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Executive Summary

August 2026 highlights included continued progress on priority interconnector and transmission-planning studies, advancement of the SAPP Transmission Pricing Methodology, and completion of SAPP Pool Plan update analyses. Competitive-market trading increased to 191 GWh, while revenue rose to US\$13.6 million. One system disturbance was reported and climate risks call for drought preparedness and focus on hydropower availability management.

System Planning

Consultative Workshop on Interconnector Implementation Arrangements

During the month of August 2026, SAPP and AUDA-NEPAD participated in a consultative workshop on the Implementation Arrangement Framework for the Botswana–Namibia (BONA), Botswana–South Africa (BOSA), and Botswana–Zambia (BOZA) interconnector projects, held in Gaborone, Botswana, from 4 to 5 August 2026. The workshop convened representatives of the participating Member States, national utilities, SADC Secretariat, SAPP, AfDB, the European Union and other development partners to align on the institutional and implementation arrangements required to advance the projects to full feasibility stage.

AUDA-NEPAD supported discussions on the proposed governance and coordination framework, including the designation of the SAPP Project Advisory Unit as the implementing agency for the feasibility studies. Deliberations also addressed the legal and institutional requirements for implementation of the USD 3.5 million AfDB/MCDF grant, progress on the BONA pre-feasibility study, and the need to finalise and submit outstanding Inter-Governmental and Inter-Utility Memoranda of Understanding for legal review.

For the **Angola–Zambia Interconnector**, coordination discussions were held between RNT,



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ZESCO, and the project team to advance the transmission line routing study. The parties reviewed alternative routing options. RNT confirmed that route selection is being evaluated based on technical, economic, social, and environmental criteria and committed to sharing supporting documentation and GIS data to facilitate the assessment process. A joint field mission involving RNT and ZESCO technical teams was proposed to validate route alternatives, assess environmental and terrain constraints, and support the identification of the preferred corridor.

For the **Botswana–Namibia Interconnector**, the study advanced through the ongoing Data Collection Phase, following completion of the inception phase. Engagements were conducted with key stakeholders, including Botswana Power Corporation (BPC), NamPower, SAPP, Ministry of Energy of Namibia and the Energy regulatory authorities to gather the technical, regulatory, and planning information required for the pre-feasibility assessment. The study is evaluating demand forecasts, generation expansion plans, transmission development requirements, regulatory frameworks, tariff structures, and cross-border electricity trading opportunities. The project has been identified in the CMP as a strategic regional interconnection capable of facilitating power transfers between Botswana and Namibia while enhancing energy security, supporting renewable energy integration, and strengthening regional electricity trade.

Overall, both studies remain on schedule and are progressing toward the next phases of technical evaluation, economic cost-benefit analysis, route assessment, and preparation of interim pre-feasibility reports. These projects are expected to contribute significantly to regional power system integration, improved security of supply, and enhanced electricity trading opportunities within the Southern African region.

The workshop agreed on a time-bound roadmap covering among others completion of legal documentation, preparation of procurement documents and commencement of procurement for the full feasibility studies by January 2027.

SAPP Transmission Pricing Methodology

Significant progress was achieved during August 2026 towards the completion and implementation of the SAPP Transmission Pricing Methodology (TPM). During its meeting held in Lusaka, Zambia, from 18 to 20 August 2026, the TPM Task Team confirmed that the core technical components of the methodology are substantially complete. Consequently, discussions have now shifted toward implementation arrangements, governance structures, tariff mitigation measures, and stakeholder engagement strategies.

In preparation for implementation, work commenced on the development of a comprehensive Transmission Pricing Framework that will support the operationalization of the TPM. A draft framework has been circulated to Members for review and input. The framework is intended to provide guidance on several key areas, including:

- Governance arrangements
- Data collection and validation processes
- Billing and settlement procedures
- Performance monitoring and reporting
- Dispute resolution mechanisms
- Methodology review and update processes
- TPM implementation roadmap

Overall, the project remains on track, with the remaining activities primarily focused on finalizing the implementation framework, assessing mitigation options, securing stakeholder buy-in, and developing a practical roadmap for the successful rollout of the SAPP Transmission Pricing Methodology.



