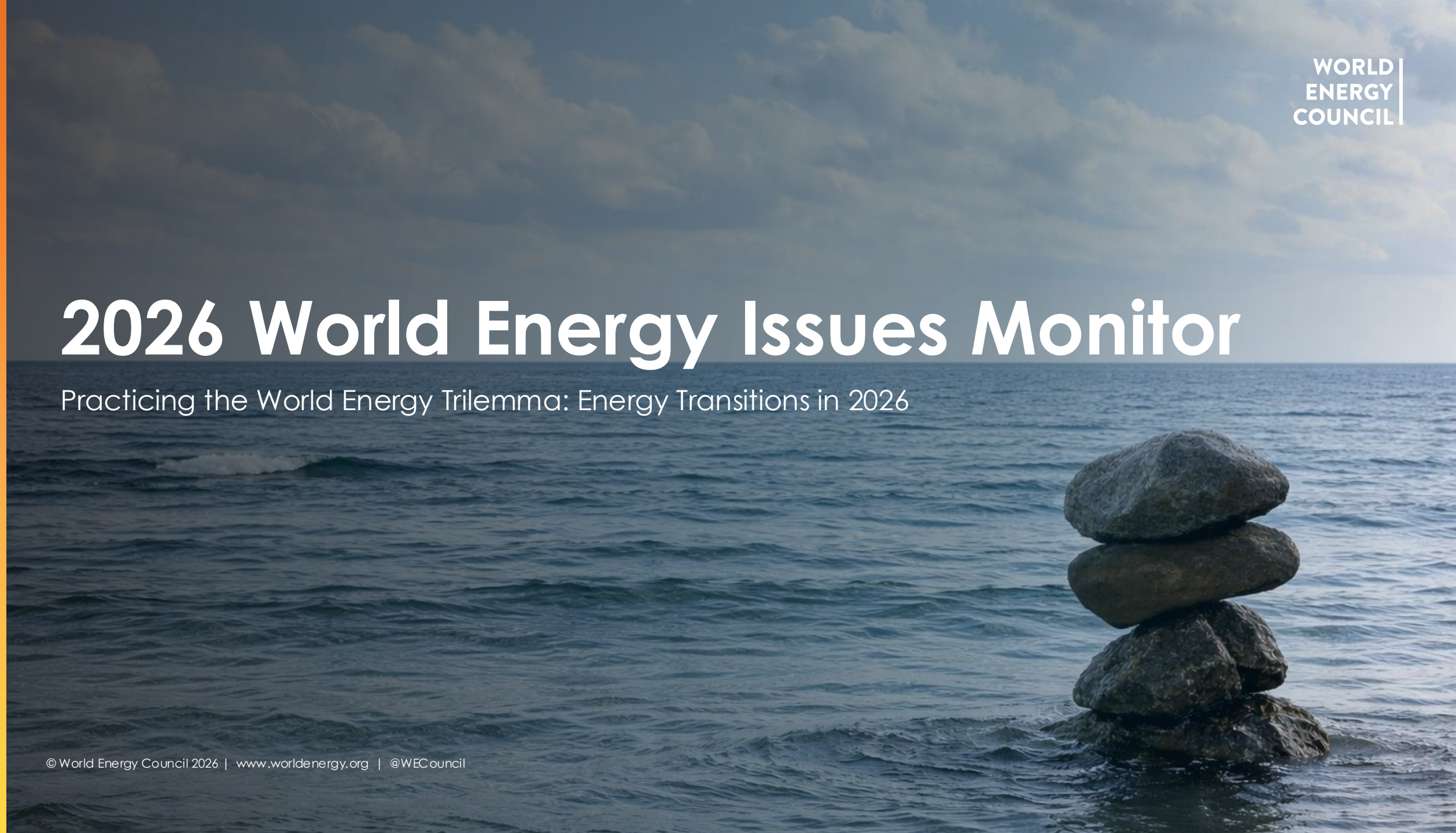

WORLD ENERGY COUNCIL

2026 World Energy Issues Monitor

Practicing the World Energy Trilemma: Energy Transitions in 2026

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WORLD ENERGY ISSUES MONITOR | MARCH 2026

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"Peace and stability have returned to pole position as the defining uncertainty shaping energy leadership. The World Energy Issues Monitor 2026 shows the importance of countries working to rebalance energy security, affordability and sustainability priorities in real time and under very different constraints. In a fragmented, many-games world, building an architecture of trust across diverse and diverging regions is not easy — but it is exactly what the World Energy Council exists to do."

Dr Angela Wilkinson

Secretary General & CEO

World Energy Council

World Energy Issues Monitor

WHAT IS THE VALUE OF THE WORLD ENERGY ISSUES MONITOR?

The World Energy Issues Monitor provides a **shared basis** for comparing perspectives, understanding what is shifting, and identifying where pressure is building across the energy landscape.

SHARED EVIDENCE BASE

Creates a common reference point in more contested or uncertain environments.

BLIND SPOTS & BRIGHT SPOTS

Helps surface pressures that may be underestimated, alongside examples of resilience, adaptation and progress.

LEADERSHIP DIALOGUE

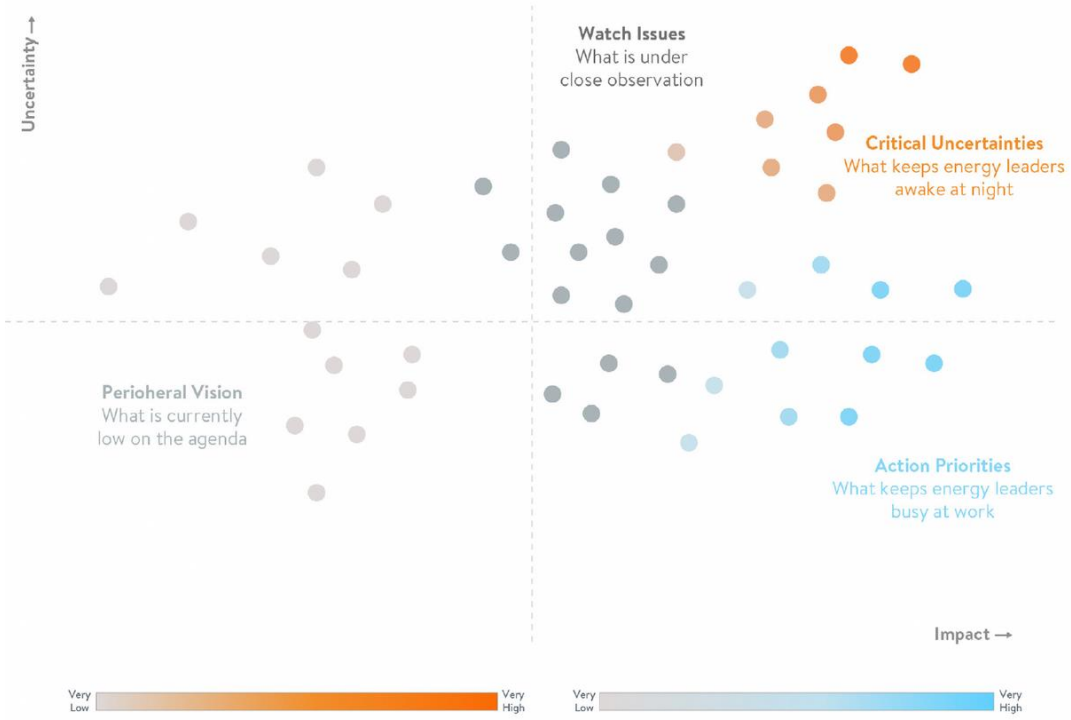
Supports more focused conversation on the issues, tensions and trade-offs shaping transitions.

CONNECTION ACROSS LEVELS

Links national realities to regional exchange, global debate and World Energy Congress agendas.

