WORLD ENERGY COUNCIL

WORLD ENERGY TRANSITIONS IN MOTION

ABOUT

WORLD ENERGY COUNCIL

The World Energy Council is the world's oldest independent and impartial community of energy leaders and practitioners. Through our Humanising Energy vision, we involve more people and communities in accelerating clean and just energy transitions in all world regions. Formed in 1923, the Council has convened diverse interests from across the full energy ecosystem for a century, and today has over 3,000 member organisations and a presence in nearly 100 countries. Our global network draws from governments, private and state corporations, academia and civil society, as well as current and future energy leaders. We effectively collaborate on impact programmes and inform local, regional and global energy agendas in support of our enduring mission: to promote the sustainable use and supply of energy for the benefit of all people.

Further details at www.worldenergy.org and on LinkedIn.
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WORLD ENERGY ISSUES MONITOR 2025

The World Energy Issues Monitor provides a snapshot of what keeps CEOs, Ministers and experts awake at night in over 100 countries.

The Monitor helps to define the world energy agenda and its evolution over time. It provides a high-level perception of what constitute issues of critical uncertainty, in contrast to those that require immediate action or act as developing signals for the future. It is an essential tool for understanding the complex and uncertain environment in which energy leaders must operate, and a tool through which one can challenge one's own assumptions on the key drivers within the energy landscape.

This 15th iteration of the World Energy Issues Monitor is based on insights of over 3,000 energy leaders in more than 100 countries to provide 48 national assessments across six world regions.

World Energy Issues Monitor 2025, published by the World Energy Council.

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FOREWORD

The world is at an inflection point, grappling with the urgency of rewiring energy systems, whilst weathering new storms – geopolitical and climate change related. Global energy transitions are ambitious, large-scale systems change processes – they are deeply human, shaping and being shaped by the lives and livelihoods, cultures and communities they touch.

The 2025 World Energy Issues Monitor draws on human collective wisdom to offer a new map for navigating energy systems changes and moving with the times. Refreshing common sense is essential and not easy in a new context of social media echo chambers, ideological bandwagons and populist politics.

This year's World Energy Issues Monitor reveals persistent people blind spots and shifting regional priorities. Demand growth continues to accelerate, reflecting dynamic shifts in consumption and electrification patterns, shaped by global competitions in digital productivity and social needs for localised security, resilience and adaptation. At the same time, governance structures remain rigid, energy policies flip-flop, and public interest is hard to engage and sustain. Volatility and inequalities are increasing. New winners and losers cannot be ignored.

What we choose to do with human collective wisdom matters – this report is not intended to be read and put on the shelf – it is designed start better quality conversations which can catalyst new and more effective collaborative actions.

Across the World Energy Council community, leaders are asking better questions and actively listening to each other: What are the implications of regional diversity? What is working and can be made to work elsewhere? Given the pervasive sense of risk, where are the actionable opportunities – for turning humanising energy blind spots into actionable bright spots?

This year special thanks are due to our Member Committees and wider stakeholder communities in China, India, Turkey, Burkina Faso and Saudi Arabia – as well as our exceptional global and national Future Energy Leaders networks. Their commitment to effective engagement – in gathering diverse perspectives and in facilitating conversations on the so-what of impact – are beacons of hope. The best way to progress orderly, just and far-reaching energy transitions is by fostering open dialogue and sharing learnings across regions.

Achieving net zero emissions world energy systems is an important milestone for all of humanity – a human challenge, for all the humans at the end of it, and we can and need to make it easier for people to understand, benefit and play their parts.

Now is the time to engage a more human-centric approach to the multitude of energy additions and transitions underway. The future of energy is not just about what powers our systems – it is about who they empower and how we harness human collective wisdom to shape new and better energy futures for billions of lives and a healthy planet.

