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State of the System – 2025/26 Summer Outlook Briefing

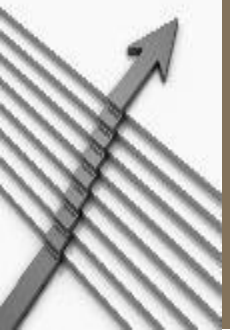
5 Sept 2025

1	**Opening remarks**	**Dr. Mteto Nyati** Chairperson
2	**Key takeaways and reflections**	**Dan Marokane** Group Chief Executive Officer
3	**Generation performance overview**	**Bheki Nxumalo** Group Executive - Gx
4	**Demand management initiatives and load reduction overview**	**Agnes Mlambo** Group Executive – Dx (interim)
5	**NTCSA focus areas**	**Monde Bala** NTCSA Chief Executive Officer (interim)
6	**Closing remarks**	**Dan Marokane** Group Chief Executive Officer

Eskom has made significant progress in addressing electricity supply constraints – and is building on this momentum for a sustainable and competitive company

Progress made in recovering generation capacity since 2023

- **Reduced loadshedding from 329 days in FY24 to 13 days** in FY25 (17 days Jan – Aug 2025 vs 84 days in 2024[1])
- Improved **EAF from 55% in FY23 to 60.6% EAF in FY25**
- Diesel generator spend reduced **from R30bn** for FY23 **to R17.7bn** in FY25, and still within budget for the this FY
- Recovered **>7.8GW generation capacity** through long term outage completions and new build
- **Increased IPP capacity** by **385MW** between FY23 and FY25



Sustaining the gains and addressing the distribution sector

- Ensuring **sustained recovery of the Generation** performance towards **achieving 70% EAF** (**achieved ~66% for Aug[2] 2025,** average **monthly improvement** of **2.6% points** between Apr and Aug 2025)
- **Addressing electricity theft -** illegal connections and illicit tokens undermine service delivery, intensification of OVS leakage correction
- While **DAA** and **prepaid mechanisms** are **gaining traction**, municipal debt remains at **unsustainably high levels**
- Focussed attention on **NTCSA's roll out** of the **Transmission Development Plan**

Long term sustainability will require coordination and careful planning

- **Containing tariff increases** through cost optimisation and correctly structured tariffs
- Adopting **risk based transition into a low carbon energy mix**, considering system risks and transparent trade-offs (managing energy trilemma)
- Ensuring appropriate rules are in place to **enable a controlled market transition** while protecting all stakeholders (including consumers)

1: Jan to Aug 2024; 2: As of 25 Aug 2025

EAF: Energy Availability Factor; FY: Financial year; IPP: Independent Power Producer; OVS: Online Vending Server; DAA: Distribution Agency Agreement

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Reflections: Eskom's performance has improved across several areas over the winter outlook period (April – Aug 2025)

149/153

Loadshedding free days between 1 April 2025 and 31 August 2025

10.47% Dx energy losses[1]

Compared to **11.33% target**. Amounts to **5.5TWh** energy lost in **FY26 Q1** (equivalent to running Kriel Power Station at an EAF of 91%)

794MW[1]

Capacity added through the completion of Medupi U4 repairs

~66% EAF[2]

For Aug 2025, 10% point improvement since April 2025, with y-o-y increase in planned maintenance

13572[1]

Total electrification connections against a target of 6201, driving universal access to electricity

380MW[3]

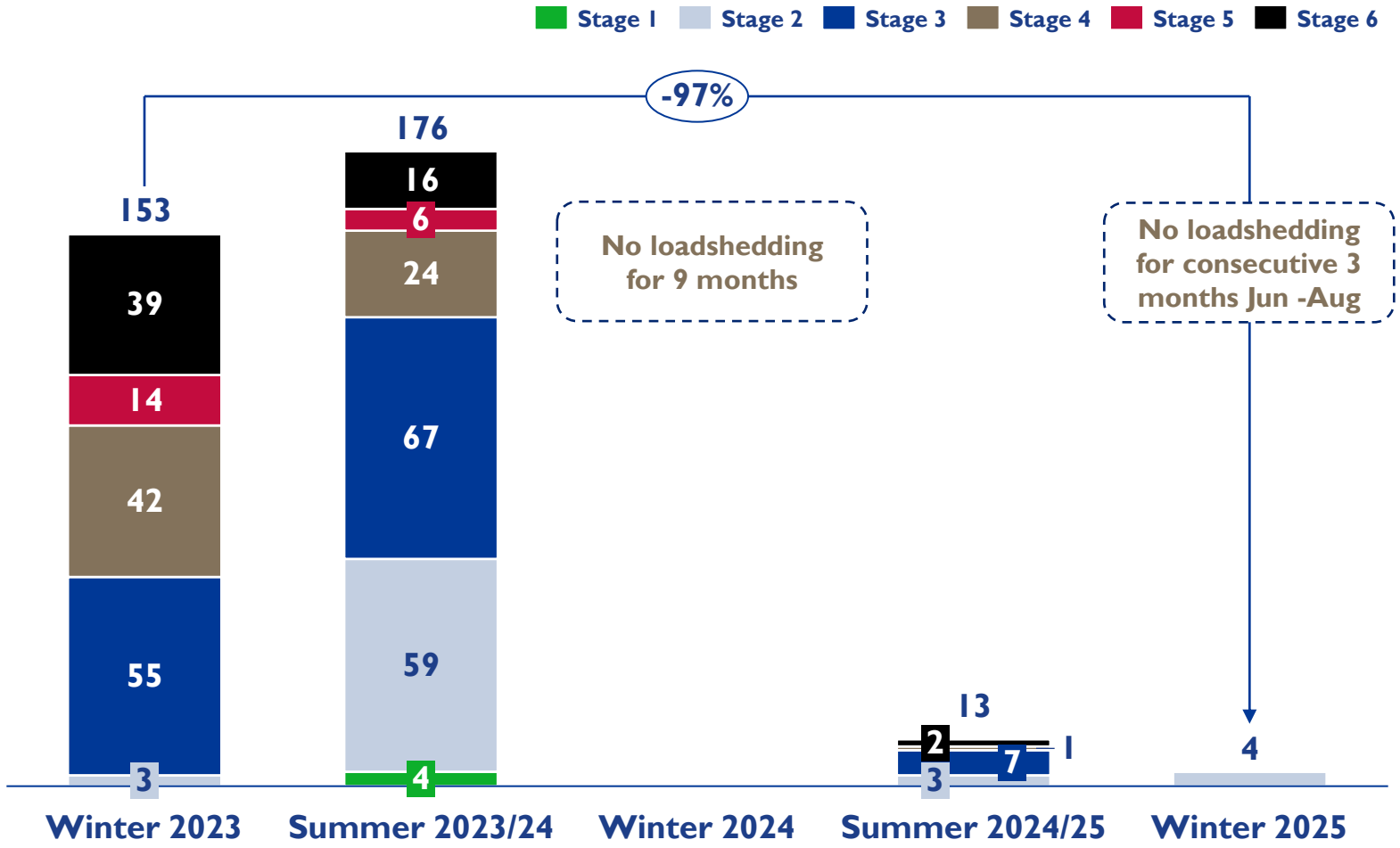
Renewable energy capacity added through IPP programmes (total REIPPP installed capacity is currently 730MW below target for FY26 YTD)

Sources: FY26 Q1 Shareholders report; Divisional inputs
1: FY26 YTD/Q1, 2: Aug MTD 3: Mar 2025 – Jun 2025; Dx: Distribution; EAF: Energy Availability Factor; PCLF: Planned Capability Loss Factor; MVA: Megavolt-Amperes