World Energy Issues Monitor

HOW TO USE THE ISSUES MONITOR?



The Energy Issues Map plots pre-identified energy transition matters by perceived impact and uncertainty, with the axes intersecting at the medium perception level to distinguish more clearly between high-impact and high-uncertainty issues.

Each Issues Map provides a snapshot of four zones:

- **Critical Uncertainties** (high impact, high uncertainty),
- **Action Priorities** (high impact, lower uncertainty),
- **Watch Issues** (moderate impact), and
- **Peripheral Vision** (lower impact).

Together, these zones help reveal where pressure is building, where attention is consolidating, and which issues may be gaining relevance.

2026 WORLD ENERGY ISSUES MONITOR
GLOBAL INSIGHTS

Practicing the World Energy Trilemma

ENERGY TRANSITIONS IN 2026

Transitions are entering a more demanding phase

Energy leaders are no longer facing temporary disruption but a shift in operating conditions.

- Systems expanding and transforming simultaneously
- Instability more persistent
- System constraints more visible

Geopolitics now shapes energy decisions

Structural geopolitical and social tensions now shape transitions, not only technical delivery challenges.

Key tensions include:

- Security vs openness
- Equity vs speed
- Decarbonisation vs development
- National priorities vs system stability

Leadership must move from declarations to delivery

Trilemma-tested delivery means:

Balancing security + affordability + sustainability

in real time so that no single priority destabilises the system.

The World Energy Council's role

Creating **trust infrastructure for global leadership dialogue**

→ comparing realities

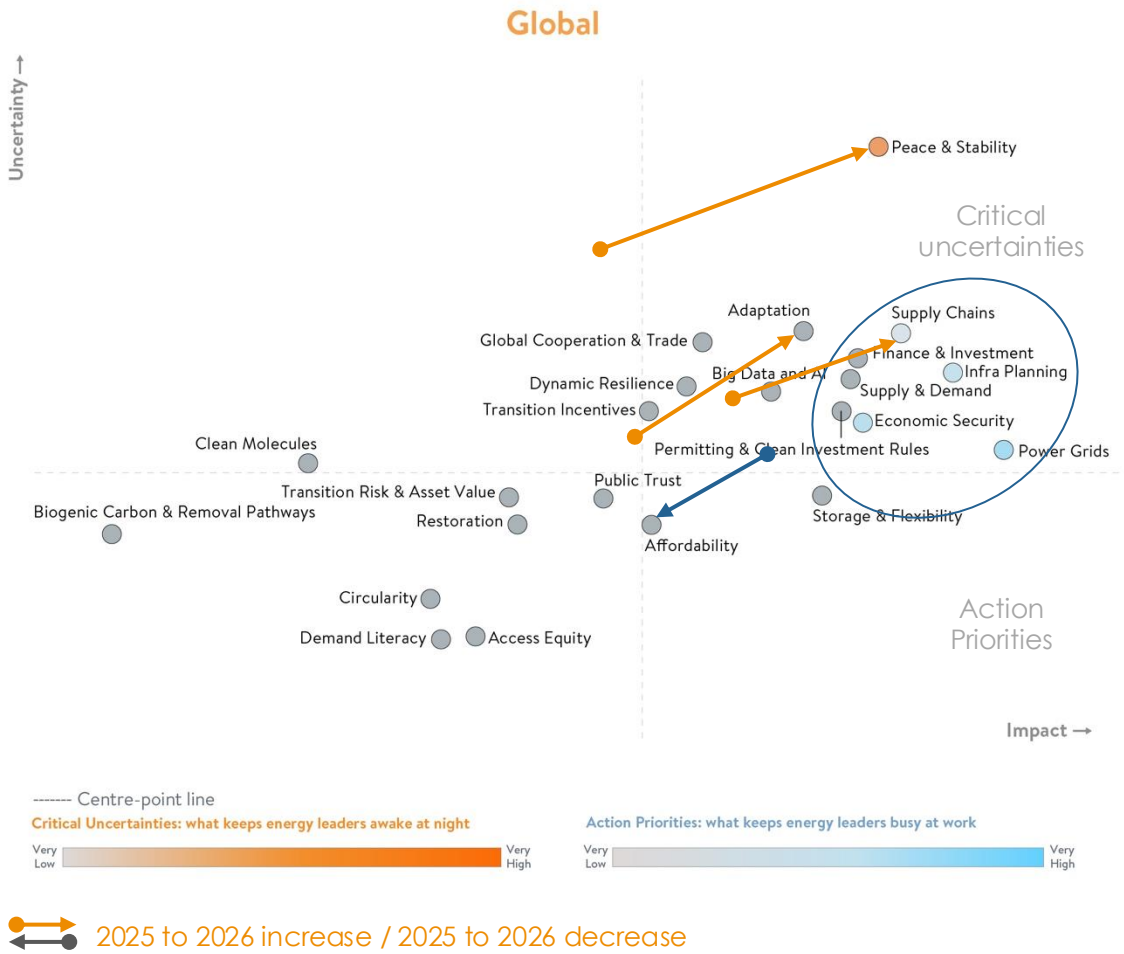
→ learning from bright spots and blind spots

→ turning insights into forward momentum.

Global Highlights

WORLD ENERGY ISSUES MONITOR | MARCH 2026

1. **Peace & Stability** is the dominant uncertainty influencing decisions across regions.
2. **Power delivery constraints** – grids, permitting, supply chains, skills – set the pace of transitions.
3. **Power demand drivers** extend well beyond the AI narrative. Multiple structural forces are compounding – electricity expansion will persist even if hydrocarbon demand plateaus.
4. **Power system stress** is visible in congestion, curtailment, negative pricing and interconnection limits.
5. **Trust** functions as invisible infrastructure – and in many places it is thinning, particularly where affordability pressures and uneven cost burdens intensify.



Top Action Priority

PREVENTING SYSTEM OVERLOAD

Energy systems are transforming faster than the infrastructure that supports them.

In 2026, the priority is not only to accelerate change, but to ensure systems can absorb it without undermining stability.

Grids and infrastructure set the pace
Grid capacity, connection timelines, planning, and access to critical components increasingly determine how fast electrification and clean energy can scale.

Delivery discipline matters as much as ambition
Permitting, sequencing, coordination, skills, and supply chain capacity are proving decisive in whether projects move at pace and at scale.

Flexibility and resilience underpin reliability
Storage, demand-side response, and adaptive planning are essential to managing variability, rising demand, and system stress.

Blind Spots

WHERE SYSTEM PRESSURE IS UNDERESTIMATED

Beyond the headline issues, the 2026 World Energy Issues Monitor points to pressures building more quietly beneath the surface – often overlooked, but increasingly decisive for keeping transitions secure, affordable and sustainable.

These pressures build beneath the surface but increasingly define the conditions for credible delivery.

Demand

Power demand growth is broader than a single AI narrative, with industrialisation, mobility, urbanisation and electrification all compounding.

Resilience

Instability is becoming continuous, requiring resilience planning beyond event-based responses.

Price Synchronisation

Costs rise when generation, grids, storage and reliable alternatives scale out of sync.

Legitimacy & Trust

Public confidence increasingly shapes what can be built, where, and at what pace.

System Depth

Materials, waste and water constraints are becoming more central as systems scale.

Interoperability

New low-carbon systems depend on conversion, storage and transport interfaces that add costs, losses and bottlenecks.

WORLD ENERGY COUNCIL 100 YEARS OF IMPACT

The World Energy Issues Monitor highlights where pressure is building, where resilience is forming, and where the operating environment is changing fastest.

It invites leaders to focus on the conditions shaping energy transitions, the limits that must be managed, and the opportunities for connection that remain – to keep security, affordability, and sustainability advancing together in real time.

PROMPT 1

Where are systems signalling pressure — and where is resilience emerging?

