1. **Objectives.** The PWG-6 meeting will revisit/review the results and accomplishments under the regional technical assistance project (RETA) 6304 (Regional Power Trade Coordination and Development), particularly in the areas of training, database/website development, master plan study, and studies on performance standards and transmission regulation. The meeting will also discuss the proposed next steps under the new RETA 6440: (Facilitating Regional Power Trading and Environmentally Sustainable Development of Electricity Infrastructure in the GMS), which was approved by ADB in December 2007 and funded by the Swedish International Development Cooperation Agency (Sida).

2. The PWG-6 meeting was held in Ho Chi Minh City, Viet Nam on 20 November 2008 and co-organized by the Electricity Regulatory Authority of Viet Nam (ERAV)-Ministry of Industry and Trade (MOIT) and the Asian Development Bank (ADB). It was attended by PWG nominees of the six GMS member countries, as well as by representatives of ADB, Agence Francaise de Developpement (AFD), Australian Agency for International Development (AusAid), Japan International Cooperation Agency (JICA), Mekong River Commission (MRC), RTE International, Swedish International Development Cooperation Agency (Sida), Soluziona, and World Bank (WB). Attached is the agenda and program of the meeting (Annex 1) and the list of PWG-6/FG-7 participants (Annex 2).

3. The PWG-6 was co-chaired by Mr. Daovong Phonekeo, Deputy Director General of the Department of Electricity, Ministry of Energy and Mines, Lao PDR, and Mr. Yongping Zhai, Principal Energy Specialist, Infrastructure Division, Southeast Asia Department (SEID), ADB.

**Opening Session**

4. Mr. Nguyen Vu Quang, Deputy Director General, ERAV-MOIT, welcomed the participants to the meeting and thanked ADB and the development partners for the support to the development of the GMS energy sector. He emphasized the importance of the studies and activities being undertaken by the RPTCC to develop regional power trade arrangements under the purview of the Inter-Governmental Agreement on Regional Power Trade (IGA). He hoped that the discussions would yield substantive outputs and wished the meeting a complete success.

5. Mr. Yongping Zhai, SEID, ADB, welcomed the participants and thanked the host, ERAV, for the hospitality and excellent meeting arrangements. He noted that we are on the threshold of starting work on key activities that would help us realize the initial stages of regional power trade as specified in the road map. He then explained that the meeting will review the results and accomplishments under the current AFD-supported RETA, and deliberate on the proposed next steps that should be the focus/direction under the new Sida-supported RETA.

**Review of Results/Accomplishments under RETA 6304**

6. **Training Program.** Soluziona (Mr. Karacsonyi and Mr. Castrillo) reviewed the results of training program implementation under RETA 6304. He presented the various training courses implemented, and elaborated on the suggested courses that include: (i) national and regional...
grid code, (ii) tariff mechanism for cross-border trading, and (iii) organization, duties and responsibilities of regulator, transmission system operator (TSO), and market operator.

7. **Discussions.** ADB took note of the proposed additional training courses and said it would assess whether some of these could be supported under subsequent technical assistance.

8. **Database and Website.** Soluziona (Mr. Castrillo) provided an overview of the recent milestones in database and website development. He explained the key features of the website (home page, forum, database access and maintenance) and the suggested user profiles for website administrator, country administrator, and private and public users. Issues and next steps included updating of data and training of country administrators, the maintenance of hardware and software, and payment of annual subscription fees.

9. **Discussions.** Mr. Zhai thanked PRC for agreeing to host the database, which is a good demonstration of GMS ownership of power trade development activities. He said the development partners (ADB, AFD, and Sida) could support the launch of the database/website but the long-term maintenance of the system depends on the GMS countries’ commitment. PRC enjoined the GMS countries to increase their interaction through the website, and to help in regularly updating the database. Viet Nam noted that there should be some indication of what information should be updated regularly. The GMS country delegations were requested to update their respective nominees for website country administrator. ADB asked Soluziona to consult the country nominees on the needed training for website maintenance and other follow-up actions.

10. Sida asked about the kind of information that could not be accessed by the public through the website. Soluziona provided examples of data with general and limited access. ADB noted the need for procedures in deciding on whether data is public or private. The WB gave suggestions on ensuring sustainability of the database, encouraging the countries to use the database and provide feedback and suggestions for improvement.

11. **Master Plan Activities.** Soluziona (Mr. Karacsonyi) gave a recap of the scope of work and the activities carried out under the indicative master plan study. He briefed on the master plan methodology, showing the input data and process used to obtain the desired outputs (optimal solutions). He gave the summary of results of sensitivity analysis and the recommendations for next steps and future improvements for the master plan exercise.

12. **Discussions.** ADB (Mr. Zhai) requested the views of GMS representatives on the relationship of their national master plans with the regional master plan. Soluziona felt that the optimal arrangement is for each country’s national master plan be adjusted based on results of the GMS master plan. Viet Nam noted the differences in results of national and regional plans, in particular capacity of interconnections. Myanmar noted ongoing discussions for power exports to its GMS neighbors, which constitute the cross-border element of its power program. Lao PDR suggested strong consideration of generation prospects in the planning of cross-border lines. Thailand said the study should recommend the amount of power for cross-border trade rather than the list of generation projects that could provide the power as there are many uncertainties for the implementation of the generation projects. ADB noted that planning is complicated by changes in the viability and priority accorded by the countries to various power projects. Cambodia proposed that the consultant coordinate with power officials on the priority cross-border projects being considered in their national master plans.
13. ADB asked the countries to indicate their domestic limitations on how much power can be imported. Based on the GMS delegates’ responses, the limitation ranged from 15 to 25 percent of total power supply. RTE International and Sida briefed on the various constraints and arrangements in power trade in Europe, i.e. that there exist no limitation on volumes or sources of electricity that may be traded between EU member states but that technical limitations may exist due to system security requirements by the Transmission System Operator (TSO) in each EU-member state. WB suggested that the optimization model should be owned by the GMS countries which could be applied in national planning, and in planning for GMS transmission and generation projects.

14. **Performance Standards and Transmission Regulation.** Soluziona (Mr. Del Mundo) briefed on the activities to develop performance standards (PS) and transmission tariffs, which include new activities such as determining transitory PS for countries that do not yet fulfill the regional grid code requirements, and methodology for power systems studies. Workshops were held to incorporate GMS comments, and a final report containing the following deliverables was presented: proposal for regional PS; transition arrangements; methodology for power systems studies to be performed when interconnecting two GMS systems; guidelines for design of new transmission facilities linked to PPAs; and proposal for compensation for transits. Sida requested the consultant (Soluziona) to provide its opinion on how close- or how far away- the consultant believed that a baseline was in terms of the GMS member countries adopting such baseline PS (in years or alternatively as a percentage of 100%).

15. **Discussions.** ADB (Mr. Zhai) stressed the need to discuss the next steps for the studies. Soluziona said this could include carrying out exercises using the prescribed methodology in the conduct of feasibility studies of priority projects. ADB (Mr. Humbert) said that the performance standards study results should be taken into account in preparing the key GMS transmission projects in the ADB pipeline. Lao PDR (Mr. Daovong, co-chair) requested clarification on the proposal for transition until performance standards targets are achieved.

16. Thailand noted that the consultant could guide the GMS countries in developing the standards and on the steps needed to achieve these standards. Soluziona recommended building capacity so that personnel in operation and control processes aim for the fulfillment of performance standards. Cambodia said that its developing grid code is similar to the one being proposed by the consultant, signaling its readiness to comply with performance standards. Soluziona based its assessment on Cambodia’s answer to the questionnaire, in the absence of other verifiable information. Thailand inquired whether the performance standards study, as submitted, is adopted.

**Closing Session**

17. ADB noted that further discussion and confirmation of agreements on performance standards would be tackled in the FG meeting the following day, along with a recap of the agreed next steps for training, database/ website maintenance and master plan updating.

18. **Consideration and Adoption of Proceedings.** Mr. Zhai announced the distribution of the draft summary of proceedings for review by the participants. After the PWG members reviewed the draft summary of proceedings, and after incorporation of suggested changes, the body therefore approved the minutes of the PWG-6 meeting *ad referendum*.

19. **Summary and Closing Remarks.** Mr. Zhai thanked the participants and appreciated the participants’ contributions during the extensive discussions that took place.
1. **Objectives.** The Inception Meeting of regional technical assistance (RETA) 6440 will present and discuss the approach, methodology, work plan and timetable, implementation organization and deliverables of RETA 6440. The meeting will also discuss the ways to advance further regional power trade by building up on the current outputs of RETA 6304 as taken up in the PWG-6 session earlier.

2. The RETA 6440 (Inception) meeting was held in Ho Chi Minh City, Viet Nam on 20 November 2008 and co-organized by the Electricity Regulatory Authority of Viet Nam (ERAV)-Ministry of Industry and Trade (MOIT) and the Asian Development Bank (ADB). It was attended by PWG nominees of the six GMS member countries, as well as by representatives of ADB, Agence Francaise de Developpement (AFD), Australian Agency for International Development (AusAid), Japan International Cooperation Agency (JICA), Mekong River Commission (MRC), RTE International, Swedish International Development Cooperation Agency (Sida), Soluziona, and World Bank (WB). Attached is the agenda and program of the meeting (Annex 1) and the list of inception workshop participants (Annex 2).

3. The meeting was co-chaired by Mr. Duy Thanh Bui, Energy Economist, Infrastructure Division, Southeast Asia Department (SEID), ADB and Mr. Daovong Phonekeo, Deputy Director General, Ministry of Energy and Mines, Lao PDR.

**Opening Session**

4. Mr. Duy Thanh Bui, Energy Economist, Infrastructure Division, Southeast Asia Department (SEID), ADB, welcomed the participants and thanked Sida for the valuable support provided to this RETA. He informed of the objective of the meeting is to discuss the consultant presentation and to set priority of the future activities taking into consideration the MOU-2 on the power trade road map. He noted that the consulting firm for the RETA (RTE France International), will present the proposed approach/ methodology for the RETA, and will lead in the discussions of the work plan/ timetable of the RETA and their links to RETA 6304 outputs. In refining the approach, methodology and work plan the consultant will be guided by the GMS representatives’ views on the proposed approach and work plan, activities and outputs.

**Inception Report of Consultant for RETA 6304**

5. **Introduction.** Mr. Michel Caubet, Team Leader, RTE International gave the overview of the presentation organized as follows: background, project objectives, project organization, presentation of components 1 and 2, kick-off meeting, and evaluation of risks. He briefed on the two components of the project. As background, he discussed the challenges of the GMS electricity sector and the progress of power cooperation and integration since 1992. The key objectives of the project include, among others: review and update of the regional master plan; operationalizing the power database; demonstrating the benefit sharing mechanism; and defining an appropriate regulatory framework, among others. He described the project organization, comprising strong association of well-known international consulting firms, in partnership with national consulting firms in GMS countries. A regional project office was set up in Bangkok, and a website for the project is planned to be developed (with both public and private components).
6. **Presentation of Report- Component 1, Module 1.** RTE-EDF (Mr. Christian Viladrich) introduced the team for module 1 and explained the objective, which is to update the master plan. He discussed the various tasks planned for the module, which include: data gathering, description of power sector profiles in each GMS country, review and update of national power development programs (PDPs), common planning criteria for regional master plan, and the update of the master plan. The latter comprises four critical steps, e.g., analysis of potential power trade, review of master plan, update of master plan (simulation using planning software), and recommendation of a road map. He emphasized on the need for GMS countries to actively participate and provide inputs and use the outputs.

7. **Presentation of Report- Component 1, Module 2.** RTE-Nord Pool (Mr. Terje Lysfjord) briefed on the Nordic power market and the European power market (current and future scenario). He gave an overview of the five tasks for module 2 (Assessment of benefits) and introduced the project team. He then discussed the features of the candidate international projects that could be used as benchmarks, and stressed the importance of guidelines for a methodology for assessment and sharing of benefits.

8. **Presentation of Report- Component 1, Module 3.** RTE-PPA Energy (Mr. Jonathan Hedgecock) gave the overview of module 3 (power transmission studies) which is complementary to module 1. He explained the various tasks of the module as follows: review of previous studies/update of data, assessment of candidate transmission projects, assessment of potential for synchronous operation, HVDC versus AC interconnection options, training, and load flow studies. He stressed the importance of drawing upon local knowledge and expertise for the effort.

9. **Presentation of Report- Component 1, Module 4.** Mr. Caubet explained the various tasks under this module as follows: data collection (with country reports as output), review and assessment of current regulatory framework, review of international experiences, conceptual design of the GMS regional electricity market, and institutionalization and implementation strategy for a regional regulatory forum (RRF). Mr. Caubet indicated that this Module 4 include activities envisaged in the MOU-2 in particular: completion of the study on GMS performance standard; completion of the study on transmission regulations and completion study on metering arrangement. He mentioned that these studies were not included in the TOR however during the contract negotiation, it was agreed to include them.

10. **Work Plan and Timetable.** Mr. Caubet gave the work plan and timetable for all four modules of component 1 and discussed the specific inputs required, and outputs expected under each module. He also showed some differences between the RTE proposal and the requirement of the MOU-2 and expressed hope that the meeting will provide clear guidance toward the priority of the activities.

11. **Discussions.** ADB (Mr. Bui) requested feedback from GMS representatives on their expectations from RETA 6440, and what activities should be given emphasis. Thailand noted the differences between the RETA’s TOR earlier submitted to the GMS countries and the TOR as stemmed from the consultant proposal. ADB (Mr. Bui) explained that the structure of the TOR remains the same, comprising the same components and tasks. He further explained that there is in fact some elaboration of the original TOR because while ADB inviting for bidders, ADB received a number of questions for clarification, as a result of such clarification, TOR was further elaborated. In addition, given that the TA was approved in December 2007 while the MOU was signed in March 2008 during contract negotiations with the consultant, ADB elaborated further
the TOR to reflect closer the situation. ADB (Mr. Zhai) added that presentation of the inception report to the countries at the FG/ RPTCC constitutes one way of obtaining GMS countries' feedback on and confirmation of the TOR. Thailand opined that that the Road Map in MOU-2 should be followed and the proposal of RTE seems to go beyond the MOU. This point is to be elaborated and agreed upon by the RPTCC-7.

12. Lao PDR (Mr. Daovong) suggested review of MOU-2 to determine what are achievable given the resources under the RETA 6440. Myanmar noted that we should not deviate from the milestones in MOU-2 since this was signed by Ministers of the GMS countries. Viet Nam suggested that responsibilities of each GMS member must be specified with respect to the regional master plan, to ensure GMS ownership. ADB (Mr. Zhai) suggested moving to component 2 to give GMS members the total picture for the RETA.

13. **Presentation of Report- Component 2.** RTE-CEERD (Mr. Thierry Lefevre) provided a background on environmental issues of energy development, and discussed the specific objectives of component 2 and how this component would be linked with component 1. He discussed the scope of work and TOR for component 2, showed the team of experts for the component, and explained the methodology which includes desk studies, meetings and interviews, expert surveys, workshops, on-the-job trainings and field trips. He presented the inputs and outputs under this component. Mr. Lefevre then discussed the characteristics of strategic environmental assessments (SEA), and environmental impact assessments (EIA) and highlighted their differences. He explained the SEA process and discussed the need for alternative scenarios in implementing programs, with scenarios constituting a framework for predicting the future.

14. RTE-CEERD (Mr. Richard Frankel) summarized the goals of sustainable development and the role of SEA and EIA as tools for providing environmentally friendly options at early stages of development planning. He explained the generalized EIA process flowchart and discussed the characteristics of social impact assessment (SIA) and health impact assessment (HIA) which form part of the EIA.

15. RTE (Mr. Caubet-Team Leader) reported on the outcome of the Kick-Off meeting of the project in Bangkok last 17-18 November 2008 and discussed the risk assessment (challenges, associated risks and preventive actions) for modules 1 to 4.

16. **Discussions.** ADB (Mr. Bui) welcome the RTE risk assessment at the beginning of the project remarked that the changing situation surrounding the project could heighten or mitigate these risks. Lao PDR noted that since component 2 refers more to the environment sector, he asked that the RPTCC be regularly furnished updates on the progress of this component. AFD said that work under the RETA’s component 2 could be expanded to include scenario analysis that factors in environmental costs, and fully implement a SEA of the regional master plan under component 1.

17. WB recalled that the MOU-2 specified the minimum accomplishments by a certain time frame, and does not prohibit additional work that may be done, and recognized that concurrence of GMS countries is needed for additional work proposed. Sida requested that the Consultant’s work plan and reporting be based on the logframe in the project document for RETA 6440 in order to ensure results based management of the contribution. Further, Sida asked whether the GMS countries have approved the logical framework of the RETA (objective, outcome and outputs) that should guide in the RETA’s implementation, monitoring and evaluation. Mr. Bui requested GMS countries to reply to Sida question but there was not direct response. Mr. Bui
explained that by giving non-objection to the TA, GMS countries approved the TA and its logframe. As there was not further comment from the audience, Mr. Bui added that additional views on the RETA’s approach may be raised in the FG/ RPTCC meetings the following day.

Closing Session

18. **Consideration and Adoption of Proceedings.** Mr. Bui announced the distribution of the draft summary of proceedings for review by the participants. After the body reviewed the draft summary of proceedings, and after incorporation of suggested changes, the body therefore approved the minutes of the inception meeting of RETA 6440 *ad referendum*.

19. **Summary and Closing Remarks.** Mr. Bui thanked the participants and appreciated the participants’ contributions during the extensive discussions that took place.
1. **Objectives.** The FG-7 meeting will take up the power sector updates in each country, and will also review the overall results of RETA 6304 in order to determine the way forward with respect to: (i) data collection and addressing key issues in performance standards and transmission regulation; (ii) topics for subsequent training courses; (iii) enhancing database/website use and administration; and (iv) applying the master plan model (in relation to the energy strategy and country power programs).