Reflections: Minimal loadshedding levels experienced as a result of improved plant reliability and increased generating capacity

Overview of loadshedding intensity and frequency between Winter 2023 and Winter 2025

# of days at various stages



Insights

- Eskom contained **loadshedding to 26 hours over Winter 2025** – reaching 100 days without loadshedding on 24 August 2025
- **Higher than expected unplanned losses** in the 2025 Winter period **resulted in 4 days of loadshedding (April – May 2025)** and **increased spend on diesel generation** (although on a declining trajectory)
- Eskom is **implementing interventions to address the root causes** of the events during **April - May 2025**

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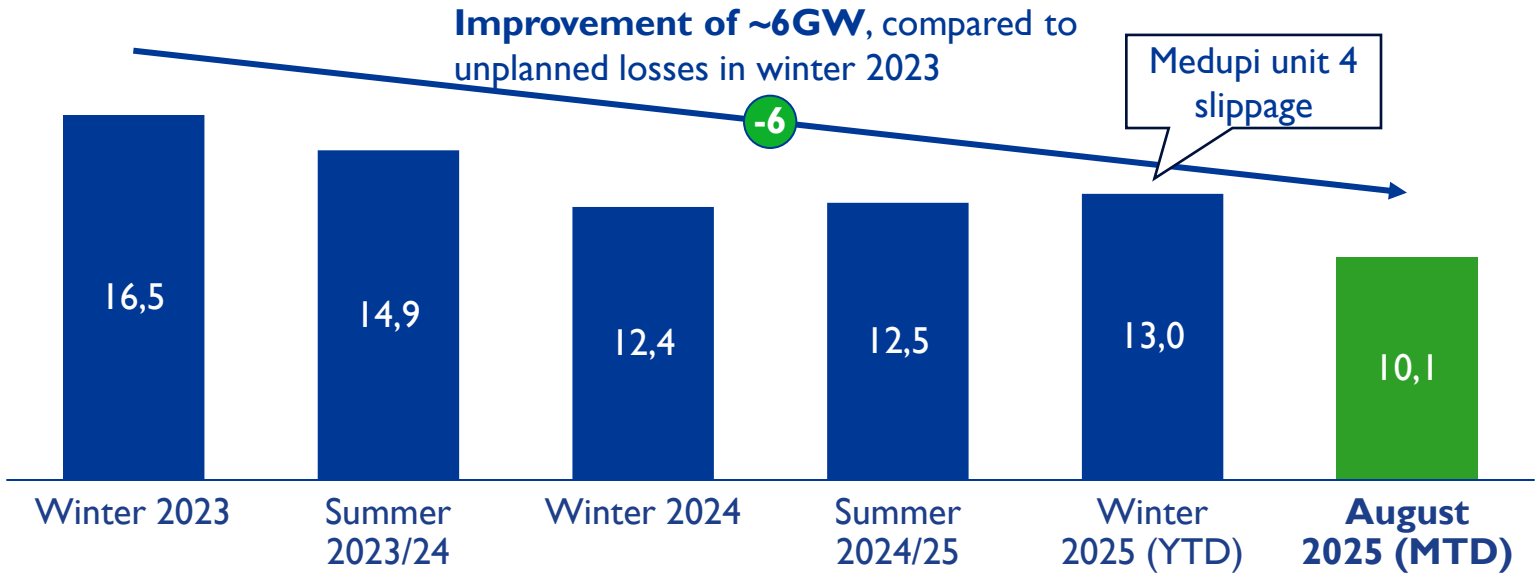
EAF: Energy Availability Factor

Reflections: The reduction in unplanned losses since 2023 has resulted in 6GW additional available capacity (equivalent to adding ~1.5x Kusile stations[2])

Eskom Gx actual performance on unplanned losses across outlook periods[1]

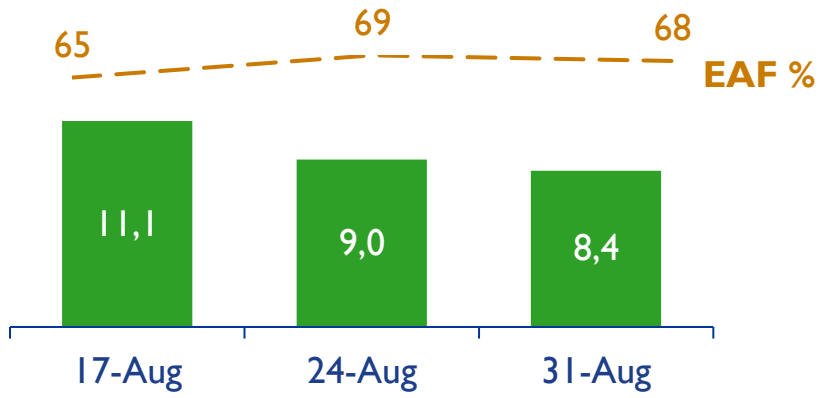
Actual average unplanned losses (GW)



August 2025 UCLF weekly performance

Actual average unplanned losses (GW)

Last three weeks of **August** showed further improvements down to **8GW unplanned losses**



Insights

- Unplanned losses have been on **a downward trajectory since Winter 2023**, with setbacks experienced in Winter 2025
- The setbacks were **primarily due to delays** in **returning units from outages. Interventions to address root causes are being implemented**
- Positive improvements in UCLF in the 3rd week of **August, trending around 9GW,** noting 38 units which performed with an EAF of above 80% in that week, with further improvements in the 4th week of August (~8GW unplanned losses) – resulting in weekly EAF improvement to over 68%
- A notable achievement reached on 23 and 24 August with **UCLF dropping to 6.9GW**, the first time that performance has been **below 7GW** since Sept 2020 (9.6GW reduction from Winter 2023 levels, equivalent to ~2.5x Kusile stations[2])

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Source: Eskom GPSS daily report (All stations) MTD as of 1 Sep 2025; 1. UCLF+OCLF, Numbers vary marginally over reports as data is refined. 2: Based on 6x720MW nominal capacity units at 90% availability. Acronyms: EAF: Energy Availability Factor; PLL – Partial load losses; Gx – Generation; UCLF – Unplanned Capability Loss Factor; OCLF – Other Capability Loss Factor; MTD – Month-to-date; Weekly figures reflect week end date

Reflections: While unplanned outages breached the moderate forecasts, loadshedding was contained to 26 hours across four days

As expected | Worse than expected

Reflection on 2025 Winter – 1 April 2025 to 31 Aug 2025					
Scenarios		**Base case scenario + 1GW risk expectations** (14 000MW UCLF)		**Actual performance**	
Number of LS days		1 Day		4 Days (26 hours)	
OCGT costs		R 2.1bn		R5.9bn	
Highest stage of LS		Stage 2		Stage 2	
Month	**Peak Residual Forecast** - MW	**Loadshedding days**	**Max Loadshedding stage**	**Loadshedding days**	**Max Loadshedding stage**
April	**27,739**	1	2	1	2
May	**29,259**	0	0	3	2
June	**30,777**	0	0	0	0
July	**30,872**	0	0	0	0
August	**29,599**	0	0	0	0

- Base case + 1GW risk anticipated 14GW of unplanned losses, however due to temporary plant failures, slightly higher load shedding was required in May 2025
- Diesel spend was higher than expected and exceeded spend in the comparable period for the previous year, as a result of higher unplanned losses

Key interventions on supply and demand management aspects, have created ~4GW additional levers to meet expected demand over the coming summer period

