

# Sudan and South Sudan Power Q4 2012

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## Abstracts

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**BMI View:** BMI's power service now focuses chiefly on thermal sources, hydropower and nuclear electricity, while developments pertinent to the green segment will be discussed in-depth in our renewables service. That said, we will continue to provide a detailed overview of the dynamics affecting the power sector. Sudan's power sector is benefiting from large-scale investment in new infrastructure.

China has emerged as one of the biggest players, having already played a major role in developing Sudan's hydroelectric power facilities. In addition, there is growing interest from foreign investors with regards to the potential development of thermal and solar power. A diversified approach to power infrastructure development could help Sudan extend the availability of energy to rural and peripheral regions. Since gaining political independence in January 2011, one of South Sudan's key concerns has been developing its own power generation, transmission and distribution capabilities. Given China's interest in South Sudan's oil resources, BMI expects China to become a major player in the development of South Sudan's energy sector.

From 2012 to 2021, Sudan's overall power generation is expected to increase at an annual average rate of 5.8% to reach 12.7TWh. Contributing to this growth will be a 2.1% annual average increase in oil-fired power generation. Hydropower generation is expected to increase by an average of 8.2% annually over the period.

The key trends and developments in the country's power sector are:

Sudan has seen the introduction of new energy transmission infrastructure alongside major power generation projects. In addition to extending its national

electricity transmission and distribution capabilities, there is the potential for Sudan to engage in cooperative electricity transmission projects with neighbours such as Ethiopia.

Despite our prediction that Sudan will steadily expand its power output over our 10-year forecast period, we expect all of this increased power generation to be used to support rising domestic demand. We do not expect Sudan to export significant quantities of power and do not have a forecast for exports. However, we do predict that a gradual decline in the percentage of transmission and distribution losses from an anticipated 30.5% in 2012 will help balance the market.

The escalation of the military conflict between Sudan and South Sudan could heighten political risk, and could impact the country's total power consumption.

South Sudan's lack of infrastructure, added to a legal framework that is at best embryonic, has so far discouraged potential investors. Despite big promises made by China, South Sudan has only very small-scale investment, mainly from east Africa.

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