

GSI Intel Memo - South Africa Winter Power Cuts

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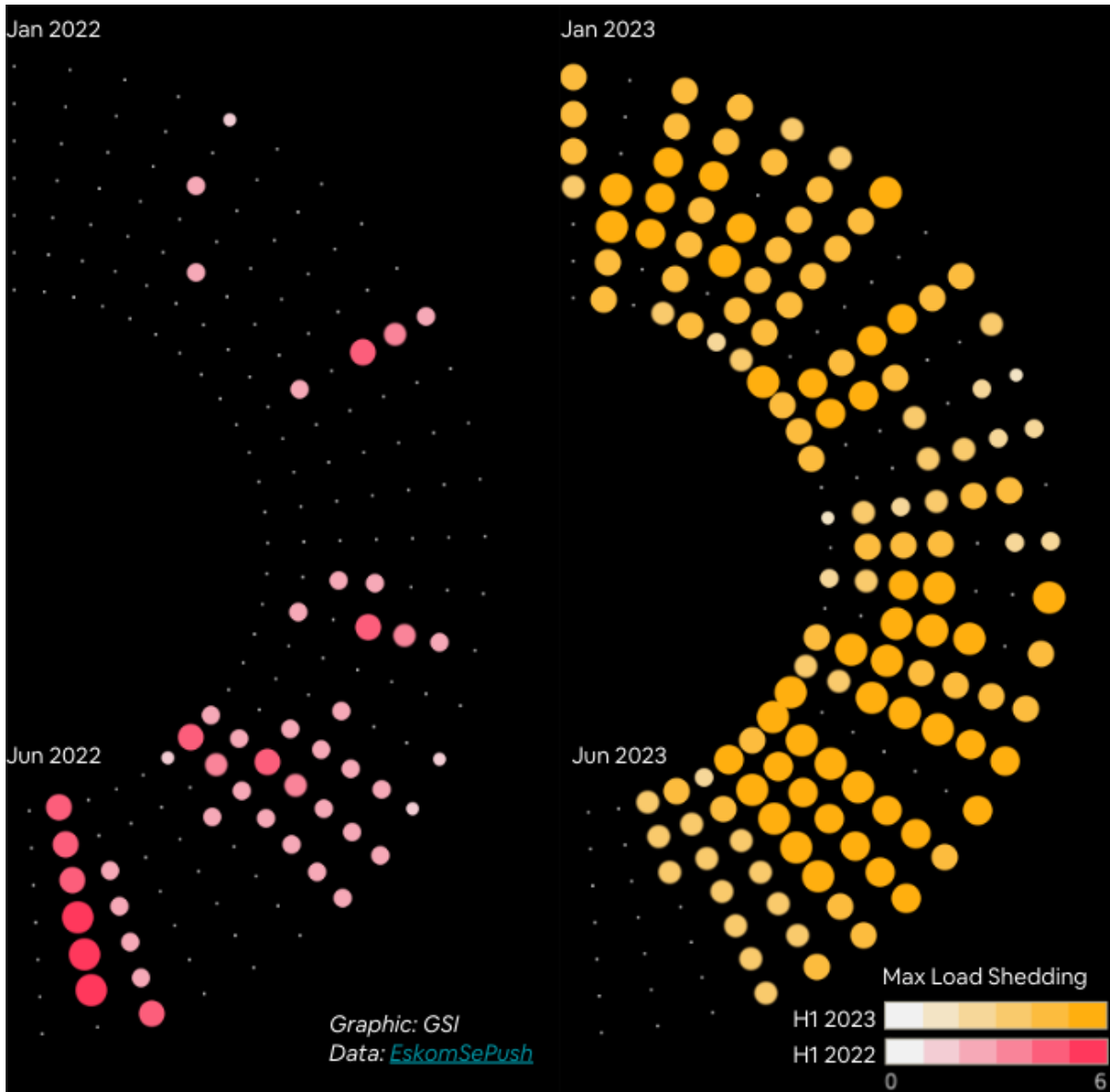
June 22, 2023

Headline

During July and August, Airbnb employees in South Africa are likely to experience more frequent power outages for longer periods of time as the country's electrical grid struggles to meet demand.

Unseasonably early winter weather in South Africa increased demand for electricity. As a result, Eskom is likely to increase load shedding to prevent the national electricity grid from collapsing. The arrival of milder spring temperatures in September will probably ease excessive demand; however, Eskom's use of load shedding to stabilize the grid will almost certainly remain.

To learn more about load shedding in South Africa, please visit previous reports on the subject (Nov '22) and the ongoing crisis (Jan '23).



Between January and mid-April, South Africans have, on average, experienced over 655 hours of load-shedding, more than in all of 2022. As the diagram illustrates, not only is load shedding more frequent in the first half of 2023 compared to 2022, but power outages last for longer.

What this means for Airbnb

Sustained and frequent power outages present numerous safety concerns for Airbnb employees living and working in South Africa. If the national grid collapses, these risks become even more pronounced.

- Airbnb employees are likely to face periods where the cumulative daily power outages last over 16 hours. Prolonged power outages commonly lead to increased levels of theft, property damage, protests, and civil unrest in cities.

- In periods of increased load shedding, critical industries that depend on backup generators, including transportation and healthcare sectors, face potential fuel shortages. Domestic users will face higher competition and prices for generator fuel, and extended periods of power outages may lead to loss of generator capacity at personal residences.
- Preventative security measures, including external lighting and alarm systems, rely on backup power sources during power outages. In prolonged or frequent outages, backup power systems often fail to recharge.
- Disruption to street and traffic lights commonly lead to increased road traffic accidents.
- Emergency response systems are not immune to power disruption leading to communication and operational delays from first responders.
- Water and sanitation systems are increasingly impacted by power disruptions leading to shortages and processing failures.
- Inconsistent power supply alongside extended outages leads to increased spoilage in refrigerated food.

In a worst-case scenario where the national grid collapses, fuel stocks would likely run out within a few days. Additionally, most telecommunication systems would become inoperable within eight hours as battery backups fail.

Further Discussion

The risk of stages 8-16 load-shedding:

Eskom has engaged in discussions with the National Energy Regulator of South Africa (NERSA) regarding provisions for stages 8 through 16. Although not officially announced, Eskom has already implemented stages 7–8 load-shedding. Higher levels of load shedding means longer outages at more frequent intervals. On June 1, 2023, South Africa’s minister of electricity warned that higher stages (8-16) of load-shedding were likely this winter. Such measures are required to protect the electrical grid, and as such, a complete collapse of the electricity system remains highly improbable.

The risk of Eskom employee strikes is currently low:

Eskom employees traditionally participate in industrial action during a late-winter 'strike season' causing significant delays in maintenance and operations. This year, Eskom signed a deal with labor unions promising annual wage increases in effort to avoid any strike action.

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