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Meetings, Workshops and Conferences

Advancing CMP Phase 3

Pre-feasibility studies for priority cross-border transmission projects linking Botswana–Namibia and Zambia–Angola were formally launched, following the completion of the Inga–Soyo interconnector pre-feasibility study. These new pre-feasibility assignments are expected to run over a six-month period and will develop the technical, economic and environmental foundations required to advance the projects to full bankability. The studies form part of Phase 3 of the Continental Power Systems Masterplan (CMP), specifically under Pillar 2 on project preparation, which focuses on translating strategic regional planning into a concrete pipeline of investment-ready infrastructure projects. The work is being financed by the European Union through the Continental Energy Programme for Africa (CEPA), underscoring the strong partnership between the African Union and the EU in supporting regional integration, power trade and energy security through enhanced cross-border infrastructure.

SAPP Integrated Demand Management Working Group Meeting

The SAPP Integrated Demand Management Working Group (IDMWG) met in Zanzibar, Tanzania from 4 to 5 February 2026. Eight SAPP members attended, along with stakeholders, including SACREEE and UNEP, who delivered presentations. Members provided updates on the status of IDM initiatives and the following key points and challenges were noted.

Key observations from member submissions

- **Residential lighting:** Most countries have transitioned to efficient lighting; a standardized methodology is needed to quantify and record resulting savings.
- **Appliance efficiency:** Adoption of energy-efficient appliances is increasing; a reliable data-capture method should be developed.



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- **Programme validation:** Numerous IDM programmes have been implemented and require robust justification and measurement of reported savings.
- **Funding:** Many IDM initiatives rely on donor funding; utilities should consider allocating internal budget lines to ensure sustainability.
- **E-waste:** An e-waste management programme is needed to address end-of-life issues from energy efficiency projects.
- **Outreach and visibility:** Media engagement during IDMWG activities is recommended to raise SAPP's profile and increase public awareness of IDM initiatives.

Challenges reported

- **Tools and regulation:** There is a shortage of energy-auditing tools and limited regulatory coordination for energy efficiency, leading to inconsistent adoption across jurisdictions.
- **Cost:** High implementation costs for energy-efficiency programmes constrain wider rollout.
- **Awareness:** Public awareness of IDM initiatives remains low and needs to be increased.

Proposed next steps

- Develop standard methodologies and data-capture protocols for measuring savings from efficient lighting and appliance programmes.
- Establish guidance for validating and documenting programme savings.
- Explore options to diversify funding, including internal utility budgets, to reduce donor dependence.
- Initiate an e-waste management framework linked to EE projects.
- Strengthen outreach by involving media in future IDMWG events to promote public awareness.



Figure 1: IDMWG Members during their meeting in Zanzibar, Tanzania

2026 SADC Sustainable Energy Week

The 2026 SADC Sustainable Energy Week took place in Victoria Falls, Zimbabwe, from 23 to 27 February 2026. The meetings were held under the theme “Driving economic growth through clean energy and energy efficiency”. The meetings were officially opened by the Vice President of the Republic of Zimbabwe, Hon. Dr. Constantino D. N. G. Chiwenga.

The meetings were attended by government ministries, policymakers, utilities, regulators, private sector companies, financiers, academia, and development partners.

SAPP Power Quality Working Group Meeting

On 11 February 2026, the SAPP Power Quality Working Group (PQWG) held a virtual meeting. The working group assessed the availability of power quality facilities on SAPP interconnectors and the power quality performance of the SAPP interconnected power system. It was noted that the main task of the working group now is composition of a guideline for mitigation of common power quality problems in SAPP.