Improvement Neutral

2024/25 Summer Outlook	Versus	2025/26 Summer Outlook		
50GW[1]	Operational dispatchable capacity	51.4GW[1]	↑	**1.4GW addition** from return of Medupi U4 and expected commercial operation of Kusile U6
9.8GW[2]	Planned maintenance	7.9GW[2]	↑	**~1.9GW reduction** in **peak** planned maintenance levels, due to completion of major outages during 2024 and early 2025, which allows for smoothing out of execution
15GW	Worst case unplanned losses	15GW	⊘	**Unplanned losses** assumptions **maintained** to account for unforeseen circumstances
11GW[3]	Actual unplanned breakdowns trend[3]	10.1GW[3]	↑	**0.8GW decrease in actual unplanned losses** leading up to 2025/26 Summer Outlook
2.1GW[4]	Demand management	2.4 GW[4]	↑	**0.3GW increase in capacity from our demand management programme,** leading up to 2025/26 Summer Outlook

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1: Average between September and March, refers to nominal capacity; 2: Peak daily PCLF over Sept and March 3: Actual unplanned breakdowns in month before respective summer periods (Aug 2024 vs. Aug 2025), OCLF + UCLF; 4: As at start of respective outlooks, further expansion pursued.

2025/26 Summer Outlook - No loadshedding expected for unplanned outages below 15GW

Summer 2025/26 – 1 September 2025 to 31 March 2026 (212 days)							
Scenarios		**Base Case:** 13 000 MW UCLF		**Base Case + 1000MW:** 14 000 MW UCLF		**Base Case + 2000MW:** 15 000 MW UCLF	
Number of LS days OCGT costs		0 Days R 0.1bn		0 Days R 0.4bn		0 Days R 1.3bn	
Highest stage of LS		-		-		-	
Month	**Peak Residual Forecast**	**Load shedding days**	**Max Load shedding stage**	**Load shedding days**	**Max Load shedding stage**	**Load shedding days**	**Max Load shedding stage**
September	**28,537**	0	-	0	-	0	-
October	**27,837**	0	-	0	-	0	-
November	**27,538**	0	-	0	-	0	-
December	**26,563**	0	-	0	-	0	-
January	**26,622**	0	-	0	-	0	-
February	**27,550**	0	-	0	-	0	-
March	**27,841**	0	-	0	-	0	-

- **No loadshedding** is expected over the 2025/26 summer period
- Limited loadshedding could be required if unplanned losses breach 15GW, the probability is considered low given current trends

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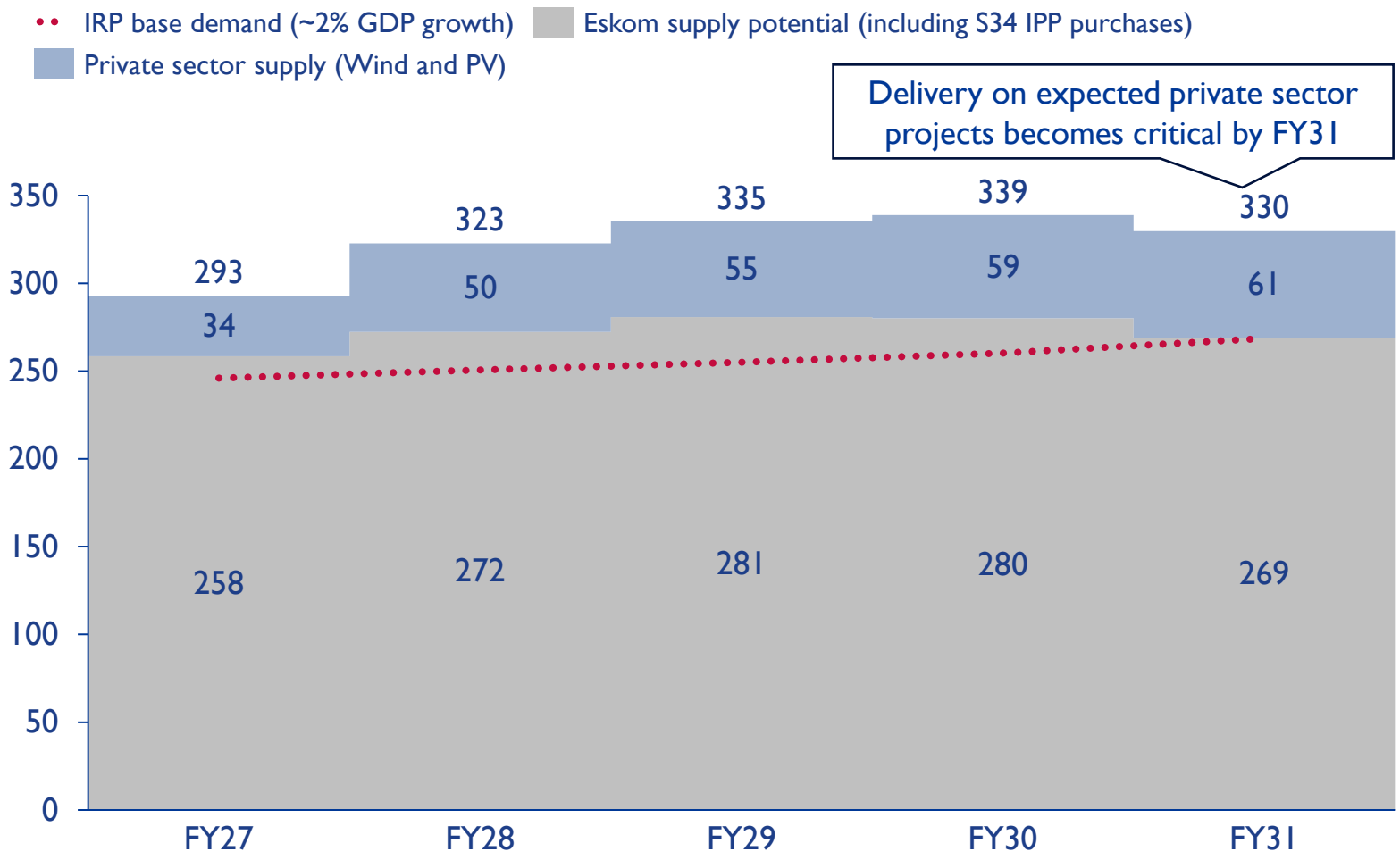
Note: Based on Capacity Plan 28 August 2025 BEFORE STERF. Acronyms: UCLF – Unplanned Loss Capability Factor; It is important to note that the Weekly System Status reports is not a loadshedding forecasts, only reflects potential reserve shortfalls without considering the available short-term reserve and demand side levers; Structural shift of 1GW-2GW reduction in unplanned breakdown assumptions from Winter 2024 levels maintained, due to Gx recovery plan progress

Gx performance improvement and expected new capacity indicate electricity will not constrain 2% GDP growth to 2030, delivery on new capacity beyond that is crucial

Electricity supply outlook assuming growth in demand *(TWh)*

Indicative, will be confirmed by MTSAO in Oct



Insights

Assumed additional capacity by FY2031

- **~7GW increase in available Eskom capacity** (~1GW EAF improvement, 6GW new capacity)[1]
- **~9GW increase in publicly procured capacity** (S34 IPP programmes)
- **~18GW increase in private sector capacity** from utility and small-scale renewable energy (primarily Wind and Solar PV)

Risks to be managed:

- **Plant flexibility of coal generators** and **peaking capacity** to accommodate increased VRE
- **Execution challenges** with new capacity
- **This is indicative** and will be confirmed in **Eskom's Medium Term System Adequacy Outlook** once completed (Oct 2025)

