



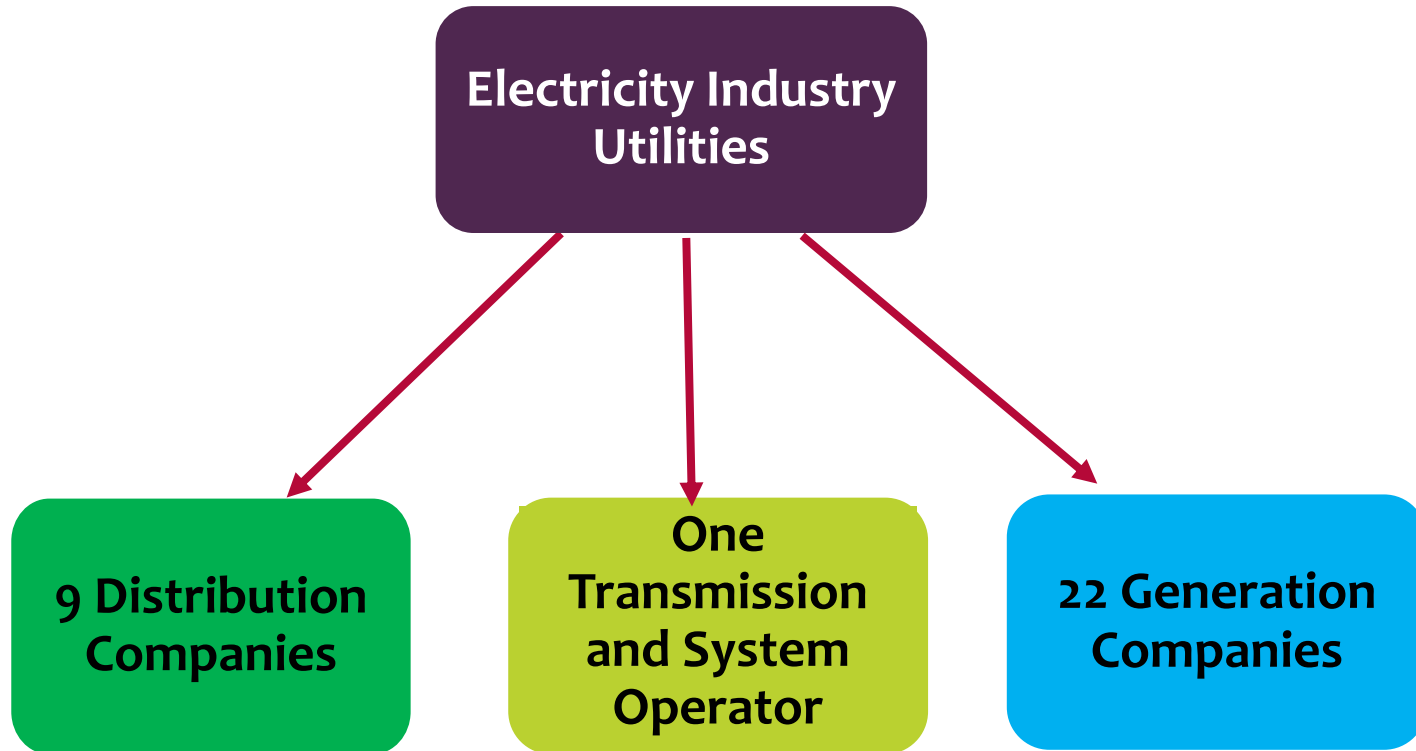
THOUGHTS ON UGANDA'S ELECTRICITY INDUSTRY POTENTIAL