2. The RPTCC-7 meeting will affirm the matrix of results of RETA 6304: Regional Power Trade Coordination and Development, and the proposed next steps under RETA 6440: Facilitating Regional Power Trading and Environmentally Sustainable Development of Electricity Infrastructure in the GMS, to be clarified in relation to the milestones prescribed in the MOU on the Road Map for GMS Cross-Border Power Trading.

3. The FG-7/ RPTCC-7 meetings were held in Ho Chi Minh City, Viet Nam on 21 November 2008 and co-organized by the Electricity Regulatory Authority of Viet Nam (ERAV)-Ministry of Industry and Trade (MOIT) and the Asian Development Bank (ADB). It was attended by RPTCC members of the six GMS member countries, as well as by representatives of ADB, Agence Francaise de Developpement (AFD), Australian Agency for International Development (AusAid), Japan International Cooperation Agency (JICA), Mekong River Commission (MRC), RTE International, Swedish International Development Cooperation Agency (Sida), Soluziona, and World Bank (WB). Attached is the agenda and program of the meeting (Annex 1) and the list of FG-7/ RPTCC-7 participants (Annex 2).

4. The FG-7 meeting was co-chaired by Mr. Daovong Phonekeo, Deputy Director General of the Department of Electricity, Ministry of Energy and Mines, Lao PDR, and Mr. Yongping Zhai, Principal Energy Specialist, Infrastructure Division, Southeast Asia Department (SEID), ADB.

**Opening Session**

5. Mr. Yongping Zhai, Principal Energy Specialist, Infrastructure Division, Southeast Asia Department (SEID), ADB, welcomed the participants and explained that the FG-7 meeting will first share updates on the progress of power generation and interconnection programs of each GMS member. The meeting will then undertake a recap of the outputs of the current RETA 6304, and deliberate on the PWG’s recommendations as to the proposed next steps for priority RPTCC activities. These efforts should help to find a good fit between these proposed next steps and the other key activities being planned under the new RETA 6440, to realize the milestones in the GMS Road Map for power trading.

6. Mr. Daovong informed of the agenda of the meeting, which will commence with the country reports on the status of power development programs.

**Updates on Progress of Power Development Plans and Transmission Interconnection Projects** (Country Presentations, Annex 3)
7. **Cambodia.** Mr. Heng Kunleang of the Energy Development Department, Ministry of Industry, Mines and Energy (MIME) gave an overview of Cambodia’s power sector (capacity, consumption), energy policy, institutional structure, electricity sector status, and the power sector strategy. He presented the updates on the country’s generation and transmission development plans, detailing the projects, their location and financing sources. He noted the projects with power trade and provincial/rural electrification components and targets.

8. **Discussion.** Sida observed high targets for rural electrification and asked whether these would be met by on-grid or off-grid projects. Cambodia clarified that the rural electrification would mostly be by on-grid and off-grid, but some would tap backbone lines for power export. Sida asked about the social and environmental requirements for private power investors. Cambodia clarified that at present only environmental impact assessment (EIA) is being used. Thailand asked about the tariff setting for IPPs. Cambodia replied that the Electricity Authority of Cambodia is responsible for this.

9. **PRC.** Mr. Zhou Anshi of the Planning Department, CSG, provided the status of CSG in 2007, showing provincial coverage, generation mix and capacity, consumption, transmission capacity, provincial west-to-east power transfer, and power exchange between regions. He explained the basis of power grid planning (e.g. demand forecast, power capacity, provincial transfers) and detailed the various international cooperation projects with neighboring countries (Viet Nam, Lao PDR, Cambodia, Thailand, and Myanmar).

10. **Discussion.** Viet Nam inquired whether new high voltage (800 kV) lines in the CSG system would affect the interconnection program with GMS neighbors. CSG informed of cross-border interconnections with Viet Nam and Lao PDR for power trade purposes, in addition to the connections between provinces within the CSG grid.

11. **Lao PDR.** Mr. Vilaysone Sourigna, of the Department of Energy Promotion and Development-MEM presented a background on power cooperation projects with GMS neighbors, discussing the status of hydropower projects for export to Thailand and Viet Nam. He showed the proposed interconnections with Thailand and Viet Nam for transfer of power from the generation projects. He showed the updated power demand forecast (2007) and target household service penetration.

12. **Discussion.** PRC inquired about the tariff setting for IPP projects. Lao PDR responded that tariffs are affected by a number of factors- project cost, financial models, government policy, financing and routing of transmission. Viet Nam inquired about the changes in the hydropower export program and Lao PDR informed of the possibility of the outputs from some projects being sold to Thailand given its higher price offer. Sida asked about the plans for unbundling power generation and transmission functions. Lao PDR said the current network is very limited (at 115 kV) and the high voltage (500 kV) lines are dedicated for power exports. ADB briefed on the status of two projects receiving ADB financing, the Bansok-Pleiku 500kV Interconnection F/S project and the Nabong-Udon Thani transmission project.

13. **Myanmar.** U Maung Maung Kyaw, of Myanmar Electric Power Enterprise (MEPE), Ministry of Electric Power No. 2 (MOEP 2), explained the developments in the institutional/policy framework for the power sector, detailing the functions assigned to MOEP 1 and MOEP 2 and the regulatory framework. He discussed the status of electricity demand and supply, and the progress in the power development program, detailing the hydropower projects and transmission lines under construction and planned for the future. He then discussed developments in power cooperation with GMS neighbors.
14. Discussion. Thailand asked about transmission system construction, and Myanmar clarified that this is undertaken by MEPE and local companies. The WB asked whether there is a system dispatcher and Myanmar replied that there is one for the 230 kV system that interconnects the country, and there are plans for 500 kV links from Mandalay to Yangon. Sida asked about the domestic tariff for power from hydropower projects exporting to Yunnan, PRC. Myanmar informed that 15% of output is provided free to the government, and the rest of the power used locally is charged 2.6 US cents per kWh, the same price for power sold to Yunnan.

15. Thailand. Mr. Varavoot of the Electricity Generating Authority of Thailand (EGAT) provided the progress of the country’s power generation (including fuel mix in 2007) and an update of the forecast energy demand, reflecting slower growth forecast for 2008-09. He showed the preliminary adjusted power development plan for 2009-2016, and the status of discussions with IPPs for coal and gas power plants, and for hydropower purchased from neighboring GMS countries.

16. Discussion. PRC asked about the rationale for development of coal power plants and Thailand replied that this is in support of the government policy of fuel diversification. The WB asked about preferential policies for renewable energy and Thailand informed that the Ministry of Energy pays premium, on top of the base tariff, for energy purchase from small producers using biomass, wind and solar sources. There were additional discussions on the issues of: (i) power purchase from Myanmar (Tasang) and Lao PDR (Xayaburi), and (ii) sale of power to Thailand (from Koh Kong coal, Cambodia).

17. Viet Nam. Mr. Nguyen Anh Tuan of Electricity of Viet Nam (EVN) provided the progress of Viet Nam’s power generation and transmission development plan. He discussed the trend in demand from 2001-2007 in relation to growth in transmission capacity. He explained the status of the power system, e.g., installed capacity, transmission grid composition, rural electrification rates, and power consumption (by industry). He showed the expected schedule of hydropower projects for export from Lao PDR and Cambodia to Viet Nam, and discussed the proposed interconnection plans for these projects, which includes the proposed Lao-Cambodia-Viet Nam interconnection line.

18. Discussion. Myanmar inquired about the factors behind the high rural electrification rate (97%) achieved by Viet Nam and EVN attributed this to strong government policy and support and effective partnerships with ADB and the World Bank. Sida asked Thailand and Viet Nam on how they ensure environment-friendly ways of power purchase from private investors in Lao PDR and Cambodia. Viet Nam noted that the law of the exporting country is being followed. Thailand said its power purchase follows social and environmental guidelines of the exporting country as well as the laws of Thailand.

Presentation of Agence Francais de Developpement (AFD): Views on Program Achievements and Potential Future Cooperation

19. AFD (Mr. Alexis Bonnel) presented on the contributions of AFD to regional coordination in the power sector. He gave a background of the AFD group, its present portfolio and range of financing tools, and its clean energy strategy (which includes demand side issues and energy service approaches). He discussed AFD’s assistance to the GMS energy sector and focused on possible support for RPTCC, beyond the funding of RETA 6304. He shared AFD’s views on the substantial program’s achievements, such as the Indicative Master Plan and enhanced coordination between GMS countries and development partners on regional integration of the power systems. He expressed the opinion that RPTCC could build on studies and work
undertaken so far to enter into more concrete decisions and commitments. He also highlighted the importance of the adoption by GMS countries of a Regional Master Plan, as it represents a key tool to address the enormous energy challenges of the region, and would at the same time consolidate long term visibility and economic confidence among stakeholders, including financial partners. He discussed a number of ideas which could shape possible AFD’s follow-up assistance to the RPTCC, such as: (i) improving resilience of regional power system to risks/external shocks (development of a complete Strategic Environmental Assessment (SEA) of the Master Plan in coordination with the GMS Core Environment Program/ Environment Operations Center (EOC), inclusion of demand side management and energy efficiency strategies in RPTCC activities, carbon footprint assessment and climate change vulnerability analysis of strategies and priority projects, development of methodologies to access carbon finance that could be applicable to RPTCC programs); (ii) developing cross-capitalization, training and best practice dissemination in the areas of design and implementation of policies on energy efficiency, renewable energy and energy conservation. He outlined the different financing tools that could be mobilized from AFD, including country based study funds, an AFD funded GMS project preparation facility managed by ADB, and advisory and technical assistance in support of the RPTCC work plan. The presentation is attached as Annex 4.

Sida

20. Sida (Mrs. Karin Andersson) highlighted the importance of the RPTCC activities and noted that Sida’s contribution emphasizes component 2 which deals with sustainability of regional power trade development. She hoped that energy efficiency and climate change issues would be addressed by the RPTCC despite their exclusion from the scope of RETA 6440. She said the presence of the MRC and EOC is a sign of seriousness in dealing with sustainability issues in energy development. She noted that ownership of the program would be key to ensuring results from the assistance provided by development partners and encouraged transparency to enhance stakeholders’ involvement in the program.

World Bank

21. WB (Mr. Jie Tang) provided an update on the World Bank’s projects in support of power trade in Cambodia and Lao PDR, including the project (in cooperation with ADB) for promoting rural electrification through the transmission project from Phnom Penh to Viet Nam border. He informed of the WB’s support for carbon emission reduction initiatives in partnership with the United Nations and other international organizations.

JICA

22. JICA (Mr. Kazuya Maruo) informed that after its reorganization, JICA can now provide ODA loans, technical cooperation and grants. He informed that JICA’s ongoing support, which includes assistance for preparation of the master plan in Cambodia and Viet Nam, transmission link in Cambodia and Lao PDR and third country training on rural electrification in Lao PDR can also contribute to the development of GMS power trade indirectly. He briefed on JICA’s activities to help realize a low carbon society based on the “co-benefit” approach under the Cool Earth Partnership.

EOC

23. The EOC (Mr. Pavit Ramachandran) briefed on the Core Environment Program (CEP), which is a multi-donor program with funding from the Governments of Sweden, The
Netherlands, and Finland. He highlighted the importance of the energy sector in addressing key environmental issues, notably in mitigating climate change effects through reduced carbon emissions from the energy sector. He looked forward to further advancing the dialogue between the energy and environment sectors and other GMS sector working groups.

MRC

24. MRC (Mr. Do Manh Hung discussed the MRC’s programs which are directly linked to the energy sector, such as the Water Utilization Program, the Basin Development Program, the Environment Program and the Hydropower Program. He expressed the hope for closer cooperation between MRC and the GMS Program in energy, such as in sharing of technical inputs and assessments and in addressing hydropower development issues in relation to Mekong river flows.

RPTCC-7 Meeting

25. The RPTCC-7 meeting was co-chaired by Mr. Thein Tun, Director General, Department of Electric Power, Ministry of Electric Power No. 2, Myanmar, and Mr. Yongping Zhai, Principal Energy Specialist, Infrastructure Division, Southeast Asia Department (SEID), ADB.

Opening Session

26. Mr. Yongping Zhai, Principal Energy Specialist, Infrastructure Division, Southeast Asia Department (SEID), ADB, welcomed the participants and explained that the RPTCC-7 meeting will review and act on the recommendations of the FG, particularly on the needed next steps corresponding to the outputs of RETA 6304. The meeting should be able to deliberate on the merits and needed improvements in the work plan for RETA 6440 in the light of the milestones in the power trade road map. He noted the key messages that have arisen from the PWG/FG meetings- (i) the need to operationalize the studies we have done; and (ii) the critical role of country ownership of the studies, to ensure these are adopted for implementation. As these messages imply, there is a need to review the earlier agreement- the MOU-2 on the power trade road map- and see how we can proceed in accordance with the milestones set in the MOU-2.

27. On the energy database and website, Mr. Zhai noted that a consensus was reached to organize training of country administrators to populate and institutionalize the website and database. Soluziona was asked to propose a training program that could help make the database more useful. He suggested that future RPTCC meeting notices will be made on this website.

Review of Road Map and Milestones in MOU-2

28. Complete the Indicative Master Plan. Thailand opined that the updating of “the indicative master plan” is beyond the activities timeline indicated in the MOU-2. Thailand also expressed concern about updating master plan studies that may take another 18 months. He stressed that establishing links between countries should be given precedence over the need to determine generation projects for export. Viet Nam suggested completing the performance standards (PS) study first, which should be applied to developing specific projects that should be PS-compliant. The WB noted that despite the lengthy process in agreeing on the master plan, what matters is for at least two countries to agree on projects to jointly work on. ADB’s view is for the consultant to revise the proposal which will operationalize the master plan study to make it useful (and not update or complete it). A useful master plan is one in which priority
projects are identified for further action, such as the conduct of feasibility studies. Lao PDR agreed on the proposal for the consultant of RETA 6440 to help in making the master plan operational. Thailand expressed that instead of spending time to update the master plan, the countries should proceed to determine the feasibility of identified cross-border lines, and proceed with the ones found viable or look for alternatives to those found not viable. ADB (Mr. Bui) drew the meeting attention to the question of whether the GMS countries are satisfied with the master plan prepared by Soluziona Mercados. Mr. Bui argued that there is a need to complete the work done by Soluziona in order to complete the regional master plan. He stressed that the discussion during the PWG meeting showed that there is a need for improvement of the work done recently.

29. **Complete the Study on Performance Standards (PS).** On whether the report prepared under RETA 6304 could be considered complete in form, Sida noted that it may be difficult to answer this question, given the differences in country situations. Thailand noted that the consultant has proposed some indicative figures as standards, but the countries have not yet agreed on these. Soluziona explained that standards have been proposed for the countries to consider and adopt. PRC said however that while the report on the PS is comprehensive, it does not provide specific figures that should be adopted for an interconnected system. For PS and transmission regulation, PRC noted that the consultant can compare the 500 kV systems used by PRC, Thailand and Viet Nam, and look into their common features and differences for a clearer overall picture, and incorporate the most appropriate 500 kV standards for the GMS. ADB (Mr. Humbert) informed of package 3 of RETA 6440 which would support feasibility study for interconnection between Cambodia, Lao PDR and Viet Nam. This study would also look at the compatibility of the systems of these three countries with Thailand’s, with the view to a later interconnection with Thailand. Thailand suggested that the timeline for adopting the performance standard is also 2010, so each country still has time to prepare a plan to install equipment to reinforce the system to meet the standards. Viet Nam stated that PS should first be applied to cross-border interconnection projects and this would be the basis for the gradual adoption of the PS throughout the national grid. There is a need to determine at this point how far the countries are from meeting the standards. ADB (Mr. Zhai) proposed to RTE France to assess the PS situation and give recommendations to achieve the objective of preparing a plan to adopt the PS by 2010. RTE France agreed to submit the assessment within six weeks (by 6 January 2009).

**Scope of work under the RETA 6440**

30. The meeting discussed the scope of work of the RETA 6440. Thailand expressed the view that there were substantial differences between the TOR earlier submitted to the Government and the TOR that would guide the work of the consultant for the RETA. A concern was that the consultant would be asked to deliver more than what was necessary. Thailand view is that the scope of the TA as presented by the consultant is beyond the MOU-2. ADB (Mr. Bui) again explained that the scope of work under the TA is as submitted to countries for no-objection. He repeated his explanation about the revision and elaboration of the TOR, which took place from when the TA was approved, up to contract negotiation. Mr. Bui stressed that this elaboration and revision was done in the belief that it is good for achieving the RETA goals. There was no attempt to change the RETA. The other GMS members however expressed that there were no substantial differences in the TORs submitted to the Governments and the TOR provided to the RETA consultant. PRC also noted that the TOR of the consultant provides a step in the right direction for GMS power cooperation. The milestones in the road map for GMS power trading specified in MOU-2 could provide further guidance in adjusting as necessary, the
TOR of the RETA consultant to ensure attainment of the objectives for power trade under the MOU-2.

31. ADB (Mr. Zhai) requested the RETA consultant, RTE International, to revise its work plan taking into account the milestones in the MOU-2, especially the three studies (the study on GMS performance standard; completion of the study on transmission regulations and completion study on metering arrangement.) The consultant after discussing internally assured that it will accommodate the requirements of the RPTTCC meeting. Sida expressed concern however that the task of refining the TOR under RETA 6440 was handed to the consultant rather than being decided by the RPTCC based on the outcome under RETA 6304.