SAPP Crime Prevention Working Group Meeting

On 17 February 2026, the SAPP Crime Prevention Working Group (PQWG) held a virtual meeting. It was noted that SAPP member utilities continue losing millions of US Dollars every year to theft and vandalism. Recent findings in Mozambique and Tanzania showed that it is not only copper that is targeted. In the second half of



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year 2025, stolen and found aluminium conductor has surpassed that of copper conductor in terms of weight (kilograms). There is need for CPWG members to collaborate with security enforcement agents at national and regional level to curb this problem. During the meeting, the SADC Secretariat shared the draft strategy document for the regional project on Preventing and Combating Theft and Vandalism of Critical Infrastructure and Equipment. This SADC strategy covers other infrastructure like for water, telecommunication and rail transportation. The document is due for validation by experts. Members of SAPP CPWG as experts were called upon to give inputs to the document by end of the month of February 2026.



Some recent pictures of stolen conductor and vandalised substation.

Joint SAPP Sub-Committee Meeting

On 18 February 2026, the SAPP Markets, Operating and Planning Sub-Committees (MSC, OSC and PSC) met jointly but virtually online. They discussed improvements to the SAPP methodologies for transfer limits, transmission pricing, imbalance energy management, and control area services charges. The matters were not concluded but the three Control Area Operators (NTCSA, ZESA and ZESCO) and SAPP CC were tasked to follow through proposals made in detail and report back to the joint meeting within a few weeks.

System Planning

SAPP Pool Plan Update

The project updates of the SAPP Pool Plan to the 2026–2045 planning horizon, with the aim to identify priority generation and transmission investments, ensure an efficient and sustainable regional electricity supply, facilitate power trade



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and integration across SAPP, and highlight priority transmission corridors for investment.

The work is being delivered by consultants and financed through GET.Transform.

Progress and deliverables

Scenario development has been in progress during the month following the validation of the benchmark scenario in January 2026.

Stakeholder engagement and alignment

A gap analysis compared the regional Master Plan with the latest national master plans of South Africa, Zambia and Zimbabwe, informed by stakeholder consultations in those countries. Consultations with the remaining SAPP countries are scheduled for March 2026.

Validation workshops have included participation from RERA, SACREEE, the SADC Secretariat, the African Union Commission, GET.Transform (GIZ), the World Bank and IRENA.

Transmission Pricing Methodology Development

During the review period, work continued on the development of the SAPP transmission-pricing model. The SAPP Coordination Centre presented the project status to the Joint Sub-Committee meeting held virtually on 18 February 2026 and in person on 9 March 2026 in Lusaka, Zambia. The model impact analysis has attracted feedback from several members, while other members have requested additional time for internal consultations.

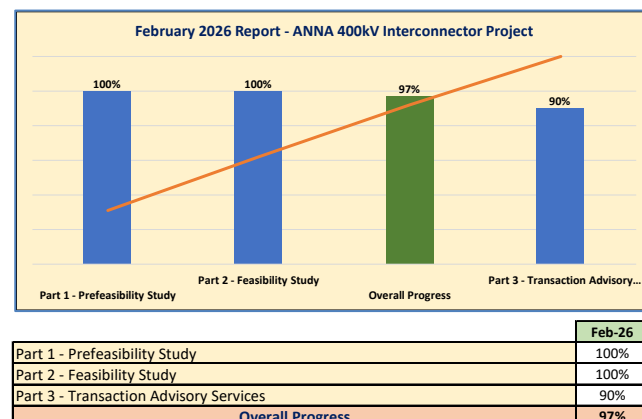
Update on SAPP Projects

Angola-Namibia Interconnector

In the month under review, progress on the project involved efforts on finalisation of early-stage procurement process of an EPC Contractor for the Angolan portion, following implementation of the Early Market Engagement (EME) process by RNT, and supported by the World Bank, SAPP and the project Transaction Advisor.

Progress Summary:

Overall Progress stands at 97%.



- Equipment specifications and EPC Tender Documents for Lubango substation, Cahama substation and 400kV, 200km tie line completed.
- Financial close and Loan Agreement for the Angola section - Lubango substation, Cahama substation and 400kV, 200km tie line substation signed.
- Discussions for the financing of Cahama to the border with Namibia started between RNT and NamPower.