PROMPT 2

Which constraints are structural, and which can be eased through better sequencing, coordination, or design?

PROMPT 3

How can intent and delivery be aligned so trust holds and progress is maintained, while keeping affordability in view?

2026 WORLD ENERGY ISSUES MONITOR
REGIONAL PERSPECTIVES

Regional Perspectives

COMPARISON OF REGIONAL ACTION PRIORITIES & CRITICAL UNCERTAINTIES

Regional patterns vary, but system pressures appear across all geographies – with different pacing, intensity, and points of strain.

ISSUE	Africa	Asia	Europe	LAC	MEGS	North America
Power Grids	●	●	●	●	●	●
Infra Planning	●	●	●	●	●	
Economic Security	●	●	●	●		
Peace & Stability		●	●		●	●
Supply Chains		●	●	●	●	●
Adaptation	●	●		●		
Storage & Flexibility		●	●		●	
Finance & Investment	●			●		●
Supply & Demand		●		●	●	
Affordability	●					
Big Data & AI					●	
Permitting & Clean Investment Rules			●			

● Action Priority
● Critical Uncertainty

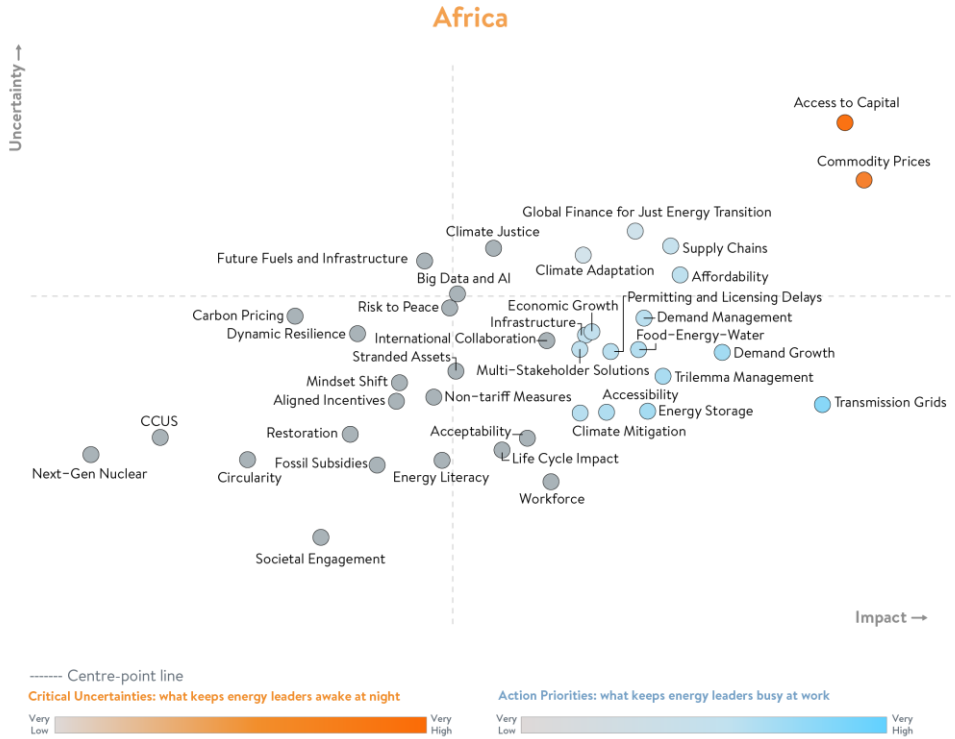
Regional Tracking – Africa

KEY SHIFTS FROM 2025 → 2026

Top Critical Uncertainty: Access to Capital, Commodity Prices → Finance & Investment

Top Action Priority: Power Grids (both years)

WORLD ENERGY ISSUES MONITOR | 2025



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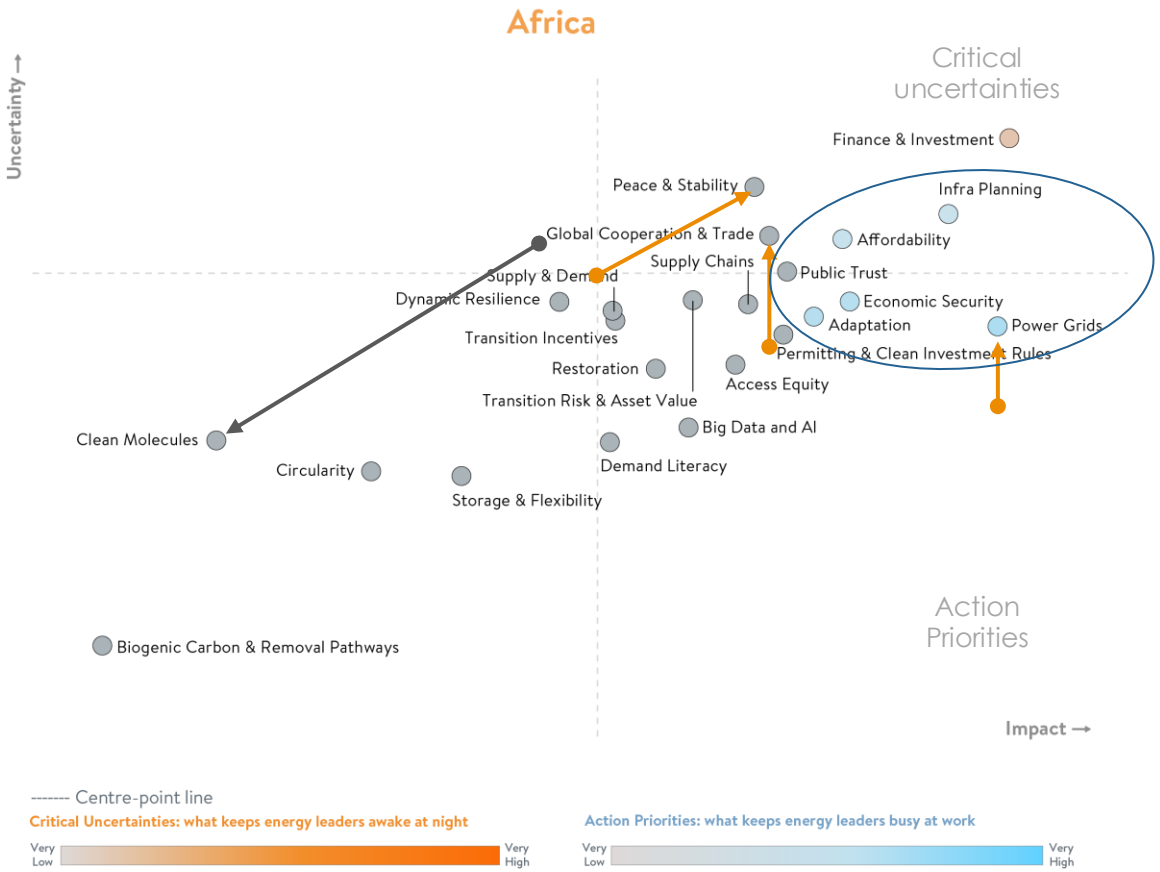