32. ADB explained that the process of consultations undertaken to finalize the TOR was adequate, and the inclusion of the TOR in the agenda of the PWG/FG/RPTCC meetings constitutes a part of such consultations. However, the meeting recognized the need for closer coordination between ADB and the executing agencies in the GMS countries, especially on the matter of finalizing the TOR and scope of work of technical assistance projects.

33. **Attendance to RPTCC Meetings.** The meeting agreed that in principle, no representative outside of the GMS region, except for development partners actively involved in regional power trade development, may participate in GMS RPTCC/FG/PWG meetings. In cases where interested stakeholders from within or outside the GMS would like to attend meetings, prior consultation with the GMS countries would be obtained.

**Next RPTCC Meeting**

34. The meeting agreed that next year’s RPTCC/FG/PWG meeting would be held in Lao PDR, subject to confirmation by the Government of Lao PDR. If there is a need to organize a separate meeting of the PWG/FG, the countries will be consulted on the hosting arrangements.

**Session VI: Closing Session**

35. **Synthesis of Discussions/ Agreements.** Mr. Zhai emphasized the need for the consultant to carefully assess the status of the outputs of RETA 6403 and the requirements of the MOU-2, and refine its work plan under RETA 6440 as necessary to accomplish the milestones in MOU-2. In response to Thailand’s request for feedback on this assessment, Mr. Zhai informed the meeting that the consultant will be asked to report back on this assessment after 15 days. A small group may be convened as necessary to discuss this assessment.

36. **Consideration and Adoption of Proceedings.** Mr. Zhai announced the distribution of the draft summary of proceedings for review by the body. After the FG/ RPTCC members reviewed the draft summary of proceedings, and after incorporation of suggested changes, the body therefore approved the minutes of the FG-7/RPTCC-7 meeting ad referendum.

37. **Closing Remarks.** Mr. Zhai encouraged frank and open discussions in future meetings to realize substantive outcomes and maximize inputs from the technical knowledge and expertise of the meeting participants.
Greater Mekong Subregion
Regional Power Trade Coordination Committee (RPTCC)
Sixth Meeting of the Planning Working Group (PWG-6)
and Inception Meeting of RETA 6440
Ho Chi Minh City, Viet Nam, 20 November 2008

Agenda and Program

19 Nov (Wed)  
Arrival of Delegates

20 Nov (Thurs)  
Day 1 (am): PWG-6 Meeting

08:30am- 08:45am  
Registration

08:45am- 09:00am  
Opening Session

09:00am- 10:30am  
Review of Results/ Accomplishments Under RETA 6304: Regional Power Trade Coordination and Development
- Training Program
- Database and Website
- Master Plan Methodology/ Results
- Performance Standards (Interim Standards, Interconnection Methodology)
- Transmission Regulation (Data for Interconnection Studies, Design of New Transmission Facilities, Cross-Border Tariffs)

08:30am- 08:45am  
Opening Session

09:00am- 10:30am  
Review of Results/ Accomplishments Under RETA 6304: Regional Power Trade Coordination and Development
- Training Program
- Database and Website
- Master Plan Methodology/ Results
- Performance Standards (Interim Standards, Interconnection Methodology)
- Transmission Regulation (Data for Interconnection Studies, Design of New Transmission Facilities, Cross-Border Tariffs)

10:30am- 10:45am  
Coffee Break

10:45am- 12:00nn  
Proposed Next Steps for RETA 6440: Facilitating Regional Power Trading and Environmentally Sustainable Development of Electricity Infrastructure in the GMS
- Power System (PS) Studies (Methodology: Voltage Control Performance, Loads Flow, Dynamic Studies, Primary Frequency Control)
- Indicative Master Plan Update/ Enhancement
- Operational Rules for the Electricity Market (Coordination Among National System Operators [SOs], Information Exchange, Schedule/ Control of Flows, Settlement)
- Details of Proposed Training Courses
- Details of Study of Regional Performance Standards
- Maintenance/ Sustainability of Database/ Website

12:00nn- 12:30nn  
Synthesis of Discussions/ Agreements
- Chair of PWG

Consideration and Adoption of Proceedings

Closing Remarks

12:30nn- 02:00pm  
Lunch Break
**20 Nov (Thurs)**

**Day 1 (pm): Inception Meeting of RETA 6440- Facilitating Regional Power Trading and Environmental Sustainable Development of Electricity Infrastructure in the GMS**

02:00pm – 02:15pm Opening Session

02:15pm- 03:30pm Inception Report of Consultant for RETA 6440 (Part I)
- Introduction of Consultant (RTE France)
- Presentation of Inception Report
- Presentation of Approach and Methodology for RETA 6440

03:30pm- 03:45pm Coffee Break

03:45pm- 04:45pm Inception Report of Consultant for RETA 6440 (Part II)
- Presentation of Work Plan and Timetable for RETA 6440 (in relation also to the Milestones for Achieving Stage 1 of RPTOA)
- Discussions
- How the outputs of RETA 6304 and RETA 6440 will be linked; Consolidation of views/ comments of GMS representatives on proposed approach/ methodology and work plan/timetable
- RTE France, Soluziona, ADB

04:45pm- 05:00pm Closing Session

Synthesis of Discussions/ Agreements

Consideration and Adoption of Proceedings

Closing Remarks

7:00 pm Dinner Hosted by ADB
(Venue to be announced)
Greater Mekong Subregion
7th Meeting of the Focal Group (FG-7) and
7th Meeting Regional Power Trade Coordination Committee (RPTCC-7)
Ho Chi Minh City, Viet Nam, 21 November 2008

Agenda and Program

21 Nov (Fri)    Day 2 (am): FG-7 Meeting

08:45am – 09:00am    Registration

09:00am-09:15am    Opening Session

09:15am- 10:30am    Country Reports on Progress of Power Development Plans and Transmission Interconnection Projects (10 minutes each country)

  Cambodia
  People’s Republic of China
  Lao PDR
  Myanmar
  Thailand
  Viet Nam
  - Discussions

10:30am- 10:45pm    Coffee Break

10:45am – 11:45nn    Results Under RETA 6304; Proposed Next Steps (In Relation to the Milestones in the MOU on the Road Map for GMS Cross Border Power Trading)
  - Database and Website Complete Turnover
  - Recap of Training and Capacity Building
  - Master Plan Component, Follow up Actions
  - Performance Standards Study (and Other Related Issues)
  - Transmission Regulation Study (Cross-Border Tariffs, etc.)

  - Discussions
  - Soluziona/ ADB

11:45nn- 12:10nn    Presentation of Agence Francais de Developpement (AFD) (Views on Program Achievements and Potential Future Cooperation)
  - Discussions
  - AFD/ ADB

12:10nn– 1:30pm    Lunch Break

21 Nov (Fri)    Day 2 (pm): RPTCC-7 Meeting

01:30pm – 01:45pm    Opening Session

01:45pm- 02:30pm    Presentation of Matrix of Results Under RETA 6304; Proposed Next Steps (In Relation to the Milestones in the MOU on the Road Map for GMS Cross Border Power Trading)
  - Database and Website Complete Turnover

3
- Recap of Training and Capacity Building
- Master Plan Component, Follow up Actions
- Performance Standards Study (and Other Related Issues)
- Transmission Regulation Study (Cross-Border Tariffs, etc.)

- Discussions
- Soluziona/ ADB

02:30pm- 03:45pm Discussion on how to Prioritize RETA 644 Work to Meet the Timelines Set in the MOU on the Road Map for Implementing GMS Cross Border Power Trading
- GMS Countries’ Comments on the Proposed Work Plan
- ADB

03:45pm- 04:00pm Coffee Break

04:00pm- 04:15pm Presentation of Summary of Recommendations/ Agreements from PWG/FG Discussions
- ADB

04:15pm- 04:45pm Closing Session

- Synthesis of Discussions/ Agreements in the RPTCC-7 Meeting
- RPTCC

Consideration and Adoption of Proceedings

Closing Remarks
Greater Mekong Subregion
Second Meeting of the
Subregional Energy Forum (SEF-2)
Ho Chi Minh City, Viet Nam, 22 November 2008

Agenda and Program

22 Nov (Sat)  Day 3: SEF-2 Meeting

08:15am – 08:30am  Registration

08:30am-08:45am  Opening Session

08:45am – 10:15am  Study to Prepare Medium Term (2008-2015) Road Map and Work Plan for Expanded Cooperation in Energy
- Presentation of Study Results/ Recommendations
- Highlights of Road Map, Proposed Projects/ Activities, Timetable
- Critical Next Steps
- Discussions and Comments of GMS countries on proposals
- Consultant/ ADB

10:15am - 10:45am  Climate Change Implementation Plan (CCIP) and the Linkage with RETA 6440’s Environment Work and Those of the Environment Operations Center (EOC) in Bangkok
- Coordination of CCIP Activities with EOC
- Strategic Environmental Assessment Work in Viet Nam
- ADB, EOC

10:45am- 11:00am  Coffee Break

11:00am- 12:00nn  Brainstorming Discussion
- Coordination Arrangements Between EOC/ Core Environment Program (CEP) Activities and RETA 6440 (especially in component 2 in finding the geographic and problematic fit between the two when selecting projects for on-the-job capacity building)
- RTE France, EOC, ADB

Application of the Work Done by EOC on Strategic Environmental Impact Assessment for RETA Training Purpose

12:00nn– 1:00pm  Lunch Break

01:00pm- 02:00pm  Country Presentations on Developments in Energy Sector (oil, gas, renewable, etc.-other than power)
Country Responses to Climate Change Issue (10 minutes each)

Cambodia
People’s Republic of China
Lao PDR
Myanmar
Thailand
Viet Nam
02:00pm-02:20pm  Coordination in Rolling Out and Follow Through of the Energy Sector Strategy (ESS) (Based on Road Map, Work Plan, and Timetable for expanding energy cooperation as agreed at the first session)
- RTE France, ADB

02:20pm- 02:40pm  Closing Session

- Chair’s Synthesis of Discussions/ Agreements in SEF-2
- Consideration and Adoption of Proceedings
- Closing Remarks
LIST OF PARTICIPANTS

A. GMS COUNTRIES

1. Cambodia

H. E. Tun Lean
Director General of Energy, General Department of Energy, MIME
45 Blvd. Norodom, Phnom Penh, Cambodia
Tel: 855 11 825 135; Fax: 855 23 218 634; Email: tunlean@forum.org.kh

Mr. Victor Jona
Deputy Director General, General Department of Energy, MIME
Ministry of Industry, Mines and Energy
#45 Norodom Blvd D., Phnom Penh, Cambodia
Tel. No.: +855 (12) 918401, Fax No.: +855 (23) 214304; Email: jvictor.mime@gmail.com

Mr. Chan Sodavath
Deputy Managing Director, Electricite du Cambodge (EDC)
Street 19, Daun Penh District Phnom Penh, Cambodia
Tel: (855 12) 895454; Fax: (855 23) 426938; Email: hengkunleang@yahoo.com

Mr. Heng Kunleang
Director, Energy Development Department, MIME
#45 Norodom Blvd., Phnom Penh, Cambodia
Tel: (855 12) 829778; Fax: (855 23) 725477; Email: hengkunleang@yahoo.com

2. People’s Republic of China

Mr. Liang Zhou
Director General
International Department, China Southern Power Grid Company
6 Huasui Road, Zhujiang Xincheng, Guangzhou, PRC 510632
Tel: 86-20-3812-1803; Fax: 86 20 3812 0189; Email: liangzhou@csg.cn

Mr. Deng Xiaowen
Deputy Division Chief
International Department, China Southern Power Grid Company
6 Huasui Road, Zhujiang Xincheng, Guangzhou, PRC 510632
Tel: 86-20-3812-1826; Fax: 86-20-3812-0189; Email: dengxw@csg.cn

Mr. Zhou Anshi
Superintendent, Planning Department, China Southern Power Grid Company
6 Huasui Road, Zhujiang Xincheng, Guangzhou, PRC 510320
Tel: 86 20 381 21027; Email: zhouas@csg.cn
Ms. Long Qing  
Section Chief  
International Cooperation Dept., CSG  
Zhujiang New Town, Huasui Road 6, Guangzhou, Guangdong PRC 510632  
Tel: 86-20-3812-1803; Fax No.: 8620 – 38120189; Email: longqing@csg.cn

Mr. Jin Xiaoming  
P.S. Expert  
China Southern Power Grid Co. Ltd., (CSG), China  
6 Huasui Road, Zhujiang Xincheng, Guangzhou City  
Guangdong Province, P.R. China 510623  
Tel. No: 8620 58120770, Fax: 8620 38120853, Email: jinxm@csg.cn

Mr. Guo Xiao Bin  
Engineer  
Room 1509 No. 6 Huashui Road  
Zhujiang Xincheng, Guangzhou City  
Guangdong Province, P.R. China 510623  
Tel. No: 8620 58121977, Fax: 8620 38121985, Email: guoxb@csg.cn

Ms. Zeng Mengyu  
Engineer  
No. 6 Huasui Road Zhujiang Xincheng Guangzhou, PRC 510623  
Tel. No: 8620 38120257, Fax: 8620 38121069, Email: zengmy@csg.cn

Mr. Hu Feixiong  
Senior Engineer, CSG  
Room 807, Huasui Road., No. 6 Guangzhou, Guangdong, PRC 510623  
Tel: 86 20 38121880; Fax: 86 20 38121893; Email: hufx@csg.cn

3. Lao PDR

Dr. Daovong Phonekeo  
Deputy Director General, Department of Electricity  
Ministry of Energy and Mines  
Nongbone Road, Ban Fai Village, Saysettha District Vientiane Capitol,  
P.O. Box 4708, Vientiane, Lao PDR  
Tel: 856 21 951 072; Fax: 856 21 413013; Email: daovongph@yahoo.com

Mr. Chansaveng Bougnong  
Chief of Power Sector Planning Division  
DOE, Ministry of Energy and Mines  
Nongbone Road, Ban Fai Village, Saysettha District Vientiane Capitol,  
P.O. Box 4708, Vientiane, Lao PDR  
Tel: +856 (20) 5805205; Fax: +856 (21) 413012; Email: bbougnong@yahoo.com

Mr. Sourigna Vilaysone  
Division Chief  
Information and Promotion Project Division,  
Ministry of Energy and Mines, Department of Energy Promotion and Development,  
Tel No.: 85621 264253; Fax No: (85621) 415626/415442; Email: svilaysone@yahoo.com
4. Myanmar

Dr. Thein Tun
Director General
Department of Electric Power
Ministry of Electric Power No. (2)
#27 Nay Pyi Taw, Union of Myanmar.
Tel. No.: 95 67 410077; Fax No.: 95 67 410219; Email - depdg@mepe.gov.mm

U Htin Aung
Deputy Director General
Energy Planning Department
Ministry of Energy
#6 Nay Pyi Taw, Union of Myanmar.
Tel. No.: 95 67 411046; Fax No.: 95 67 411113; Email: myanmoe@mptmail.net.mm

U Pe Zin Tun
Director
Energy Planning Department
Ministry of Energy
#6 Nay Pyi Taw, Union of Myanmar.
Tel No.: 95 67 411115; Fax No.: 95 67 411113/411479
Email: myanmoe@mptmail.net.mm / pezintun@gmail.com

Dr. Maung Maung Kyaw
Superintendent Engineer
Myanmar Electric Power Enterprise
Ministry of Electric Power No. (2)
#13, Bldg 2023, Nay Pyi Taw, Union of Myanmar
Tel. No.: 95 67 410216; Fax No.: 95 67 410210; Email: mepepl@mepe.gov.mm

5. Thailand

Mr. Samerjai Suksumek
Director, Power Policy
Energy Policy and Planning Office (EPPO)
Tel. No.: 66(2) 612 1555 ext 431; Fax:66(2) 612 1384; Email: samerjai@eppo.go.th

Ms. Punnee Rojrungsithum
Senior Policy and Plan Analyst
Bureau of Power Policy, EPPO
Tel No.: 66(2) 612 1555 ext 502; Fax:66(2) 612 1386; Email: punnee@eppo.go.th
Ms. Panitchanok Boonsiri  
Policy and Plan Analyst, Infrastructure Projects Office  
Office of National Economic & Social Development Board  
962 Krung Kasem Rd. Pomprab Bangkok 10100  
Phone 662-280-4085 Ext. 3422; Fax 662-280-1860; Email: panitchanok@nesdb.go.th

Ms. Somruedee Tipmabutr  
Administrative Officer  
Electricity Generating Authority of Thailand (EGAT)  
53 Charabsinitwong, Bangkruai, Nonthaburi 11130, Thailand  
Tel: 66(2) 436 2165; Fax: 66(2) 436 2194; Email: somruedee.t@egat.co.th

Mr. Sompol Uthaichalanonta  
Assistant Director, System Control and Operation Division  
Electricity Generating Authority of Thailand (EGAT)  
Tel: 66(2) 436 2102; Fax:66(2) 879 5069; Email: sompol.u@egat.co.th

Mr. Varavoot Siripol  
Assistant Director, System Planning Division  
Electricity Generating Authority of Thailand (EGAT)  
Tel: 66(2) 436 3502; Fax:66(2) 436 3592 ; Email: varavoot.s@egat.co.th

Mr. Tawatchai Sunranwanich  
Head, Transmission System Development Planning Section  
Electricity Generating Authority of Thailand (EGAT)  
53 Charabsinitwong, Bangkruai, Nonthaburi 11130, Thailand  
Tel: 66(2) 436 3525; Fax:66(2) 436 3590; Email: tawatchai.s. @egat.co.th

6. Viet Nam

Mr. Pham Manh Thang  
Director General  
Electricity Regulatory Authority of Vietnam (ERAV)  
Ministry of Industry (MOI) – Head of Vietnamese Delegation  
D11, Khuat Duy Tien, Thanh Xuan District  
Hanoi, Viet Nam  
Tel: (84-4) 5543 049; Fax: (84-4) 5543 008; Email: thangpm@moi.gov.vn