Next Steps:

- Finalisation of the Lubango and Cahama substations tender packages for Angola and submit to the Bank for final approval.
- Offer the final EPC Tenders proposals for Angola, comprising lines, substations and works packages, to the market.
- Developing Static Var Compensation Specification and Tender Document for NamPower, for Kunene substation.
- Provide support to Tender Clarification and Evaluation.
- Contract Preparation and Procurement Support.
- Negotiate Financial Terms & Financial Close Support.



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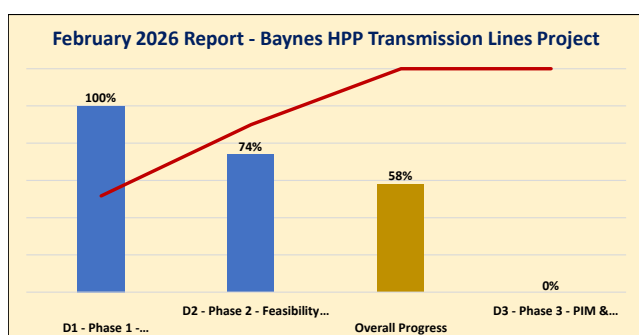
Baynes HPP Transmission Lines Project

Technical Feasibility Studies

In the month under review, project activities intensified following procurement of Digital Terrain Model (DTM) data for the Angola line route section. DTM data was procured following challenges in undertaking LiDAR surveys in Angola, due to flyby restrictions along the proposed line route by aviation authorities. The DTM data has close comparative accuracy to the LiDAR data and is by far more affordable.

Progress Summary:

Overall Progress stands at 58%.



	Feb-26
D1 - Phase 1 - Prefeasibility Study	100%
D2 - Phase 2 - Feasibility Study	74%
D3 - Phase 3 - PIM & Tender Docs	0%
Overall Progress	58%

- Digital Terrain Modeling (DTM) of the Baynes HPP - Cahama line route, in Angola completed.
- Field geotechnical investigations in Namibia, for the Kunene - Baynes HPP line route completed.
- Draft preliminary design report covering the proposed lines and substation infrastructure layout and dimensioning completed.
- Draft Capital Expenditure (CAPEX) cost estimate for the project completed.

Next Steps:

- Compilation of a draft Feasibility Study report by end of April 2026.
- Preparation of a draft Project Information Memorandum by end of April 2026.

- Validation workshop of the part 2 outputs by end of May 2026.

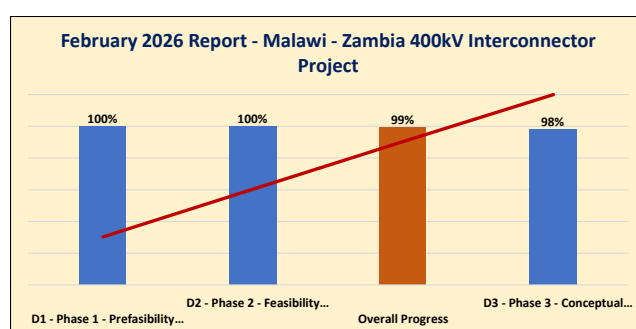
Malawi – Zambia Interconnector Project

Technical Feasibility Studies

In the month under review, activities on the project involved review and finalisation of draft final tender packages for the proposed 400kV double circuit line, extension of Nkhoma and Chipata West substations in Malawi and Zambia respectively.

Progress Summary:

Overall progress stands at 99%.



	Feb-26
D1 - Phase 1 - Prefeasibility Study	100%
D2 - Phase 2 - Feasibility Study	100%
D3 - Phase 3 - Conceptual Design/Tender Docs/Training	98%
Overall Progress	99%

- Review of draft Tender Documents by SAPP, ESCOM, ZESCO, SwedFund, EIB, EU and World Bank teams has been completed, comments submitted for update and integration in the draft final report on 26 February 2026.
- Finalisation of the Environmental and Social Management Plan (ESMP), covering the 400kV line, the Nkhoma and Chipata West substations is ongoing.
- ESCOM and ZESCO have advanced in the process of formalising a Joint Development Agreement, for the financing, construction and commercial operation of the interconnector discussions with lenders towards project financing.

