Fax: +263-4-307023
Email: info@sapp.co.zw Website: www.sapp.co.zw



Mozambique – Malawi Interconnection Readiness Workshop and Site Visit

The 400 kV Mozambique – Malawi interconnector is due for commissioning in October 2025. Delegates from EDM and HCB of Mozambique, ESCOM of Malawi, ZESA of Zimbabwe and SAPP CC participated in a site visit of the Matambo substation in Mozambique, the starting point of the interconnector, the 2,075 MW Hidroelectrica de Cahora Bassa (HCB) power station, and the Songo Converter Station from 12 to 13 July 2025. On 14 July 2025, they then attended a workshop at Songo, in Mozambique, to evaluate readiness for operations of the interconnector and new cross-border energy trading involving ESCOM of Malawi. Various tasks were assigned, to be tracked via monthly online meetings.



Delegates at a site visit in Mozambique



Workshop participants at HCB and in Songo, Mozambique.

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. The meeting participants were shown the telecommunications and SCADA equipment at the substation.



SAPP TWG Members at Phombeya substation



Southern African Power Pool (SAPP)
24 Golden Stairs Road, P.O. Box EH52, Emerald Hill,
Harare, Zimbabwe,
Tel: +263-4-335517/335558 / 335468 Fax: +263-4-307023
Email: info@sapp.co.zw Website: www.sapp.co.zw



Protection Coordination Task Team Meeting

Following high impact SAPP interconnected power system disturbances of 2021/2022, the SAPP Operating Sub-Committee (OSC) formed the SAPP Protection System Coordination Task Team to:

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



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

The Task Team held a meeting in Lusaka, Zambia from 29 to 30 July 2025 to obtain 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.

G20 Energy Transition Working Group Side Events

SAPP participated in side events of the G20 Energy Transition Working Group on 30 July 2025. The SAPP Coordination Centre Executive Director was a panellist on a session entitled Bridging Borders – The Regulatory Path to Regional Power Integration while the Chief Engineer Planning and Operations was a panellist on a session entitled Energy Planning & Principles.

System Planning

Ten-Year Infrastructure Investment Plan for Africa's Cross-Border Projects

The Ten-Year Infrastructure Investment Plan for Africa's Cross-Border Projects (TYIIP) is an initiative under South Africa's G20 Presidency, designed to enhance energy security and foster regional cooperation across Africa. Spearheaded by AUDA-NEPAD and coordinated by the African Development Bank (AfDB), the TYIIP focuses on developing power and gas infrastructure, utilizing existing frameworks such as the Continental Power Systems Masterplan and the African Single Electricity Market. The drafting session, scheduled from July 2 to 4, 2025, at the African Union Headquarters, aimed to gather insights from Regional Economic Communities (RECs) and power pools to create a comprehensive TYIIP report. Key objectives included discussing the outline, agreeing on the structure of various sections, selecting interconnections, and developing cross-cutting themes. The session produced a first draft for presentation at the G20 Energy Ministers Meeting in October 2025, promoting integrated energy solutions and investment throughout the continent.



Southern African Power Pool (SAPP)
24 Golden Stairs Road, P.O. Box EH52, Emerald Hill,
Harare, Zimbabwe,
Tel: +263-4-335517/335558 / 335468 Fax: +263-4-307023
Email: info@sapp.co.zw Website: www.sapp.co.zw



High-Level Technical Meeting on the African Single Electricity Market (AfSEM) and the Continental Power System Master Plan

Participation in the AfSEM High-Level Technical meeting, held from June 30 to July 1, 2025, at the African Union Commission (AUC) Headquarters in Addis Ababa, Ethiopia, marked a significant milestone with the official inauguration of the African Single Electricity Market (AfSEM) High-Level Technical Oversight Committee. This gathering facilitated strategic discussions on the implementation of the AfSEM and the Continental Power System Master Plan (CMP). The rich exchange of insights and collaboration throughout the sessions demonstrated our collective commitment to achieving Africa's energy integration and transition objectives.

The AfSEM High-Level Technical Oversight Committee will serve as the main technical advisory body to the Ministerial Council, overseeing the implementation of AfSEM's strategic objectives and coordinating energy efforts at both regional and continental levels while aligning with the priorities of Member States.