Mr. Nguyen Manh Hung  
Vice President  
Electricity of Viet Nam  
18 Tran Nguen Han Str., Hanoi Viet Nam  
Tel: (84-4) 963217409; Fax: (84-4) 22201364; Email: hungnm_ptgd@evn.com.vn

Ms. Dao Minh Hien  
Director  
Power System Planning & Licensing Department  
Electricity Regulatory Authority of Vietnam (ERAV)  
D11 Khuat Duy Tien, Thanxuan, Hanoi Viet Nam  
Tel: (84-0) 9130700035; Email: hiendm@moit.gov.vn
Mr. Tang The Hung
Deputy Director
System Planning and Licensing Department
Electricity Regulatory Authority of Vietnam
D11, Khuat Duy Tien, Thanh Xuan District
Hanoi, Viet Nam
Tel. No.: (844) 5543223/2147415, Fax No.: (844) 5543008; Email: HungTT@moit.gov.vn

Nguyen Vu Quang
Deputy Director General
Ministry of Industry and Trade
11, Khuat Duy Tien Str., Thanh Xuan, Hanoi Viet Nam
Tel. No.: (844) 2120779, Fax No.: (844) 5543008; Mobile: 0913 583 787
Email: quangnv@moit.gov.vn

Tran Tue Quang, B. Eng. MBA
Deputy Director
Tariff Fees Department
Ministry of Industry and Trade
11, Khuat Duy Tien Str., Thanh Xuan, Hanoi Viet Nam
Tel. No.: (844) 5543 224, Fax No.: (844) 5543008; Mobile: 84 90 2555 636
Email: quangtt@moit.gov.vn

Mr. Tran Dang Khoa

Mr. Nguyen Anh Tuan
Chief
Power System Development Department
Institute of Energy
6 Ton That Tung, Khuong Thoong Dong Da – Hanoi
Tel. No.: (844) 8523742, Fax No.: (844) 852902; Email: tuanan@fpt.vn

Ms. Pham Thi Bich Hong

Mr. Do Duc Hung
Administration Office – EVN
Email: hungdd@evn.com.vn

Hoang Ha Quynh Giao
Expert
Power System Planning & Licensing Department
11, Khuat Duy Tien Str., Thanh Xuan, Hanoi Viet Nam
Tel. No.: (844) 977 108 188, Fax No.: (844) 3554 3223; Email: giaohhq@moit.gov.vn
B. DEVELOPMENT PARTNERS

1. Agence Française de Développement (AFD)

Mr. Alexis Bonnel
Head of Energy, Infrastructure and Environment
Agence Française de Développement (AFD)
5, rue Roland Barthes, 75 598 Paris Cedex 12, France
Tel: (+33-1) 5344 3543; Fax: (+33-1) 5344 3865; Email: bonnela@afd.fr

Mr. Carl Bernadac
Sr. Energy Economist
Agence Française de Développement (AFD)

Mr. Hervé Breton
Sr. Infrastructure Specialist
Infrastructure and Urban Development
AFD Bangkok
Tel: 02 636 12 40 ext 140; Email: BRETONH@groupe-afd.org

2. Australian Agency for International Development (AusAID)

Ms. Penny Morton
Environmental Consultant
Australian Agency for International Development
Australian Embassy
37 South Sathorn Road Bangkok 10120
Tel. No.: +662-344-6480; Fax No.: +662-344-6305; E-mail: sam.beever@dfat.gov.au

3. Japan International Cooperation Agency (JICA)

Kazuya MARUO
Representative, JICA Thailand Office
31st Floor, Exchange Tower,
388 Sukhumvit Road, Klongtoey Bangkok 10110
Tel. No.: 02-261-5250 (Ex. 137); Fax: 02-261-5262
Mobile: 081-825-4987; E-mail: Maruo.Kazuya@jica.go.jp

4. Swedish International Development Cooperation Agency (SIDA)

Mrs. Karin Andersson
Senior Infrastructure Advisor
Regional Asia Team
Swedish International Development Cooperation Agency
Valhallagen 199, SE -105 25 Stockolm Sweden
Tel. No: +46 8 698 5259; Fax No.: +46 8 698 5330; Email: karin.andersson@sida.se

Mr. Bjorn Oberg
Regulatory & Power Market Advisor
Hi Tech building 53 Sveav 9-11 SE 10152 Stockholm Sweden
Tel. No: +46 8 698 8890; Fax No.: +46 8 698 8899; Email: bob@oebergs.com
Mr. Christer Holtsberg

5. World Bank

Ms. Beatriz Arizu de Jablonski
Senior Energy Specialist
Energy and Transport Sector Unit
East Asia and Pacific Region, World Bank
Email: barizu@worldbank.org
Phone: 202-473-2603

Jie Tang
Senior Energy Specialist
Email: jtang@worldbank.org

C. CIVIL SOCIETIES

1. Environment Operations Center (EOC)

Mr. Pavit Ramachandran
Component Leader - Strategic Environmental Assessments
Environment Operations Center (EOC)
23rd Floor, Offices at Central World
999/9 Rama I Road, Pathumwan, Bangkok 10330
Tel. No.: (66)-2-207-4424 (direct); Mobile: (66)-868873813; Fax No.: (66)-2-207-4400
E-mail: pavit1512@yahoo.com

Mr. Ketkeo SALICHANH
Director, Policy and Law Division
Water Resources and Environment Administration, WREA
Prime Minister’s Office Nahaidio Village, Vientiane Capital, Lao PDR
Tel. No.: (856)-21 8712/020 5507180; Fax No.: (856)-21-218712/219354
E-mail: salichanh@hotmail.com / salichanh@yahoo.com

2. Mekong River Commission (MRC)

Mr. Do Manh Hung
Director
Operation Division
Mekong River Commission
184 Fa Ngaum Road, Unit 18 Ban Sithane Neva, Sikhottabong
Vientiane 10000, Lao PDR
Tel. No.: (856)-21 263 263 (4030); Fax No.: (856)-21-263 264; Mobile: (856-20)-5599136
Email: hung@mrcmekong.org

Mr. Voradeth Phonekeo
Hydropower Project Manager.
Mekong River Commission
184 Fa Ngaum Road, Unit 18 Ban Sithane Neva, Sikhottabong
Vientiane 10000, Lao PDR
Tel. No.: (856)-21 263 263 (4049); Fax No.: (856)-21-263 264;
Email: voradeth@mrcmekong.org
D. RETA CONSULTANTS

1. RTE INTERNATIONAL (RETA 6440)

Michel CAUBET
Executive Manager (Project Team Leader)
International Affairs - RTE
1, Terrasse Bellini - TSA 4100
92919 LA DEFENSE CEDEX
Tel. NO.: +33 (0)1.41.02.20.54; Fax No.: +33 (0)1.41.02.28.67
Mobile No.: +33 (0)6.61.28.85.21: Email: michel.caubet@RTE-FRANCE.COM

Mr. Jean Senot
Department Head
International Affairs - RTE (France)
1, Terrasse Bellini - TSA 4100
92919 LA DEFENSE CEDEX
Tel. NO.: +33 (0)61402 58 83; Fax No.: +33 (0)1.47.50.20.56
Email: senot@wanadoo.fr

Mr. Amiraly Valibhay
Executive Manager
RTE International Affairs (France)
1 Tenane Bellini TSA 41000 92919 Lu Defewe Cedex
Tel. No.: (33)-14102 2917; Fax No.: (33)-14102 2867;
Email: amiraly.valibhay@rte-france.com

Mr. Christian Viladrich
Power System Expert
EDF – CIH – Savoie Technolac
73 373 Le Bourget Du Lac Cedex France
Tel. No.: (33 4)-79606295; Fax No.: (33 4)-479 60 62 35;
Email: christian.viladrich@edf.fr

Mr. Terje Lysfjord
Senior Vice Preseident
Nord Pool Consulting AS (Norway)
Vollaveien 19 1366 Lysauer, Norway
Tel. No.: 47 488 95 158; Fax No.: 47 67108501;
Email: terje.lysfjord@nordpool.com

Mr. Jonathan Hedgecock
Executive Director
Power Planning Associates Energy (England)
1 Fredrick Sanger Road, Surrey Research Park, Guildford, Guu2 7YA, UK
Tel. No.: 44 1483 544951; Fax No.: 44 1483 544 955;
Email: jonathan.hedgecock@ppaenergy.co.uk
Mr. Peter Beard  
Power Planning Associates Energy (England)  
Executive Director  
1 Fredrick Sanger Road, Surrey Research Park, Guildford, Guu2 7YA, UK  
Tel. No.: 44 1483 544741; Fax No.: 44 1483 544;  
Email: peter.beard@ppaenergy.co.uk

Mr. Thierry Lefevre  
Director, Centre for Energy Environment Resources Development  
P.O. Box 23 Radjadamnern Post Office  
Bangkok 10200, Thailand  
Tel. No.: 66 0 2 235 5817; Fax No.: 66 0 2 236 9574;  
Email: peter.beard@ppaenergy.co.uk

Mr. Richard Frankel  
International EAI Expert  
CEERD (Thailand)  
44/21 Chockchai 4, Soi 18 Lat Prad Road, Bangkok 10230 Thailand  
Tel. No.: 66 2 5399229; Fax No.: 66 2 5399229;  
Email: rjfenvir@samart.co.th

Dr. Wanpen Wirojanagud  
International Expert on EIA  
CEERD (Thailand)  
123/196 Knon Kaen University Khon Kaen 40002 Thailand  
Tel. No.: 0818717627; Fax No.: 043 202 572 ext 105; Email: wanpen@kku.ac.th

Mr. Montri Suwanmontri  
International Social Specialist  
CEERD (Thailand)  
24 Ari Samphan 4, Bangkok 10400, Thailand  
Tel. No.: 6681 8219700; Fax No.: 856 20 5673712; Email: drmontris1@hotmail.com

Mr. John Soussan  
SEI (Sweden)

2. SOLUZIONA (RETA 6304)

Mr. Jorge Karacsonyi  
ADB RETA Consultant, Soluziona  
Tel: 34-91-579-5242; Email: jkaracsonyi@mercadosenergeticos.com

Mr. Rowaldo Del Mundo  
Associate Professor of Electrical Engineering  
College of Engineering, University of the Philippines Diliman, Quezon City 1101

Mr. Victor Anthony J. Castrillo, Jr.  
Senior Consultant, Utilities & Energy, SOLUZIONA, Asia-Pacific Office:  
28th Floor Cyber One Tower, 11 Eastwood Avenue, Eastwood City Cyberpark  
Quezon City, Philippines 1110  
Tel: (632) 687 5422; Fax: (632) 687 6090; Email: vacastrillo@ph.soluziona.com
E. ASIAN DEVELOPMENT BANK

Mr. Anthony Jude
Principal Energy Specialist, Infrastructure Division, Southeast Asia Department
Tel: (63 2) 632 6198, Fax: (63 2) 636 2336; Email: ajude@adb.org

Mr. Zhai Yongping
Principal Energy Specialist, Infrastructure Division, Southeast Asia Department
Tel: (63 2) 632 5976; Fax: (63 2) 636 2336; Email: yzhai@adb.org

Mr. Xavier Humbert
Senior Energy Specialist
Infrastructure Division, Southeast Asia Department/VRM, Email: xhumber@adb.org

Mr. Duy Thanh Bui
Energy Economist, Infrastructure Division, Southeast Asia Department
Tel: (63 2) 632 6768; Fax: (63 2) 636 2336; Email: buiduythanh@adb.org

Mr. Jun Tian
Advisor, Office of the Director General, Regional and Sustainable Development Department
Tel: (63 2) 632 4912; Fax: (63 2) 636 2198; Email: jtian@adb.org

Ms. Maila Conchita M. Abao
Senior Project Assistant, Infrastructure Division, Southeast Asia Department
Tel: (63 2) 632 6409; Fax: (63 2) 636 2336; Email: mcabao@adb.org

Mr. Jesusito Tranquilino
ADB Consultant, GMS Unit, Operations Coordination Division, Southeast Asia Department
Tel: (63 2) 632 5448, Fax: (63 2) 636 2226; E-mail: jtranquilino@adb.org

Ms. Christine Linaza
Secretariat Consultant, Infrastructure Division, Southeast Asia Department
Tel: (63 2) 632 5922, Fax: (63 2) 636 2226; E-mail: clinaza@adb.org
Greater Mekong Subregion (GMS)

Seventh Meeting of the Focal Group (FG-7)

Cambodian Power Development Plans

Ministry of Industry, Mines and Energy

Ho Chi Minh, Viet Nam, 21 November, 2008
Overview of Power Sector

• Cambodia’s power sector was rehabilitated since 1995
• EDC’s Capacity output in 2007: 194.8 MW and 1071 GWh
• Projection in 2024: 3045.33 MW and 16244.61 GWh
• At present, only 20% of households has access to electricity
• Annual energy consumption per capita: 103 kWh
• 22 small isolated power system
• High potential of hydro source: more than 10,000 MW
Energy Policy

To provide an adequate supply of energy throughout Cambodia at reasonable and affordable price,

To ensure a reliable and secured electricity supply at reasonable prices, which facilitates the investments in Cambodia and developments of the national economy,

To encourage exploration and environmentally and socially acceptable development of energy resources needed for supply to all sectors of Cambodia economy,

To encourage the efficient use of energy and to minimize the detrimental environmental effects resulted from energy supply and consumption.
Current Structure of Electricity Sector

Royal Government of Cambodia

Electricity Authority of Cambodia

Ministry of Industry, Mines and Energy

Ministry of Economic and Finance

Cambodia’s Electricity Business

REE

IPP

PEC

EDC

Ownership of EDC

Policy; Planning; Development; Technical standard

Tariff, license, finances and performance; Enforce the regulations, rules and standards
Cambodia Power Sector Strategy

Cambodia Power Strategy Components:

A- Development of Generation and Transmission

B- Power trade with neighboring countries

C- Provincial and Rural Electrification Program
<table>
<thead>
<tr>
<th>No.</th>
<th>A. Generation Expansion Plan</th>
<th>Fuel</th>
<th>MW</th>
<th>Year</th>
<th>Export</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Kirirom III Hydro power Plant</td>
<td>Hydro</td>
<td>18</td>
<td>2010</td>
<td></td>
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<td>2</td>
<td>Kamchay Hydro Power Plant</td>
<td>Hydro</td>
<td>193</td>
<td>2010</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>200 MW Coal Power Plant (I) in Sihanouk Ville - Phase 1</td>
<td>Coal</td>
<td>100</td>
<td>2011</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Atay Hydro Power Plant</td>
<td>Hydro</td>
<td>110</td>
<td>2012</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>200 MW Coal Power Plant (I) in Sihanouk Ville - Phase 2</td>
<td>Coal</td>
<td>100</td>
<td>2012</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>700 MW Coal Power Plant (II) in Sihanouk Ville - Phase 1</td>
<td>Coal</td>
<td>100</td>
<td>2013</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Lower Stung Rusey Chhrum Hydro Power Plant</td>
<td>Hydro</td>
<td>338</td>
<td>2013</td>
<td></td>
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<td>8</td>
<td>Tatay Hydro Power Plant</td>
<td>Hydro</td>
<td>246</td>
<td>2013</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>700 MW Coal Power Plant (II) in Sihanouk Ville - Phase 2</td>
<td>Coal</td>
<td>100</td>
<td>2014</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>700 MW Coal Power Plant (II) in Sihanouk Ville - Phase 3</td>
<td>Coal</td>
<td>100</td>
<td>2015</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>700 MW Coal Power Plant (II) in Sihanouk Ville - Phase 4</td>
<td>Coal</td>
<td>100</td>
<td>2016</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Lower Sesan II + Lower Srepok II</td>
<td>Hydro</td>
<td>420</td>
<td>2016</td>
<td>Oriented</td>
</tr>
<tr>
<td>13</td>
<td>Stung Chay Areng Hydro Power Plant</td>
<td>Hydro</td>
<td>108</td>
<td>2017</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>700 MW Coal Power Plant (II) in Sihanouk Ville - Phase 5</td>
<td>Coal</td>
<td>100</td>
<td>2017</td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>700 MW Coal Power Plant (II) in Sihanouk Ville - Phase 6</td>
<td>Coal</td>
<td>200</td>
<td>2018</td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Steung Treng Power Plant</td>
<td>Hydro</td>
<td>980</td>
<td>2018</td>
<td>Oriented</td>
</tr>
<tr>
<td>17</td>
<td>Sambor Hydro Power Plant</td>
<td>Hydro</td>
<td>2600</td>
<td>2019</td>
<td>Oriented</td>
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<tr>
<td>18</td>
<td>Coal Power Plant (III) or Gas Power Plant</td>
<td>Coal/NG</td>
<td>450</td>
<td>2020</td>
<td></td>
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<tr>
<td></td>
<td><strong>Lower Sesan III (375 MW), Lower Srepok III (330MW) &amp; IV (235 MW)</strong></td>
<td></td>
<td></td>
<td></td>
<td>Oriented</td>
</tr>
</tbody>
</table>
Transmission