Angela Wilkinson
Secretary General & CEO
World Energy Council

EXECUTIVE SUMMARY

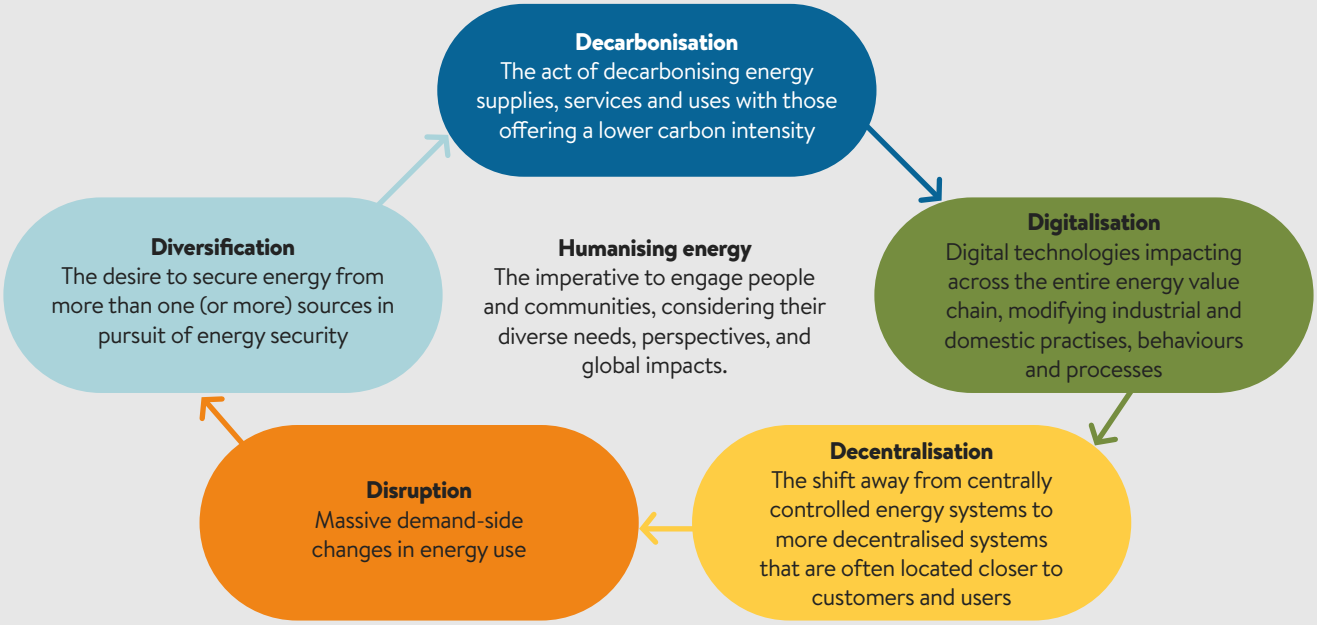
The 2025 World Energy Issues Monitor reveals the evolving patterns of global energy transitions, highlighting shared priorities and regional differences. Drawing insights from over 3,000 respondents across 100+ countries, it identifies key uncertainties, action priorities, and emerging trends shaping the future of energy.

KEY FINDINGS

- **Critical Uncertainty:** Commodity Prices remain in pole position – Fossil fuel dependence and market volatility, influenced by geopolitical tensions, shifting policies, and supply chain constraints.
- **Top Action Priority:** Transmission Grids for a second year running – Grid expansion and modernisation are essential to enabling clean energy growth, yet challenges in permitting, investment, and collaboration slow progress.
- **Blind Spots:** Social License & Circular Economy – Community engagement and resource circularity are often overlooked yet critical for long-term success. Public buy-in hinges on co-benefits – connecting wellbeing, sustainable development and energy transition agendas is crucial for progressing orderly, just and far-reaching energy transitions.
- **Bright Spots:** Regional Leadership – Countries like Brazil, China, Saudi Arabia, New Zealand, and Spain demonstrate that targeted policies, investments, and social inclusion can and do drive meaningful energy progress.

THE COUNCIL'S '5 DS' REAFFIRMED

As energy systems evolve in response to shifting geopolitical landscapes, economic pressures, and climate imperatives, the five interconnected drivers – decarbonisation, decentralisation, disruption, digitalisation, and diversification – remain central. Disruption is intensifying, driven by shifting consumer behaviours, emerging business models, and rapid digital innovation.



NAVIGATING THE FUTURE

The World Energy Trilemma – balancing security, equity, and sustainability – remains imperative and benefits from working with a flexible and integrated guiding framework. Even so, the World Energy Trilemma approach, now in its 16th year, is also evolving to manage new trade-offs and its use is being extended to designing resilient, just, and inclusive energy systems. The contrasting Rocks and Rivers scenarios highlight both entrenched interests and fluid innovations shaping the transition.

CALL TO ACTION

Energy transitions are not quick, easy or simple processes of swapping old technology for new, nor can they be completed all in one go. Instead, we are grappling with socially-messy, multi-dimensional and dynamic situations and systems. The best way to succeed involves systems thinking, adaptive and interactive strategies and using many and new ways to stretch and deepen collaboration.