Presented on CEO Forum Kampala Serena Hotel

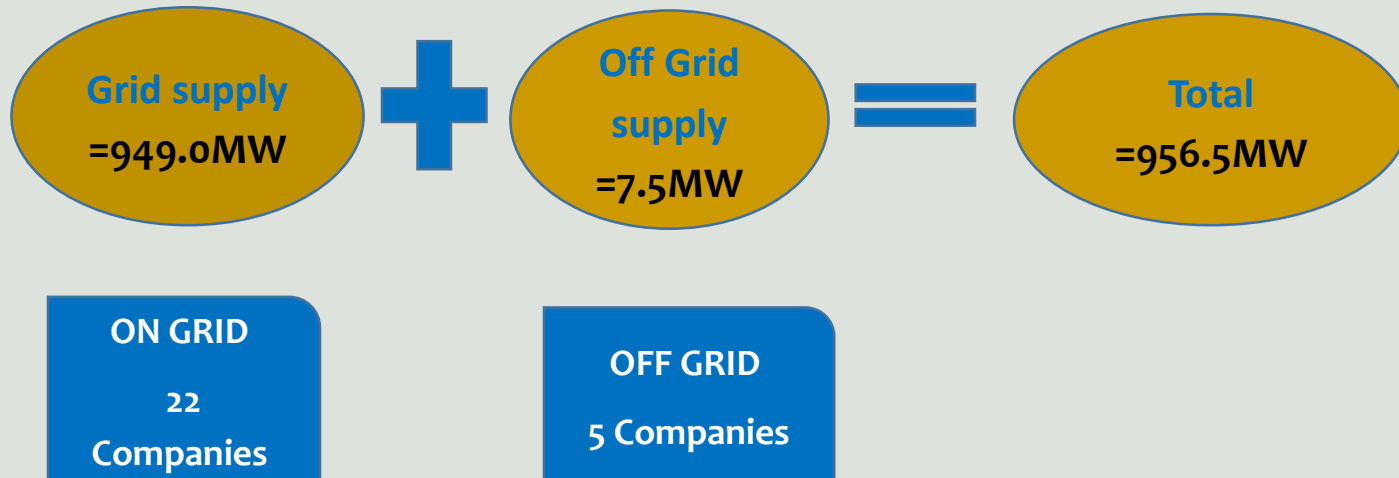
By

Eng. Ziria T Waako

ELECTRICITY INDUSTRY PLAYERS

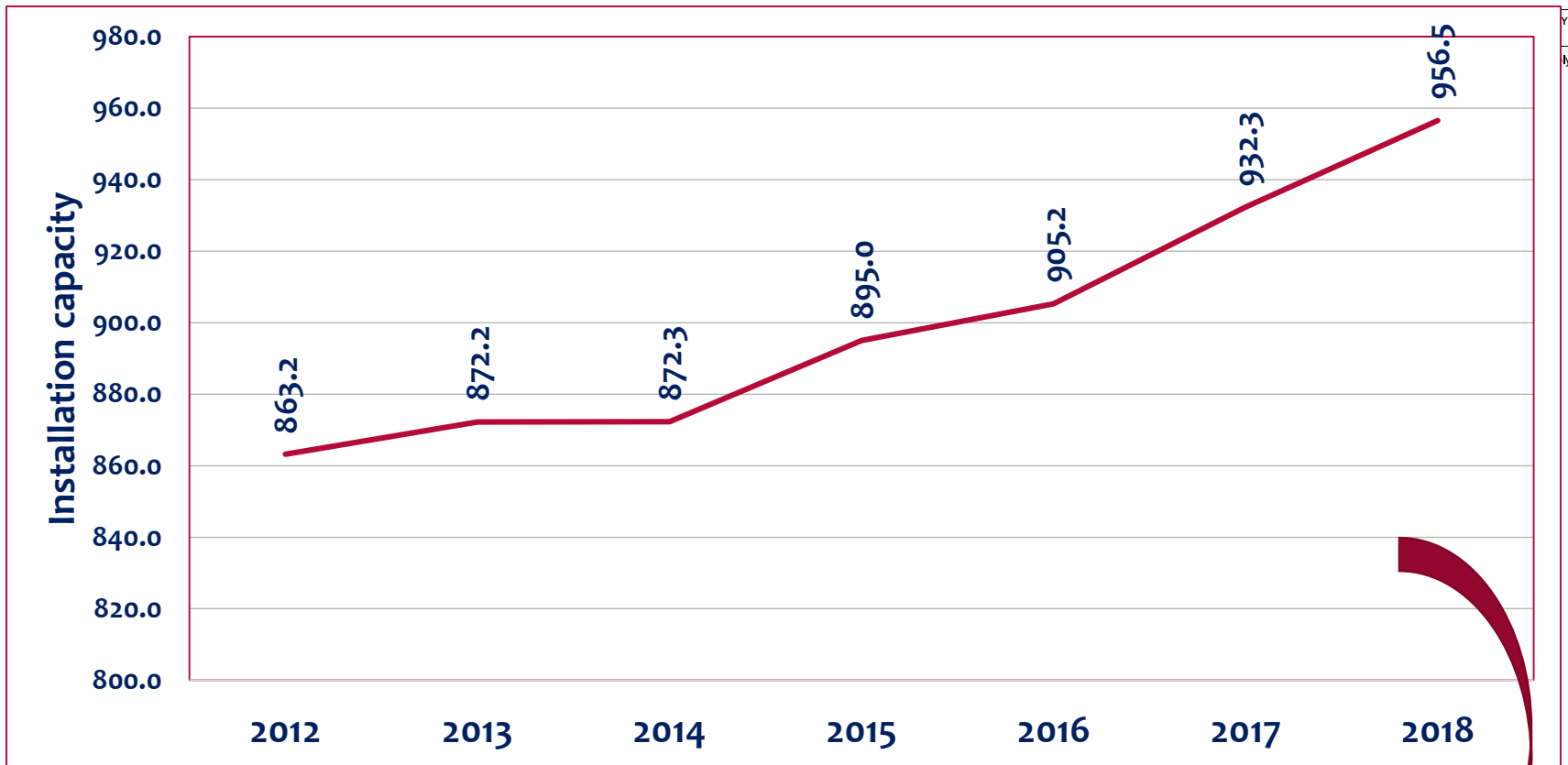


GENERATION CAPACITY COMPOSITION



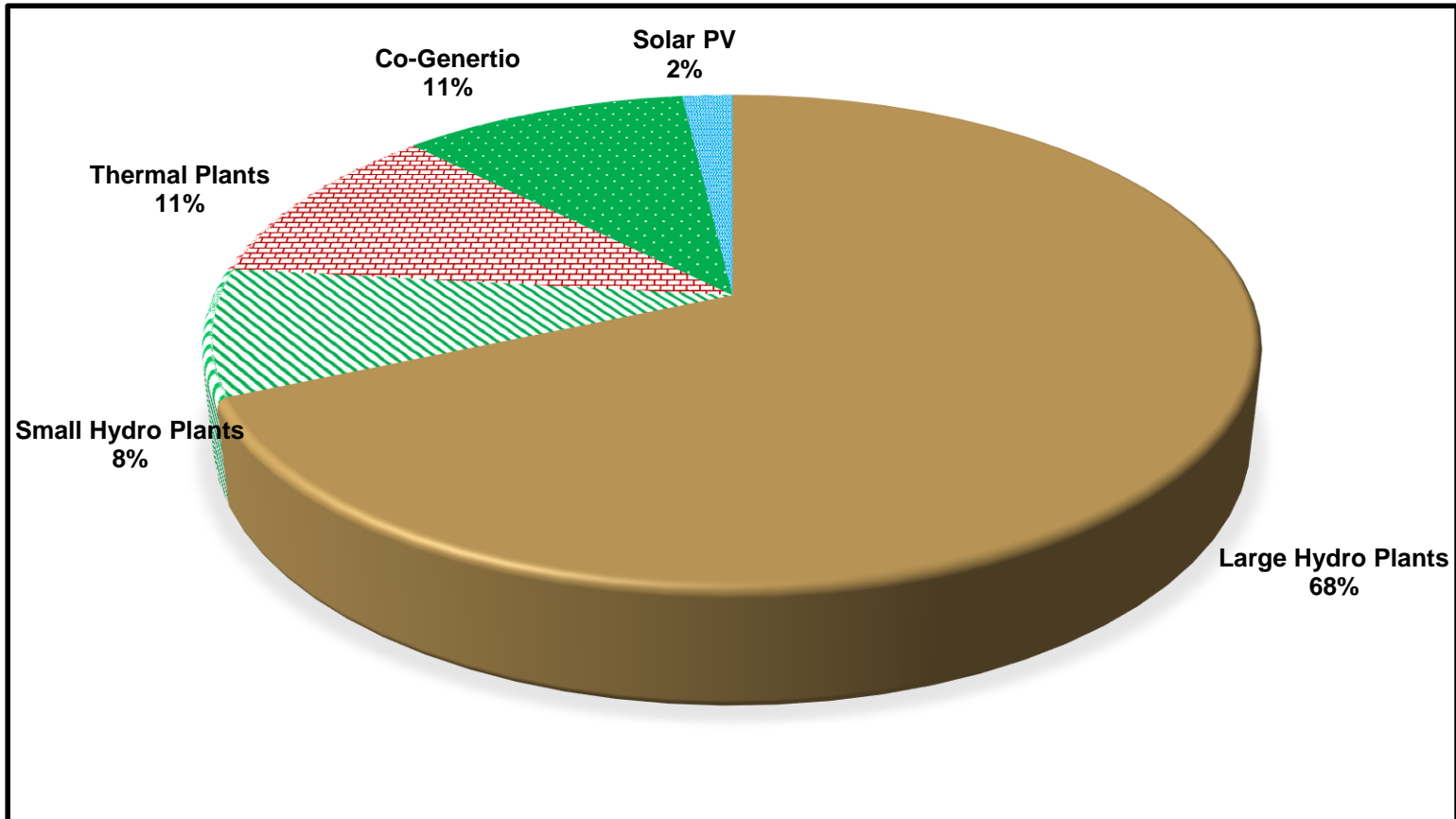
- ❑ MORE PLANTS EXPECTED TO BE COMMISSIONED WITH 242 MW AND 640MW BY END 2018 AND 19 RESPECTIVELY

GROWTH IN INSTALLED GENERATION CAPACITY OVER THE YEARS



- **MORE PLANTS EXPECTED TO BE COMMISSIONED WITH 242 MW AND 640MW BY END 2018 AND 2019 RESPECTIVELY**

INSTALLED GENERATION BY TECHNOLOGY



GROWTH IN CUSTOMERS

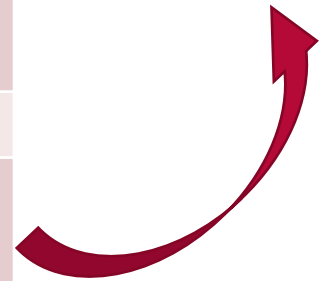


Customer categories	June, 2015	June, 2016	June, 2017	June, 2018
Domestic	691,031	734,353	1,000,021	1,160,001
Commercial	62,276	63,963	86,081	100,193
Medium Industrial	2,454	2,559	2,653	2,737
Large Industrial	492	521	500	556
Extra Large Industrial	0	0	38	39
Street Lights	324	271	299	279
Total	756,577	801,667	1,089,592	1,264,805