Members of the Transmission Pricing Methodology Task Team during their workshop in Lusaka, Zambia



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SAPP Pool Plan Update

Good progress was made during the month on the development of the SAPP Pool Plan Update. The project team continued work across the key study components, including sensitivity analyses, network simulations, and the identification and assessment of priority regional transmission projects.

Following the public consultation process, stakeholder comments were reviewed and incorporated into the study. Several additional sensitivity analyses were undertaken to assess the impact of changes in project commissioning schedules, demand growth projections, technology cost trajectories, climate resilience considerations, battery storage lifetimes, and regional interconnections with the Eastern Africa Power Pool (EAPP).

Significant progress was also achieved on regional network studies. The 2030 interconnected network model was developed based on the validated 2026 network framework and expanded to include confirmed generation, demand, and transmission developments across the region. Transfer capability assessments were undertaken on key regional interfaces, and preliminary voltage-based transfer limits were established. Further thermal and contingency verification studies remain in progress.

The project remains on schedule, with the immediate focus being the completion of network study analyses, submission of the network simulations chapter, completion of sensitivity and priority project assessments, and finalization of the updated SAPP Pool Plan by December 2026.

Priority Interconnector & Generation Projects

Angola-Namibia Interconnector

Progress Summary

In the month under review, progress on the project was marked by RNT reviewing bidder clarifications in response to EPC tender proposals issued to the market in June 2026, for the Lubango to Cahama transmission infrastructure supply and construction tenders.

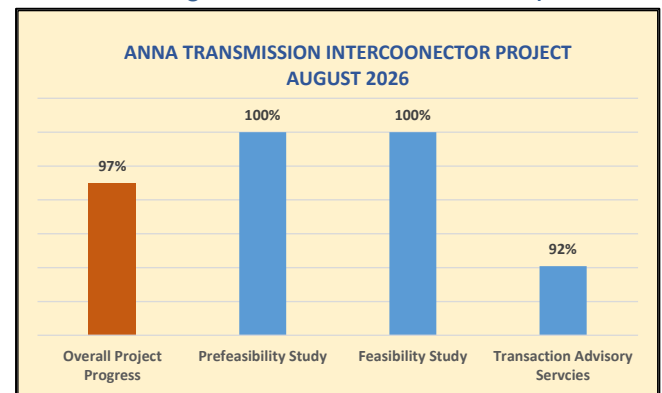
(a) Lubango-Cahama Transmission Corridor:

- Clarification and responses to bidders, for supply and construction tenders' proposals, are ongoing.
- Bid resubmission period has been extended to mid-October 2026, to allow bidders to repackage their technical and financial proposals based on the RNT clarified position.

(b) Cahama-Kunene Transmission Corridor:

- Draft tender documents for the 400kV, 136km corridor from Cahama to the border with Namibia and draft tender documents for the 400kV, 30km corridor from the border to Kunene substation are being revised and updated.
- The unified 400kV, 166km corridor has been transferred to the NamPower capital project investment portfolio, following agreements reached with RNT on 14 April 2026.
- Draft tender documents are also being prepared by ZUTARI for the supply and installation of compensation equipment (STATCOM or SVC) at Kunene substation.

Overall Progress Chart is at 97% Completion



ANNA Project – August 2026 Progress Report

Next Steps

- Lubango – Cahama Corridor Tender: Bid opening and evaluation by the end of October or early November 2026.
- Cahama – Kunene Corridor Tender: Finalisation and submission to the market by November 2026.



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- Kunene Compensation equipment Tender: Finalisation and submission to the market by November 2026.