Comprising senior representatives from various African institutions, regional economic communities, and development partners, the committee will meet at least once a year to strategize, assess progress, and guide the activities of Technical Working Groups and the Strategic Planning Coordination Unit (SPCU). Its establishment represents a crucial advancement in moving AfSEM from planning to action, encouraging collaboration and investment in Africa's energy landscape.

Meeting with Get.invest

A virtual meeting was held on 29 July 2025 between SAPP PAU and Get.Invest focused on reviewing various projects and discussing their development stages and priorities. The goal was to identify specific projects that could receive support from Get.Invest in terms of structuring.

Transmission Pricing in SAPP

Dummy invoices for the network's use of system charges were issued to all utilities for review during the month.

Update on SAPP Projects

Angola-Namibia (ANNA) Interconnector

The ANNA 400kV Transmission Interconnector Project is for the integration of the Angola transmission network to the SAPP network, through Namibia. In Angola the line portion is 336km long and 30km in Namibia. Associated project substations in Angola include the future Lubango and future Cahama and the existing Kunene substation in Namibia.

Transaction Advisory Services

In the month of July 2025, work on the ANNA Project focused mainly on completing (i) Draft Final Tender Documents for the procurement of an EPC Contractor for the Angola transmission corridor, (ii) Draft Final Commercial Structure of the Project. Overall progress standing at 93% has not changed since March 2025, following changes to the Procurement Strategy to the draft Tender Documents.

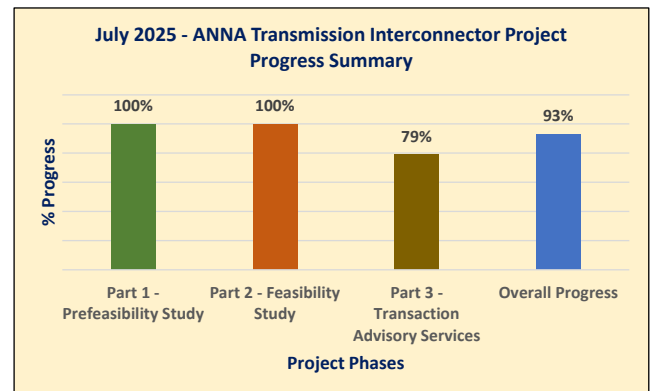


Figure 1: July 2025 Progress

Tender Documents:

- The World Bank procurement team reviewed and submitted final comments on the draft Standard Procurement Document (SPD) for RNT. The Transaction Advisor has since reviewed and incorporated the Bank's comments on the new SPD template and resubmitted the updated documents to the Bank on 29 July 2025.



Southern African Power Pool (SAPP)
 24 Golden Stairs Road, P.O. Box EH52, Emerald Hill,
 Harare, Zimbabwe,
 Tel: +263-4-335517/335558 / 335468 Fax: +263-4-307023
 Email: info@sapp.co.zw Website: www.sapp.co.zw



- RNT and the World Bank have agreed to proceed with two separate bidding processes as follows:
 - Lot 1 - Substations:** Covering the expansion of Lubango substation and construction of new Cahama substation, to be procured as a single contract under a design, supply, and construct arrangement.
 - Lot 2 - 400kV Transmission lines:** Split into two Lots; with one lot being the 400kV Lubango – Cahama line portion and the second one being the 400kV Cahama to the Namibia border line. Once the SPD has been approved by the project MANCO, an Early Market Engagement (EME) exercise will be undertaken to identify potential local and international contractors and suppliers who have previously bid for similar works in Angola or in the region.

Project Structure:

- RNT reported that the Government of Angola has indicated the need to potentially revisit the previously agreed commercial structure for the ANNA Transmission Project, specifically for the transmission line portions under Lot 1 and Lot 2, respectively.
- The Government's proposal has recommended a Public-Private-Partnership (PPP) for the transmission line portion between the new Cahama substation and the border with Namibia.

Ongoing Activities:

Following recent developments on the Project, primarily on the Angola transmission portion, Project stakeholders have agreed to hold a MANCO meeting on 5 August 2025, to review and finalise the following:

- Decision on the revised Standard Procurement Documents (SPD) developed for the Angola transmission portion.
- Decision on the recommended commercial structure.