1: Despite shutdown of 5 stations by FY30, Eskom's existing fleet available capacity grows by ~800MW due to improved availability projections; 2GW from RE and BESS, 3.9GW from Richards Bay gas and CCGT conversions
2: Assumes that all coal stations operate at 90% energy utilisation factor, includes supply from S34 IPPs and imports/wheeling; 3: IRP 2024 public consultations; 4: Includes production required for network losses and exports/wheeling; 5: Assuming 25% LF for PV plants and 35% LF for Wind (in line with SA actuals over past 5 years); Assumes 1:1 correlation between GDP and electricity growth in short-med term

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Generation has completed the majority of its original Recovery Plan objectives, and will move to the next phase focussing on sustainability of recovery

Implementation complete | Implementation in progress

1 Set up for success

- **Set-up the enabling structures**
  - Turnaround plans
  - Generation recovery office
  - Key enablers
- **Guard performance** at current **flagship stations**
  - Medupi, Lethabo, Matimba and Peaking
- Focus on the **Priority stations**
  - Tutuka, Duvha, Majuba, Matla, Kendal, Arnot, Kriel
  - Kusile removed from priority list
- **Execution of Koeberg 1 Outage**
- **Source external specialised skills**

2 Execute excellence

65%[1] EAF

Actions for FY24

- **Successful execution of Koeberg 1**
- **Sustain excellent Medupi performance**
- **Embed principles of Operational Excellence**
- **Address internal skills gaps**
- **Prevent outage slips**
- **Return of Kusile 1, 2 and 3**
- **Synchronisation of Kusile 5**
- **Review plant shutdown dates based on system requirements**

3 World class performance

70%[1] EAF

Actions for FY25 onwards

- **Return of Medupi 4** from long term forced outage
- **Commercial operation of Kusile 5**
- **Synchronisation of Kusile 6**
- **Continuous focus on current and future skills**
- **Ensure successful implementation of Koeberg 2 steam generator and long-term operating projects** (synchronized to the grid on 30 Dec 2024)

Generation's **continued focus on improving Operational Reliability and Sustainability** will ensure that the principles of **operational excellence are embedded, outage slips are prevented** and the **number of unit trips are reduced**

Continuous execution of Culture transformation and Strategic Levers as per the Generation recovery plan

Note: 1. Month-to-Date for March 2024 and March 2025

The outlook is supported by the interventions we are putting in place to drive a plan geared towards Operational Reliability and Sustainability

Operational Reliability & Sustainability Plan focus areas

1 Reduce number of trips

- Execute projects to resolve inherent trips risks and eliminate single points of failure
- Root cause analysis training for station incident investigators.
- Roll out and implementation of Gx Trip Reduction Directive at all power Stations
- Improve plant resilience through increased redundancy

2 Improve Outage planning and execution

- Strategic partnerships (OEMs, Utilities)
- Contract Management & Assurance
- Technology, Artificial Intelligence
- Procurement & availability of spares
- Enhanced Outage Performance Improvement Center (OPIC)

3 Execute key strategic projects

- Invest in refurbishment projects at key mid-life stations
- Continue with Koeberg long-term operations refurbishments
- Expedite key projects to ensure compliance to Minimum Emissions Standards (MES)

4 Enhance People, Plant, Process Mindset

- Implement people, plant and process interventions to address root causes leading to unreliability
- Leadership development focus
- Embed Operational excellence principles

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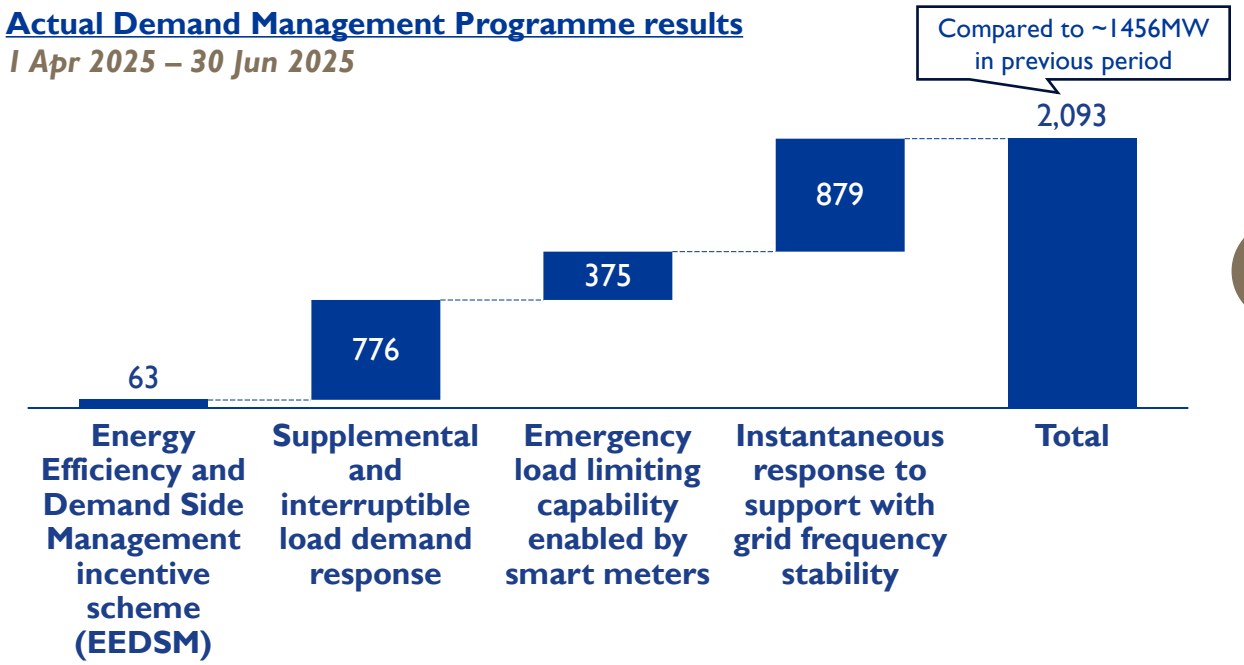
We will continue to use of our Demand Management Programme as a lever to reduce the risk of load shedding

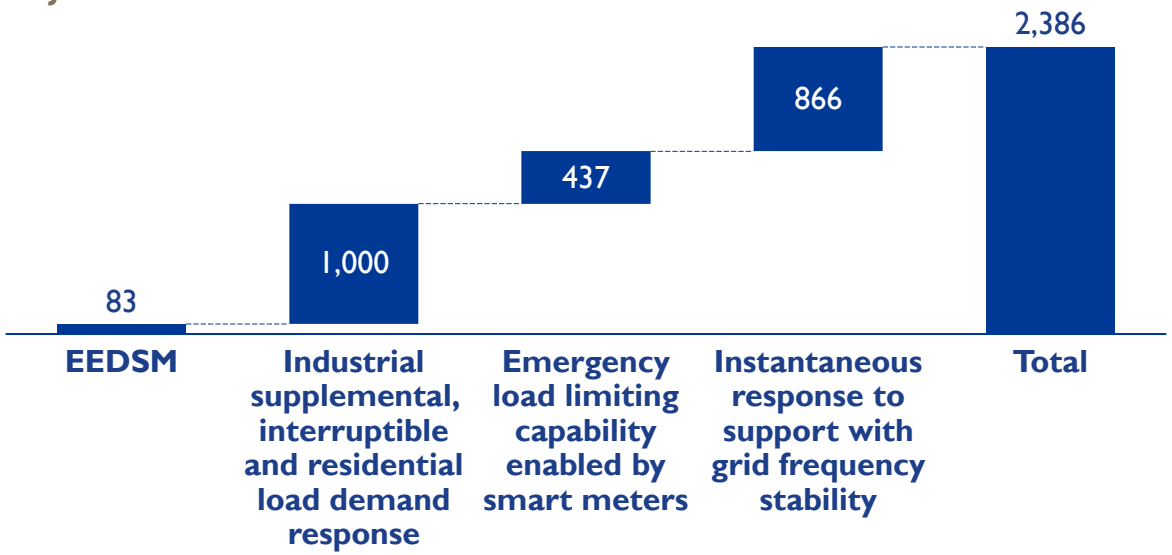
Actual Demand Management Programme results