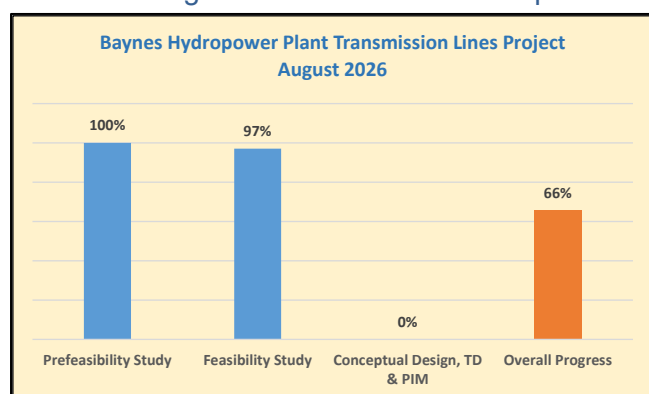
Baynes HPP Transmission Lines Project

Progress Summary

Progress in the month under review, includes an update of the Power Systems Analysis Report and review of the Draft Feasibility Study Report by the project stakeholders.

- Work on the review of the Power System Analysis report has commenced.
- SAPP was requested to secure funding for the 132kV Transmission Line between the Main Dam and Regulating Dam. The funding is sought from the utility contributions made by RNT and NamPower on the project.

Overall Progress Chart is at 66% Completion



Baynes Project – August 2026 Progress Report

Next Steps

- Conclusion of a Power System Analysis report by October 2026.
- Validation of the Draft Feasibility Study Report by end of October 2026.
- Commission Part 3: Tender Documents and Commercial case preparation.

The Contract for the Hydrologist Expert has been signed for the Independent Panel of Experts.

Progress on the ESIA and Resettlement Policy Framework Studies is summarised through the following activities:

Deliverables: The final Scoping Reports, including the Issues and Responses Reports, were finalised on 7 August 2026. The final Scoping Report was then prepared for submission to the Angolan authority, MINEB, and submitted on 20 August 2026.

Stakeholder Engagement: The review of the Stakeholder Engagement Plan (SEP) for the ESIA phase commenced on 14 August 2026, and the deadline for comments was subsequently extended to 31 August 2026.

Specialist Studies: Compilation of the specialist assessment reports is underway, with 8 of the 13 reports completed.

Malawi – Zambia Interconnector Project

The ESIA for the transmission line is complete, and the Resettlement Action Plan (RAP) is in its final draft stage. In Malawi, the Draft RAP is complete and is being prepared for submission to the Ministry of Lands. This will run concurrently with the disclosure meeting for the Draft ESIA report with affected parties.

Mozambique – Tanzania Interconnector Project

The Technical Contract is under review by the African Development Bank (AfDB).

System Operations

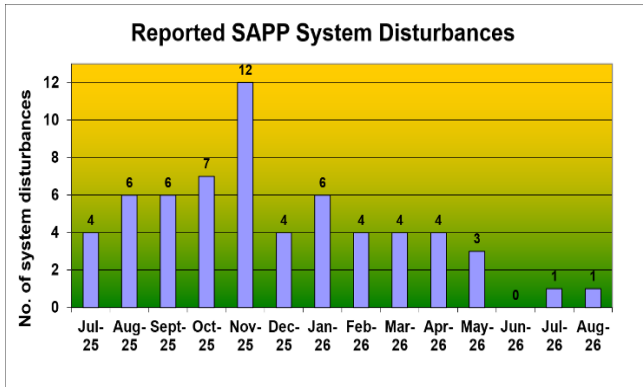
Reported SAPP System Disturbances

In the month of August 2026, only one SAPP system disturbance was reported. In this disturbance, while the 400 kV South Africa - Botswana interconnector was out of service, the remaining 132 kV South Africa – Botswana lines tripped due to veld fires. The Botswana power system collapsed due to acute supply-demand unbalance. Refer to the figure below for an outlook of reported SAPP system disturbances in the last twelve months.