Baynes HPP Transmission Lines Project

The Baynes HPP 400kV Transmission Lines Project is for the development of a transmission line to integrate the proposed 872 MW Baynes Hydropower Plant located on the Cunene River, between Angola and Namibia. The proposed transmission line will evacuate power from the hydropower plant to electricity markets in Angola, Namibia and the rest of the SAPP. The line portion in Angola is 275km long and 175km in Namibia.

1. Technical Feasibility Studies:

In the month under review, overall progress stands at 45%. The following results areas recorded marginal progress:

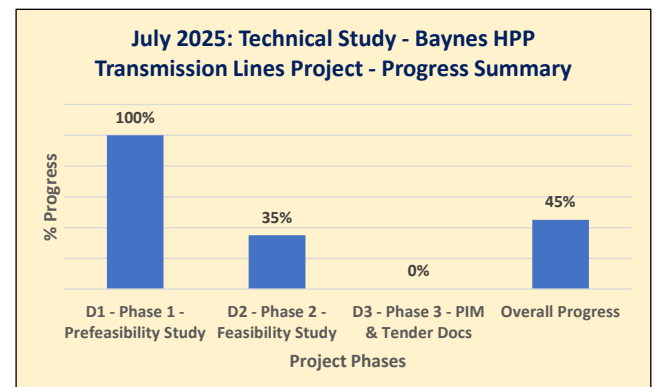


Figure 2: July 2025 Progress

Transmission Corridor (LiDAR/GeoTech):

LiDAR and Geotechnical survey service providers have been appointed. LiDAR approval and permitting progressing in Namibia and Angola.

Power System Analysis:

The Reference Case (2032) was updated with SAPP provided information. Dynamic Simulation setup and future models for 2035 and 2040 planning horizons were developed.

Training and Skills Transfer:

- Training in Long-Term Power System Planning took place from 14 to 18 July 2025 at the Department of Electrical and Electronics Engineering, at University of Stellenbosch, South Africa.



Southern African Power Pool (SAPP)
 24 Golden Stairs Road, P.O. Box EH52, Emerald Hill,
 Harare, Zimbabwe,
 Tel: +263-4-335517/335558 / 335468 Fax: +263-4-307023
 Email: info@sapp.co.zw Website: www.sapp.co.zw



Ongoing Activities:

- Acquisition of an aerial permit for Angola
- Update of the SAPP dynamic model case file
- Selection of the sites for switching station
- Update of the commercial structure

2. ESIA Studies:

Activities completed during this period include the following:

- Preparation of registration documents and the registration of the project at the Ministry of Environment and Tourism in Namibia was concluded on 2 July 2025
- The Draft Inception Report
- Draft Stakeholder Engagement Plan
- A coordination meeting was held on 9 July 2025 to discuss the project description and battery limits of the project for the ESIA.

Ongoing activities:

- Preparation of registration document for the Angola portion of the line is at the final stages.
- Initiation of the preparation of the scoping report and the terms of reference for the Impact Assessment phase of the study.

Malawi – Zambia Interconnector Project

The Malawi-Zambia (MAZA) Transmission Interconnector Project is for the development of a 192km, 400kV double circuit transmission line between Nkhoma substation in Malawi and Chipata West substation in Zambia. The line portion in Malawi is 145.6km and 46.6km in Zambia.

1. Technical Feasibility Studies:

A validation workshop on the Final Feasibility Study report took place on 23 July 2025, in Lilongwe, Malawi. Present at the workshop were ESCOM (host), ZESCO, SAPP CC, SwedFund, EIB and Studio Pietrangeli (Consultant). Overall progress stands at 78%.

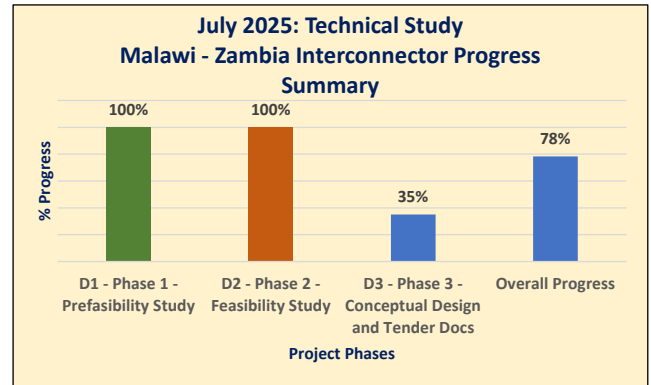


Figure 3: July 2025 Progress

The Final feasibility Study report was approved by the project stakeholders.