- 115 kV BOT interconnecting with Thailand to supply Banteay Meanchey, Siem Reap and Battambang
- 115 kV Vietnam (Tai Ninh) - Kampong Cham, WB (2011)
- 115 kV Lao (Ban Hat) - Stung Treng, WB (2011)
- 230 kV Phnom Penh - Kampong Cham, WB (2011)
- 230 kV Phnom Penh Battambang via Kompong Chhnang-Pursat, BOT(2012)
- 220 kV Phnom Penh Viet Nam via Takeo ,ADB+NDF (2008)
- 230 kV Kampot – Sihanoukville , ADB+JBIC (2010)
<table>
<thead>
<tr>
<th>No.</th>
<th>Existing Transmission and Expansion Plan</th>
<th>Year Operation</th>
<th>T/L (km)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>115 kV, Kirirom I - Phom Penh (CETIC)</td>
<td>2001</td>
<td>120</td>
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<tr>
<td>2</td>
<td>115 kV, Thailand - Bantey Meanchey - Siem Reap - Battambong</td>
<td>2007</td>
<td>203</td>
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<tr>
<td>3</td>
<td>220 kV, Phnom Penh - Takeo - Viet Nam, (construct the substation in Takeo), (ADB + NFD)</td>
<td>2009</td>
<td>110</td>
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<tr>
<td>4</td>
<td>115 kV, Reinforcement of transmission line and construct substation at WPP (West Phnom Penh), (WB)</td>
<td>2009</td>
<td>30</td>
</tr>
<tr>
<td>5</td>
<td>230 kV, Takeo - Kompot, (construct substation in Kompot), (KFW)</td>
<td>2010</td>
<td>87</td>
</tr>
<tr>
<td>6</td>
<td>115 kV, Steung Treng - Loa PDR, (construct substation in Steung Treng), (WB)</td>
<td>2011</td>
<td>56</td>
</tr>
<tr>
<td>7</td>
<td>110 kV, Kampong Cham - Viet Nam, (construct 3 substations: - Kampong Cham, - Soung, - Pongnearkreak), (WB)</td>
<td>2011</td>
<td>68</td>
</tr>
<tr>
<td>8</td>
<td>230 kV, Kampot - Sihanouk Ville, (construct 2 substations: - Vealrinh - Sihanouk Ville), (ADB + JBIC)</td>
<td>2011</td>
<td>82</td>
</tr>
<tr>
<td>9</td>
<td>230 kV, Phnom Penh - Kompong Chhnang - Pursat - Battambong, (construct 3 substations: - Kompong Chhnang, - Pursat, - Battambong), (CYC)</td>
<td>2012</td>
<td>310</td>
</tr>
<tr>
<td>10</td>
<td>230 kV, Pursat - Osom, (construct 1 substation in Osom Commune), (CYC)</td>
<td>2012</td>
<td>175</td>
</tr>
<tr>
<td>11</td>
<td>230 kV, Kampong Cham – Kratie, (CUPL)</td>
<td>2012</td>
<td>110</td>
</tr>
<tr>
<td>No.</td>
<td>Existing Transmission and Expansion Plan (Con.)</td>
<td>Year</td>
<td>T/L (km)</td>
</tr>
<tr>
<td>-----</td>
<td>---------------------------------------------------------------------------------------------------------------</td>
<td>------</td>
<td>----------</td>
</tr>
<tr>
<td>12</td>
<td>230 kV, Kratie – Stung Treng, (India)</td>
<td>2012</td>
<td>126</td>
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<tr>
<td>13</td>
<td>230 kV, Phnom Penh – Kampong Cham, (CUPL)</td>
<td>2011</td>
<td>100</td>
</tr>
<tr>
<td>14</td>
<td>220 kV, Phnom Penh – Sihanoukville, along national road 4, (CHMC)</td>
<td>2013</td>
<td>220</td>
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<tr>
<td>16</td>
<td>230 kV, Stung Tatay Hydro – Osom substation, (CHMC)</td>
<td>2015</td>
<td>15</td>
</tr>
<tr>
<td>17</td>
<td>115 kV, West Phnom Penh – East Phnom Penh (construct substation GS4 at South Phnom Penh)</td>
<td>2015</td>
<td>20</td>
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<tr>
<td>18</td>
<td>230 kV, Reinforcement of transmission line on the existing pole, Phnom Penh – Kampong Cham (transmit power from Lower Sesan II + Lower Srepok II)</td>
<td>2017</td>
<td>100</td>
</tr>
<tr>
<td>19</td>
<td>230 kV, Stung Chay Areng - Osom substation (CSG)</td>
<td>2017</td>
<td>60</td>
</tr>
<tr>
<td>20</td>
<td>230 kV, Kampong Cham - Kampong Thom - Siem Reap, (construct 1 substation in Kampong Thom), (KTC)</td>
<td>2019</td>
<td>250</td>
</tr>
</tbody>
</table>

**Total Transmission Line**

2,362
Transmission Expansion Plan
(2001 – 2020)
Cambodia Transmission 2013

[Image of a map of the Cambodia Power System 2013 with various locations and connections marked.]
National transmission described in Energy Sector Strategy
B-Power Trade

- Import from Vietnam at High voltage 220 kV with capacity of 200 MW by 2009
- Import from Thailand at 115 kV starting November 2007 to serve northern grid up to 80 MW
- Import from Vietnam to Kampong Cham Province at high voltage 115 kV with capacity of 20 MW by 2011
- Import from Lao to Stung Treng Province at 115 kV with capacity until 20 MW by 2011
- Power Interconnection at high voltage 500 kV, Lao - Cambodia – Vietnam, ADB (2018)
- 5 Cross border MV links from Vietnam and 8 from Thailand at 22 kV to serve Cambodian communities close to the border.
C-Provincial and Rural Electrification

• Completion rehabilitation of 8 provincial towns supported by ADB ($18.6 mil.) and AFD (€3.75 mil.),
• Grid extension & Rural Elect. Program: WB SDR27.9 mil., GEF $5.75 mil.
• Renewable energy master plan study and 2 micro hydro development by JICA
• Rural Electrification target:
  - 100% of villages has access to electricity services by 2020
  - 70% of rural population has access to quality electricity services by 2030
• Rural Electrification Fund to subsidize part of rural electrification projects.
End of Presentation

Thank you for your attention.
Update For CSG Power Grid Planning & GMS Cooperation Projects

China Southern Power Grid Co., LTD

November, 2008
Contents:

✓ Status of CSG in 2007
✓ Power Grid Planning
✓ GMS Cooperation Projects
Status of CSG in 2007
CSG: Status in 2007

Area: 1,000,000 km²

Population: 236 Million
17.8% of China

GDP 4.5 Trillion Yuan
RMB 17.6% of China
CSG: Status in 2007

Total Capacity: 128GW  ▲  16.7%

Hydro: 38.6GW
Thermal: 83.0GW
Nuclear: 3.78GW
Renewables: 0.30GW

<table>
<thead>
<tr>
<th>Region</th>
<th>Capacity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Guangdong</td>
<td>58.9</td>
</tr>
<tr>
<td>Guangxi</td>
<td>19.8</td>
</tr>
<tr>
<td>Yunnan</td>
<td>22.2</td>
</tr>
<tr>
<td>Guizhou</td>
<td>21.7</td>
</tr>
<tr>
<td>Hainan</td>
<td>3.0</td>
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</tbody>
</table>
### Status in 2007

**Generation:** 553 TWh  \(\uparrow\) 14.6%

<table>
<thead>
<tr>
<th>Province</th>
<th>Generation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Guangdong</td>
<td>269.5</td>
</tr>
<tr>
<td>Guangxi</td>
<td>68.5</td>
</tr>
<tr>
<td>Yunnan</td>
<td>90.5</td>
</tr>
<tr>
<td>Guizhou</td>
<td>100.3</td>
</tr>
<tr>
<td>Hainan</td>
<td>11.4</td>
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</tbody>
</table>
CSG: Status in 2007

Consumption: 564TWh  ▲  14.3%
### CSG: Status in 2007

<table>
<thead>
<tr>
<th>Region</th>
<th>Peak Load</th>
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</thead>
<tbody>
<tr>
<td>Guangdong</td>
<td>55.8</td>
</tr>
<tr>
<td>Guangxi</td>
<td>11.5</td>
</tr>
<tr>
<td>Yunnan</td>
<td>11.4</td>
</tr>
<tr>
<td>Guizhou</td>
<td>10.7</td>
</tr>
<tr>
<td>Hainan</td>
<td>1.9</td>
</tr>
</tbody>
</table>

Peak Load: 87GW  ▲  10.5%
CSG : Status in 2007

Capacity of 500kV Transformers  83 GVA
Capacity of 220kV Transformers  135 GVA
Capacity of HVDC          7.8 GW
CSG: Status in 2007

Length of 500kV Transmission Lines  22,000 km
Length of 220kV Transmission Lines  38,000 km
Length of HVDC Transmission Line    3,000 km
Max. Power from West to East is 15.3GW
CSG: Status in 2007

Power exchange between regions

<table>
<thead>
<tr>
<th>Region</th>
<th>TWh</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hongkong</td>
<td>4.04TWh</td>
</tr>
<tr>
<td>Macau</td>
<td>1.69TWh</td>
</tr>
<tr>
<td>Chongqing</td>
<td>3.97TWh</td>
</tr>
<tr>
<td>Hunan</td>
<td>4.30TWh</td>
</tr>
<tr>
<td>Vietnam</td>
<td>2.83TWh</td>
</tr>
</tbody>
</table>
Power Grid Planning
Demand Forecast from 2006 to 2010

- **GDP**: Increase rate 9% ~ 10%/per year
- **Consumption**: 682TWh in 2010 Increase rate 9.4%/pear year
- **Peak load**: 114GW in 2010 Increase rate 10.4% /pear year

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Consumption (TWh)</strong></td>
<td>230.2</td>
<td>434.7</td>
<td>681.5</td>
<td>13.4%</td>
<td>9.4%</td>
</tr>
<tr>
<td><strong>Peak (GW)</strong></td>
<td>37.89</td>
<td>69.59</td>
<td>114.03</td>
<td>12.9%</td>
<td>10.4%</td>
</tr>
</tbody>
</table>
## Increased Capacity of Power (2006-2010)

<table>
<thead>
<tr>
<th>Type</th>
<th>Capacity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hydro</td>
<td>28,400MW</td>
</tr>
<tr>
<td>Thermal</td>
<td>49,900MW</td>
</tr>
<tr>
<td>Coal</td>
<td>42,200MW</td>
</tr>
<tr>
<td>Gas</td>
<td>7,700MW</td>
</tr>
<tr>
<td>Nuclear</td>
<td>1,000MW</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>79,300MW</strong></td>
</tr>
<tr>
<td><strong>Turn off</strong></td>
<td><strong>6,100MW</strong></td>
</tr>
<tr>
<td><strong>Net Increase</strong></td>
<td><strong>73,200MW</strong></td>
</tr>
</tbody>
</table>
Capacity of Power in 2010

Total Capacity: 164,000 MW

- Hydro: 59,390 MW
- Thermal: 99,800 MW
- Nuclear: 4,780 MW
Max. Power from West to East is 24.38GW
UHVDC Voltage：±800kV  
Current：3.125kA  
T/L:1412km  
Capability:5GW
Chuxiong UHVDC substation

Area : 0.3km²
Shuidong UHVDC substation

Area: 0.3 km²
Max. Power from West to East is 37.38GW
2013 UHVDC
Total : 17.8GW
sea cable
HVDC Voltage : 500kV
T/L:31km
Capability:600MW
GMS Cooperation Projects
International Cooperation Projects

☆ Sino-Vietnam Cooperation
☆ Sino-Laos Cooperation
☆ Sino-Cambodia Cooperation
☆ Sino-Thailand Cooperation
☆ Sino-Myanmar Cooperation
Sino-Vietnam Cooperation

1. Power Supply to Vietnam
   3 220kV + 4 110kV lines
   Total by the end of Sep 2008: 5.9 TWh

2. 500kV Interconnection Project
   Feasibility Study is under progression

3. Vinh Tan 1 BOT Coal-fired Power Plant Project (2×600MW)
   Under negotiation
Sino-Laos Cooperation

1. Laos’ Master Plan on Electric Power Industry

2. Nam Tha 1 Hydro-Electric Power Project (3×56MW)
   Under Negotiation

3. Nam Ou Hydropower Station Project (about 1000MW)
   Initiated by Sinohydro Corporation

4. Northern Grid Construction Project
   Under Construction
Sino-Cambodia Cooperation

1. Sambor Hydro-Electric Power Project (2600MW)
   Finished the FS and submitted it to Cambodia.

Sino-Thailand Cooperation

1. China-Laos-Thailand 500kV Transmission Project
   Suspended.
Sino-Myanmar Cooperation

1. Ta Sang Hydro-Electric Power Plant Project (10×711MW)
   Signed Frame Agreement to develop in Thalwan River

2. Development of the Myanmar Northern Hydropower Projects (the total is about 1680MW)
   Initiated by China Power Investment Corporation
Thank You!
Power Development Plans &
Transmission Interconnection
Projects
Lao PDR

Presented by Mr. Vilaysone Sourigna
Department of Energy Promotion & Development
Ministry of Energy & Mines
Back ground
- 22 December 2007 signed the MOU with Thailand
  Lao PDR will export electricity to Thailand 7000 MW
- 14 March 2008 signed the Minutes of Meeting between Minister of Ministry of Energy & Mines of Lao PDR and Minister of Ministry of Industry & Trade of SR. Vietnam
  Lao PDR will export electricity to Vietnam 5000 MW
## Export to Thailand

<table>
<thead>
<tr>
<th>No</th>
<th>Name of Project</th>
<th>Contr. Capacity</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Nam Theun 2</td>
<td>920MW</td>
</tr>
<tr>
<td>2</td>
<td>Nam Ngum 2</td>
<td>597MW</td>
</tr>
<tr>
<td>3</td>
<td>Nam Bak 1</td>
<td>80MW</td>
</tr>
<tr>
<td>4</td>
<td>Theun Hinboun Exp</td>
<td>220MW</td>
</tr>
<tr>
<td>5</td>
<td>Nam Ngum 3</td>
<td>440MW</td>
</tr>
<tr>
<td>6</td>
<td>Nam Theun 1</td>
<td>523MW</td>
</tr>
<tr>
<td>7</td>
<td>Nam Ngiep 1</td>
<td>260MW</td>
</tr>
<tr>
<td>8</td>
<td>Hongsa Lignite</td>
<td>1570MW</td>
</tr>
<tr>
<td>9</td>
<td>Nam Ou</td>
<td>843MW</td>
</tr>
<tr>
<td>10</td>
<td>Donsahong</td>
<td>300MW</td>
</tr>
<tr>
<td>11</td>
<td>Sepian Xenamnoi</td>
<td>390MW</td>
</tr>
<tr>
<td>12</td>
<td>Sekong 4</td>
<td>300MW</td>
</tr>
<tr>
<td>13</td>
<td>Nam Kong 1</td>
<td>150MW</td>
</tr>
<tr>
<td>14</td>
<td>Xayabouli/Pak Beng</td>
<td>1000MW</td>
</tr>
</tbody>
</table>

7893 MW
## Export to Vietnam

<table>
<thead>
<tr>
<th>No</th>
<th>Name of Project</th>
<th>Installed Capacity MW</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Sekaman 0&amp;1</td>
<td>323</td>
</tr>
<tr>
<td>2</td>
<td>Sekaman 2 (a, b)</td>
<td>164</td>
</tr>
<tr>
<td>3</td>
<td>Sekaman 3</td>
<td>250</td>
</tr>
<tr>
<td>4</td>
<td>Sekaman 4 (a, b)</td>
<td>170</td>
</tr>
<tr>
<td>5*</td>
<td>Nam Kong 1</td>
<td>150</td>
</tr>
<tr>
<td>6</td>
<td>Nam Kong 2</td>
<td>60</td>
</tr>
<tr>
<td>7</td>
<td>Nam Kong 3</td>
<td>30</td>
</tr>
<tr>
<td>8</td>
<td>Dak E meule</td>
<td>185</td>
</tr>
<tr>
<td>9</td>
<td>Sekong 3 (Up. &amp; Low.)</td>
<td>250</td>
</tr>
<tr>
<td>10*</td>
<td>Sekong 4</td>
<td>300</td>
</tr>
<tr>
<td>11*</td>
<td>Sekong 5</td>
<td>400</td>
</tr>
<tr>
<td>12</td>
<td>Nam Ngum 4A &amp; 4B</td>
<td>150</td>
</tr>
<tr>
<td>13</td>
<td>Nam Xam (1,2,3 and 4)</td>
<td>750</td>
</tr>
<tr>
<td>14</td>
<td>Nam Mo</td>
<td>110</td>
</tr>
<tr>
<td>15</td>
<td>Nam Kan (Nam Mo 1)</td>
<td>66</td>
</tr>
<tr>
<td>16</td>
<td>Nam Et (1,2,3)</td>
<td>450</td>
</tr>
<tr>
<td>17</td>
<td>Nam Neun</td>
<td>65</td>
</tr>
<tr>
<td>18</td>
<td>Nam Peun</td>
<td>64</td>
</tr>
<tr>
<td>19</td>
<td>Xexou</td>
<td>95</td>
</tr>
<tr>
<td>20</td>
<td>Luangprabang (Mekong)</td>
<td>1410</td>
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</tbody>
</table>
# Electricity Demand Forecast (PDP 2007)

<table>
<thead>
<tr>
<th>Year</th>
<th>2006</th>
<th>2010</th>
<th>2015</th>
<th>2020</th>
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</thead>
<tbody>
<tr>
<td>Energy Consumption (GWH)</td>
<td>1727</td>
<td>3493</td>
<td>7009</td>
<td>8549</td>
</tr>
<tr>
<td>Peak load (MW)</td>
<td>349</td>
<td>648</td>
<td>1216</td>
<td>1486</td>
</tr>
</tbody>
</table>
Nam Ou - Thailand
Hongsa - Thailand
Pak Beng - Thailand
Xayabouli - Khonken
Nabong - Oudon
Ban Sok - Oubon
Ban Sok - Stung Treng - Tay Ninh
Langphabang - Xam Neua - Nho Quan - Thanh Hoa
500kv Transmission Line Facilities

1. Nabong (Laos) - Oudon (Thailand)
2. Indochina facilities:
   - Ban Sok (Laos) - Pleiku (Vietnam)
   - Ban Sok-Stung Treng (Cambodia)-Tay Ninh (Vietnam)
3. Ban Sok (Laos) - Oubon (Thailand)
4. Hongsa (Laos) - Thailand
5. Nam Ou (Laos) - Thailand
6. Luangphabang (Laos) - Nho Quan or Than Hoa
   Vietnam
7. Xayabouli (Laos) – Khon Ken (Thailand)
8. Pakbeng (Laos) - Thailand
Khop Chai
Thank you
Country Report
on
Progress of Power Development Plans and Transmission Interconnection Projects

MYANMAR

Ho Chi Minh City, Viet Nam
21.11.2008
## Contents

1. Developments in Institutional / Policy Framework for Electricity Sector
2. Status of Electricity Demand and Supply
3. Progress in Power Development Program
4. Developments in Power Cooperation with GMS Neighbors
(1) Developments in Institutional / Policy Framework for Electricity Sector

In order to effectively carry out to fulfill the electricity requirement for the economic development, nation-building and multi-sector development tasks, the Ministry of Electric Power has been reorganized as two Ministries viz Ministry of Electric Power No.1 and Ministry of Electric Power No.2 on 15 May, 2006.
Organization Chart for Ministry of Electric Power No. (1)

- Minister
  - Deputy Minister
    - Department of Hydropower Planning
      - Projects & Generation Planning
      - Economics Planning
      - General Administration
    - Department of Hydropower Implementation
      - Administration
      - Planning & Works
      - Material Planning
      - Finance
      - Machinery
      - Electrical & Mechanical Installation
      - Construction 1
      - Construction 2
      - . . .
      - . . .
      - Construction 7
      - Investigation
      - Design & Technology
      - Maintenance
    - Hydropower Generation Enterprise
      - Engineering Division
      - Material Planning
      - Finance
      - Administration
(1) Developments in Institutional / Policy Framework for Electricity Sector (Cont.)