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SAPP system disturbances in the last 12 months

Power Supply – Demand Situation

The table below shows the power supply and demand situation. Also refer to the notes of the table.

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	32510	-	27582	-
Botswana, BPC	475	50	698	-
Eswatini, EEC	60	204	229	-
Mozambique, EDM and HCB ^{2,3}	2186	-	1085	-
Namibia, NamPower	490	350	672	-
Zambia, ZESCO, CEC	3129	175	2734	-
Zimbabwe, ZESA	1505	150	1693	-
Lesotho, LEC	76	130	206	-
DR Congo, SNEL ²	1650	50	2379	100

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 reporting period.

Table 2: Key SAPP outages in the reporting period

DATE	DESCRIPTION
03-08 August 2026	The 400 kV Camden – Edwaleni interconnectors for replacement of insulators.
16 August 2026	The 330 kV Songo (HCB) - Bindura (ZESA) interconnector for annual maintenance.
22 - 24 August 2026	The 400 kV Matimba (NTCSA) - Phokoje (BPC) - Insukamini (ZESA) interconnector for replacement and commissioning of three CTs on the 400kV Matimba - Phokoje line.

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

Table 3: Key SAPP outages in the near future

DATE	DESCRIPTION
1-11 September 2026	400 kV Maputo – Edwaleni for repair of the line circuit breaker.
20 September 2026	HCB Songo HVAC system and HCB Power Plant for annual maintenance.
08 September 2026	220kV Victoria Falls – Sesheke (Zambia-Namibia) interconnector for Insulator replacement program
11 September 2026	220kV Victoria Falls – Sesheke (Zambia-Namibia) interconnector for Insulator replacement program
14 September 2026	220kV Victoria Falls – Sesheke (Zambia-Namibia) interconnector for Insulator replacement program
17 October 2026	The 400kV Kokerboom - Aries (South Africa – Namibia) interconnector for maintenance.
18 October 2026	The 400kV Kokerboom - Aries (South Africa – Namibia) interconnector for maintenance.



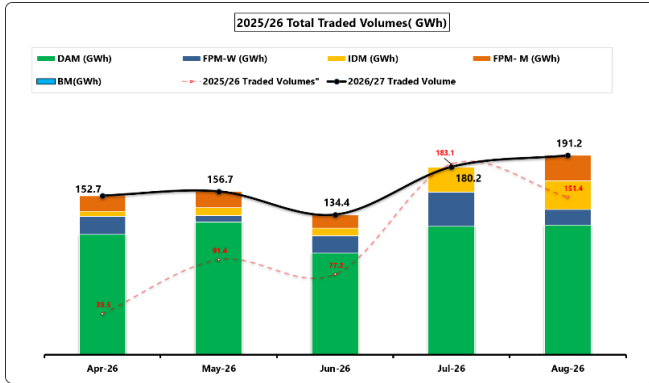
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Electricity Trading

SAPP Traded Volumes

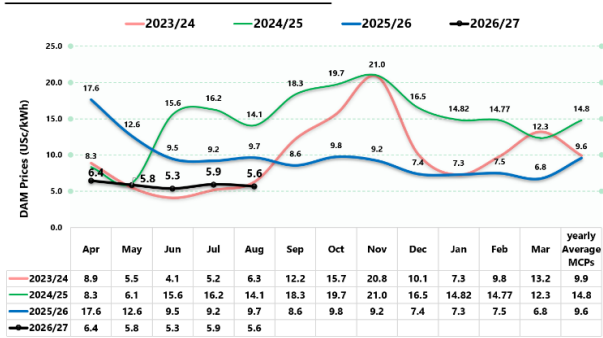
A total of 191.2 GWh was traded in August 2026, representing a 6% month-on-month increase from the 180.2 GWh recorded in July 2026.



Market Energy Prices

The Day-Ahead Market (DAM) recorded a monthly average unconstrained price of 5.6 US\$/kWh in August 2026. Overall, prices during the April–August period of the 2026/27 financial year were lower than those recorded over the corresponding period in the previous financial year, primarily because available supply outstripped market demand.