Next Steps:

- Finalisation and submission of an updated



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Tender Document and ESMP chapter by 5 March 2026.

- Validation workshop for the approval of Tender Documents, complete with infrastructure, technical, financial proposals and EPC works.
- Integration of the EMSP chapter in the tender documents, for onward deployment by the selected EPC contractor.

Projects at Procurement of Consulting Services Stage

Two projects are at procurement of consulting services, for the implementation of Technical Feasibility studies and ESIA Studies.

- **The Luapula River Hydropower Project:** Technical and ESIA studies Expression of Interest (EoI) have been completed and reviewed by AfDB/NEPAD-IPPF/MCDF. Project is pending the RFP stage.
- **The Mozambique – Tanzania Transmission Interconnector Project:** Selection of Technical and ESIA studies consulting firm have been completed and contract negotiations are planned for March 2026.

Regional Transmission Infrastructure Financing Facility (RTIFF)

SAPP CC has successfully concluded and signed off on the agreed RTIFF Term Sheet with Climate Fund Managers (CFM) marking a milestone in the formal alignment between the parties on the key commercial, legal, and governance principles underpinning the RTIFF.

The process has now progressed to the next phase, which focuses on the identification, review, and alignment of a pipeline of potential projects eligible for funding under the RTIFF framework. This stage will ensure that priority regional interconnector and transmission projects are appropriately structured and positioned to access financing through the facility.

System Operations

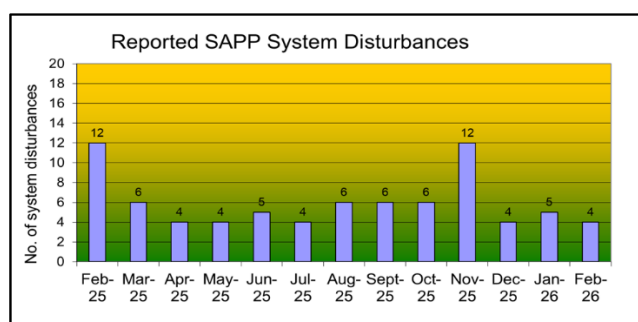
SAPP System Disturbances

In the month of February 2026, four (4) SAPP system disturbances were reported. In the first one, one generator in South Africa was shut down from 452 MW because of the loss of mills resulting in power frequency dipping from 49.652 to 49.491 Hz and the bus coupler circuit breaker at Songo in Mozambique tripping due to frequency fluctuations.

In the second one, an internal transmission line tripped in Zimbabwe, separating the Mozambique North network and part of the Zimbabwe eastern network. Due to the resulting supply deficiency, the bus-coupler circuit breaker at Songo substation in Mozambique tripped on under-frequency leading to the collapse of the islanded networks.

In the third one, the power frequency dropped to 49.438 Hz after one generator in South Africa de-loaded from 475 MW to 325 MW and the tie line imports reduced from 100 MW to 12 MW. The instantaneous demand response scheme assisted in recovering the frequency to the normal band. In the fourth one, one 220 kV Zambia – DR Congo interconnectors tripped due to thunderstorms and the other two tripped subsequently on directional over-power protection.

Refer to figure below for an outlook of reported SAPP system disturbances in the last twelve months.



Power Supply – Demand Situation

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



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Table 1: SAPP power supply situation

Country, Utility	Available (MW), during time of peak	Firm Imports ^{2,4}	Potential Peak Demand (MW) ¹	Load Shed (MW) (Estimated)
South Africa, Eskom NTCSA	31146	-	24793	-
Botswana, BPC	892	50	621	-
Eswatini, EEC	60	200	212	-
Mozambique, EDM and HCB ^{2,3}	2246	-	1130	-
Namibia, NamPower	543.5	350	645	-
Zambia, ZESCO, CEC	3162	175	2338	-
Zimbabwe, ZESA	1505	200	1767	-
Lesotho, LEC	78	130	150.4	-
DR Congo, SNEL ²	1650	150	2115	70

Notes: ¹Potential Peak Demand without load shedding.
²Estimated figures
³EDM load excludes MOZAL, which has been included in Eskom demand.
⁴Some members also utilise the competitive market to meet peak demand.