1 Apr 2025 – 30 Jun 2025



Available levers over the summer period

1 Jul 2025 – 31 Mar 2026



Several demand side interventions have been implemented to support the grid, which results in:

- **Optimisation of cost of energy** through reducing the usage of **expensive diesel generators and transfer pricing,** especially during evening peak times
- **Reduction in the severity of load shedding** through lowering demand during supply constrained periods
- **Demand Management levers** can be utilised as a **balance responsible lever** in the **energy trading market to further reduce overall tariffs**

Distribution is increasing its demand management capability through:

- Implementation of **additional EEDSM projects**
- Introduction of the **Residential Demand Response** (RDR) (200MW is included as part of the DR supplemental) – also improves inclusiveness, and enables residential customers to improve utilisation of distributed energy resources
- **Smart meter load limiting capability** (current 437MW), up to 2000MW capability pursued by 31 March 2026 (only available in emergency circumstances)
- Instantaneous response levers support with **grid frequency stability**

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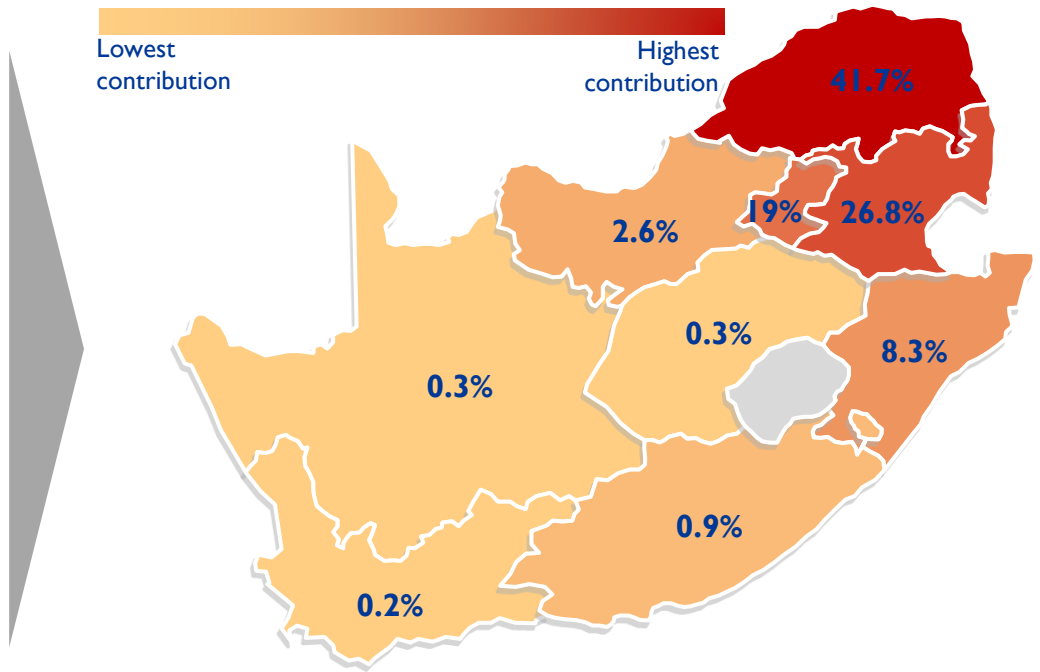
Progress is also being made to reduce load reduction, its implementation remains necessary to protect the lives of customers and electrical equipment

Load reduction is required in areas where distribution network transformers are overloaded, primarily due to **electricity theft** and **illegal connections**

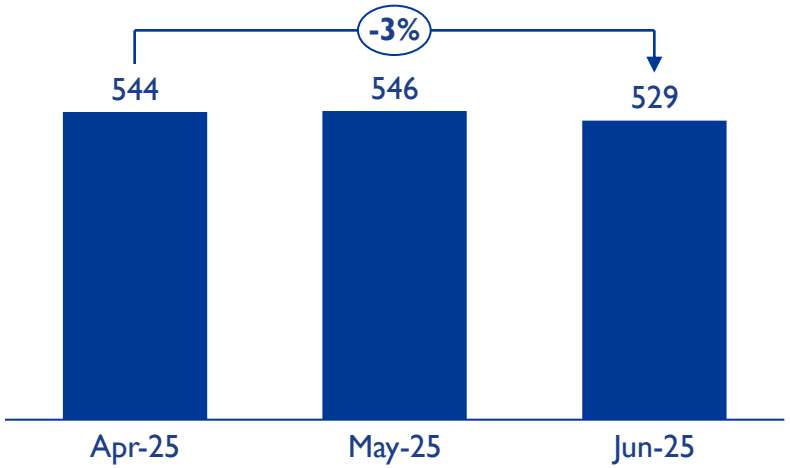
Geographical overview of load reduction[1]

% of total load reduction across South Africa



Load reduction trends[1]

Total MW across morning and evening peak



Largest improvement witnessed in **Limpopo (-13%)** and **Mpumalanga (-5%)**

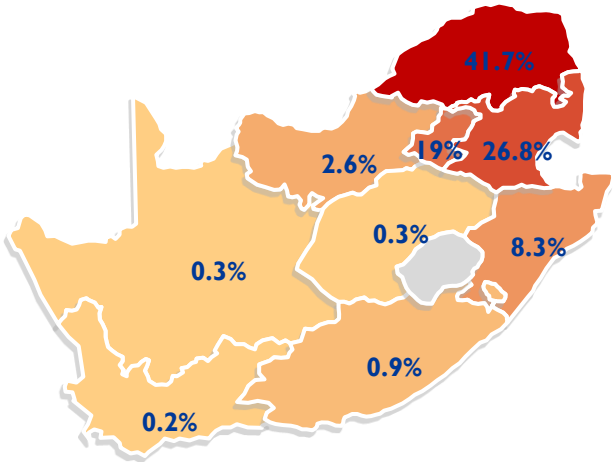
- **529MW of load reduction was required** over morning and evening peak during Jun 2025, with **LP, MP and GP accounting for >87% of total**
- **Progress** has been made to **reduce load reduction nationally** (3% improvement from 544MW in Apr 2025 to 529MW in Jun 2025), with the largest improvements experienced in **Limpopo** and **Mpumalanga** (13% and 5% reductions respectively)
- Eskom is committed to **reducing load reduction by 15-20%** by **Mar 2026**, and **eradicating** load reduction within **the next 18 months** by:
  - **Removing and formalising of 640,000 illegal connections** by Mar 2026
  - Upgrading infrastructure incl., **smart meters, reducing zero buyers** and **illegal vending**
  - Increasing **free basic electricity** registrations in key areas

1: Based on MW reduced over April – June 2025 (morning + evening peak)

Eliminating load reduction requires an accelerated smart meter roll out, targeting 971 feeders by March 2027