DAM Prices (US\$/kWh)
2026/27 Financial Year



Market Revenues

Competitive market revenue reached US\$13.6 million in August 2026, increasing by 8% from US\$12.6 million in July 2026 and by 9% from US\$12.5 million in August 2025.

Market Surveillance

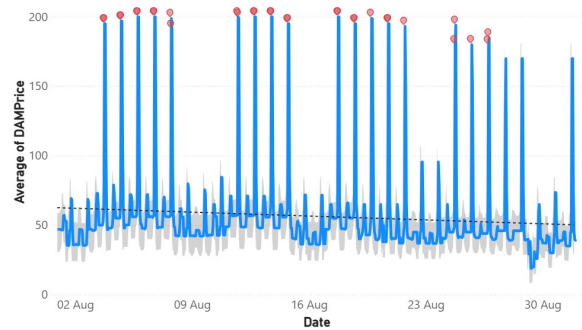
Market Monitoring and Surveillance

In August 2026, the Day-Ahead Market (DAM) recorded an average clearing price of 5.6 US\$/kWh, representing a 5% decrease from 5.9 US\$/kWh in July 2026. DAM clearing prices ranged between 1.9 US\$/kWh and USD 20.0 US\$/kWh with significantly higher volatility observed during the evening peak period.

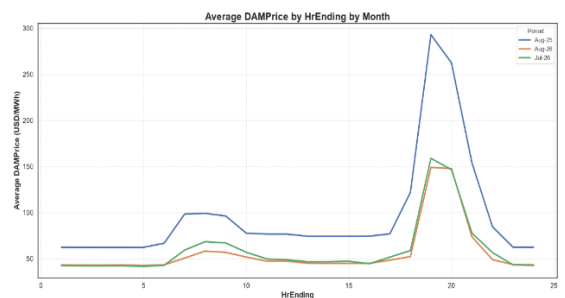
Average hourly DAM prices in August 2026 closely tracked July 2026 levels but remained significantly lower than those observed in August 2025. The Intraday Market (IDM) mirrored DAM trends but was generally priced higher than the DAM. The Market Trading Platform (MTP) performed as anticipated during the month under review.

Market Surveillance Cases

Anomaly Detection for DAM Prices - August 2026



Market Price Monitoring



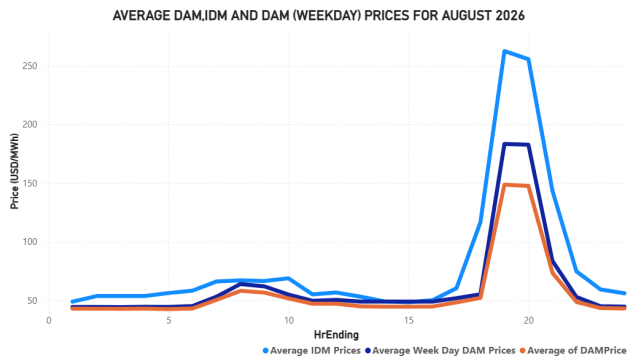
Average DAM Clearing Prices for August 2025, July 2026 and August 2026



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Average hourly IDM and DAM Prices for August 2026



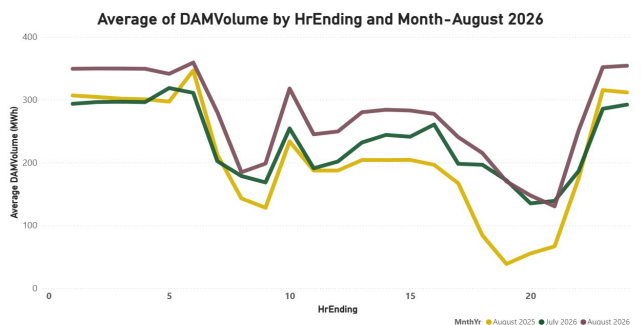
IDM prices generally tracked the DAM price movements in both direction and timing, but they consistently remained higher across all time-of-use periods. This pattern is consistent with the higher real-time system balancing requirements faced in IDM settlement. Overall, no irregularities were observed and there were no indicators of price manipulation.