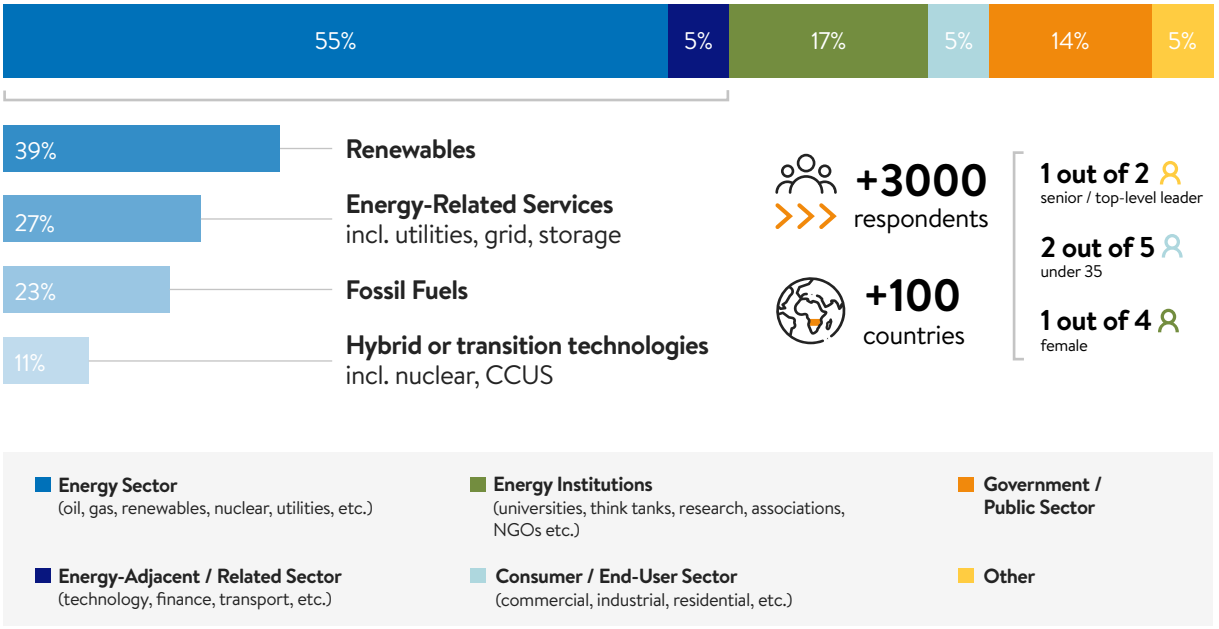
Stakeholder engagement is essential and involves making more informed choices – the how to, with whom and what for – are inextricably linked to the why and so what of systems change management.

Diversity is real and a source of innovation and learning if we also choose to actively listen and leverage regional insights, to scale new solutions, and foster inclusive dialogue across generations, sectors, and geographies.