2025 to 2026 increase / 2025 to 2026 decrease

Regional Tracking – Asia

KEY SHIFTS FROM 2025 → 2026

Top Critical Uncertainty: Commodity Prices → Supply Chains

Top Action Priority: Affordability → Power Grids

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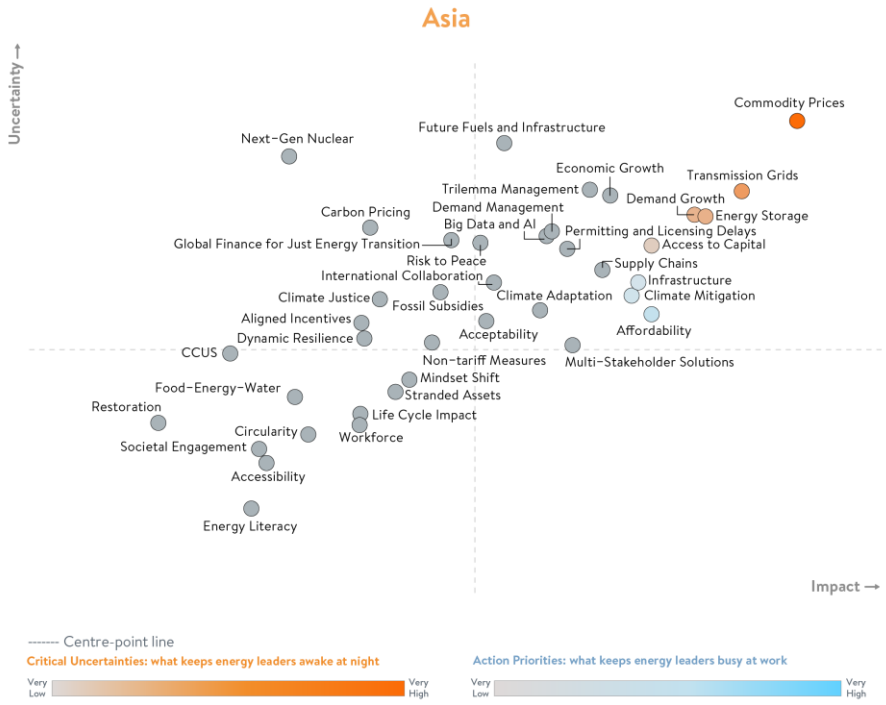

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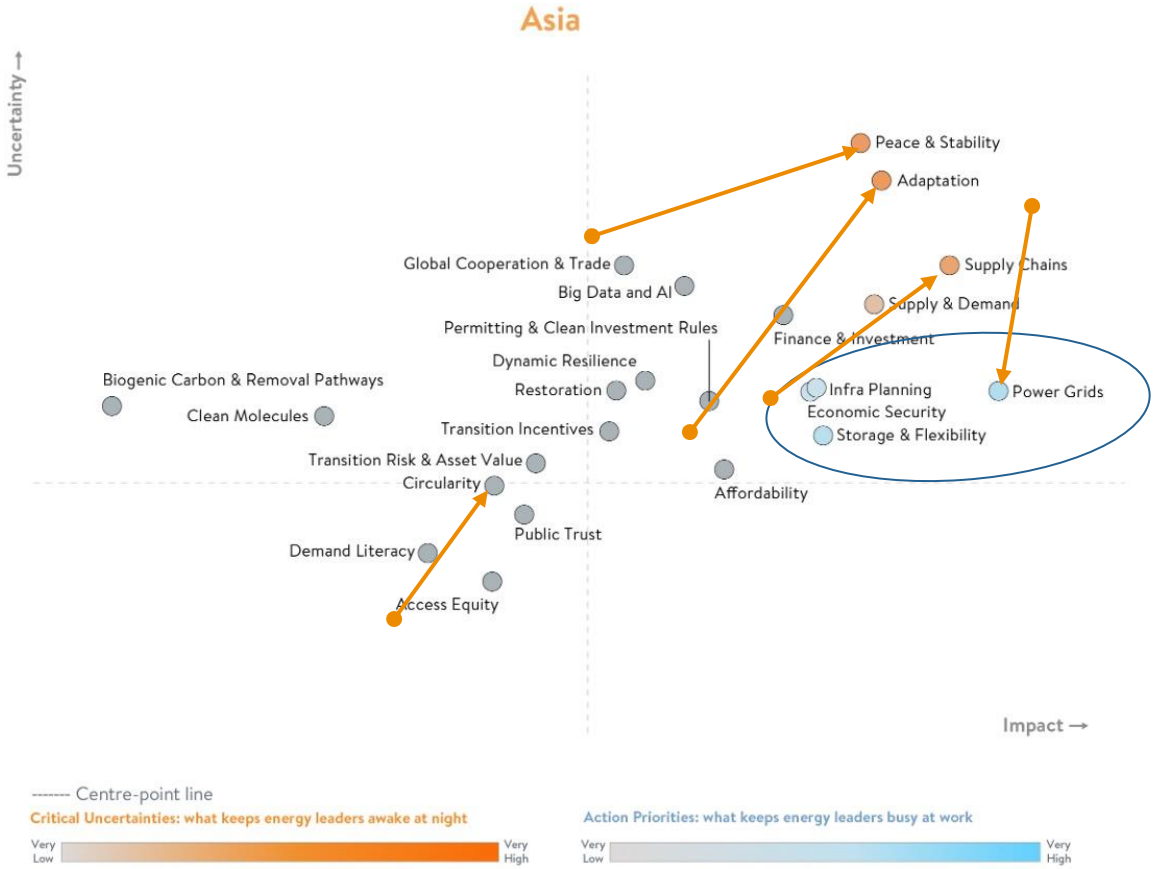


2025 to 2026 increase / 2025 to 2026 decrease

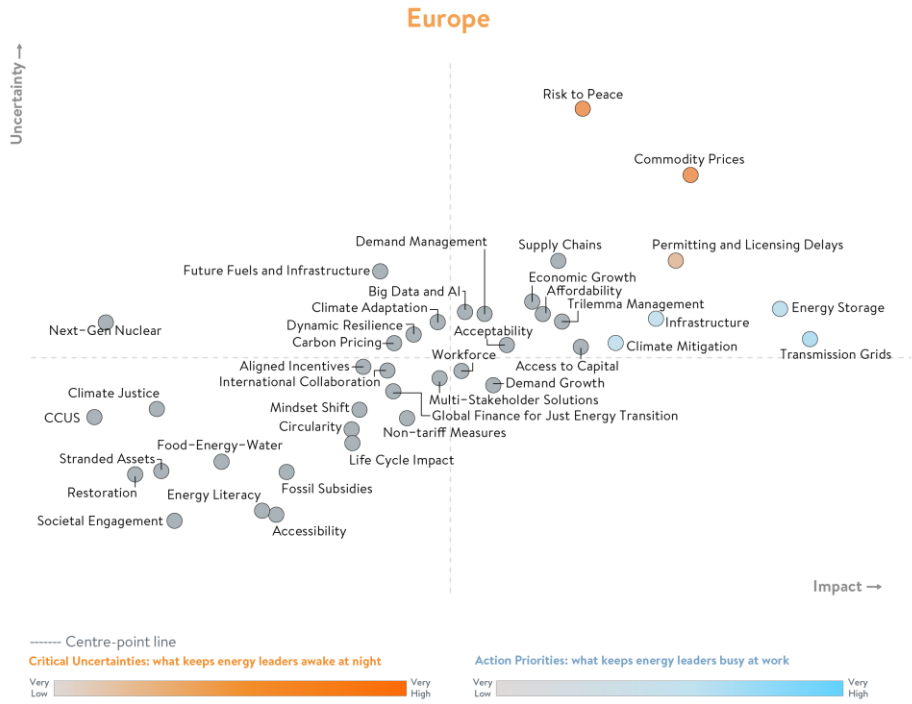
Regional Tracking – Europe

KEY SHIFTS FROM 2025 → 2026

Top Critical Uncertainty: Commodity Prices → Peace & Stability

Top Action Priority: Power Grids (both years)