SAPP Outages

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

Table 2: Key SAPP outages in the month

DATE	DESCRIPTION
03 February 2026	Outage of the 220 kV Victoria Falls – Mukuni line for termination of CVT at Mukuni.
01-15 February 2026	Outage of the NTCSA Dwarsberg – BPC Segoditwane no.1 132kV line for tower replacement.
26 February 2026	Outage of the 400 kV NTCSA Camden – EEC Edwaleni line to clear teleprotection defects

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

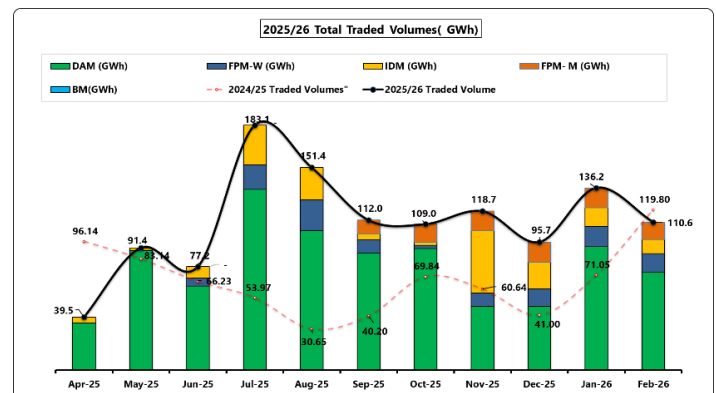
Table 3: Key SAPP outages in the near future

DATE	DESCRIPTION
14 - 15 March 2026	Outage of the ZESA 330 kV Warren – Dema transmission line for protection system malfunctioning remedial works. The outage may affect power transfers in the central corridor.
11 March 2026	Outage of the 350 kV NamPower Gerus – Zambezi HVDC link for pre-maintenance inspection.
15 - 29 March 2026	Outage of the 350 kV NamPower Gerus – Zambezi HVDC link for maintenance.
31 March 2026 - 04 July 2026	Outage of the 400/132 kV Mozal transformer at Maputo for intank inspection.
16 March 2026 - 01 November 2026	Outage of the 132 kV Spitskop – Dwarsberg no.1 line for replacement of collapsed towers.

Electricity Trading

SAPP Traded Volumes

Total traded volumes across all markets decreased by 19% to 110.6 GWh in February 2026, from 136.2 GWh in January 2026.



Monthly Traded Volumes (GWh) in FPM-M, FPM-W, DAM, IDM, and BM (April 2025 to February 2026).

Market Energy Prices

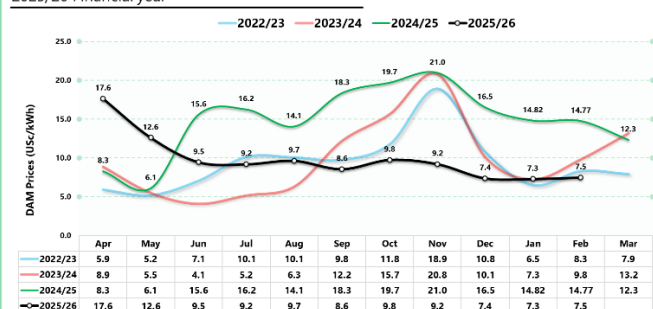
The monthly average DAM market-clearing price (MCP) for February 2026 was 7.5 USc/kWh, representing a 3% increase compared to the January 2026 market-clearing price of 7.3 USc/kWh.



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DAM Prices (USc/kWh) 2025/26 Financial year



DAM Monthly Average Market Clearing Prices from April 2025 to February 2026.