Ongoing Activities:

- Work on the completion of the draft final Conceptual Design report.
- Work on the completion of the draft Tender documents for the line and associated substations.

2. ESIA Studies:

The Draft ESIA report for the Zambia portion of the transmission line was completed.

A validation workshop was held from 22 July to 25 July 2025 in Lusaka, Zambia. The aim of the validation workshop was to discuss the comments raised during the review of the submitted draft ESIA report. Additionally, individual specialists presented on the outcome of the socio-economic study, ecological study, heritage study, and the progress related to ongoing RAP studies in Malawi and Zambia.

Next steps:

- Update the ESIA Report for Zambia Portion of the transmission line.
- Consultant to finalise the RAP surveys and prepare the report
- Initiate the process of updating the ESIA and ESMP report for the Malawi portion of the transmission line.



Southern African Power Pool (SAPP)
 24 Golden Stairs Road, P.O. Box EH52, Emerald Hill,
 Harare, Zimbabwe,
 Tel: +263-4-335517/335558 / 335468 Fax: +263-4-307023
 Email: info@sapp.co.zw Website: www.sapp.co.zw



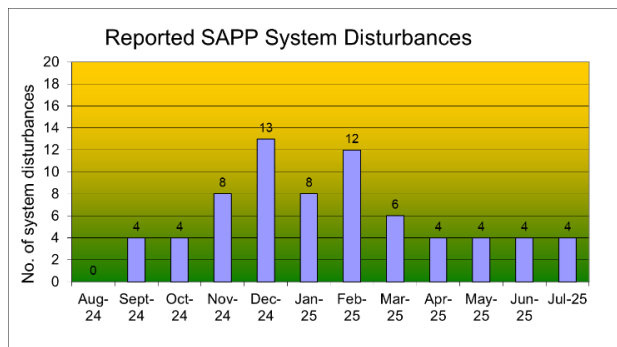
Regional Transmission Infrastructure Financing Facility (RTIFF)

During the month of July 2025, a physical meeting was held at the SAPP Coordination Centre (SAPP CC) between representatives from the SAPP CC, Climate Fund Managers (CFM), and the Multilateral Investment Guarantee Agency (MIGA) to further deliberate on the structure of the fund. The meeting provided an opportunity for in-depth discussions on key aspects of the proposed framework and alignment on critical considerations for moving the initiative forward.

System Operations

SAPP System Disturbances

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 line fault. Other interconnectors from Zimbabwe to Mozambique North and to Zambia also tripped due to the 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.



Power Supply – Demand Situation

The table below shows the power supply and demand situation in the month.

Country, Utility	Available (MW), during time of peak	Recorded Peak Demand (MW) ¹	Load Shed (MW)
South Africa, Eskom	32849	30291	-
Botswana, BPC	590	667	-
Eswatini, EEC	60	216	-
Mozambique, EDM and HCB ^{2,3}	2246	1024	-
Namibia, NamPower	543.5	616	-
Zambia, ZESCO, CEC	2203	2063	600
Zimbabwe, ZESA	1505	1766	300
Lesotho, LEC	78	172	-
DR Congo, SNEL ²	2034	1976	200

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

SAPP Outages

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

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-Phokoje-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
29-31 JUL25	400 kV Camden – Edwaleni line

The table below presents key SAPP outages planned in the near future.