UMEME = 1,183,569

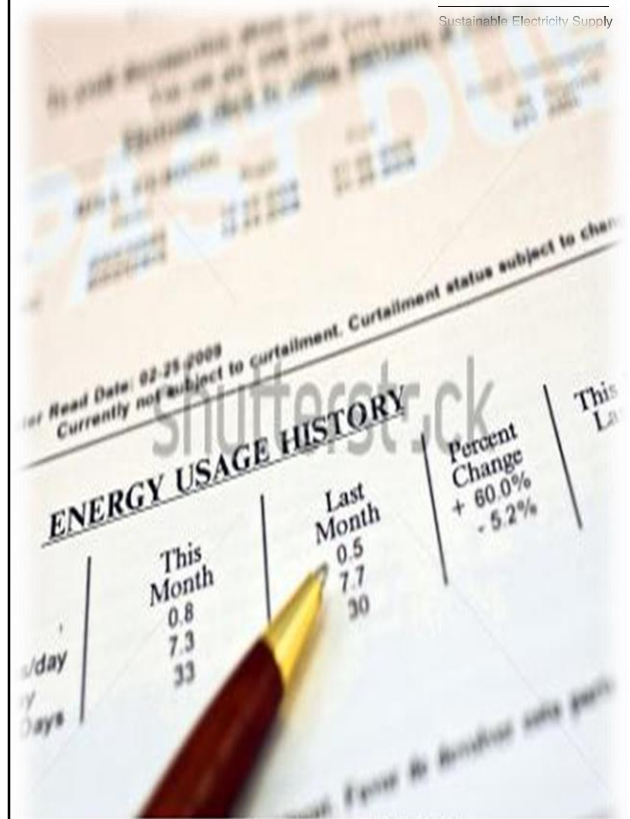
+

Mini-grids = 81,236



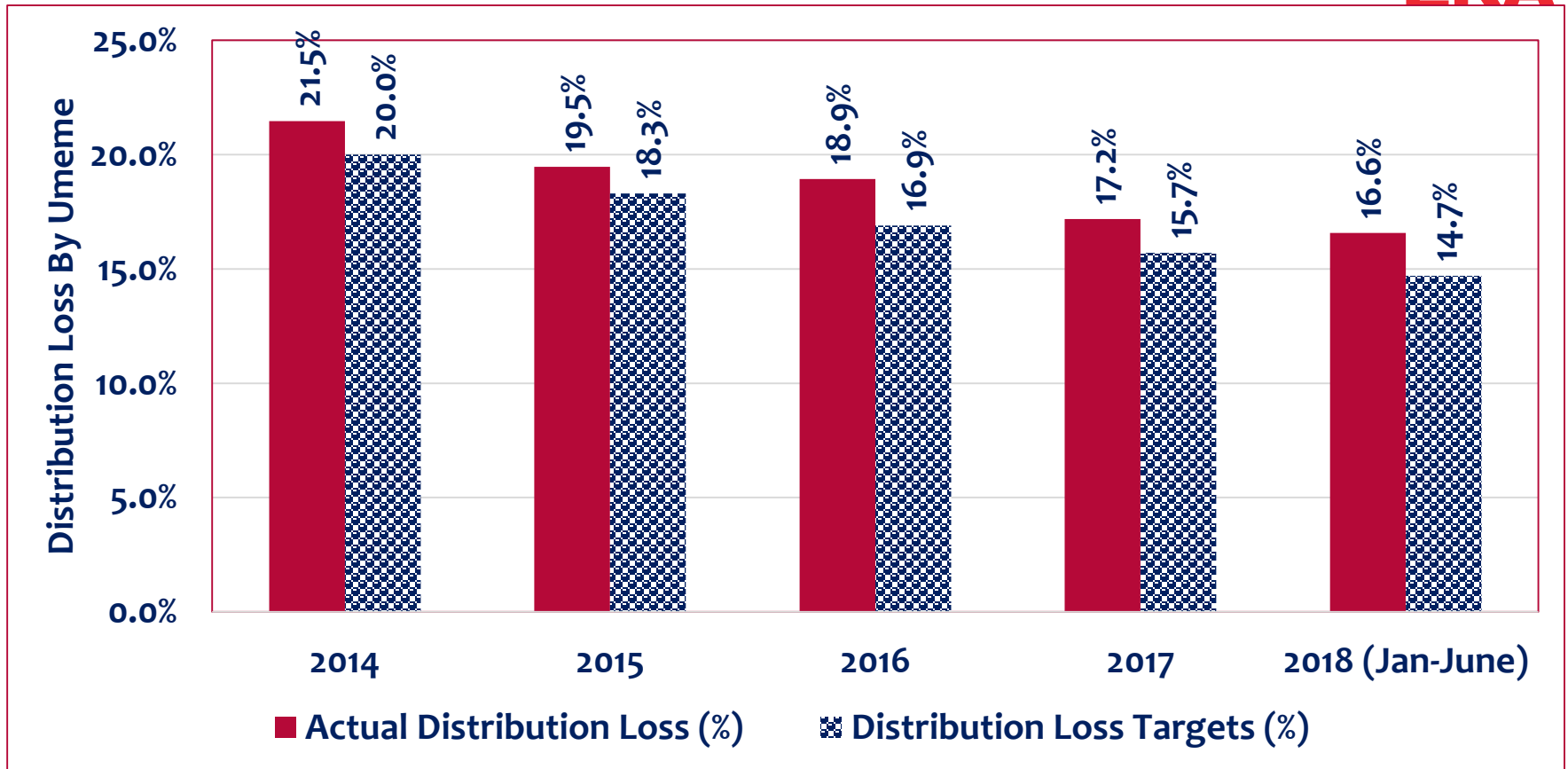
TARIFF DETERMINATION PROCESS

- The Tariff determined by Regulator adjusted quarterly for changes in;
 - a) Exchange rate
 - b) Inflation
 - c) Fuel Prices
- Adjustment intended for the long term financial sustainability of the industry



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TREND OF UMEME ENERGY LOSSES