Prices for the Balancing and Forward Physical Markets

Trades were recorded during all time-of-use periods on the FPM-Weekly and during off-peak and standard on the FPM-Monthly markets. However, there were no trades on the Balancing Markets (BM).

Market Volume Monitoring

Average Unconstrained DAM Market Volumes for August 2025, July 2026 and August 2026

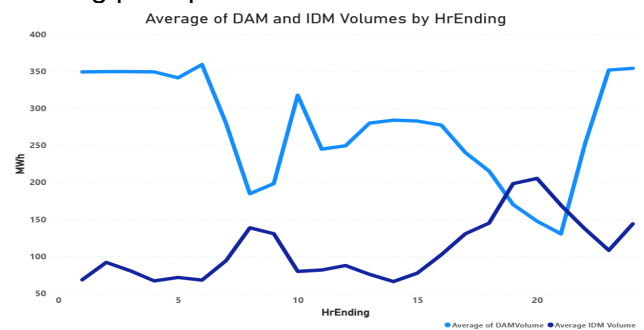


Unconstrained DAM volumes in August 2026 were generally consistent with, and at many hours

modestly higher than, July 2026 levels, and were broadly comparable to those recorded in August 2025 for the Off-Peak, Standard and Morning Peak periods. The clearest exception was the Evening Peak period, where August 2025 volumes were markedly lower than both July 2026 and August 2026.

Average hourly energy Traded on the IDM and DAM Markets

On average the hourly IDM volumes were lower than the average hourly DAM volumes traded for all the times of use, except during evening peak periods.



Transmission Capacity and Outage Monitoring

During the month under review, significant transmission and generator outages were recorded in the ZESA and NTCSA control areas which affected SAPP Trades; however, the respective transmission system operators (TSOs) successfully restored service within a day or two when the contingencies occurred. These outages materially influenced market outcomes, contributing to elevated DAM price volatility and price excursions during the affected periods.

Market Operator Monitoring

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



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Environmental Corner

Southern African Regional Climate Outlook Forum 33 - El-Nino Forecast

The Southern African Regional Climate Outlook forum - 33 (SARCOF-33) was held in Swakopmund, Namibia from 25 to 28 August 2026. This year's forum was held under the theme, "From Climate Observation to Seasonal Prediction: Informing Early Action for the Upcoming Season." SAPP participated in the forum alongside other stakeholders, including river basin organizations, National Meteorological and Hydrological Services (NMHSs), agricultural institutions, and civil protection agencies.

The seasonal forecast for the October 2026 to March 2027 period indicates an increased likelihood of below-normal rainfall and severe drought conditions across much of the southern region, including Zambia, Zimbabwe, South Africa, Eswatini, Lesotho, Botswana, Angola, southern Mozambique, and Malawi, largely due to the anticipated influence of El Niño conditions. In contrast, parts of western Angola, northern Malawi, northern Mozambique, the Democratic Republic of Congo, and Tanzania are expected to receive normal to above-normal rainfall.

Given this outlook, it is advisable for SAPP members to proactively prepare and diversify electricity generation sources to complement hydropower generation, which is likely to be constrained by reduced water availability resulting from drought conditions. Furthermore, utilities and system operators are encouraged to work closely with their respective National Meteorological and Hydrological Services to obtain country-specific forecasts and climate information that can support operational planning, risk management, and energy security interventions.

Environmental Management System (EMS) Implementation

Environmental management system implementation is progressing across SAPP members at varying levels. The Coordination Centre is also addressing the Stage 1 audit

findings, and the certification body has accepted the proposed action plan.