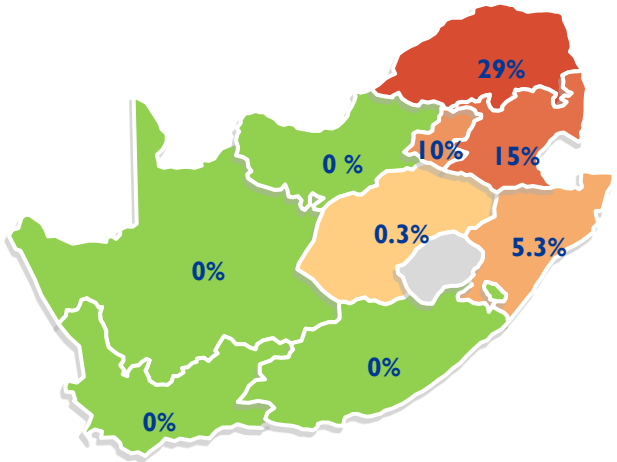
Current status
% of total LR across South Africa[1]

Improvement expected between **Sep 2025 and Mar 2027** (compared to current view)



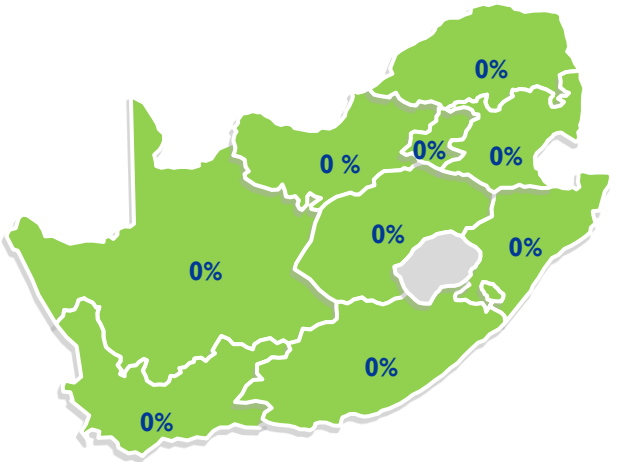
Currently, **~529MW of load reduction** (evening + morning peak) is required due to distribution feeder network overloading – **primarily in LP, MP, GP and KZN**

Phase 1 accelerated (by Mar '26)



✓ **210 feeders**, resolving EC, WC, NC and NW

Phase 2 accelerated (by Mar '27)



✓ **Total of 761 feeders**, resolving Limpopo, Mpumalanga and FS

In addition interventions are being implemented to **upgrade metering infrastructure including** ~1.5 mil smart meters of the load reduction areas by **Mar 2027**

Reducing zero-buyers and addressing **illegal vending**

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1: Based on MW reduced over April – June 2025 (morning + evening peak); LR: Load Reduction; FBE: Free Basic Electricity

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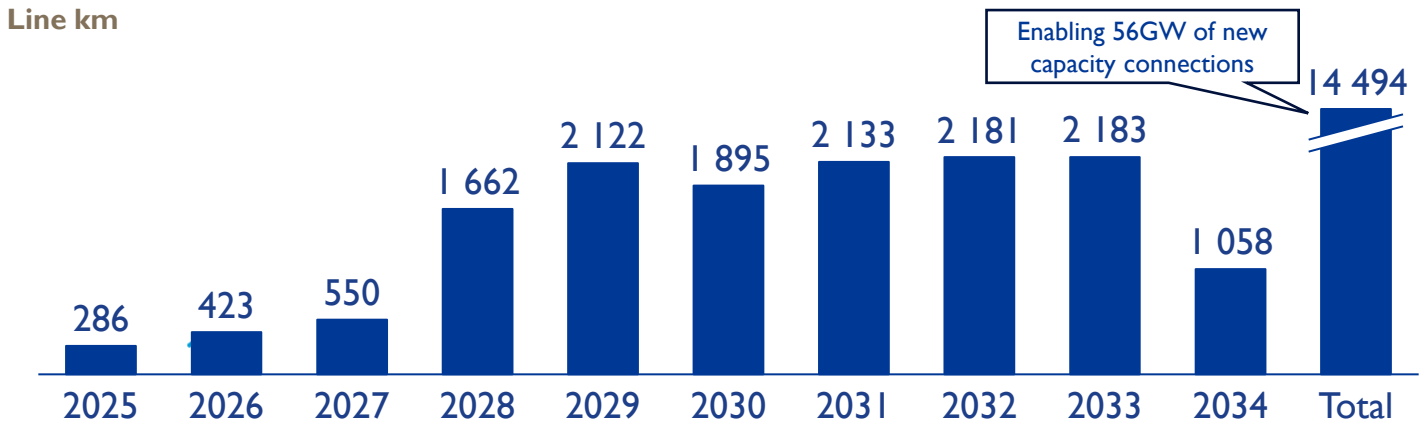
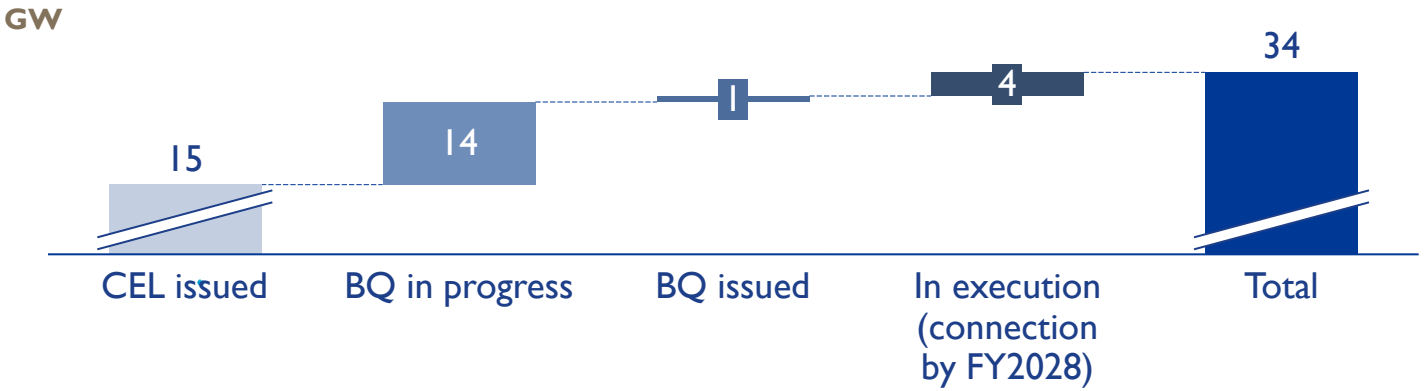
NTCSA's current transmission network expansion plans will unlock 56GW of new generating capacity over the next 10 years

Transmission network rollout (TDP 2024)



Private sector capacity grid connection status (excluding gov. procured IPPs)



Insights

- A total of **292.6km of transmission lines** have been constructed in the **previous financial year** (FY25) against a target of 286 km
- The target for **current financial year** (FY26) is to **construct 423.1 km of transmission lines** and 108.2 km has been constructed to date.
- NTCSA has **allocated a total capital budget of R133bn** over the first 5 years of the TDP, ending 31 March 2030.
- **Considerable progress has been made** on key enablement initiatives i.e. **Owner's Engineers** (OE) panel contracts, **Engineer, Procure and Construct** (EPC) lines and substation contracts, **101 transformer contracts, line construction incubation program, steel suppliers** etc. for the delivery for the TDP.
- **34GW of private sector projects** for wheeling or **own use** are currently between **CEL and execution phase**, with **4GW in execution** and expected to be **connected** to the grid **by FY28**

The ERAA supports the fast-tracking of this plan by introducing a procurement mechanism that enables the Minister of Electricity and Energy to acquire new transmission infrastructure through ITPs