WORLD ENERGY ISSUES MONITOR | 2025



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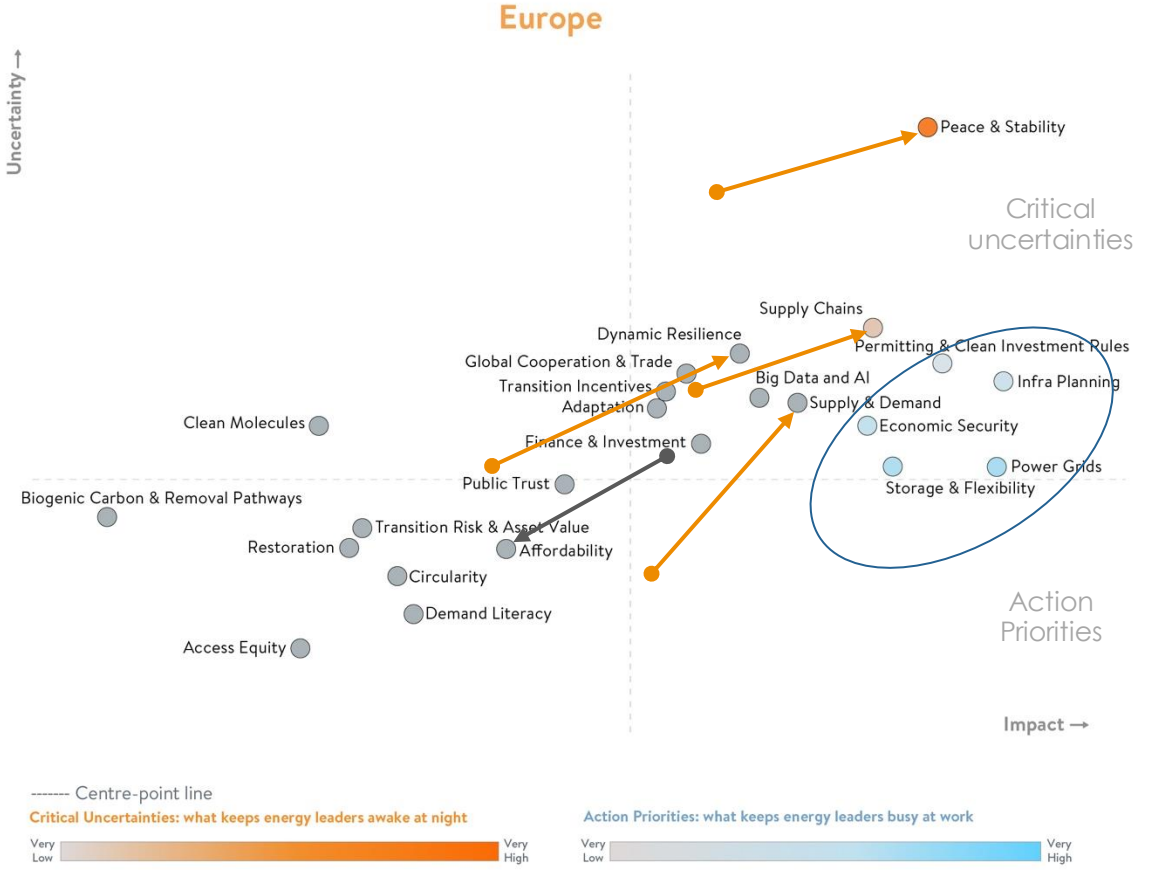


2025 to 2026 increase / 2025 to 2026 decrease

Regional Tracking – LAC

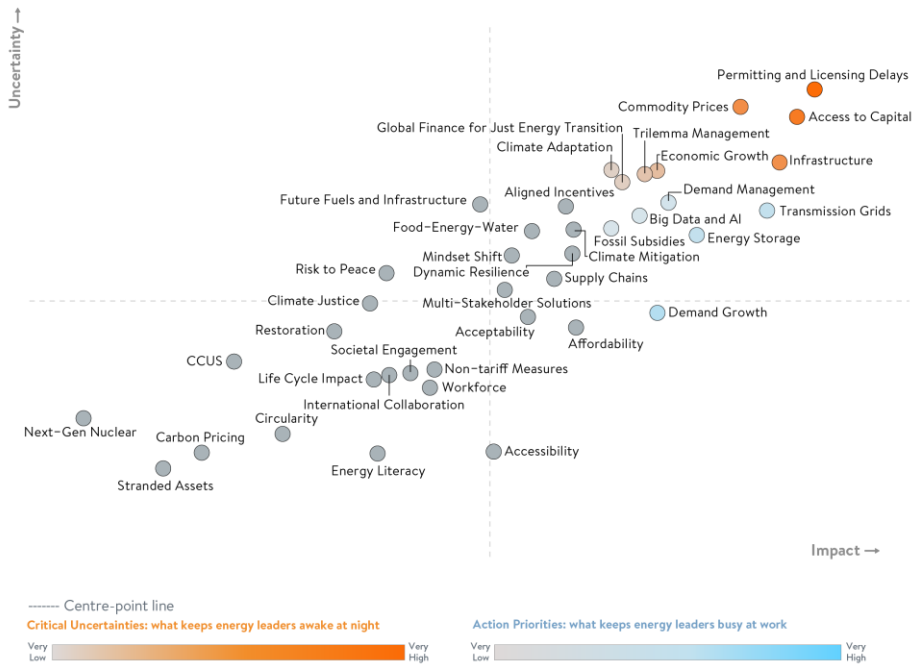
KEY SHIFTS FROM 2025 → 2026

Top Critical Uncertainty: Permitting → Finance & Investment

Top Action Priority: Demand Growth → Power Grids

WORLD ENERGY ISSUES MONITOR | 2025

Latin America and the Caribbean



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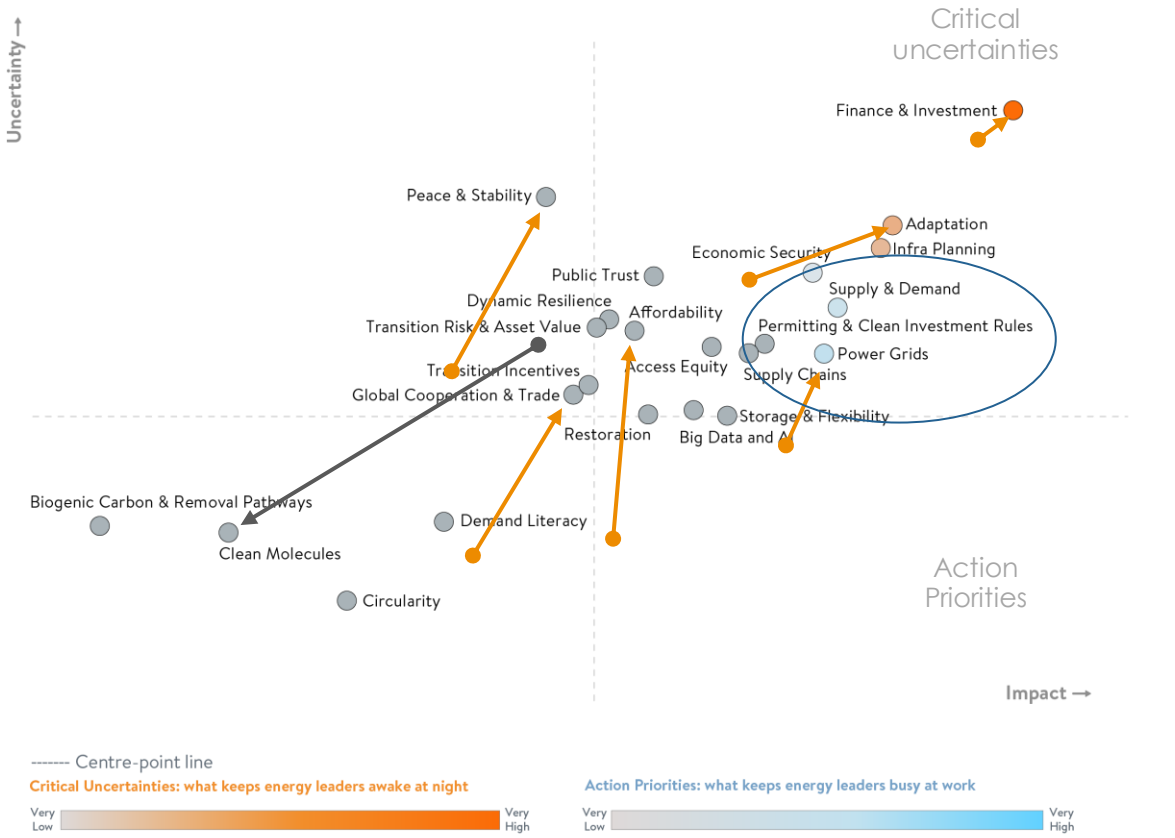
Latin America and the Caribbean



