



Policy brief
The Geopolitical Duality of Power in South Sudan: An Analysis of Regional Energy Initiatives

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Executive Summary

South Sudan's emergence into regional energy politics, as seen by its long-frozen power deal with Uganda and its recent announcement to import electricity from Ethiopia, is an integral two-way gauge of its own internal crisis of governance and its evolving external diplomatic strategy. The failure of South Sudan-Uganda power deal since its Memorandum of Understanding in 2015 is a grim reflection of long-standing domestic issues, including weak institutions, tight budgets, and political will and economic uncertainty culture. The major pronouncement by the President Salva Kiir to import power from Ethiopia dam is a diplomatic strategic move. This public declaration of intention is meant to signal a diversification of regional alignments, take advantage of a new relationship to meet national energy needs, and reduce an over-reliance on a historical relationship with Uganda.

The distinction between these two paths highlights the precarious position of South Sudan as a junior partner beholden to the fraught geopolitical interests of two of the most dominant states in the region. The failure of the Uganda deal is an issue of political and institutional fact, while the deal with Ethiopia is currently more of an issue of political rhetoric and strategic publicity. The success of the deal with Ethiopia, as opposed to the Ugandan prototype, relies less on a proven bilateral security relationship and more on the shared vision of pan-African economic integration. Were it is to succeed, this new vision would have the potential to redefine South Sudan's regional standing and serve as a long-sought impetus to regional development, moving beyond a security-centered paradigm to one based on economics.

Introduction:

The Interplay of Energy, Governance, and Geopolitics in South Sudan

South Sudan remains among the least electrified nations on earth, with an estimated grid access rate for electricity of a mere 5.4% by a 2022 World Bank report and 8.4% IRENA report in 2023. This is among the lowest rates anywhere and is down from even lower in past years. Unreliable electricity is a root development constraint for over 11 million people, with approximately 70% of the population relying on traditional biomass fuels to satisfy their cooking and heating needs. Power that is available is expensive, carbon-based, and concentrated in and around the capital, Juba, where tariffs are among the regions highest at around \$0.40 per kWh. The country's power mix has become 100% thermal, powered by imported diesel generators, a costly and environment-hostile tradition exacerbated by civil strife, hyperinflation, and insecure supply routes. The Government of South Sudan's pursuit of gargantuan power import schemes is therefore as much a technical or economic endeavor as a significant indicator of a country's capacity for development, a government's stability, and the nature of its foreign relations.

The bifurcation of the derailed Uganda agreement and the publicly stated Ethiopia agreement offers a new lens through which to study South Sudan's internal issues and its changing strategic foreign policy. It forces reflection on domestic failure's effect on foreign relations and how a government can use foreign pronouncements to generate an illusion of forwardness. To offer an introductory insight into the nation's energy dilemma, the next table presents an overview of major figures of the sector in question.

Part I: The Domestic Basis of Regional Relations

The South Sudanese Energy Paradox

South Sudan's energy economy is dominated by a stark paradox: it is one of the world's least electrified countries while possessing enormous renewable energy endowments. Natural resources of the country consist of five high-potential hydropower locations along the Nile River with the potential to generate power of up to 2,600 MW, as well as rich solar energy resources with much of the country receiving yearly global irradiation of over 5.0 kWh/m² \$. The potential is yet to be tapped. The government's Revised National Development Strategy (R-NDS) 2021-2024 puts the Fula hydropower project, a 1080 MW project, at the top priority but has not yet started construction due to financial challenges despite the initial funding appropriation. This failure to develop a flagship domestic project is a symptom of deeper systemic issues.

Systemic Barriers to Infrastructure Development

The freezing of key national infrastructure projects, including the Fula dam, is symptomatic of a profound governance and institutional failure in South Sudan.

The country's political instability and economic meltdown, which have been accompanied by hyperinflation and serious hard currency shortages, have rendered it extremely difficult to maintain currently existing infrastructure, let alone mobilize the funds needed for new projects. It is compounded by a legislative and regulatory vacuum. The "South Sudan National Electricity Bill 2015" aimed to create a standalone electricity regulator that would oversee all aspects of the sector, from generation to import and export. However, the bill is pending, and the electricity sector continues to be governed by the "Southern Sudan Electricity Corporation Act, 2011". This is aged legislation, and it does not clarify what functions of the government are as a policymaker, regulator, and operator, a lack of institutional clarity which renders it unattractive and confusing to attract large-scale foreign investment. The absence of an explicit and independent regulatory body directly discourages mobilization of capital adequate for building large projects. With an unstable and poorly regulated system in place, South Sudan is deemed too risky a location by international financiers and development actors.