Market Revenues

In February 2026, the total revenue exchanged on the competitive market was US\$8.4 million, as compared to January 2026, in which US\$10 million was recorded. In February 2025, US\$16.3 million was exchanged on the competitive market.

Market Surveillance

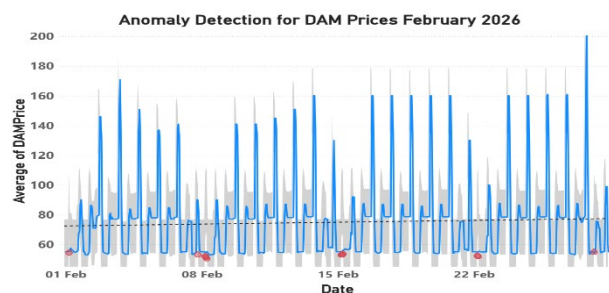
Market Monitoring and Surveillance

In February 2026, the Southern African Power Pool (SAPP) Day-Ahead Market (DAM) recorded an average clearing price of 7.5 USc/kWh, representing a 3% increase from 7.3 USc/kWh in January 2026. The average unconstrained DAM clearing prices ranged between 5.3 USc/kWh and 20.05 USc/kWh, with much reduced volatility occurring during evening peak hours.

Despite the month-on-month decline, average hourly DAM prices for February 2026 were tracking those of January 2026. The Intraday Market (IDM) mirrored DAM trends, except during evening peaks where prices were higher.

Moreover, February 2026 showcased a more stable pricing environment compared to February 2025, marked by fewer extreme spikes and reduced volatility. The Market Trading Platform (MTP) functioned efficiently throughout the month.

Market Surveillance Cases

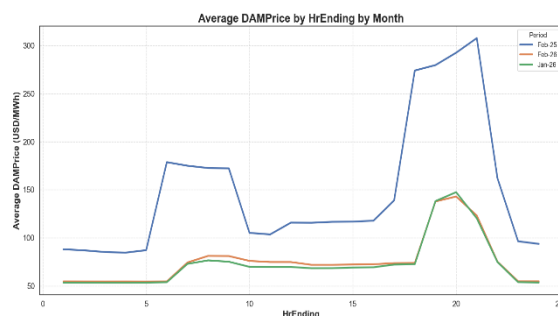


Routine monitoring of bids and pricing behaviour identified anomalies at lower end of the price spectrum. Subsequent analysis determined that these irregularities were predominantly attributable to supply-demand imbalances and transmission constraints, rather than any deliberate market manipulation. No cases were flagged for formal investigation during the month.

Market Price Monitoring

Average DAM Clearing Prices for February 2025, February 2026 and January 2026.

February 2026 closely tracked January 2026 patterns, with moderate variability across the month. February 2025 recorded the highest average hourly DAM clearing prices.



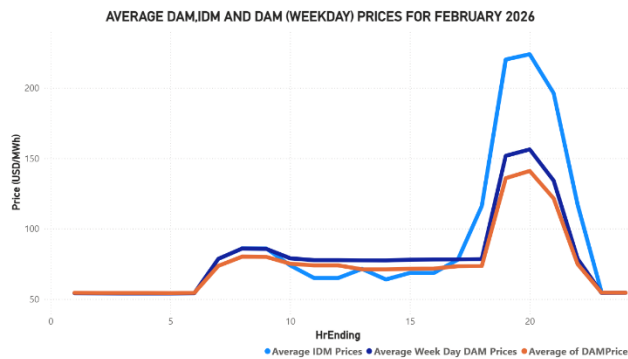
Average hourly IDM and DAM Prices for February 2026

IDM prices largely followed DAM patterns. However, IDM prices were consistently higher during evening-peak hours, reflecting real-time balancing requirements. No irregularities or indications of price manipulation were detected.