Organization Chart for Ministry of Electric Power No. (2)

- Minister
- Deputy Minister

- Department of Electric Power
  - Projects & Power Generation Planning
  - Power System Strategic Planning
  - Economic Planning
  - General Administration & Human Resources Planning

- Yangon City Electricity Supply Board
  - Engineering
  - Material Planning
  - Administration
  - Finance

- Electricity Supply Enterprise
  - Engineering
  - General Services
  - Material Planning
  - Administration
  - Finance

- Myanma Electric Power Enterprise
  - Power Transmission Projects
  - Power System
  - Thermal Power
  - Material Planning
  - Administration
  - Finance
### Responsibilities for Ministry of Electric Power No.1

- Development of new hydroelectric power projects.
- Operation and maintenance of existing hydroelectric power stations and coal fired thermal power station.
- Selling the electricity to the Ministry of Electric Power No.2

### Responsibilities for Ministry of Electric Power No.2

- Planning and implementation of transmission lines and sub-stations compliance with the generation plan of both ministries.
- Operation and maintenance of gas turbines, combined cycles and thermal power stations.
- Purchasing the electricity from the Ministry of Electric Power No.1
- Planning and implementation of distribution system and selling the electricity to the end users
Developments in Institutional / Policy Framework for Electricity Sector (Cont:)

Regulatory Framework

As electricity business has been subsidized by the government long ago, Ministry of Electric Power No.1 and No.2 in accordance with the guidance of the government take the responsibilities of regulator.

Challenges in REGULATION

- Policy of Myanmar Power Sector is changing gradually towards privatization
- Regulation for new system is not ready yet and a lot of regulatory challenges ahead
- Opportunity to learn experiences of other ASEAN countries on regulatory issues

Private Sector Participation

Local investors are allowed to participate in the scheme of Independent Power Producer (IPP) for medium hydropower projects

- The MOU on Thaukyegat(2) Hydropower Project (120 MW) was signed between MOEP(1) and Asia World Company Limited on 2\textsuperscript{nd} May 2008.
- The MOU on Baluchaung No.(3) Hydropower Project (48 MW) was signed between MOEP(1) and High Tech Concrete Technology Company Limited on 2\textsuperscript{nd} May 2008.
Contents

(1)  Developments in Institutional / Policy Framework for Electricity Sector

(2)  Status of Electricity Demand and Supply

(3)  Progress in Power Development Program

(4)  Developments in Power Cooperation with GMS Neighbors
### (2) Status of Electricity Demand and Supply

#### Installed Capacity for National Grid System

<table>
<thead>
<tr>
<th>Sr</th>
<th>Type</th>
<th>Nos. of PS</th>
<th>Installed (MW)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Hydro Electric</td>
<td>14</td>
<td>885.0</td>
</tr>
<tr>
<td>2</td>
<td>Gas Turbine</td>
<td>9</td>
<td>549.9</td>
</tr>
<tr>
<td>3</td>
<td>Steam Turbine</td>
<td>6</td>
<td>285.0</td>
</tr>
<tr>
<td></td>
<td><strong>Total</strong></td>
<td><strong>29</strong></td>
<td><strong>1719.9</strong></td>
</tr>
</tbody>
</table>

#### Status of Electricity Demand and Supply

<table>
<thead>
<tr>
<th>Sr</th>
<th>MOEP-I MOEP-II</th>
<th>Installed (MW)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>MOEP-I</td>
<td>1005.0</td>
</tr>
<tr>
<td>2</td>
<td>MOEP-II</td>
<td>714.9</td>
</tr>
<tr>
<td></td>
<td><strong>Total</strong></td>
<td><strong>1719.9</strong></td>
</tr>
</tbody>
</table>

![Map with energy sources indicated]
## System Installed Capacity

<table>
<thead>
<tr>
<th>Year</th>
<th>MW</th>
</tr>
</thead>
<tbody>
<tr>
<td>1996</td>
<td>800.4</td>
</tr>
<tr>
<td>1997</td>
<td>835.4</td>
</tr>
<tr>
<td>1998</td>
<td>847.4</td>
</tr>
<tr>
<td>1999</td>
<td>956.0</td>
</tr>
<tr>
<td>2000</td>
<td>976.0</td>
</tr>
<tr>
<td>2001</td>
<td>1008.5</td>
</tr>
<tr>
<td>2002</td>
<td>1038.5</td>
</tr>
<tr>
<td>2003</td>
<td>1038.5</td>
</tr>
<tr>
<td>2004</td>
<td>1546.9</td>
</tr>
<tr>
<td>2005</td>
<td>1546.9</td>
</tr>
<tr>
<td>2006</td>
<td>1546.9</td>
</tr>
<tr>
<td>2007</td>
<td>1571.9</td>
</tr>
<tr>
<td>2008</td>
<td>1719.9</td>
</tr>
</tbody>
</table>

The chart above illustrates the trend of system installed capacity over the years from 1996 to 2008.
(2) **Status of Electricity Demand and Supply (Cont:)**

**System Peak Generation**

<table>
<thead>
<tr>
<th>Year</th>
<th>MW</th>
</tr>
</thead>
<tbody>
<tr>
<td>1996</td>
<td>660.8</td>
</tr>
<tr>
<td>1997</td>
<td>682.6</td>
</tr>
<tr>
<td>1998</td>
<td>665.2</td>
</tr>
<tr>
<td>1999</td>
<td>715.5</td>
</tr>
<tr>
<td>2000</td>
<td>721.1</td>
</tr>
<tr>
<td>2001</td>
<td>692.5</td>
</tr>
<tr>
<td>2002</td>
<td>701.2</td>
</tr>
<tr>
<td>2003</td>
<td>708.3</td>
</tr>
<tr>
<td>2004</td>
<td>864.0</td>
</tr>
<tr>
<td>2005</td>
<td>966.4</td>
</tr>
<tr>
<td>2006</td>
<td>995.7</td>
</tr>
<tr>
<td>2007</td>
<td>1005.0</td>
</tr>
<tr>
<td>2008</td>
<td>1061.2</td>
</tr>
</tbody>
</table>

**Diagram: System Peak Generation**

![Graph showing System Peak Generation from 1996 to 2008 with a gradual increase in MW.](image-url)
Contents

(1) Developments in Institutional / Policy Framework for Electricity Sector

(2) Status of Electricity Demand and Supply

(3) Progress in Power Development Program

(4) Developments in Power Cooperation with GMS Neighbors
### (3) Progress in Power Development Program

<table>
<thead>
<tr>
<th>Power Stations</th>
<th>Nos. of Power Station</th>
<th>Installed (MW)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Existing</td>
<td>29</td>
<td>1,719.9</td>
</tr>
<tr>
<td>Under Construction</td>
<td>29</td>
<td>19,413.8</td>
</tr>
<tr>
<td>Future</td>
<td>14</td>
<td>13,971.5</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>72</strong></td>
<td><strong>35,105.2</strong></td>
</tr>
</tbody>
</table>

There is no Under Construction Project and Future Plan for new Gas Turbine and Steam Turbine.
## Under Construction Hydro Electric Power Projects

<table>
<thead>
<tr>
<th>Sr.</th>
<th>Project Name</th>
<th>Capacity (MW)</th>
<th>Remark</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Kun</td>
<td>60</td>
<td>70%</td>
</tr>
<tr>
<td>2</td>
<td>Phyu</td>
<td>40</td>
<td>70%</td>
</tr>
<tr>
<td>3</td>
<td>Shwekyin</td>
<td>75</td>
<td>65%</td>
</tr>
<tr>
<td>4</td>
<td>Kyeeon Kyeewa</td>
<td>74</td>
<td>66.2%</td>
</tr>
<tr>
<td>5</td>
<td>Myithar</td>
<td>40</td>
<td>24.5%</td>
</tr>
<tr>
<td>6</td>
<td>Thahtay</td>
<td>102</td>
<td>6%</td>
</tr>
<tr>
<td>7</td>
<td>Upper Keng Tawng</td>
<td>52.5</td>
<td>-</td>
</tr>
<tr>
<td>8</td>
<td>Buu Ywa (Lower)</td>
<td>42</td>
<td>12.5%</td>
</tr>
<tr>
<td>9</td>
<td>Upper Sedaw Gyi</td>
<td>60</td>
<td>1.8%</td>
</tr>
<tr>
<td>10</td>
<td>Myogyi</td>
<td>24</td>
<td>46%</td>
</tr>
<tr>
<td>11</td>
<td>Yeywa</td>
<td>790</td>
<td>67%</td>
</tr>
<tr>
<td>12</td>
<td>Upper Paung Laung</td>
<td>140</td>
<td>27%</td>
</tr>
<tr>
<td>13</td>
<td>Ann</td>
<td>15</td>
<td>5%</td>
</tr>
<tr>
<td>14</td>
<td>Thaukyegat-2</td>
<td>140</td>
<td>Asia World, BOO</td>
</tr>
<tr>
<td>15</td>
<td>Anyarpya</td>
<td>9.3</td>
<td>-</td>
</tr>
</tbody>
</table>
### Progress in Power Development Program (Cont:)

<table>
<thead>
<tr>
<th>Sr.</th>
<th>Project Name</th>
<th>Capacity (MW)</th>
<th>Remark</th>
</tr>
</thead>
<tbody>
<tr>
<td>16</td>
<td>Yarzagyo</td>
<td>4</td>
<td>22.1%</td>
</tr>
<tr>
<td>17</td>
<td>Tamanthi</td>
<td>1200</td>
<td>9%, NHPC MoU</td>
</tr>
<tr>
<td>18</td>
<td>Tasang</td>
<td>7110</td>
<td>Pre Construction</td>
</tr>
<tr>
<td>19</td>
<td>Nancho</td>
<td>40</td>
<td>26%</td>
</tr>
<tr>
<td>20</td>
<td>Hutgyi</td>
<td>1360</td>
<td>Under FS</td>
</tr>
<tr>
<td>21</td>
<td>Ayeyarwaddy Myitsone</td>
<td>4100</td>
<td>CPI</td>
</tr>
<tr>
<td>22</td>
<td>Ta Pein-1</td>
<td>240</td>
<td>DUHD</td>
</tr>
<tr>
<td>23</td>
<td>Ta Pein-2</td>
<td>168</td>
<td>DUHD</td>
</tr>
<tr>
<td>24</td>
<td>Shweli-2</td>
<td>460</td>
<td>YUPD</td>
</tr>
<tr>
<td>25</td>
<td>Shweli-3</td>
<td>360</td>
<td>YUPD</td>
</tr>
<tr>
<td>26</td>
<td>Upper Thanlwin</td>
<td>1400</td>
<td>Hanergy Holding Group Ltd</td>
</tr>
<tr>
<td>27</td>
<td>Shwe Sar Yay</td>
<td>660</td>
<td>NHPC</td>
</tr>
<tr>
<td>28</td>
<td>Tanintharyi</td>
<td>600</td>
<td>Italian-Thai</td>
</tr>
<tr>
<td>29</td>
<td>Baluchaung-3</td>
<td>48</td>
<td>High Tech Concrete Co.,</td>
</tr>
</tbody>
</table>

**Total** 19,413.8
(3) Progress in Power Development Program (Cont:)

Under Construction Hydro Power Station Projects

- Shweli-3 (360 MW)
- Nancho (40 MW)
- Upper Thanlwin (1400 MW)
- Tasang (7110 MW)
- Baluchaung-3 (48 MW)
- Upper Paunglaung (140 MW)
- Thaukyekhat-2 (140 MW)
- Tanintharyi (600 MW)
- Upper Kengtawng (52.5 MW)
- Myitthar (40 MW)
- Buywa (42 MW)
- Kyeeon Kyeewa (74 MW)
- Ann (15 MW)
- Thahtay (102 MW)
- Kun (60 MW)
- Pyuu (40 MW)
- Shwekyin (75 MW)
- Hutgyi (1360 MW)
- Shwesaryay (660 MW)
- Manipu (380 MW)
- Upper Sedawgyi (60 MW)
- Htamanthi (1,200 MW)
- Upper Kiyi (4,100 MW)
- Upper Paunglaung (140 MW)
- Upper Kengtawng (52.5 MW)
- Tanintharyi (600 MW)
- Myitsone (4,100 MW)
### Future Hydro Power Station Projects

<table>
<thead>
<tr>
<th>Sr.</th>
<th>Project Name</th>
<th>Capacity (MW)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Yenan</td>
<td>1200</td>
</tr>
<tr>
<td>2</td>
<td>Khaung Lan Phu</td>
<td>2700</td>
</tr>
<tr>
<td>3</td>
<td>Phi Zaw</td>
<td>2000</td>
</tr>
<tr>
<td>4</td>
<td>Wu Sauk</td>
<td>1800</td>
</tr>
<tr>
<td>5</td>
<td>Chi Phway</td>
<td>2800</td>
</tr>
<tr>
<td>6</td>
<td>Laik Zar</td>
<td>1900</td>
</tr>
<tr>
<td>7</td>
<td>Sai Din</td>
<td>76.5</td>
</tr>
<tr>
<td>8</td>
<td>Bilin</td>
<td>280</td>
</tr>
<tr>
<td>9</td>
<td>Dayine Chaung</td>
<td>25</td>
</tr>
<tr>
<td>10</td>
<td>Tha Kyet</td>
<td>20</td>
</tr>
<tr>
<td>11</td>
<td>Lay Myo</td>
<td>500</td>
</tr>
<tr>
<td>12</td>
<td>Manipura</td>
<td>380</td>
</tr>
<tr>
<td>13</td>
<td>Upper Buywa</td>
<td>150</td>
</tr>
<tr>
<td>14</td>
<td>Upper Yeywa</td>
<td>140</td>
</tr>
<tr>
<td></td>
<td><strong>Total</strong></td>
<td><strong>13,971.5</strong></td>
</tr>
</tbody>
</table>
Future Hydro Power Station Projects

- Yenan (1200 MW)
- Khaunglanphu (2700 MW)
- Phi Zaw (2000 MW)
- Wu Sauk (1800 MW)
- Laik Zar (1900 MW)
- Chi Phway (2800 MW)
- Manipura (380 MW)
- Upper Buywa (150 MW)
- Laymyo (500 MW)
- Upper Yeywa (2800 MW)
### Transmission Lines

<table>
<thead>
<tr>
<th>kv</th>
<th>Nos. of Lines</th>
<th>Miles</th>
</tr>
</thead>
<tbody>
<tr>
<td>230</td>
<td>20</td>
<td>1186</td>
</tr>
<tr>
<td>132</td>
<td>27</td>
<td>1206</td>
</tr>
<tr>
<td>66</td>
<td>70</td>
<td>1515</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>117</strong></td>
<td><strong>3907</strong></td>
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<table>
<thead>
<tr>
<th>kv</th>
<th>Nos. of Lines</th>
<th>Miles</th>
</tr>
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<tr>
<td>230</td>
<td>15</td>
<td>599.15</td>
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<td>132</td>
<td>6</td>
<td>98.67</td>
</tr>
<tr>
<td>66</td>
<td>2</td>
<td>52.74</td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>23</strong></td>
<td><strong>750.56</strong></td>
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</table>

### Substations

<table>
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<tr>
<th>kv</th>
<th>Nos. of S/S</th>
<th>MVA</th>
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<tr>
<td>230</td>
<td>23</td>
<td>2108</td>
</tr>
<tr>
<td>132</td>
<td>25</td>
<td>1013</td>
</tr>
<tr>
<td>66</td>
<td>52</td>
<td>939</td>
</tr>
<tr>
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<td><strong>100</strong></td>
<td><strong>4060</strong></td>
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<table>
<thead>
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<th>kv</th>
<th>Nos. of S/S</th>
<th>MVA</th>
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<td>230</td>
<td>8</td>
<td>865.0</td>
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<td>132</td>
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<td>5</td>
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<td><strong>Total</strong></td>
<td><strong>15</strong></td>
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(3) Progress in Power Development Program (Cont:)

Under Construction T/L and S/S Projects

<table>
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<td></td>
<td></td>
</tr>
<tr>
<td>Under Con.</td>
<td></td>
<td></td>
<td></td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Sub Stations</th>
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<th>132</th>
<th>66</th>
</tr>
</thead>
<tbody>
<tr>
<td>Existing</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Under Con.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
(3) Progress in Power Development Program (Cont:)

Future T/L & S/S Projects
(3) Progress in Power Development Program (Cont:)

Future National Grid System
Contents

(1) Developments in Institutional / Policy Framework for Electricity Sector

(2) Status of Electricity Demand and Supply

(3) Progress in Power Development Program

(4) Developments in Power Cooperation with GMS Neighbors
Hydro Power Station Projects to Cooperate with other countries

(4) Developments in Power Cooperation with GMS Neighbors

Laik Zar (1,900 MW)
Htamanthi (1,200 MW)
Myitsone (4,100 MW)
Manipu (380 MW)
Shwesaryay (660 MW)
Yenan (1200 MW)
Khaunglanphu (2700 MW)
Wu Sauk (1800 MW)
Chi Phway (2800 MW)
Tapein-2 (168 MW)
Tapein-1 (240 MW)
Upper Thanlwin (1400 MW)
Shweli-1 (6x100 MW)
Shweli-2 (460 MW)
Shweli-3 (360 MW)
Tanintharyi (600 MW)
Shweli-2 (460 MW)
Shweli-2 (460 MW)
Shweli-1 (6x100 MW)
Hutgyi (1360 MW)
Tanintharyi (600 MW)
(4) Developments in Power Cooperation with GMS Neighbors (Cont:)

Shweli(1) Hydropower Co. Ltd. (SHPC)

Department of Hydro Electric Power Implementation (DHPI), MOEP-1
20% equity
10% profit share

Yunnan United Power Development Co. Ltd. (YUPD)
80% equity
90% profit share

15%
PPA

100%

85%
PPA

M.E.P.E Myanmar Power Grid

YPNG Yunnan Power Grid

Joint Venture

Yunnan Machinery & Equipment Import & Export Corp.