2025 to 2026 increase / 2025 to 2026 decrease

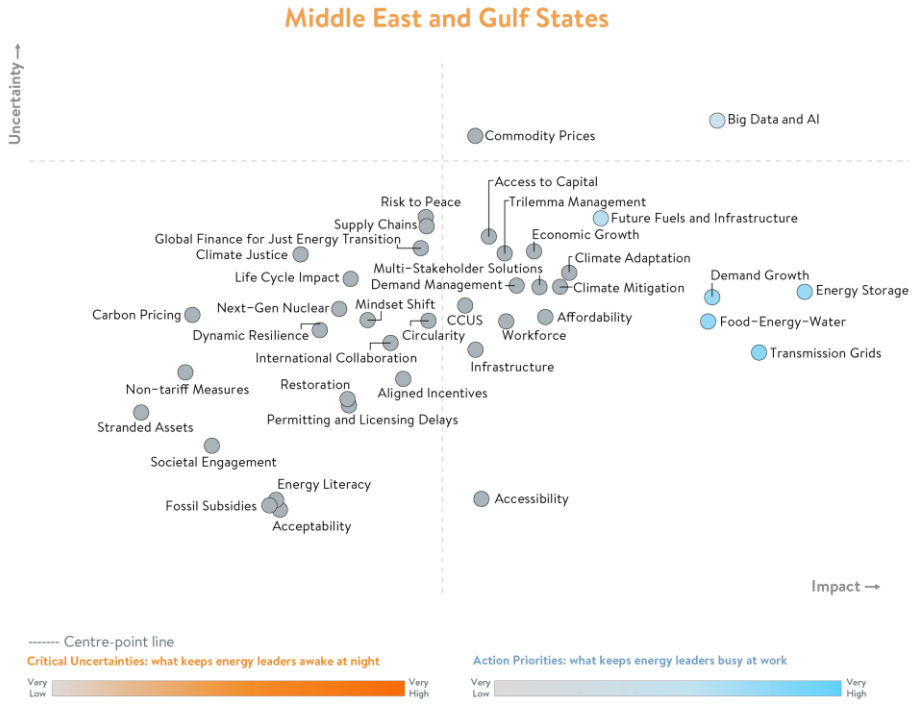
Regional Tracking – MEGS

KEY SHIFTS FROM 2025 → 2026

Top Critical Uncertainty: Big Data & AI (both years)

Top Action Priority: Power Grids (both years)

WORLD ENERGY ISSUES MONITOR | 2025



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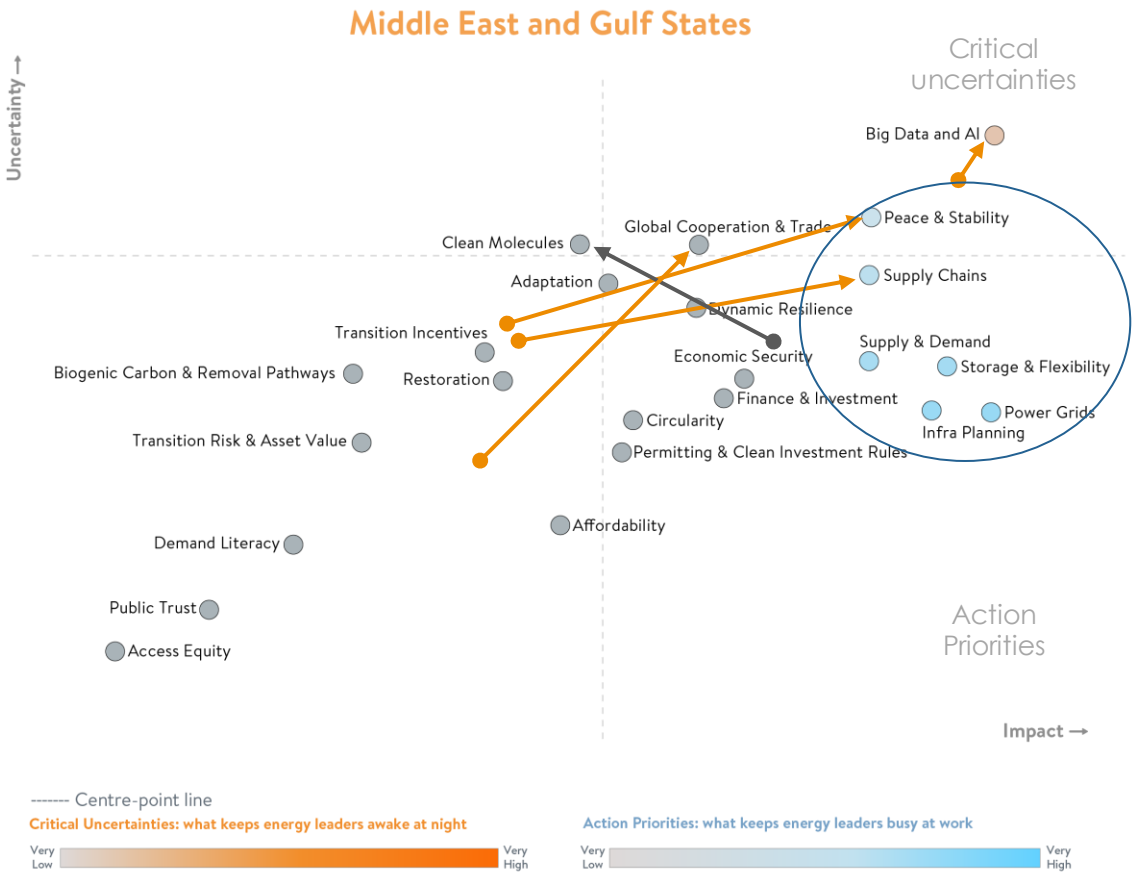