GENERATION AND DEMAND OUTLOOK

Current
Demand

Peak Demand
stood at 645
MW as of AUG
2018

Demand
Projection

Medium term
Demand
Growth at 7%

Generation Capacity is 956MW

7 Projects to be commissioned in
2018 with 270MW

15 Projects already Licensed
Construction

18 Projects under Feasibility
Study

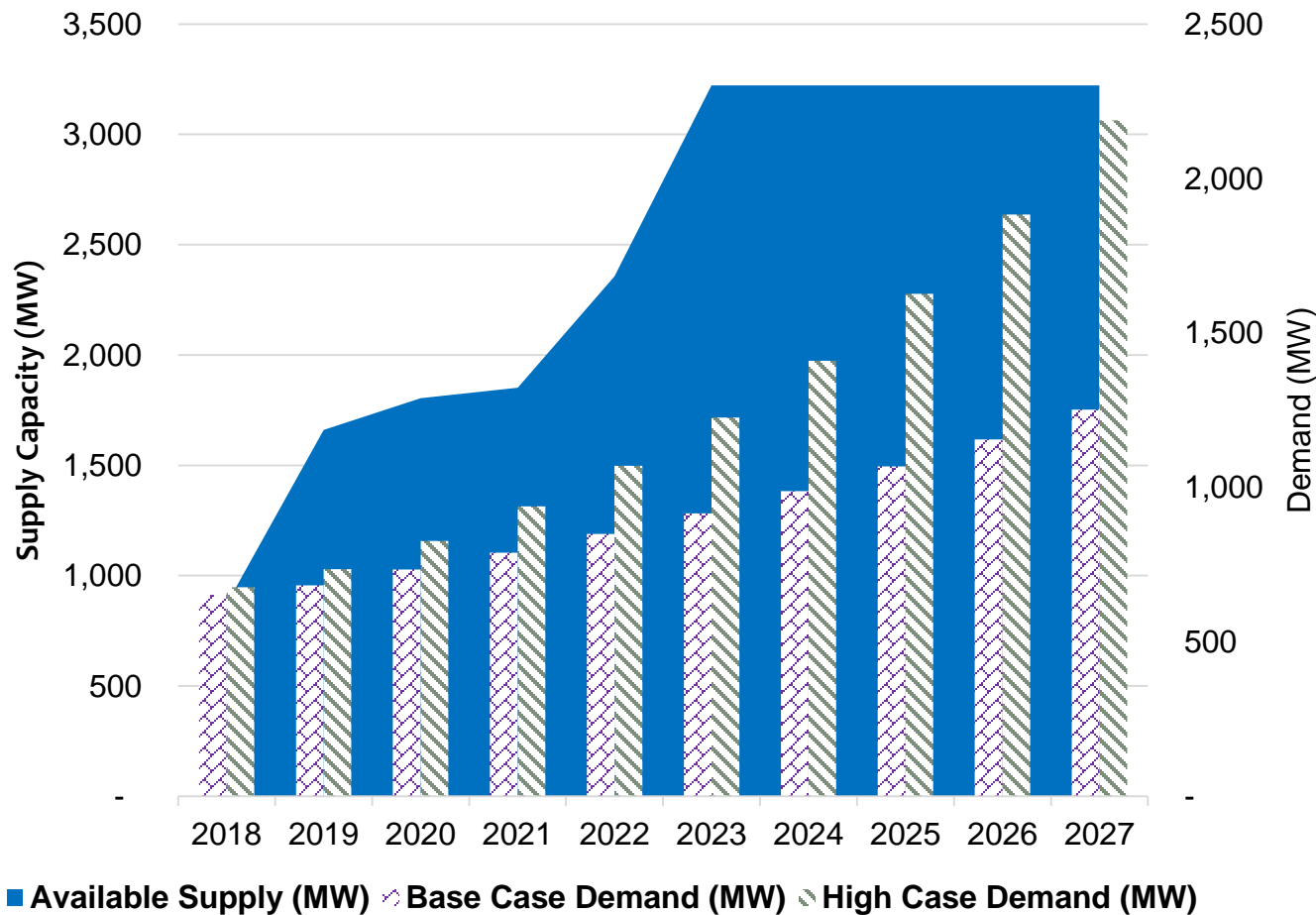
2800MW to be commissioned by
2024



Note

Sustainable Energy Supply

DEMAND SUPPLY OUTLOOK



- ❖ Possible excess generation at current demand growth
- ❖ Opportunity to invest in transmission network up to USD 4BN.
- ❖ Invest in Distribution network up to USD1.7BN.
- ❖ Infrastructure for 4 Industrial parks on Going.

INITIATIVES TO ACCELERATE ACCESS

- Building Capacity for Mini-grids
- Development of Mini-Grid Regulations
- Grid Intensification ERTIII (World Bank)
- Grid Densification (KfW)
- License Exemption
- Electrification of Sub-county Head Quarters.

GOVERNMENT INITIATIVES TO INCREASE INDUSTRIAL DEMAND



- ❖ Transmission infrastructure Development for Industrial Parks.
- ❖ Renegotiation of Bujagali
- ❖ Development of Code extra Large Industrial Customers.
- ❖ Rebate policy Development

OVERALL INDICATORS



INDICATOR	2018
Rural Electrification rate, %	10
Urban Electrification rate, %	60.5
National Electrification rate, %	22.0
Total Generation Capacity, MW	862
Generation per capita, Kwh	100.5
Distribution Losses, %	17.3
Domestic Price per unit, \$ cents USD	18.6
Emergency (Thermal) Generation, MW	100
Number of utilities	32

NATIONAL TARGET

Measure	Target
Vision 2040	
Electricity Generation	41, 738 MW
Electricity per Capita Consumption	3,668 kWh
National Grid Access	80 %
NDPII 2019/2020	
Power Generation	2,500MW
National Electricity Access	30%
Electricity per Capita Consumption	578kWh

OPPORTUNITIES

1. Investment in the Manufacturing with sufficient power especially in Industrial Parks.
2. Invest in distribution and transmission Network.
3. Positive knock on effects of electricity on the country's Economic growth.
4. Job Creation in the various sector players as well as value addition.