Climate Change Task Team Meeting

The Climate Change Task Team met on 12 August 2026 to finalize its review of the SAPP Climate Change Mitigation and Adaptation Strategy. The review aligned the strategy with SAPP member countries' Nationally Determined Contributions, National Adaptation Plans, Energy Compacts, and relevant legislation. It also incorporated recommendations from the Climate Resilience Component of the SAPP Pool Plan.

ESC Guidelines Review

The Document Review Task Team held its final meeting on 17 August 2026 to conclude the review of the Environmental and Social Impact Assessment (ESIA) Guidelines for Hydropower Generation and Transmission Projects.

The review aligned the SAPP guidelines with evolving international best practices, emerging environmental and social requirements, and regulatory developments across member countries. The revised guidelines are expected to improve consistency in regional ESIA processes and support the sustainable development of hydropower and transmission infrastructure projects.

Meetings, Workshops and Conferences

SAPP Crime Prevention Working Group Meeting

The SAPP Crime Prevention Working Group (CPWG) met from 04 to 05 August 2026 in Johannesburg, South Africa. It was noted that SAPP member utilities continue losing millions of US Dollars to theft and vandalism. To facilitate action on agreed strategies, such as cross-border patrols, CPWG is working hand-in-hand with the InterPol Bureau. The InterPol Bureau sent a representative to the CPWG meeting. It was agreed that InterPol will be involving SAPP in cross-border operations. Unregulated scrap-metal businesses, lack of harmonization of laws, corruption and poverty remain the top deterrents in the fight against theft and vandalism of electricity infrastructure.



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Some members of the CPWG and a representative from InterPol at the meeting in Johannesburg, South Africa.



Recent picture of a vandalised transmission tower.



Recent picture of a cart made from vandalised transmission tower members.

Africa50 Infra for Africa Forum

The SAPP Coordination Centre Executive Director attended the Africa50 Infra for Africa Forum in Dar es Salaam, Tanzania from 5 to 6 August 2026. He was a panelist on a session entitled “Scaling Grids, Securing Energy” providing an opportunity to

highlight SAPP’s efforts in development of regional transmission projects.

NTCSA High-level Visit to SAPP

NTCSA Senior Management visited the SAPP Offices on 13 August 2026. The objective of the visit was to share knowledge with SAPP on regional power market operations, cross-border electricity trading and grid coordination and to enhance regional collaboration.



NTCSA Team at the SAPP Coordination Centre

SAPP Power Quality Working Group Meeting

The SAPP Power Quality Working Group (PQWG) continued sharing power quality data on a monthly basis. Almost all utilities now have online power quality databases. Few have been experiencing challenges in reporting power quality performance. Apart from voltage dips and unplanned outages on some interconnectors, the interconnected power system is performing well in terms of monitored power quality parameters, including the total harmonic distortion which is less than the limit of 2.5%.

The collaboration between PQWG and the Regional Energy Regulators Association (RERA) is active. At the last Working Group meeting, held from 06 to 07 August 2026, RERA reported that funding for training was secured from the World Bank. CT Lab, a South African company, presented new power quality technologies to the Working Group at the recent meeting for consideration.



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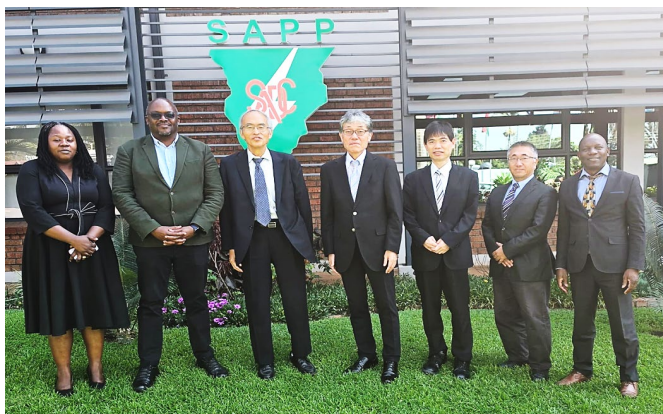




Some members of the PQWG at the meeting in Johannesburg, South Africa.