Southern African Power Pool (SAPP)
 24 Golden Stairs Road, P.O. Box EH52, Emerald Hill,
 Harare, Zimbabwe,
 Tel: +263-4-335517/335558 / 335468 Fax: +263-4-307023
 Email: info@sapp.co.zw Website: www.sapp.co.zw

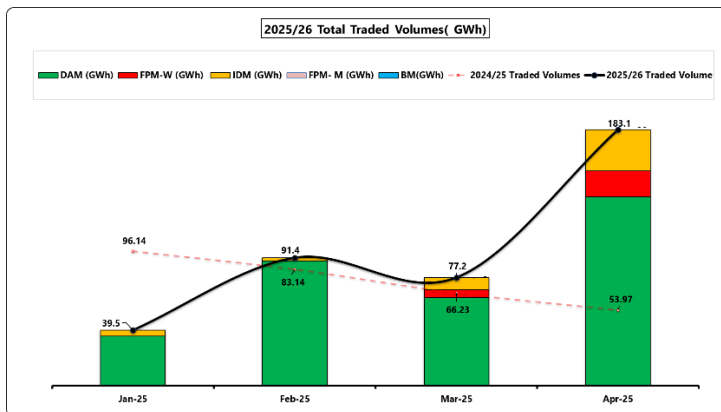


DATE	DESCRIPTION
05-08 AUG25	400/132 kV Maputo – Mozal transformer
05-08 AUG25	400 kV Arnot – Maputo interconnector
07AUG25	400 kV Aries - Kokerboom interconnector
18-24 AUG25	400 kV Aries – Aggeneis line

Electricity Trading

Traded Volumes

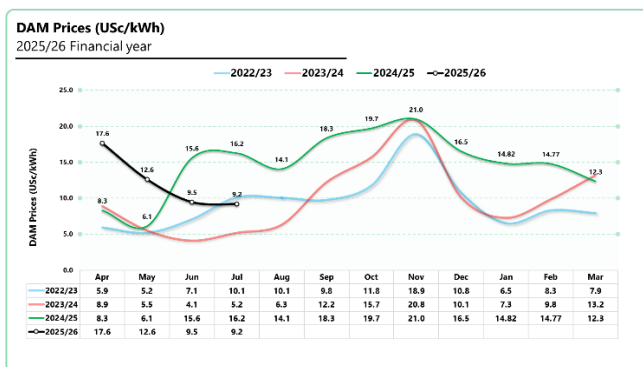
Total traded volumes in all the markets increased by 137% to **183 GWh** in July 2025, from the June 2025 volume of **77 GWh**.



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

Market Energy Prices

The monthly average DAM market clearing price (MCP) for July 2025 was 9.2 US\$/kWh, representing a 3% decrease compared to the June 2025 market-clearing price of 9.5 US\$/kWh.



DAM Monthly Average Market Clearing Prices from April 2025 to July 2025

Market Revenues

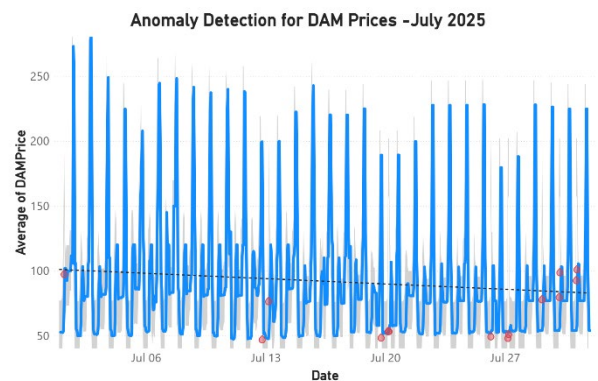
In July 2025, the total revenue exchanged on the competitive market was US\$9.2 million, representing 67% increase from the US\$5.5 million exchanged in June 2025. In July 2024, US\$8.4 million was exchanged on the competitive market.

Market Surveillance

Market Monitoring and Surveillance

In July 2025, the Market Surveillance Unit observed a narrowing of Day-Ahead Market (DAM) price distributions, accompanied by increased price convergence relative to June 2025. Importantly, no indications of market abuse or insider trading were detected, thereby upholding the integrity of the market.

Despite this overall stability, price volatility persisted during morning and peak-demand hours, reflecting fluctuations typically associated with high-load periods. DAM trading volumes remained consistent with those recorded in June 2025, and overall market behaviour continued to align with historical supply and demand fundamentals, suggesting a stable and well-functioning market environment.



During the month under review, the average hourly Day-Ahead Market (DAM) prices trended downwards.