This creates a self-reinforcing cycle whereby a poorly capacity state cannot invest in basic infrastructure, which contributes to its economic and political weakness. The extra-regional power import schemes, therefore, are as much a response to energy needs as they are an attempt to bypass this very internal governance deficiency. This is also supported by the present deal with Sudan, where South Sudan is charged for 40 MW of imported electricity but uses only 5% of the same due to the failure to build the necessary transmission lines and distribution networks. This is the height of institutional incompetence which has resulted in huge financial wastage.

Part II: The Uganda Interconnection: A Decades-Long Stalled Ambition

Historical and Strategic Context

There is a long-standing historical cultural, political, and economic bond between Uganda and South Sudan. Uganda's President Yoweri Museveni was personally close to the late SPLA leader John Garang and openly supported South Sudan's secession from Sudan. This formed the background to a post-independence relationship under which Uganda had been regarded as a vital security guarantor and a most significant trading partner to the nascent nation. There have been strong economic relations with South Sudan emerging as the largest importer of Ugandan commodities valued at an estimated \$900 million in business.

The Proposed Uganda-South Sudan Power Project (SUPIP)

The two nations, in 2015, entered into a Memorandum of Understanding (MOU) with a project to build a 400kV transmission line, the South Sudan-Uganda Power Interconnection Project (SUPIP), connecting Gumbo village on Juba to Olwiyo in Uganda. The estimated \$260 million project was formally approved for financing by the African Development Bank (AfDB) in December 2024. The AfDB approved a loan of \$119.21 million to Uganda and a grant of \$32.50 million to South Sudan, with the view to providing clean, sustainable, and affordable power to virtually 300,000 people and integrating South Sudan into the East African Power Pool network.

Analysis of Delays and Failures.

Despite the formal project proposal and latest endorsement of funding, huge delays have haunted the endeavor since the 2015 MOU. The agonizingly slow progress is not a matter of economic or technical impossibility but a sign of the very nature, asymmetrical in character, of the Juba-Kampala relationship, further compounded by South Sudan's chronic institutional and security fragility. The scales are weighed heavily in Uganda's favor, with Kampala often acting as security guarantor and playing significant political strings on Juba through military intervention and economic leverage. Security is the central concern of the Ugandan state, looking for a friendly "junior partner" in Juba to avoid proxy war and forces that might destabilize the domestic situation. While this political will exists, it is not sufficiently robust to overcome the profound physical and institutional barriers within South Sudan. According to the World Bank, the trade connection is hindered by sluggish customs clearance, weak staff capacity, poorly maintained roads, and other forms of informal payments and roadblocks that drive up costs. These systemic issues make big-scale infrastructural projects virtually unfeasible to execute and financially hazardous to all involved stakeholders. Inability to build the Renk-Malakal power transmission line after importing power from Sudan is an earlier case study to this institutional paralysis; according the policy brief by Aban Ayik by 2022 Rent was only using 5% of the imported electricity from Sudan in which the project was sustainable on paper, but the "on-the-ground" reality of sick state put the completion of the project on hold. Thus, SUPIP delay is an inevitable outcome of such high-risk systemic conditions that have put the project on hold for nearly a decade, and recent financing will not eliminate such entrenched issues.

Part III: The Ethiopia Interconnection: A New Diplomatic Pivot

Historical and Diplomatic Context

Ethiopia's past with South Sudan is based on past support to the Southern Sudan cause and a long-standing role as a regional mediator. Ethiopia was the first major nation to extend recognition to the sovereignty of South Sudan in 2011 and has always highlighted regional peace and economic integration. This background history, begun in 1972 with the Addis Ababa Agreement, is the starting point from which to build a new style of partnership founded on joint economic prosperity and not security and trading domination.

The GERD Inauguration and the Juba-Addis Pledge

In the course of commissioning the Grand Ethiopian Renaissance Dam (GERD), a project of supercontinent scale, President Salva Kiir made a public announcement that South Sudan was "soon going to import power from the dam. It was done in a ceremony attended by other leaders in the region like Kenya's President William Ruto, who also made the same declarations. Kiir welcomed the dam as a "symbol of unity, sacrifice, and determination" and evidence of what could be achieved if a nation pulled together behind a shared vision, a sharp alignment with a narrative of African-led development.

Deconstructing the New Initiative.