SAPP – JICA Technical Support Programme Meeting

Experts from Japan International Cooperation Agency (JICA) visited SAPP Coordination Centre from 24 to 28 August 2026 to evaluate progress made so far and plan next activities.



Some members of staff from SAPP and experts from JICA during the meeting at the SAPP Coordination Centre in Harare, Zimbabwe.

Julius Nyerere Power Plant Official Opening

The President of the United Republic of Tanzania, Her Excellency Samia Suluhu Hassan, officially commissioned the 2115 MW Julius Nyerere Hydropower Plant on Saturday, 22 August 2026. SAPP was represented by the Executive Director accompanied by the Operations Engineer during the official commissioning, invited by TANESCO.

Here are key project facts:

- **Location:** Built on the Rufiji River in the Coast Region of eastern Tanzania.
- **Cost:** Approximately 7.45 trillion Tanzanian Shillings (USD 2.84 billion).

- **Capacity:** 2,115 MW total, powered by nine generating units of 235 MW each.
- **National Impact:** Total capacity rises to 4646 MW against a peak demand of 2271 MW, creating a surplus of 2375 MW.
- **Export Plans:** Tanzania is in talks to export excess power to neighbours like Kenya and Zambia.
- **Builders:** Implemented by an Egyptian consortium of Arab Contractors and Elsewedy Electric.



The Julius Nyerere Hydro-Power Plant in Tanzania.



SAPP Coordination Centre Executive Director and Operations Engineer at the inauguration of the Julius Nyerere Hydropower Plant in Tanzania

ABSA Visit to SAPP

The ABSA Team visited the SAPP Coordination Centre to discuss areas of cooperation and improvement.



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SAPP and ABSA Team at SAPP Offices

African Energy Commission Visit to SAPP

The African Energy Commission Executive Director visited the SAPP Coordination on 5 August 2026. The meeting discussed how to enhance collaboration between AFREC and SAPP.



AFREC Executive Director and SAPP Chief Engineer (Planning and Operations) at SAPP Offices

Upcoming Events - 2026

DATE	EVENT
1-3 September 2026	Middle East Energy 2026, Dubai, UAE
8 -11 September 2026	67 th SAPP Meetings, Zanzibar, Tanzania
21-25 September 2026	IEEE PES/IAS Power Africa Conference, Nairobi, Kenya
6-8 October 2026	EAPP – SAPP Coordination Tak Team Meetings, Arusha, Tanzania
7-9 October 2026	Energy Forum for Africa Conference, Lusaka, Zambia
12–16 October 2026	Africa Energy Week (AEW), Cape Town, South Africa
21-22 October 2026	SAPP Market Sounding Event, Johannesburg, South Africa
2-6 November 2026	SAPP-JICA Workshops on Various Planning, Operations, Markets Topics, Harare, Zimbabwe (Hybrid format)
4 November 2026	61 st SAPP Executive Committee Meeting, Eswatini
3-5 November 2026	3 rd Annual Zimbabwe – Zambia Energy Projects Summit
9 to 20 November 2026	UNFCCC COP 31, Turkey
10-11 November 2026	Review of the SAPP Operating Guidelines Inception and Workshop Meeting, Johannesburg, South Africa.
18-19 November 2026	23 rd SAPP Energy Traders and System Controllers Forum, Blantyre, Malawi
26 November 2026	Joint PSC-OSC-MSC meeting for validation of the SAPP Protection System Coordination Task Team Final Report, Virtual Online MS Teams
October/ November 2026	EAPP – SAPP Coordination Committee Meeting, TBA
December 2026	69 th SAPP CC Board meeting, Harare, Zimbabwe
15 -19 March 2027	The SADC Sustainable Energy Week, Ezulwini, Eswatini



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