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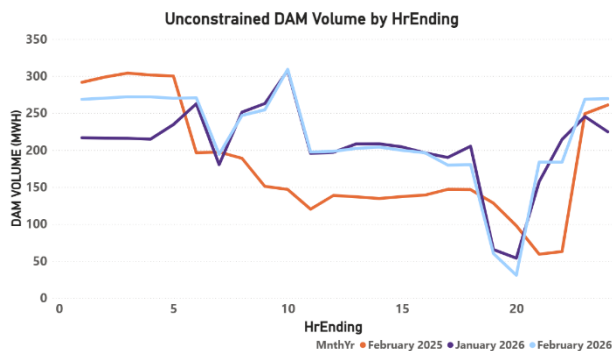




Prices for the Balancing and Forward Physical Markets

There were trades during all times of use on the FPM-Weekly. However, there were no trades on the FPM-Monthly and Balancing Markets (BM).

Market Volume Monitoring



The unconstrained volumes in February 2026 were tracking those of January 2026 (although lower during the evening peak hours) and were higher than those of February 2025.

Transmission Capacity and Outage Monitoring

On the 3rd of February 2026 from Hour Ending 0800 to Hour Ending 1800 there was an emergency outage of the 220 kV Victoria Falls – Mukuni line in ZESCO for termination of synchronizing CVTs on the 220kV Mukuni Line panel for CB105. ZESA Dema - Warren 330kV line tripped on 12 February 2026 and returned to service the same day.

Engagement with Utilities

During the month under review, the Market Surveillance Unit received data from ZESCO and EDM, highlighting the current status of their Transmission capacity utilization and the state of generation capacity within their areas.

Market Operator Monitoring

There were no delays in publishing market results during the month under review.

Environmental Corner

Environmental Management System (EMS) Implementation

SAPP environmental management systems implementation has continued with members carrying on with awareness campaigns, development of documentation while others were addressing findings from previous audits. Members that are already certified have been enhancing their systems through internal audit preparation to ensure continued conformance with management systems requirements.

NIR Environmental and Social Training Alignment Meeting

The SAPP Environmental Sub-committee convened a virtual meeting with NIR and SLR consulting firm to discuss the needs of the sub-committee in the planned training. The consulting team made a request for volunteers within the ESC who would be willing to share their project specific experiences to enhance the discussions in the training. Key among the topics for the training included:

- Resettlement action and biodiversity offset planning
- Practical session on screening and scoping terms of reference development
- Involuntary resettlement and livelihood restoration
- International lender environmental and social standards



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ESIA and Climate Change Strategy Review by the Document Review Task Team

On the 20th of February 2026, the Document Review Task Team convened a meeting to revisit the comments made on the SAPP Climate Change Mitigation and Adaptation Strategy. The team agreed to share the finalized document with the main Environmental Sub-committee in readiness for the 66th SAPP Meetings.

SAPP Pool Plan Climate Resilience Component Meeting

The meeting was convened on the 27th of February 2026 between the GFA consulting team and SAPP with the intention to develop an action plan for improvement of the draft climate component presentation of the pool plan that had spatial data gaps for critical generation and transmission assets, as well as other assets that were named using questionable credentials.

Upcoming Events - 2026

DATE	EVENT
3 – 5 March 2026	Africa Energy Indaba, Cape Town, South Africa
9 - 13 March 2026	66 th SAPP Meetings, Lusaka, Zambia
19 - 20 March 2026	11 th Annual Powering Africa Summit (PAS), Washington D.C., USA
25 March 2026	60 th SAPP Executive Committee Meeting, Malawi
30 March - 2 April 2026	SAPP-EAPP Coordination Meeting, Lusaka, Zambia
9 - 21 May 2026	SAPP-JICA Japan Study Visit for OSC Members, Tokyo, Japan
19 - 21 May 2026	ENLIT Africa 2026, Cape Town, South Africa
23 – 28 August 2026	CIGRE Paris Session, Paris, France
August/ September 2026	67 th SAPP Meetings, Tanzania
October 2026	61 st SAPP Executive Committee Meeting, Eswatini



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