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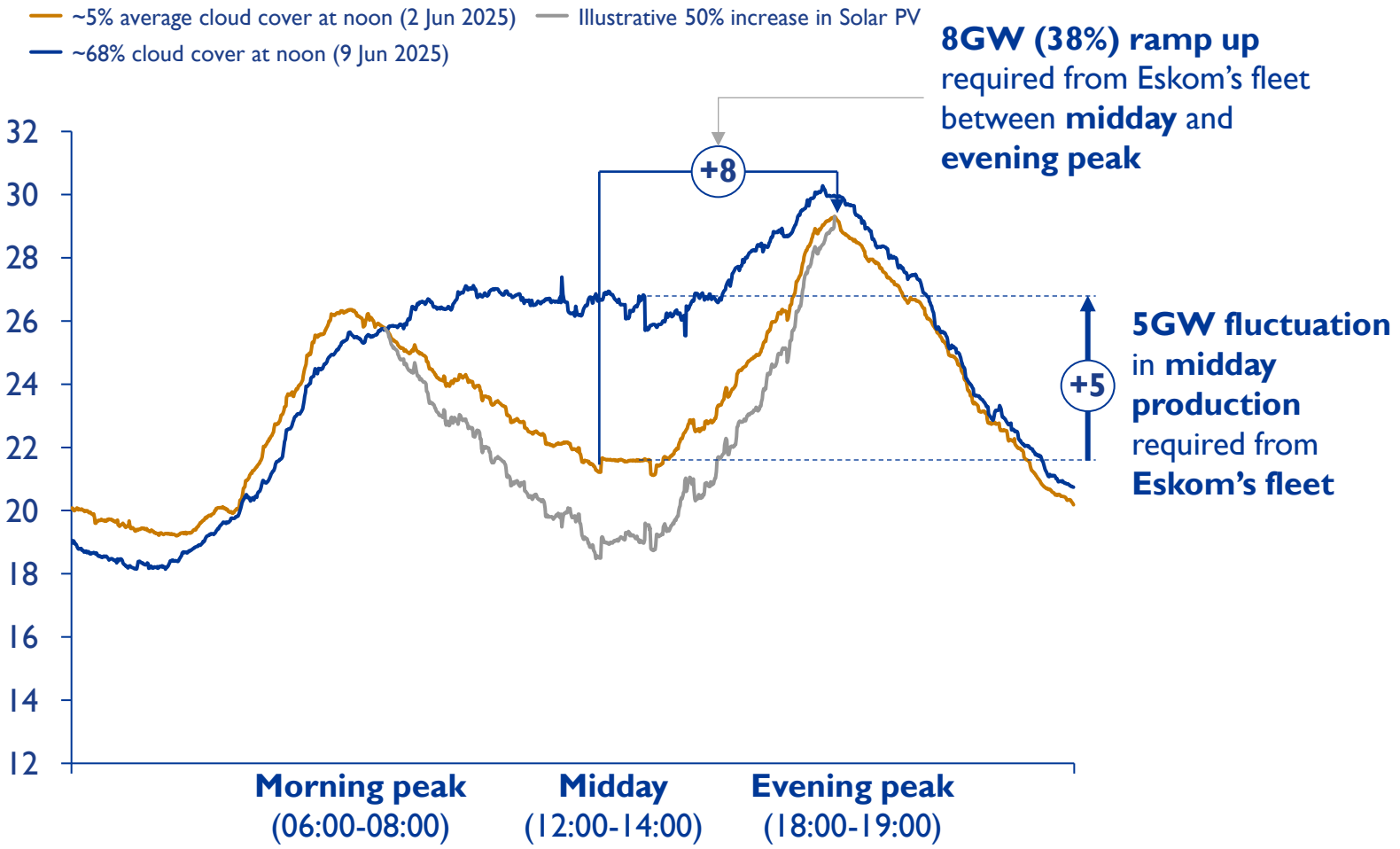
Footnote: TDP – Transmission Development Plan, ERAA – Electricity Regulation Amendment Act. CEL: Cost Estimate Letter; BQ: Budget quotation; ITP: Independent Transmission Projects

As South Africa's electricity system incorporates increased variable renewable energy (especially Solar PV), flexibility of the system becomes a key priority

Grid demand profile variability driven by increased Solar PV generation

GW residual demand across day



8GW (38%) ramp up required from Eskom's fleet between **midday** and **evening peak**

5GW fluctuation in **midday production** required from **Eskom's fleet**

Insights

- South Africa currently has **9.3 GW Solar PV** (2.3 GW from government procured renewable IPPs + 7GW behind the meter) installed across the country
- The **variance in demand for grid supplied dispatchable capacity** currently **varies ~ 5GW at noon across days** and **~8GW between noon** and **evening peak**, strongly influenced by Solar PV generation
- With a **50% increase in Solar PV** (conservative considering expected projects by 2030), these variances will increase to **up to 10GW,** which creates **significant flexibility requirements and planning uncertainty**
- **More coordinated planning is a key priority,** to ensure **system stability** and **associated variability risks** despite **increase in available capacity,** is managed over the summer period
- **Understanding geographical distribution** of existing and new Solar PV is a key aspect of improved system operations

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Note: Weather also influences demand between cloudy and sunny days

Electricity system reforms are underway to support a rules based competitive electricity sector

Market Operator license

Application submitted and **confirmation of adequacy received** from NERSA on **6 Aug 2025 –** NERSA public hearings anticipated on 30 Sep 2025

Preparation of market participants

The **SAWEM school launched Jul 2025,** with further events scheduled to run between **Aug and Dec 2025**

Market Code

Draft published and open for **public input until 18 Sep 2025**, final **market code workshop** scheduled for **11 Sep 2025**

Market platform, systems and processes

Internal **pilots currently in progress,** additional **IT systems** and **processes** in development **-** on track for **launch in Apr 2026**

Prequalification stage for ITPs (opened 31 July 2025), will play a **crucial role** in broader **reform** of the **electricity sector**

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SAWEM: South African Wholesale Electricity Market; ITP: Independent Transmission Projects

Summer 2025 Outlook briefing

1	**Opening remarks**	**Dr. Mteto Nyati** Chairperson
2	**Key takeaways and reflections**	**Dan Marokane** Group Chief Executive Officer
3	**Generation performance overview**	**Bheki Nxumalo** Group Executive - Gx
4	**Demand management initiatives and load reduction overview**	**Agnes Mlambo** Group Executive – Dx (interim)
5	**2025/26 Summer outlook and NTCSA focus areas**	**Monde Bala** NTCSA Chief Executive Officer (interim)
6	**Closing remarks**	**Dan Marokane** Group Chief Executive Officer

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Through the collective efforts of our internal and external stakeholders, Eskom continues to improve security of electricity supply in South Africa

No loadshedding is expected over the Summer period from 1 Sep 2025 to 31 Mar 2026 - **unplanned losses are to be maintained below 15GW**

Reduction of unplanned breakdowns remains a priority – with Gx capacity now added, **continued focus** on **embedding operational excellence (reducing** unit **trips and preventing outage slips)**, will bring us to comfortably meeting demand all the time.

