

HIGHLIGHTS FROM REGIONAL LEADERSHIP EXCHANGES

# PRACTICING TRILEMMA DISCIPLINE

The World Energy Council’s Regional Leadership Exchanges (RLEs) were convened in April-May 2026 as leadership dialogues to explore how regions are navigating the increasingly complex balance between energy security, energy equity, and environmental sustainability in an increasingly fragmented and uncertain operating environment.

Across the exchanges, leaders described energy systems that are expanding even as they transform – with rising demand, geopolitical fragmentation, infrastructure strain, affordability pressures, and societal expectations reshaping the conditions under which energy decisions are made.

A consistent message emerged across the regions: this is no longer simply a transition challenge, but a **systems leadership challenge** centred on maintaining coherence, resilience, and legitimacy under growing strain. Leaders repeatedly emphasised that many perceived “trade-offs” are no longer primarily technological, but increasingly reflect challenges of sequencing, governance, infrastructure readiness, and institutional coordination.

## GLOBAL PARTICIPATION



**275+ ATTENDEES**

Cross-sector participation from across the supply chain



**65 COUNTRIES**

Perspectives from Europe, Asia, Africa, the Middle East and the Americas

This was particularly evident in contexts where no single actor can fully see or steer the whole system.

This reinforces the evolving role of the **World Energy Trilemma** not only as a benchmarking framework, but as a practical leadership discipline for navigating persistent tensions, maintaining system coherence, and supporting more grounded decision-making under constraint.

The exchanges also reinforced that there are many regionally distinct transformations unfolding simultaneously under very different political, economic, and institutional conditions.

## EMERGING REGIONAL NARRATIVES & WORLD ENERGY TRILEMMA PERFORMANCE

2023 World Energy Trilemma Index Results

TOP 25%

>25%-50%

>50%-75%

BOTTOM 25%

### EUROPE

**Execution constrained**  
Maintaining social and industrial coherence during transition

### AFRICA

**Development under constraint**  
Balancing access, industrialisation, and transition expectations

### ASIA & PACIFIC

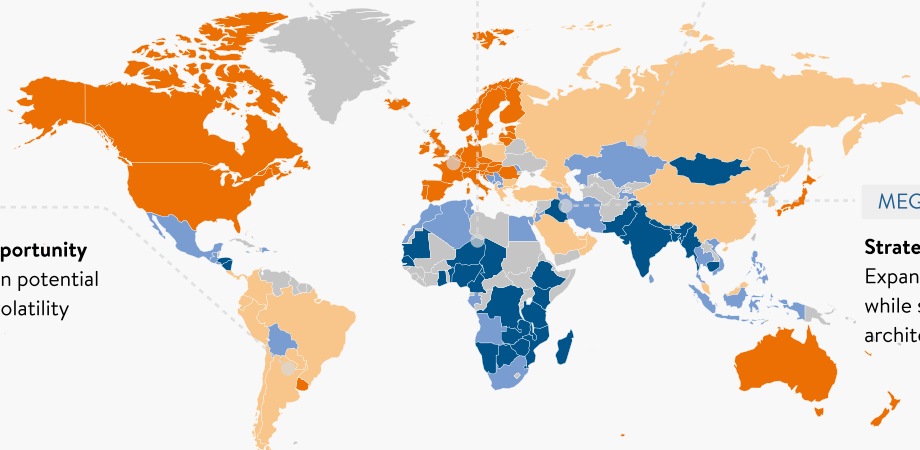
**Scale-speed-diversity**  
Managing accelerating demand across fragmented governance and transition models

### LAC

**Abundance and opportunity**  
Unlocking transition potential amid institutional volatility

### MEGS

**Strategic confidence**  
Expanding energy systems while shaping future transition architectures





AFRICA



ASIA



EUROPE



LAC



MEGS

| DOMINANT TENSION     | Development Imperatives vs. Transition Conditionality  | Meeting Growing Demand vs. System Resilience  | Transition Ambition vs. System Resilience  | Realizing Resource Potential vs. Institutional Fragility  | Economic Diversification vs. Energy Legacy   |
|----------------------|--|---|--|---|--|
| SECURITY             | Access expansion constrained by weak transmission, integration, and delivery capability                            | Electricity demand growth outpacing infrastructure and system flexibility while managing coal transitions | Grid and system readiness not keeping pace with electrification and renewable integration        | Hydro dependence exposed to climate variability and transmission bottlenecks                          | Geopolitical exposure and resilience risks in highly interconnected and increasingly digitalised systems |
| EQUITY               | 600 million without electricity – equity is fundamentally about reliable, affordable, and productive energy access | Maintaining affordability and industrial competitiveness during large-scale system transformation         | Rising transition costs testing affordability, industrial competitiveness, and political support | Fossil fuel subsidies politically irresistible; distributed solar creating regressive cross-subsidies | Managing subsidy reform while maintaining social stability and affordability                             |
| SUSTAINABILITY       | International finance withdrawal from gas constrains the fastest development pathway                               | Continued coal dependence alongside rapid economic growth   | Permitting delays are the binding constraint on deployment – not financing or policy ambition    | Political and regulatory volatility undermining long-term transition investment and delivery          | Expansion and optimisation logic, not replacement; CCUS and decarbonisation                              |
| LEADERSHIP CHALLENGE | Building institutional and financial capability while expanding access   | Coordinating fragmented pathways amid explosive demand growth   | Maintaining legitimacy and competitiveness while managing system strain                          | Sustaining long-term policy continuity and investment confidence                                      | Balancing strategic diversification with geopolitical and economic stability                             |

## FROM TRADE-OFF MANAGEMENT TO REBALANCING

The Exchanges reinforced that successful energy transitions will increasingly depend on leaders' ability to navigate persistent tensions and maintain system coherence under growing strain. In many regions, maintaining affordability, trust, and political durability is now as critical as technology deployment itself.

While trade-offs cannot always be eliminated, the exchanges highlighted the importance of dialogue spaces that help leaders surface blind spots, strengthen shared understanding, make trade-offs explicit and discussable, and explore opportunities for better sequencing and coordination across fragmented systems and institutions.

These insights will help inform the continuing evolution of the **World Energy Trilemma** as a practical leadership discipline for navigating increasingly complex and fragmented energy systems.

## REGIONAL LEADERSHIP EXCHANGES

Our Regional Leadership Exchanges are a member-exclusive dialogue series bringing together senior leaders to engage in shared learning, strategic dialogue, and collaborative sense-making on regional energy priorities. Please contact your Member Committee if you are interested in joining. These discussions will continue at the **World Energy Congress** in Riyadh 26–29 April 2027

GET INVOLVED