Although the news had extensive public scrutiny, the available information indicates that no report of any terms, capacity, or timeline of the possible agreement to be made. The lack of this type of transparency is in stark contrast to the Uganda deal, for years where there have been available reports of detailed projects, financing agreements, and transmission lines. The GERD, a cause of regional tension, is also a powerful new assertion of soft power on the part of Ethiopia. The public announcement of the power deal between Ethiopia, even if it is not current in its substance, is a deliberate diplomatic action by South Sudan seeking to diversify its geopolitical ties and reduce its excessive reliance on its historical ally, Uganda. The Kampala relationship has a taint of suspicion and dependency, as evidenced by the collapse of the power deal. In contrast, Ethiopia's GERD project is a shining exemplar of regional independence and economic ambition.

In pledging publicly to buy power from the GERD, President Kiir is sending one message: South Sudan is not solely dependent on its traditional patrons. This move signals a willingness to deal with new regional actors and to cooperate on a broader vision of African-initiated development, one that can hopefully serve as a counterbalance to its more transactional, security-oriented relationship with Uganda. The fact that it was announced on a high-level regional level with other regional leaders like Kenya's President Ruto strengthens this strategic intention. The short-term goal is not necessarily a signed document but the strategic negotiating position that results from the public announcement.

Part IV: Geopolitical Implications for South Sudan and the IGAD Region

South Sudan's Strategy of Regional Diversification

South Sudan is attempting a strategic balancing act between its two strongest neighbors. While Uganda has continued as the classic security partner and trade route, Ethiopia has served as a political and diplomatic interlocutor. By seeking energy from both, South Sudan is attempting to take advantage of the best of both relationships without risking over-reliance on either one. This policy acknowledges the existing, unbalanced partnership with Uganda yet looks to find a new path of shared prosperity with Ethiopia that could bring a more equal long-term partnership. The two simultaneous, and apparently incompatible, energy deals highlight this deliberate strategic approach.

Uganda's Reaction and the State of Bilateral Competition

The Ethiopia agreement could bring a new level of competition to the Juba-Kampala relationship. While Uganda's economic stakes are significant, its most concern is security and a friendly "junior partner" in Juba. Ethiopia's economic pivot, particularly with the GERD, represents a new type of soft power that competes with Uganda's traditional security-focused influence. This competition is further complicated by Sudan's ongoing instability, which has historically had a tense relationship both with Kampala and Addis Ababa. Therefore, South Sudan's strategic decisions are also indicative of its desire not to be a proxy for this regional rivalry.

The Broader Regional Integration Context

The Intergovernmental Authority on Development (IGAD) was established to promote regional integration, stability, and infrastructure development, with energy projects as the hub of that ambition. Despite this, however, IGAD's ability to broker serious solutions has been continually thwarted by internal conflict and perceptions of partisanship. The pursuit of these two energy deals concurrently is evidence of both the opportunity and the challenge for IGAD to engineer genuine, coordinated regional infrastructure. For a government facing significant internal challenges, including a stalled peace process, economic collapse, and widespread corruption, demonstrating competence and securing international credibility is paramount. The Uganda power deal's failure is a tangible mark of this internal struggle. The Ethiopia declaration on a grand regional platform is a stern message of ambition and visionary foresight, possibly aimed at wooing new overseas investment or pushing existing allies to speed up stalled projects.

Conclusion and Recommendations

The disappointed Uganda-South Sudan power deal reflects South Sudan's entrenched internal governance and institutional issues that plague South Sudan.

It is a project that is hampered, not by political will or finance, but by the frailty of the country's foundation. The self-declared Ethiopia-South Sudan deal, however, is a diplomatic declaration of a new regional strategic direction. It is a political declaration declaring Juba's intention to diversify alliances and become part of a broader vision of African-led economic emancipation. Success for South Sudan with its energy future, and thus political stability, would be contingent upon its ability to convert such political talk into concrete, actionable plans.

Based on this analysis, I therefore recommend the following to facilitate support for South Sudan's path towards energy security and regional stability:

1. To the Government of South Sudan: Most urgently, the one most urgent step is to give priority to making activation of the South Sudan National Electricity Bill of 2015. Creating an independent, reputable regulator would be the "missing link" to attract international investment necessary for both local and regional schemes. A strong regulator would provide the confidence required for financiers to move beyond grants and on to full-scale, long-term investment.
2. Regional Partners (Uganda & Ethiopia): There should be a concerted push towards infrastructure development. The Intergovernmental Authority on Development (IGAD) should employ its role to facilitate and mediate such projects so that they are not exploited as surrogates for political competition but are sought out of sheer interest in the affairs of regional stability and progress. The focus should be on establishing a model that facilitates a diversified and secure energy grid, positioning South Sudan in the regional power matrix in a way that minimizes dependencies and maximizes mutual gains.

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