Eskom is committed to **reducing load reduction** through **removing and formalising illegal connections**, **upgrading infrastructure** and supporting **increased registration** for **free basic electricity**

The development of the SAWEM and delivery of **transmission capacity expansion** to **connect new capacity,** is important to ensure sufficient electricity supply and accommodate **economic growth**

Thank you to all the Eskom Guardians and stakeholders for the continued commitment to restore security of electricity supply in South Africa

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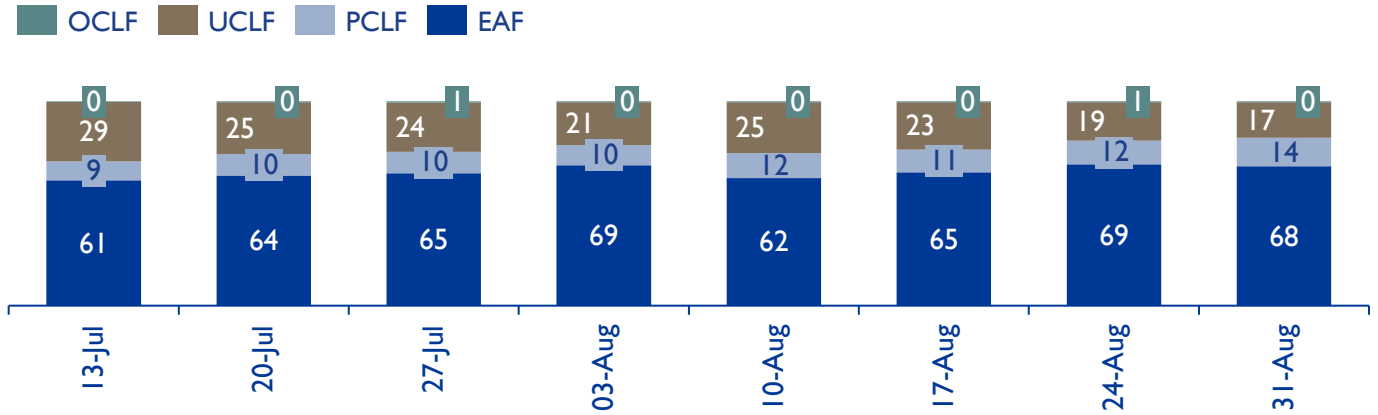
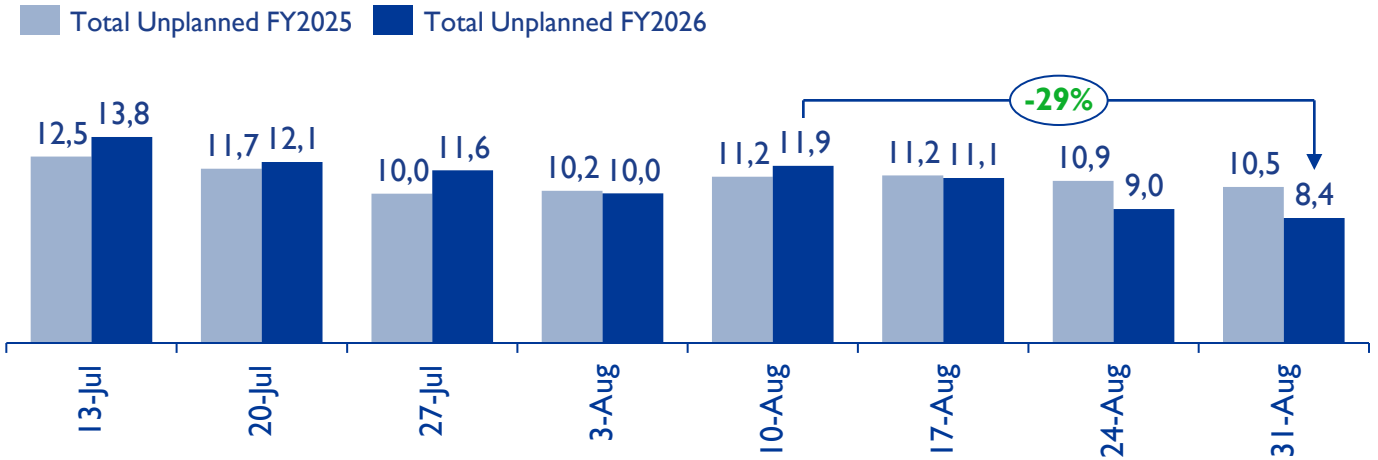
Question & Answer session

A ~30% improvement in UCLF was noted between the first and last week of August 2025

Generation Overview weekly performance FY2026 (%)



Weekly Total Unplanned performance comparison in GW



Insights

- **EAF was maintained between 61% and 69%,** with late August marking peak performance – UCLF in the last week almost ~2GW lower than in the same week in the previous year
- **UCLF showed a steady improvement** from early July to late August, reflecting enhanced operational control, improved reliability and overall stronger fleet performance
- Due to having excess capacity, some units were placed on **cold reserve which enabled additional opportunity maintenance** to be conducted
- The **reduction in total unplanned losses** from over ~13 800 MW in early July to under 8 400 MW by late August highlights a clear trajectory of recovery and consistent improved performance

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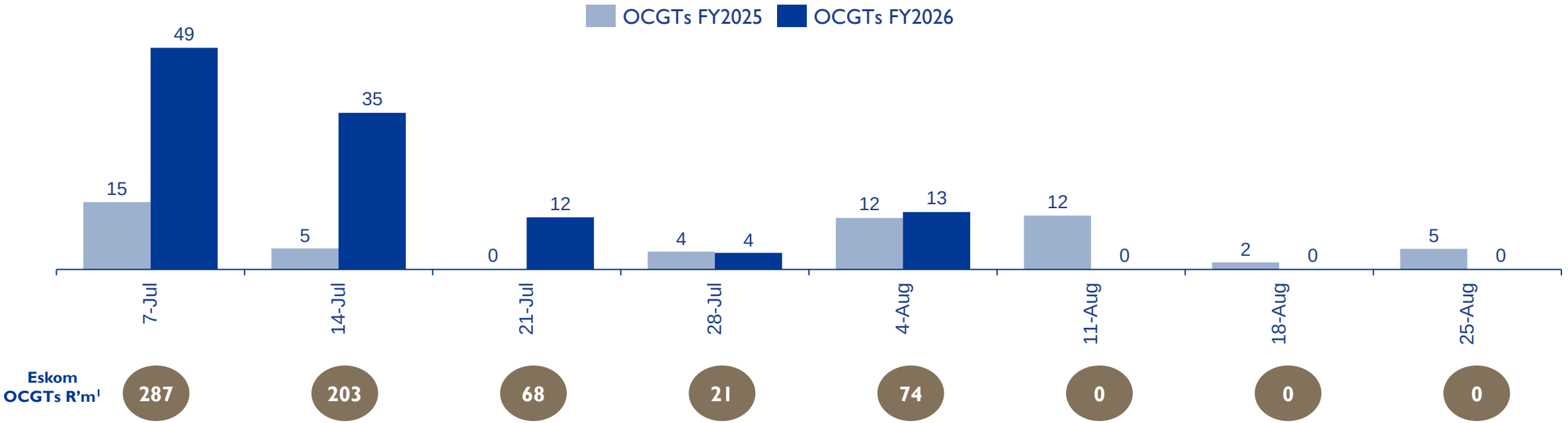
1: The report is based on prelim figures, i.e., subject to verification

OCGTs utilisation drastically reduced from the start of July 2025, lower than the comparable period in previous year

Eskom Only Weekly OCGTs Usage (GWh) Comparison Jul – Aug[1]



Key Insights

- OCGT utilisation was 0GWh between 8 to 31 August 2025, underscoring efficient base-load performance and reduced reliance on OCGT support
- IPP's were minimally utilized during this period

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1: The report is based on prelim figures, i.e., subject to verification

xx Denotes Eskom OCGTs weekly actual costs Excl. Environmental Levy