Hydro Lancang Co.

Hexing Co. Ltd.

85%
Developments in Power Cooperation with GMS Neighbors (Cont:)

<table>
<thead>
<tr>
<th>Shwe Li Power Station</th>
<th>100 MW x 6 Nos.</th>
</tr>
</thead>
<tbody>
<tr>
<td>No.(1) Machine</td>
<td>75 MW</td>
</tr>
<tr>
<td>No.(2) Machine</td>
<td>100 MW</td>
</tr>
<tr>
<td>No.(3) Machine</td>
<td>100 MW</td>
</tr>
</tbody>
</table>

Commercial Operation between MOEP-2 and YUPD start at 5th, November 2008.

At the moment Myanmar use only free energy 15%.

PPA between MOEP-2 and YUPD is under negotiation. Myanmar shall be entitled to purchase up to 300 MW.

For Cross Border, 72 Hour Test Run successfully finished at (23.10.2008).

Cross Border Commercial Operation does not start yet.

Planned to start the Cross Border Commercial Operation with 100 MW.
“Cooperation for a Better World”

THANK YOU
Updated Status of Thailand Power System

The 7th GMS Focal Group (FG) Meeting
Vietnam, 21st November 2008
Present Status
Total Installed Capacity by Power Producers
(As of October 2008)

<table>
<thead>
<tr>
<th>Power Producer</th>
<th>Capacity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>EGAT</td>
<td>15,021.0 MW</td>
<td>50.3%</td>
</tr>
<tr>
<td>IPP</td>
<td>12,151.6 MW</td>
<td>40.7%</td>
</tr>
<tr>
<td>Lao PDR</td>
<td>340 MW</td>
<td>1.1%</td>
</tr>
<tr>
<td>SPP</td>
<td>2,079.1 MW</td>
<td>7.0%</td>
</tr>
<tr>
<td>Malaysia</td>
<td>300 MW</td>
<td>1.0%</td>
</tr>
<tr>
<td>Malaysia</td>
<td>300 MW</td>
<td>1.0%</td>
</tr>
<tr>
<td>Lao PDR</td>
<td>340 MW</td>
<td>1.1%</td>
</tr>
</tbody>
</table>

Total Install Capacity as October 2008: 29,891.7 MW
Peak Demand on 21 April 2008: 22,568.2 MW
Thailand Fuel Mix for Power Generation in 2007

Total Energy Generation = 146,925 GWh

Included Power Purchased
Updated Future Aspects
Statistical Record of Monthly Peak Power Demand

22,568.2 MW (21 Apr. 08 : 14.30 pm.)

22,586.1 MW (24 Apr. 07 : 14.30 pm)

% = Month to Month Growth

MW
สถิติความต้องการไฟฟ้ารายเดือน

<table>
<thead>
<tr>
<th></th>
<th>JAN</th>
<th>FEB</th>
<th>MAR</th>
<th>APR</th>
<th>MAY</th>
<th>JUN</th>
<th>JUL</th>
<th>AUG</th>
<th>SEP</th>
<th>OCT</th>
<th>NOV</th>
<th>DEC</th>
<th>1–25 ส.ค.</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007</td>
<td>11,256</td>
<td>10,904</td>
<td>13,256</td>
<td>12,223</td>
<td>12,668</td>
<td>12,768</td>
<td>12,577</td>
<td>12,723</td>
<td>12,505</td>
<td>12,500</td>
<td>11,679</td>
<td>11,867</td>
<td>10,226</td>
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<tr>
<td>2008</td>
<td>11,881</td>
<td>11,529</td>
<td>13,288</td>
<td>12,592</td>
<td>13,058</td>
<td>12,785</td>
<td>13,071</td>
<td></td>
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<td></td>
<td></td>
<td>10,445</td>
</tr>
<tr>
<td>% Growth</td>
<td>5.56</td>
<td>5.73</td>
<td>0.24</td>
<td>3.02</td>
<td>3.07</td>
<td>0.13</td>
<td>3.92</td>
<td></td>
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<td>2.14</td>
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</table>

<table>
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<th>MAR</th>
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<th>JUN</th>
<th>JUL</th>
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<th>SEP</th>
<th>OCT</th>
<th>NOV</th>
<th>DEC</th>
<th>1–25 ส.ค.</th>
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</thead>
<tbody>
<tr>
<td>2007</td>
<td>11,256</td>
<td>22,159</td>
<td>35,416</td>
<td>47,638</td>
<td>60,307</td>
<td>73,075</td>
<td>85,652</td>
<td>98,375</td>
<td>110,88</td>
<td>123,38</td>
<td>135,05</td>
<td>146,92</td>
<td>95,878</td>
</tr>
<tr>
<td>2008</td>
<td>11,881</td>
<td>23,410</td>
<td>36,698</td>
<td>49,290</td>
<td>62,348</td>
<td>75,132</td>
<td>88,203</td>
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<td></td>
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<td></td>
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<td>98,647</td>
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<tr>
<td>% Growth</td>
<td>5.56</td>
<td>5.64</td>
<td>3.62</td>
<td>3.47</td>
<td>3.38</td>
<td>2.82</td>
<td>2.98</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2.89</td>
</tr>
</tbody>
</table>

Approximate Growth of 2008 over 2007 = 2.9%
Preliminary Assumption for the Revision of Demand Forecast

Tentative Forecast of August 2008

1. Energy Growth Rate
   - 2008 = 2.9 %
   - 2009 = 4.8 %
   - 2010 - 2021 Same Growth Rate as Previous Forecast

2. Peak Power Demand
   - Use Actual Demand of 2008 = 22,568.2 MW as initial point

3. Load Factor = Previous Forecast
By end of 2011, Decrease in Energy Demand = 7,017 GWh
By end of 2016, Decrease in Energy Demand = 9,389 GWh
Decrease in Power Demand

- 2008: -1,389 MW
- 2011: -1,076 MW
- 2016: -1,436 MW
- 2021: -1,881 MW
System Reserve Margin

- PDP2007: Revision 1 (Tentative Load)
- PDP2007: Revision 1 (Previous Load)

Year | Reserve Margin
--- | ---
2008 | 28.9%
2009 | 26.4%
2010 | 28.2%
2011 | 23.6%
2012 | 22.7%
2013 | 23.8%
2014 | 21.1%
2015 | 21.9%
2016 | 19.7%
2017 | 17.2%
2018 | 16.6%
2019 | 15.5%
2020 | 17.3%
2021 | 16.2%

25/11/2008
## Power Development Plan (2009 - 2013)

<table>
<thead>
<tr>
<th>Year</th>
<th>PDP2007_Rev1 (Jan 08)</th>
<th>Expected Revision</th>
</tr>
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<tbody>
<tr>
<td></td>
<td>Project Name</td>
<td>MW</td>
</tr>
<tr>
<td>2009</td>
<td>EGAT's SB CC # 3</td>
<td>715</td>
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<tr>
<td></td>
<td>EGAT's BPK CC # 5</td>
<td>719</td>
</tr>
<tr>
<td></td>
<td>PP (Nam Theun 2)</td>
<td>920</td>
</tr>
<tr>
<td>2010</td>
<td>SPP</td>
<td>225</td>
</tr>
<tr>
<td></td>
<td>RPS</td>
<td>33</td>
</tr>
<tr>
<td>2011</td>
<td>SPP</td>
<td>25</td>
</tr>
<tr>
<td></td>
<td>PP (Nam Ngum 2)</td>
<td>596</td>
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<tr>
<td>2012</td>
<td>SPP (Gheco)</td>
<td>245</td>
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<td></td>
<td>IPP Coal (Gheco)</td>
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<td></td>
<td>IPP Gas (Siam Energy) # 1</td>
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<td>PP (Theum Hin Boun)</td>
<td>220</td>
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<td>2013</td>
<td>SPP</td>
<td>200</td>
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<tr>
<td></td>
<td>IPP Gas (Siam Energy) # 2</td>
<td>800</td>
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<td>IPP Coal (NPS) # 1-4</td>
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<td></td>
<td>EGAT's BPK CC # 6</td>
<td>700</td>
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<tr>
<td></td>
<td>PP (Hong Sa # 1)</td>
<td>490</td>
</tr>
<tr>
<td></td>
<td>PP (Nam Ngum 3)</td>
<td>440</td>
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<tr>
<td></td>
<td>Power purchased from neighboring countries</td>
<td>450</td>
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# Power Development Plan (2014-2016)

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<th>Year</th>
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<tbody>
<tr>
<td></td>
<td>Project Name</td>
<td>MW</td>
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<tr>
<td>2014</td>
<td>SPP</td>
<td>200</td>
</tr>
<tr>
<td></td>
<td>PP (Hong Sa # 2-3)</td>
<td>2x490</td>
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<td>PP (Nam Theun 1)</td>
<td>523</td>
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<td>PP (Nam Ou # 1)</td>
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<td>PP (Nam Ngiep)</td>
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<td>SPP</td>
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<td>PP (Nam Ou # 2)</td>
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<td>EGAT's Coal # 1</td>
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<td>2016</td>
<td>SPP</td>
<td>200</td>
</tr>
<tr>
<td></td>
<td>EGAT's Coal # 2-3</td>
<td>2x700</td>
</tr>
</tbody>
</table>
On-going Projects

- **Nam Theun 2 Project** 920 MW :
  - PPA November 2003
  - Project will be completed in **November 2009**

- **Nam Ngum 2 Project** 615 MW :
  - PPA May 2006
  - Project will be completed in **December 2010**
On-going Projects (Continued)

- Theun Hinboun (Expansion) Project 220 MW:
  - PPA December 2007
  - Project will be completed in March 2012
GREATER MEKONG SUBREGION

Regional Power Trade Coordination Committee (RPTCC)

SIXTH MEETING OF THE PLANNING WORKING GROUP (PWG - 6)

PROGRESS OF VIETNAM POWER DEVELOPMENT PLAN AND TRANSMISSION INTERCONNECTION PROJECT

HO CHI MINH CITY, VIETNAM 21ST NOVEMBER 2005
Power Generation

Annual Growth rate (2001-2007):
- Generation output: 14.1%
- Energy sale: 14.5%
- Peak demand: 12.2%
- Installed Capacity 11.7%

- EVN power plant projects:
- 33 projects under construction
- 7 projects being prepared for construction starting from 2009-2010
Total installed capacity of Power Plants as of 2007: 13512 MW
Peak Demand Oct. 2008: 11605 MW
Till now the new additional capacity of 883 MW; Total estimated new capacity in 2008: 1738 MW
TRANSMISSION grid & RURAL ELECTRIFICATION

By the end of 2007

500 KV
- Lines: 3.286 km
- Substations: 7.050 MVA

220 KV
- Lines: 6.490 km
- Substations: 17.500 MVA

110 KV
- Lines: 11,400 km
- Substations: 22,200 MVA

RURAL ELECTRIFICATION (3/2008)

<table>
<thead>
<tr>
<th></th>
<th>Province</th>
<th>District</th>
<th>Village</th>
<th>Rural HHs</th>
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</thead>
<tbody>
<tr>
<td>Province</td>
<td>100%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>District</td>
<td>100%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Village</td>
<td></td>
<td></td>
<td>97.2%</td>
<td></td>
</tr>
<tr>
<td>Rural HHs</td>
<td></td>
<td></td>
<td></td>
<td>93.6%</td>
</tr>
</tbody>
</table>
Power consumption period 2001-2007

Energy consumption 2001

- Residential Consumption: 48%
- Industry: 41%
- Commerce: 5%
- Agriculture: 2%
- Others: 4%

Energy consumption 2007

- Residential Consumption: 41%
- Industry: 50%
- Commerce: 5%
- Agriculture: 1%
- Others: 3%
## Expected Schedule of Hydropower Projects in Lao PDR

<table>
<thead>
<tr>
<th>Name of Projects</th>
<th>Capac. MW</th>
<th>Commissioned</th>
<th>Developers</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Xe kaman 3</td>
<td>250</td>
<td>2010</td>
<td>EDL-VietLao PJS</td>
<td>Under Contr.</td>
</tr>
<tr>
<td>Xe kaman 1</td>
<td>290</td>
<td>2012-2013</td>
<td>VietLao PJS</td>
<td>Preparing for start construction</td>
</tr>
<tr>
<td>Luong Pha Bang</td>
<td>1410</td>
<td>2015-2016</td>
<td>Lao-PVN-Song Da Co</td>
<td>F/S on-going; Connection plan has been submitted to MOIT (VN) &amp; MEM (Laos)</td>
</tr>
<tr>
<td>Xe kaman 4&amp;4A</td>
<td>74+69</td>
<td>2013</td>
<td>Lao &amp; VietLao PJS</td>
<td>Pre-F/S on-going</td>
</tr>
<tr>
<td>Xe Kong 3 upper</td>
<td>152</td>
<td>2014-2015</td>
<td>VietLao PJS</td>
<td>PreF/S on-going</td>
</tr>
<tr>
<td>Xe Kong 3 down</td>
<td>96</td>
<td>2014-2015</td>
<td>VietLao PJS</td>
<td>PreF/S on-going</td>
</tr>
<tr>
<td>Nam Et 1,2,3</td>
<td>420</td>
<td>TBD</td>
<td>EVN-Sovico</td>
<td>Planning</td>
</tr>
<tr>
<td>Nam Mo</td>
<td>105</td>
<td>2012</td>
<td>VN developer</td>
<td>PreF/S</td>
</tr>
<tr>
<td>Nam Kan</td>
<td>66</td>
<td>TBD</td>
<td>EVN-…</td>
<td>PreF/S on-going</td>
</tr>
<tr>
<td>Nam Kong 2</td>
<td>70</td>
<td>2014</td>
<td>EVN-Cavico</td>
<td>Planning</td>
</tr>
<tr>
<td>Xe Xou</td>
<td>60</td>
<td>2013</td>
<td>EVN-Cavico</td>
<td>Planning</td>
</tr>
<tr>
<td>Xe kaman 2&amp;2A</td>
<td>100+64</td>
<td>2015</td>
<td>VN developer</td>
<td>PreF/S on-going</td>
</tr>
<tr>
<td>Dak E Meul Upper</td>
<td>23</td>
<td>2014-2015</td>
<td>Lao &amp; VietLao PJS</td>
<td>Planning</td>
</tr>
<tr>
<td>Dak E Meul Mid</td>
<td>115</td>
<td>2014-2015</td>
<td>Lao &amp; VietLao PJS</td>
<td>Planning</td>
</tr>
<tr>
<td>Xe kaman Xanxay</td>
<td>32</td>
<td>2012</td>
<td>Lao &amp; VietLao PJS</td>
<td>Planning</td>
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<tr>
<td>SeKong 4</td>
<td>300</td>
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<td>Region Oil &amp; Others</td>
<td>F/S on-going</td>
</tr>
<tr>
<td>SeKong 5</td>
<td>400</td>
<td>TBD</td>
<td>Region Oil &amp; Others</td>
<td>F/S on-going</td>
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<tr>
<td>Nam Kong 1</td>
<td>100</td>
<td>TBD</td>
<td>Region Oil &amp; Others</td>
<td>F/S on-going</td>
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<tr>
<td>HPPs in Nam Xam river</td>
<td>700</td>
<td>TBD</td>
<td>Vinashin &amp; Others</td>
<td>Planning</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>4896</strong></td>
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</table>
## expected schedule of Hydropower Projects in cambodia