No formal surveillance cases were opened. Routine screening of bids and pricing behaviour flagged minor pricing anomalies at the minimum price range. Further analysis revealed that these



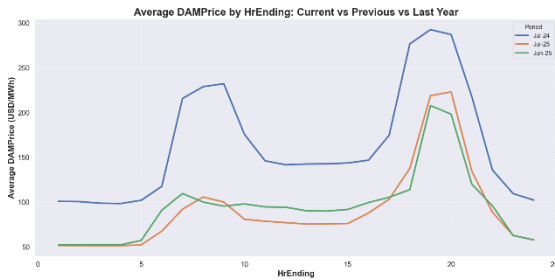
Southern African Power Pool (SAPP)
 24 Golden Stairs Road, P.O. Box EH52, Emerald Hill,
 Harare, Zimbabwe,
 Tel: +263-4-335517/335558 / 335468 Fax: +263-4-307023
 Email: info@sapp.co.zw Website: www.sapp.co.zw



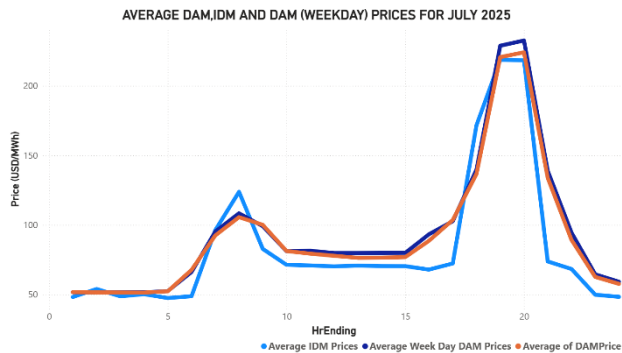
anomalies were influenced by the prevailing dynamics of supply and demand within the market.

Average DAM Clearing Prices for July 2025, June 2025, and July 2024

The average hourly DAM clearing prices for July 2025 were lower than those of July 2024 and were tracking those of June 2025 for all hours of the day.



Average hourly IDM and DAM Prices for July 2025

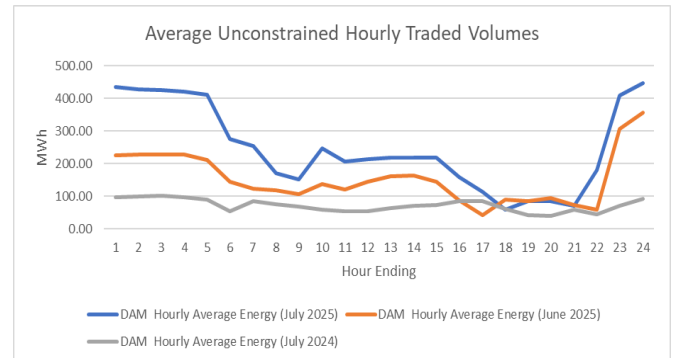


The average weekday DAM clearing prices were tracking the average hourly DAM clearing prices. The IDM market followed DAM price trends but remained consistently lower, reflecting its residual balancing nature. Price inversions during hours ending 08:00 and 18:00 are likely due to localized constraints or scarcity. No indications of price gaming were found in these hours.

Balancing and Forward Physical Markets

Some trades were observed on the FPM(Weekly) during off-peak and standard times of use. There were no trades on the FPM (Monthly) and Balancing Markets (BM).

DAM Market Volumes



The data highlights a significant increase in DAM trading activity in July 2025, particularly during early morning and late evening hours, reflecting a more dynamic and responsive market as compared to June 2025. In contrast, July 2024 shows minimal variation and lower volumes, indicating a less active trading environment.

Adherence to Transmission Capacity Allocation Criteria

There were major generator and transmission system outages in the ZESA and ESKOM control areas that were reported during the month under review.

MTP System Performance

The MTP system operated as expected throughout the review period, except for 16 July 2025, when scheduled system maintenance was conducted from 06:00 to 08:00 hours.

Market Operator Activities

There were no delays in publishing market results during the month under review. The Market Operator performed according to expectations during the month under review.

Meetings and Trainings

The Market Surveillance Team attended Data Analytics Power BI AI Business Intelligence for Strategic Decision-Making from 21 to 25 July 2025. The Team also attended the SAPP – Enerweb Quarterly meetings from 29 July 2025 to 1 August 2025.