2025 to 2026 increase / 2025 to 2026 decrease

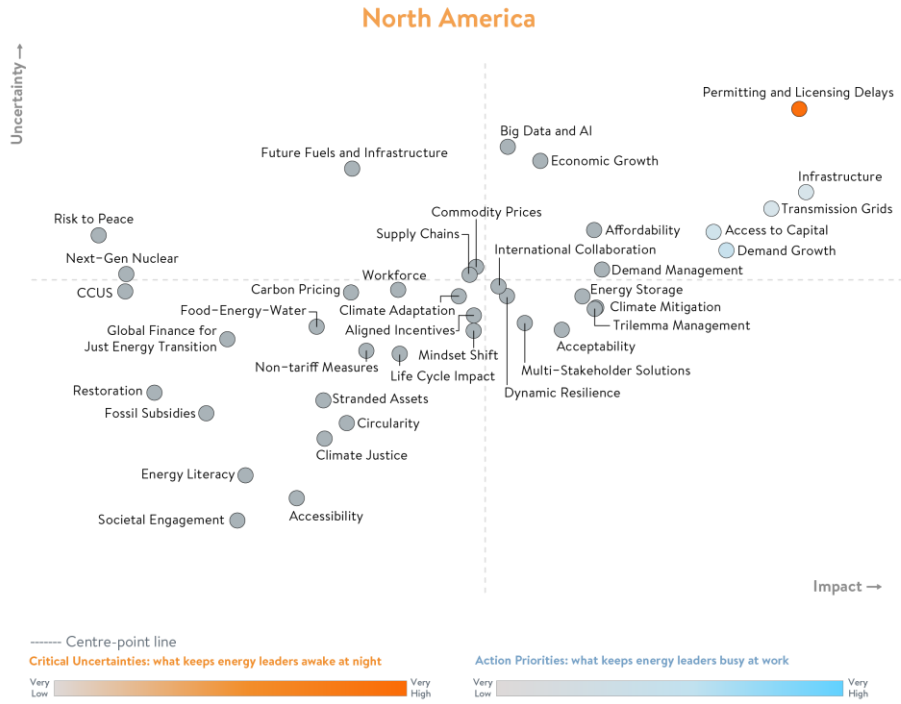
Regional Tracking – North America

KEY SHIFTS FROM 2025 → 2026

Top Critical Uncertainty: Permitting → Peace & Stability

Top Action Priority: Demand Growth → Power Grids

WORLD ENERGY ISSUES MONITOR | 2025



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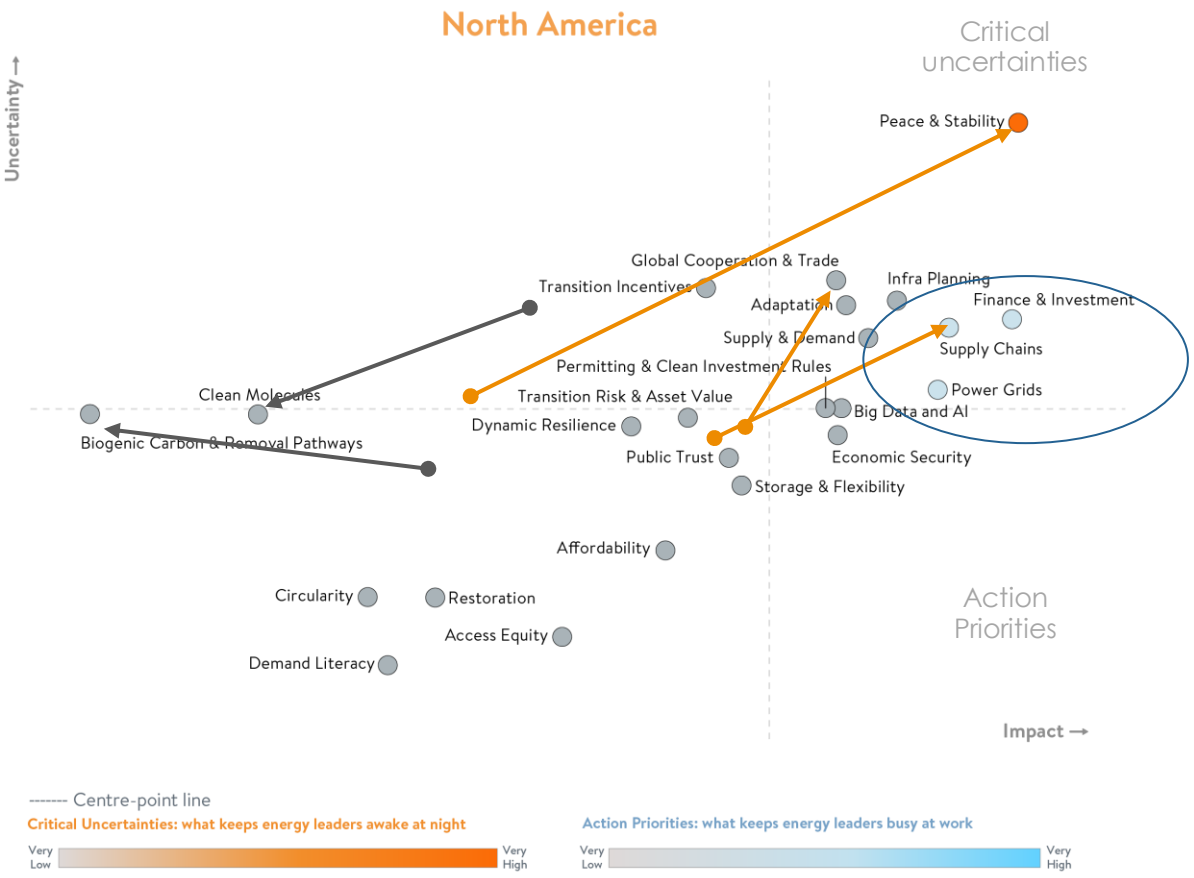

2025 to 2026 increase / 2025 to 2026 decrease

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KEEPING THE RADAR ON

Share a New Signal Today

Are you seeing an emerging shift, tension or development in your work? Help the community identify what may shape the future of energy by sharing a signal from your region or sector.

Capture your observation through the **Signal Sharing Form** so we can continue **sense-making together.**

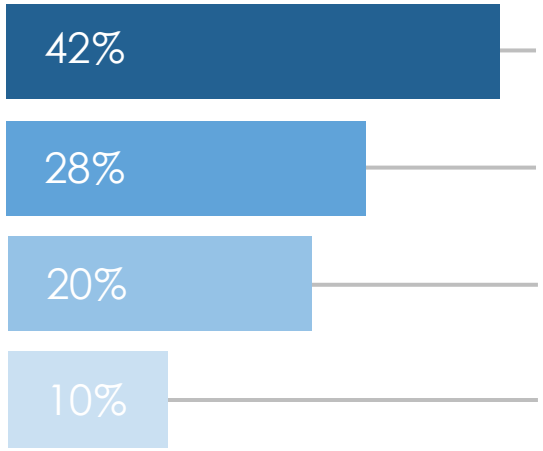
Submit a Signal

2026 WORLD ENERGY ISSUES SURVEY
KEY STATS

Capturing Diversity

WORLD ENERGY ISSUES MONITOR | SURVEY STATS

WORLD ENERGY COUNCIL 100 YEARS OF IMPACT



Non-fossil
incl. solar, wind, hydro, nuclear

Energy-Related Services
incl. utilities, grid, storage

Fossil Fuels

Hybrid or transition technologies
incl. CCUS, hydrogen, bioenergy

+2750
RESPONDENTS

+110
COUNTRIES

1 out of 2
senior & top/level leader

1 out of 4
under 35

1 out of 4
female

Energy Sector
(oil, gas, renewables, nuclear, utilities, etc.)

Energy-Adjacent / Related Sector
(technology, finance, transport, etc.)

Energy Institutions
(universities, think tanks, NGOs etc.)

Consumer / End-User Sector
(commercial, industrial, residential, etc.)

Government / Public Sector

Other

2026 WORLD ENERGY ISSUES MONITOR
ANNEX

Maps Methodology and How to Read

WORLD ENERGY ISSUES MONITOR | MARCH 2026

Country Maps:

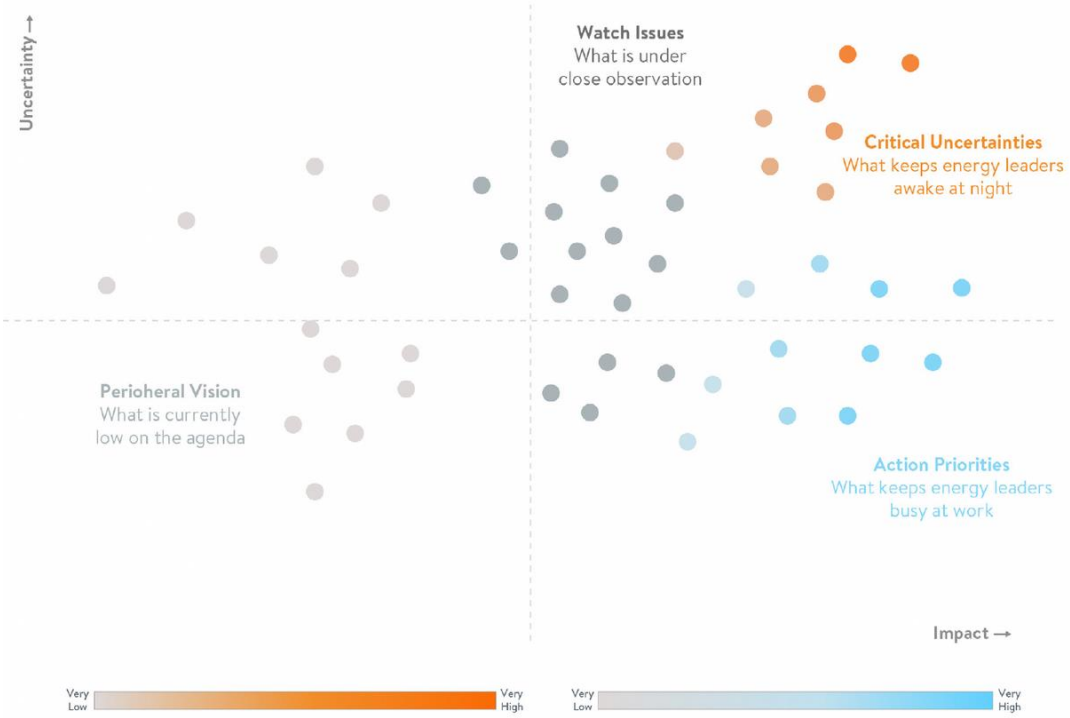
- Responses are weighted based on seniority level (the higher the level, the higher the weight)
- Issues' scores reflect a weighted average of individual responses

Regional and Global Maps:

- In order to avoid any bias from under or over representation in the survey, all countries are weighted to reflect their relative role in the energy system based on their:
  a) energy consumption,
  b) energy production,
  c) national income per capita
- Issues' scores reflect a weighted average of countries' scores

- **Colour shades** are graded according to proximity to the right-hand corners of the maps. This enables finer differentiation of the degree of uncertainty and impact attributed to issues, and to highlight (lighter shades) issues that are close to becoming Critical Uncertainties and Action Priorities.

- The **centre-point line** represents the medium level for impact and uncertainty to help comparison between different issues maps.



2026 Issues Framework

UPDATED CATEGORIES & ISSUES

The 2026 World Energy Issues Survey tracks **23 transition issues** across **six categories**, offering a shared framework for understanding where pressure is building, where priorities are shifting, and where emerging bright spots may shape more resilient energy transitions.

Category	Issues List
Geopolitical	1 Peace & Stability Risks 2 Secure & Responsible Supply Chains 3 Global Cooperation & Trade Rules
Economic	4 Financing & Investment Confidence 5 Economic Security & Industrial Competitiveness 6 Affordability & Inclusive Benefits 7 Expanding Supply & Balancing Demand 8 Transition Risk & Asset Value
Societal	9 Social License & Access Equity 10 Public Voice & Trust in Transitions 11 Demand Literacy & Design
Environmental	12 Climate Adaptation & Resilience 13 Nature-Positive Restoration 14 Circularity & Materials Footprint
Regulatory	15 Infrastructure Planning & Delivery Speed 16 Permitting & Clean Investment Rules 17 Incentives for Net-Positive Transitions 18 System Risk Preparedness & Dynamic Resilience
Technology Gamechangers	19 Digital & AI System Optimisation 20 Storage & Flexibility 21 Clean Molecules & Infrastructure 22 Biogenic Carbon & Removal Pathways 23 Power Grids

Regional & Country Breakdown

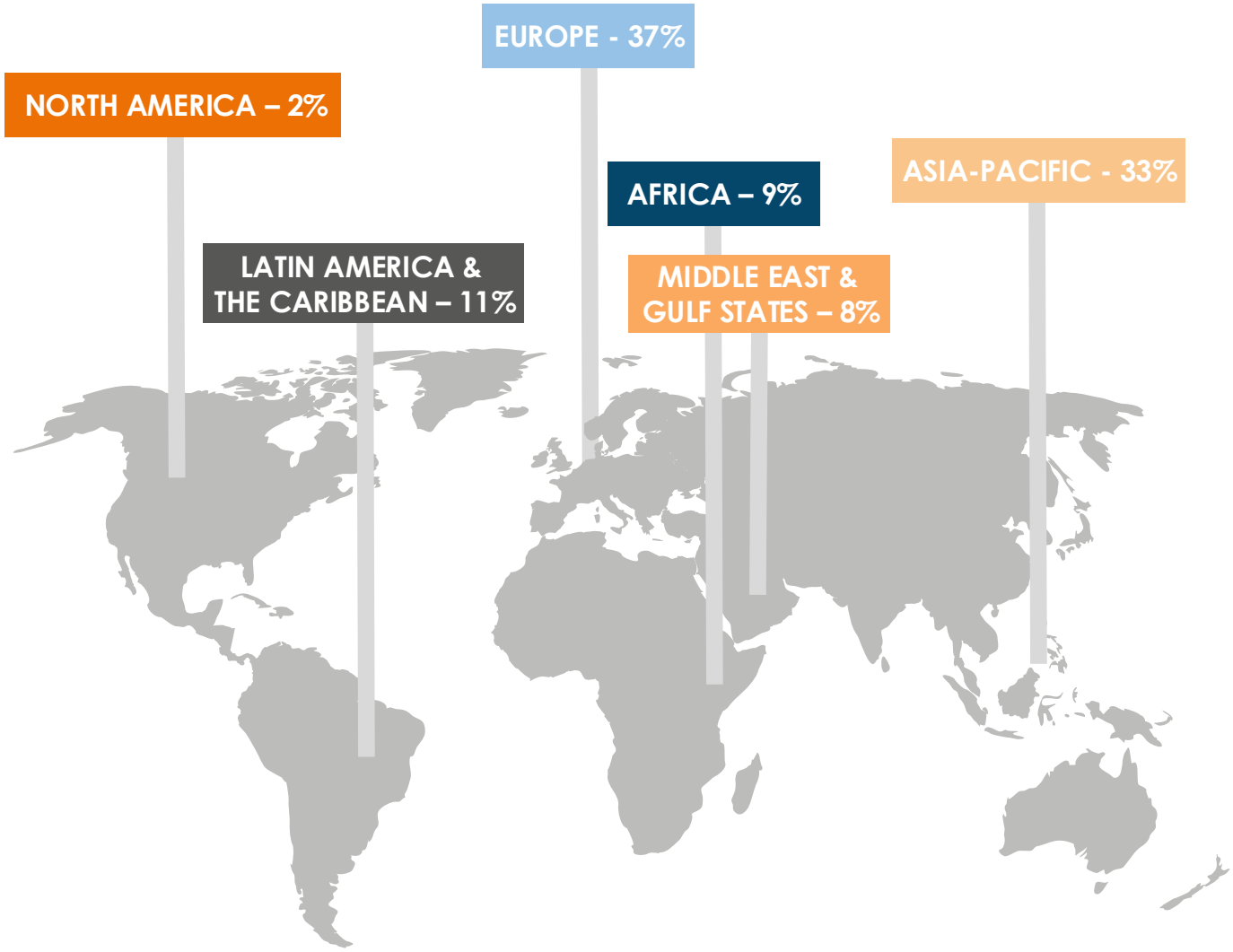
WORLD ENERGY ISSUES MONITOR | SURVEY STATS

With the collection of over 2,750 responses across all regions, **Member Committees** activated their communities, ensuring diverse perspectives and truly global insights.

In addition to global and regional deep dives, this resulted in **40 analyses of country-level** energy transitions.

China recorded the highest participation overall, followed by **Saudi Arabia and France.**

Relative to population size, **Iceland, Lebanon, Uruguay, Armenia, and Burkina Faso** stood out in their respective regions.



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YEARS OF IMPACT

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