<table>
<thead>
<tr>
<th></th>
<th>Name of Projects</th>
<th>Capac. MW</th>
<th>Commissioned</th>
<th>Developers</th>
<th>Remarks</th>
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<tbody>
<tr>
<td>1</td>
<td>SeSan 1</td>
<td>90</td>
<td>2012-2013</td>
<td>EVNI-Cambodia PJ S</td>
<td>F/S ongoing; Connection plan has been submitted to MOIT (VN) &amp; MIME (Cambodia)</td>
</tr>
<tr>
<td>2</td>
<td>Low Sesan 2</td>
<td>420</td>
<td>2013-2014</td>
<td>EVNI-Cambodia PJ S</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Low Sesan 3</td>
<td>180</td>
<td>2015-2016</td>
<td></td>
<td>Planning</td>
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<tr>
<td>4</td>
<td>Prekliang</td>
<td>128</td>
<td>2015-2016</td>
<td></td>
<td>Planning</td>
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<tr>
<td>5</td>
<td>SamBor</td>
<td>467</td>
<td>2018-2019</td>
<td></td>
<td>Planning</td>
</tr>
<tr>
<td>6</td>
<td>Lower Srepok HPPs</td>
<td>~300MW</td>
<td>TBD</td>
<td></td>
<td>Planning</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td><strong>1685</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
progress of transmission / interconnection planning
HPPs in the north of lao pdr - connection plan

option 1
HPPs in the north of lao pdr - connection plan

option 2 (proposed)
HPPs in the south of lao pdr - connection plan

**option 1**

- **ALTERNATIVE 1**
  - Dak E Muele Midstream
  - Xekaman 3
  - Xekaman 4
  - Xekaman 2
  - Xekaman 4A
  - Dak E Muele Upstream
  - Sekong 3 – Up stream
  - Sekong 3 – Down stream
  - Xekaman Xamxay
  - xExou
  - BANSOK
  - THANH MY
  - PLEIKU
  - VIETNAM

**the alternatives of 220kv connection**

**option 2**

- **ALTERNATIVE 4**
  - Dak E Muele Midstream
  - Xekaman 3
  - Xekaman 4
  - Xekaman 2
  - Xekaman 4A
  - Dak E Muele Upstream
  - Sekong 3 – Up stream
  - Sekong 3 – Down stream
  - Xekaman Xamxay
  - xExou
  - BANSOK
  - THANH MY
  - PLEIKU
  - VIETNAM
  - SongTranh 2
HPPs in the south of lao pdr - connection plan

**option 3**

**ALTERNATIVE 2**
- Dak E Muele Midstream
- LAO PDR
- VIETNAM
- THANH MY

**Sekong 3 – Up stream**
- Dak E Muele Upstream
- Xekaman 3
- Xekaman 4
- Xekaman 4A

**BANSOK**
- Xekaman 2
- Sekong 3 – Down stream
- Xekaman 1
- XeXou
- Xekaman Xanxay

**option 4**

**ALTERNATIVE 3**
- Dak E Muele Midstream
- LAO PDR
- VIETNAM
- THANH MY

**Sekong 3 – Up stream**
- Dak E Muele Upstream
- Xekaman 3
- Xekaman 4
- SongTranh 2

**BANSOK**
- Xekaman 2
- Xekaman 4A
- Xekaman 2A
- Sekong 3 – Down stream
- Xekaman 1
- XeXou
- Xekaman Xanxay

**PLEIKU**
HPPs in the south of lao pdr - connection plan

**option 5**

**ALTERNATIVE 5**
- Dak E Muele Midstream
- Dak E Muele Upstream
- Sekong 3 – Up stream
- Xekaman 1
- Xekaman 2
- Xekaman 2A
- Xekaman 3
- Xekaman 4
- Xekaman 4A
- SongTranh 2
- BANSOK
- Sekong 3 – Down stream
- Xekaman Xanxay
- XeXou
- PLEIKU
- THANH MY
- VIETNAM
- LAO PDR

**option 6 (proposed)**

**ALTERNATIVE 6**
- Dak E Muele Midstream
- Dak E Muele Upstream
- Sekong 3 – Up stream
- Xekaman 1
- Xekaman 2
- Xekaman 2A
- Xekaman 3
- Xekaman 4
- Xekaman 4A
- SongTranh 2
- BANSOK
- Sekong 3 – Down stream
- Xekaman Xanxay
- XeXou
- PLEIKU
- THANH MY
- VIETNAM
- LAO PDR

The alternatives of 500 + 220kv connection
HPPs in the south of lao pdr - connection plan

option 6 (proposed)

- A Transmission JSC to be setup by VN & Laos to develop/operate the section from 500kV Bansok S/S to Viet-Lao Border
- 500kV line section from border to Pleiku S/S to be constructed by EVN
HPPs in cambodia - connection plan

connection plan of low se san i & low se san ii (proposed)

Disadvantages
- Capacity transmission limited
  (can not evacuate capacity from the other HPPs)
VN-Lao-cambodia connection plan

option 1
VN-Lao-cambodia - connection plan

option 2
Thank you
GMS Regional Coordination in the Power Sector
Contributions from AFD

RPTCC 7, November 21, 2008
Ho Chi Minh City, Vietnam

Alexis BONNEL
Head, Infrastructure and Environment Division
Agence Française de Développement
Who are we? AfD Group

- French ODA Agency: Public Co & Bank
  - AfD
  - PROPARCO: financing of the private sector
  - French GEF secretariat

- Present in 80+ countries

- USD 3 billion of ODA committed in 2007
  - 3.5 billion in 2008
    - Energy agenda ~ 40%
    - Asia ~ 25%

- Wide range of financing tools
  - Equity financing
  - Private sector loans
  - Partial risk guarantees, loan guarantees
  - Guarantees on loans in local currency
  - Non sovereign loans
    - (concessional or market conditions)
  - Sovereign loans
    - (from very concessional to market conditions)
  - Grants (projects, study funds)

- Untied aid

3 constraints impose new energy strategies, in developed + developing economies
- World (re)discovering energy market tensions and high prices / fossil energy shortage
- Climate change + growing local impacts
- Energy security and long term sustainability needs

Change energy (not climate)
« (C)lean and sustainable »
- Demand side management
- Energy efficiency
- Renewable energy diversification & scaling up

Market essentially driven by oil prices providing wrong signals?
- “Business as usual” approach not sustainable
- Additional incentives needed => role for policy makers, development partners, … & RPTCC, dealing with 250 GW of new capacity in coming 25 years
AFD in the GMS energy sector

- **Project preparation financing**
  - PPTA on grant basis
    - through Country based study funds
    - through specific GMS Project Preparation Fund located within AdB

- **Investment financing**
  - **Sovereign or non sovereign** soft loans
  - **Private sector** financing: loans, equity, guarantee schemes (PROPARCO)

- **Specific support to the development of Regional Coordination**
  - Technical assistance
  - Additional grant financing from **French GEF** if related to environmental issues
AFD support to RPTCC

1 M EUR grant committed in 2005

Regional Technical Assistance (RETA 6304) managed by AdB

Scope of RETA 6304:
- Regional performance standards
- Interconnection methodology
- Transmission regulation
- Database and website
- Regional master plan
- Training & capacity building
Views on program achievements

- Quality of studies, triggering methodological debates among GMS countries & development partners
- Good **coordination** between GMS countries AdB and other development partners
- More concrete **decisions / commitments** from GMS countries still to come
- Importance of a regularly updated & **validated** Regional Master Plan
  - Predictability & long term visibility on prioritized investments key to consolidate economic confidence among stakeholders
  - Key tool to support **stronger policy making** needed to address huge energy challenges to come
Future collaboration?

- Based on RPTCC development matrix & RETA 6440
- Improve resilience of regional power system to risks and external shocks (1/2)
  - Broaden scope of economic analysis of RPTCC activities
    - “Business as usual” approaches may generate short term gains, but might increase medium-long term risk exposure
    - Fully developed SEA approach applied to regional planning can still lead to short term gains while reinforcing medium-long term resilience
  - Develop economic/planning methodologies that better factor:
    - depletion of fossil energy resources
    - environmental externalities (local & global)
    - shortage of financing resources to carry out investments?
    - consistent with scale of GMS and long term economic/social/environmental objective of GMS integration
Future collaboration ?

- Improve resilience of regional power system to risks and external shocks (2/2)
  - Include Demand Side Management / Energy Efficiency in Regional Master Plan
    - key to reinforce resilience
    - huge sensitivity to demand scenarios
    - financial crisis = additional reason to address demand side issues
  - Assess Carbon Footprint of different regional power trade development scenarios / of projects
  - Look at possible methodologies to access Carbon Finance ? (AICD study : GHG emissions avoided through interconnections in Africa ~ total impact of all CdM projects in continent ~ 40 M tCO2eq)
  - Adaptation : carry out Climate Change Vulnerability Analysis (e.g.: evolution of hydro flows ? sensitivity on Master Plan)
  - Link with Subregional Energy Forum/Environment Operations Center
Future collaboration?

- Build on RPTCC’s achievements to further develop cross-capitalization and best practice dissemination among GMS members

- Training/capitalization: topics not yet addressed by RPTCC?
  - Renewable energy
  - Demand side management and energy efficiency
    Regional power coordination = not only about coordinating supply, also demand side issues
  - Importance of Regional “nega-Watt” generation
(C)lean Energy: an “energy service” approach

(C)LEAN ENERGY MANAGEMENT

BUSINESS AS USUAL

Primary energy
-------------------
Fossil coal, gas, oil
Fissile nuclear power

Final energy
-------------------
Electricity
Heat
Fuel

Energy services
-------------------
Industry
Transport
Residential / Commercial

Transformers (end-uses)

Renewables
Wind, solar, hydro, geothermal

Biomass

Energy efficiency

Demand side management
Human development index & Electricity consumption per capita

Source: AIE
Financing resources for RPTCC

- Feasibility studies
  - Country based study funds
  - GMS Project Preparation Fund

- Advisory Technical Assistance
  - Direct grant financing of specific activities, complementing RETA 6440
    - e.g. Regional workshop on energy efficiency / demand side management / renewable energy scaling up?
  - Submit proposal to French GEF on further inclusion of environmental issues at regional planning level (SEA)
    - e.g. reinforce links between Components 2 & 1 under RETA 6440?
  - New RETA? Depending on needs beyond RETA 6440
Thank you...
Fossil energy depletion

Source: Exxon Mobil, 2002
Fossil energy depletion

estimations basses et hautes des ressources ultimes depuis 1970

Source: J-M. Jancovici 2008
1 Gtoe = 1 billion tons equivalent oil. Annual world energy consumption in 2005 was of about 10 Gtep

Total proven reserves: 800 Gtoe, 4000 Gtoe maximum including possible.

Source IFP
Fossil fuel depletion

Quelles énergies pour demain ?
(demande tendancielle)

Source : Bernard Rogeaux, EDF, décembre 2007

Energy shortage

Liquid energy shortage

2000 Gtec (R/P=460 ans)

Source : Bernard Rogeaux, EDF, décembre 2007
Change energy, not climate

Primary energy consumption
Scenario *Business as usual*

Not enough energy resources for growth

Fossil resources too abundant for climate change

Source: IEA

« Decarbonizing » energy consumption

Development of global primary energy consumption under the [r]evolution scenario

Energy-related CO2 emissions in the 450 Stabilisation case

Source: Greenpeace

Source: OCDE
Oil price (constant 2004 US$)
Energy consumption / capita (tep/person) ..... X 10
vs. World GDP
Implications on development models?

- **Growth not sustainable since industrial revolution**
  - Under-tariffication of goods and services
  - Many externalities not accounted for (there is no “free ride”)
    - local and global environment
    - finitude of natural resources
      - non renewable or on extremely long cycles
      - demographic explosion + explosion of per capita demand
  - Cost of inaction on climate = 20% of world GDP by 2200
  - Cost of action = 1 to 3% of world GDP (Stern report)

- **Climate = opportunity for sustainable growth**
  - Technical, economic social and natural capital
  - Revisit economic models: “negative” discount rate on natural capital stock
  - Demand side management = condition of future economic development in a context of scarce and costly resources
Measuring carbon footprint

- **Internal (direct project emissions)**
- **Intermediary**
- **Upstream**
- **Internal & Downstream**
- **Global Carbon Footprint**
Le Bilan Carbone® de l’AFD

Dans le cadre de ses engagements en faveur du développement durable et de la lutte contre le changement climatique, l’AFD s’est dotée de deux outils simplifiés d’analyse des émissions de gaz à effet de serre des projets de développement et de la vulnérabilité de ces derniers face aux effets des changements climatiques. L’objectif est de permettre aux responsables des projets financés par l’AFD d’analyser le contenu en carbone et d’enrichir le concept des projets par une prise en compte du changement climatique.

Le premier outil permet aux personnes qui instruisent des projets de développement de quantifier l’ordre de grandeur des émissions des projets durant les phases d’investissement et de fonctionnement. Pour la plupart des projets, le calcul pourra être fait avec quelques données de base (de 5 à 10) saisies dans des menus déroulants pour faciliter le travail. Un manuel guide l’utilisateur de ce tableau Excel adossé à une base de données adaptée. Cette évaluation donne un premier ordre de grandeur des émissions de CO₂eq des projets, permettant de poursuivre l’analyse sur les possibilités de réduction de ces émissions si cela est pertinent (comparer les coûts...).
## Titre, pays et numéro du projet

### Hypothèses sur l’évolution du projet

- Durée du projet: ans
- Taux de croissance annuel moyen des émissions
- Taux d’actualisation

### Financement AFD

- Financement AFD (global actualisé) millions d’euros
- Représentant du coût total

### Calcul des émissions

#### > Emissions de mise en place du projet : combustibles fossiles utilisés pour le génie civil

<table>
<thead>
<tr>
<th>Combustible</th>
<th>Tons</th>
<th>Equivalant C avec amont sans amont</th>
<th>Tons</th>
<th>Equivalant C avec amont sans amont</th>
<th>Tons</th>
<th>Equivalant C avec amont sans amont</th>
<th>Tons</th>
<th>Equivalant C avec amont sans amont</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gazole</td>
<td>968</td>
<td>0,087</td>
<td>951</td>
<td>0,087</td>
<td>968</td>
<td>0,087</td>
<td>1116</td>
<td>0,097</td>
</tr>
<tr>
<td>Supercarburant (ARS, SP95, SP98)</td>
<td>1025</td>
<td>0,084</td>
<td>1076</td>
<td>0,081</td>
<td>1126</td>
<td>0,089</td>
<td>1126</td>
<td>0,089</td>
</tr>
<tr>
<td>Huile lourd</td>
<td>1498</td>
<td>0,080</td>
<td>1508</td>
<td>0,080</td>
<td>1698</td>
<td>0,080</td>
<td>1698</td>
<td>0,080</td>
</tr>
</tbody>
</table>

#### > Emissions de mise en place du projet : matériaux de construction utilisés

<table>
<thead>
<tr>
<th>Matériaux</th>
<th>Tons utilisés</th>
<th>Equivalant C avec amont sans amont</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aluminium recyclé 100%</td>
<td>670</td>
<td>0</td>
</tr>
<tr>
<td>Acier ou fer blanc neuf</td>
<td>870</td>
<td>0</td>
</tr>
<tr>
<td>Zinc</td>
<td>800</td>
<td>0</td>
</tr>
</tbody>
</table>

#### > Emissions de fonctionnement : combustibles fossiles consommés par les locomotives

<table>
<thead>
<tr>
<th>Combustible</th>
<th>Tons</th>
<th>Equivalant C avec amont sans amont</th>
<th>Tons</th>
<th>Equivalant C avec amont sans amont</th>
<th>Tons</th>
<th>Equivalant C avec amont sans amont</th>
</tr>
</thead>
<tbody>
<tr>
<td>Houille (PCS&gt;23 865 kJ/kg)</td>
<td>728</td>
<td>0,101</td>
<td>1169</td>
<td>0,101</td>
<td>1169</td>
<td>0,101</td>
</tr>
<tr>
<td>Lignite (PCS&lt;17 435 kJ/kg)</td>
<td>501</td>
<td>0,106</td>
<td>1237</td>
<td>0,106</td>
<td>1237</td>
<td>0,106</td>
</tr>
<tr>
<td>Gazole</td>
<td>911</td>
<td>0,082</td>
<td>1011</td>
<td>0,082</td>
<td>1011</td>
<td>0,082</td>
</tr>
<tr>
<td>Huile lourd</td>
<td>968</td>
<td>0,087</td>
<td>1016</td>
<td>0,087</td>
<td>1016</td>
<td>0,087</td>
</tr>
</tbody>
</table>

#### > Emissions de fonctionnement : électricité de réseau directe

<table>
<thead>
<tr>
<th>Pays de consommation</th>
<th>Kg équivalent C par kWh</th>
<th>1 éq. C / kWh</th>
</tr>
</thead>
<tbody>
<tr>
<td>Afrique du Sud</td>
<td>0,129</td>
<td>0</td>
</tr>
<tr>
<td>Angola</td>
<td>0,182</td>
<td>0</td>
</tr>
<tr>
<td>Jordanie</td>
<td>0,202</td>
<td>0</td>
</tr>
<tr>
<td>Sénégal</td>
<td>0,224</td>
<td>0</td>
</tr>
<tr>
<td>Vietnam</td>
<td>0,116</td>
<td>0</td>
</tr>
</tbody>
</table>

#### Pertes en ligne de l’électricité

<table>
<thead>
<tr>
<th>Rapport par kWh</th>
<th>K équivalent C par kWh</th>
<th>Taux de déperdition</th>
<th>1 éq. C / kWh</th>
</tr>
</thead>
<tbody>
<tr>
<td>10%</td>
<td></td>
<td></td>
<td>0</td>
</tr>
</tbody>
</table>
Prise en compte de la contrainte énergie-climat dans les projets financés
Analyse de la vulnérabilité

MANICORE
Jean-Marc Jancovici
20 rue Georges Clemenceau
91400 ORSAY
www.manicore.com

décembre 2006