Southern African Power Pool (SAPP)
24 Golden Stairs Road, P.O. Box EH52, Emerald Hill,
Harare, Zimbabwe,
Tel: +263-4-335517/335558 / 335468 Fax: +263-4-307023
Email: info@sapp.co.zw Website: www.sapp.co.zw





Environmental Corner

Environmental Management System Implementation

SAPP members are progressing with the implementation of environmental management systems standards. During the period under review there were virtual stakeholder engagements undertaken by the consultant covering SAPP members as well as external parties. In addition to that, the development of feedback tools to evaluate effectiveness of initiatives was done and the initial round of validation is still in progress.

The main objective of this initiative is to strengthen areas of good performance while improving identified areas of weakness.

Parliamentary Green Investment Dialogue

SAPP participated in the Parliamentary Green Investment Dialogue held in Walvis Bay from 10 to 13 July 2025 alongside Members of Parliament, and policy makers from six African countries. Delegates were drawn from Botswana, Kenya, Namibia, Rwanda, Zambia and Zimbabwe.

This high-level forum focused on accelerating climate finance through Green Energy Zones and

Corridors. The event was part of the Parliamentarians for Climate Finance project, delivered by Climate Parliament and UNIDO, with support from the Green Climate Fund (GCF).

Emphasis was placed on the potential for renewable powered industry and examples of what targeted investment and forward-looking energy planning, policy and regulation can deliver. The following were some key topics discussed:

- Importance of environmental and climate change considerations in national policy and law formulation
- How to de-risk clean energy projects using blended finance
- Regional and national planning tools to support project pipelines
- Community-led energy initiatives and clean transport
- The role of hydrogen corridors in linking local projects to the regional market.

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 (46) 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 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



Southern African Power Pool (SAPP)
24 Golden Stairs Road, P.O. Box EH52, Emerald Hill,
Harare, Zimbabwe,
Tel: +263-4-335517/335558 / 335468 Fax: +263-4-307023
Email: info@sapp.co.zw Website: www.sapp.co.zw



- Capacity building needs and how they can be addressed
- Significance of Solar and Wind technology project developer's standards

Upcoming Events - 2025

DATE	EVENT
6-7 August 2025	Crime Prevention Working Group Meeting, Harare, Zimbabwe
5-7 August 2025	SADC Just Energy Transition Workshop, Windhoek, Namibia
7-8 August 2025	SAPP Generation Planning Working Group Meeting, TBA
14-15 August 2025	Power Quality Working Group Meeting, Gaborone, Botswana
16 - 24 August 2025	TICAD 9 High-Level Meeting, Japan
1-5 September 2025	65th SAPP Meetings, Johannesburg, South Africa
8-10 September 2025	GEI Conference, Beijing, China
8-10 September 2025	Africa Climate Summit, Addis Ababa, Ethiopia
8-11 September 2025	Southern African Regional Climate Forum (SARCOF-31) Lusaka, Zambia
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
September 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
October/ November 2025	59th SAPP EXCO Meeting, Lesotho
28-30 October 2025	SAPP-EAPP Interconnection Operations Working Group Meeting, Dar es Salaam, Tanzania (TBC)
28-30 October 2025	14th International Forum on Energy for Sustainable Development, Skopje, Republic of North Macedonia

10-21 November 2025	COP30, Brazil
11-12 November 2025	Telecommunications Working Group Meeting, Lesotho
19-20 November 2025	SAPP Energy Traders and System Controllers Forum, Luanda, Angola
26-28 November 2025	Africa Investment Forum Market Days Event 2025, Rabat, Morocco
November 2025	SAPP Finance Working Group Meeting, Namibia
December 2025	64th SAPP CC Board Meeting, Harare, Zimbabwe
3 – 5 March 2026	Africa Energy Indaba, Cape Town, South Africa



Southern African Power Pool (SAPP)
 24 Golden Stairs Road, P.O. Box EH52, Emerald Hill,
 Harare, Zimbabwe,
 Tel: +263-4-335517/335558 / 335468 Fax: +263-4-307023
 Email: info@sapp.co.zw Website: www.sapp.co.zw