INTRODUCTION

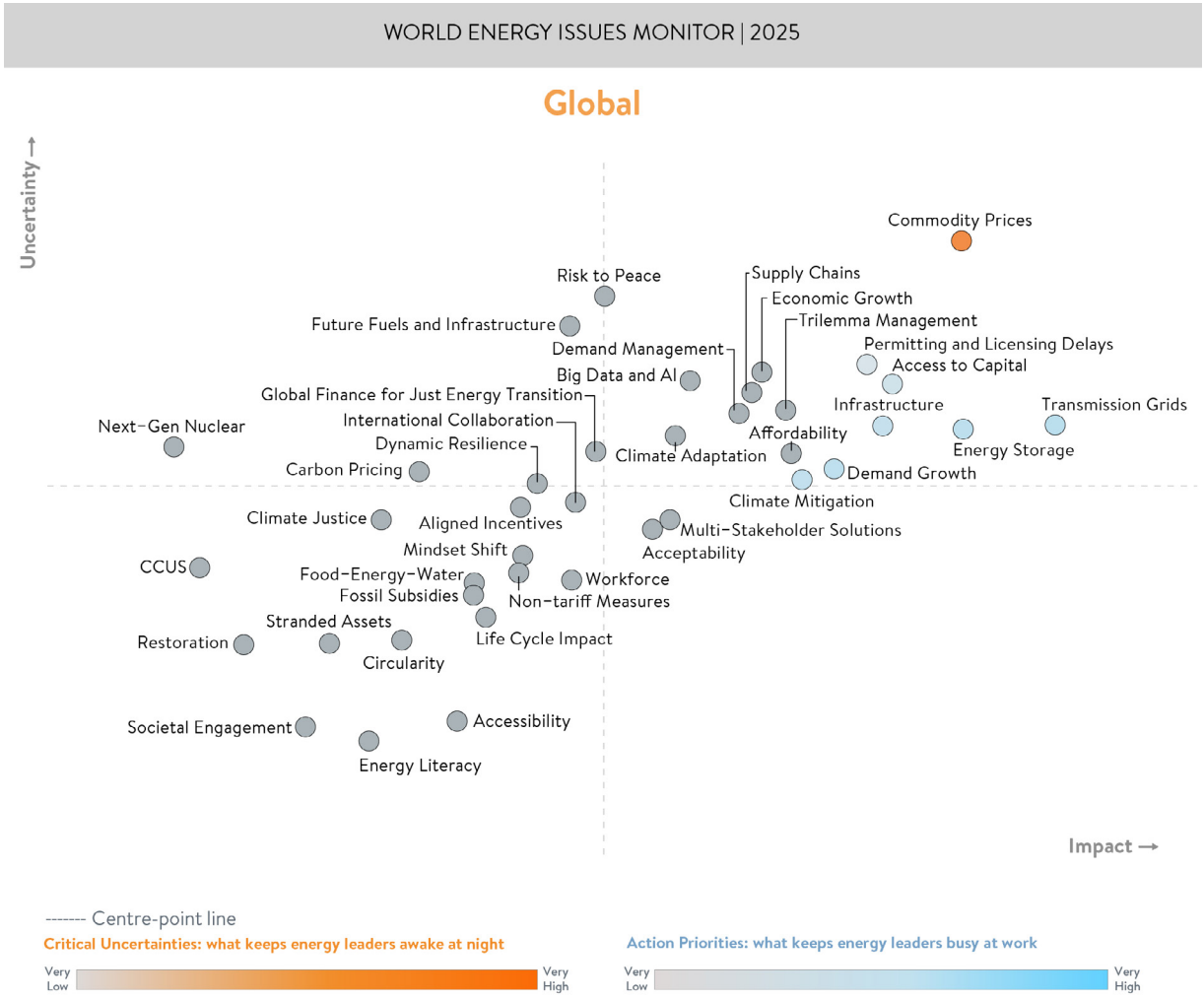
Energy transitions around the globe are increasingly dynamic, **emergent, and self-organising** – much like the flocking of birds. Each bird reacts to its neighbours and surroundings, creating evolving formations that may look different from one moment to the next yet remain guided by the same basic rules. Energy transitions follow the same patterns, with a few unifying drivers – like climate concerns, technology advances, and social imperatives – shaping countless local variations, depending on political, economic, and cultural conditions.

Figure 1. Capturing Diversity: Geographic, Sectoral & Generational Perspectives



The **2025 World Energy Issues Monitor** serves as our lens into these patterns. It shows what factors drive energy transitions, how regions and groups respond differently, and where **shared insights** can help us nudge the global energy sector onto more **human-centred**, resilient, and **inclusive pathways.** Decarbonising our energy systems has yet to truly begin. And, at a time when the international landscape is growing more **fragmented** – with multiple poles of influence and competing agendas – understanding these **regional differences** is both urgent and essential to start the process of net-zero and beyond.

Figure 2. Global Impact and Uncertainty Map 2025



CRITICAL UNCERTAINTIES AND ACTION PRIORITIES

TOP CRITICAL UNCERTAINTY: COMMODITY PRICES

Even as more renewables come online, the world still depends heavily on fossil fuels, meaning **commodity prices** remain the single greatest source of uncertainty. North America's and the Middle East's perspectives on this issue differ, suggesting a sense of energy sufficiency and confidence in managing price risks, setting them apart from other regions that continue to grapple with acute volatility.

- FOSSIL PROMINENCE AND MARKET VOLATILITY
  Wars, shifting alliances, and critical mineral constraints destabilise oil, gas, and electricity markets, making long-term investments risky.

- FRAGILE 'ME-FIRST' POLICIES
  Many governments pivot to self-preservation – securing domestic energy supply and imposing tariffs – exacerbating price fluctuations that ripple across regions.

- RENEWABLE REALITIES AND RESOURCE LIMITS
  The material demands of the renewables revolution and shift to circularity present significant energy and resource constraints. In many places, there will not be enough 'spare and connected' renewable power to support multiple competing needs and uses for decades to come.

TOP ACTION PRIORITY: GRIDS

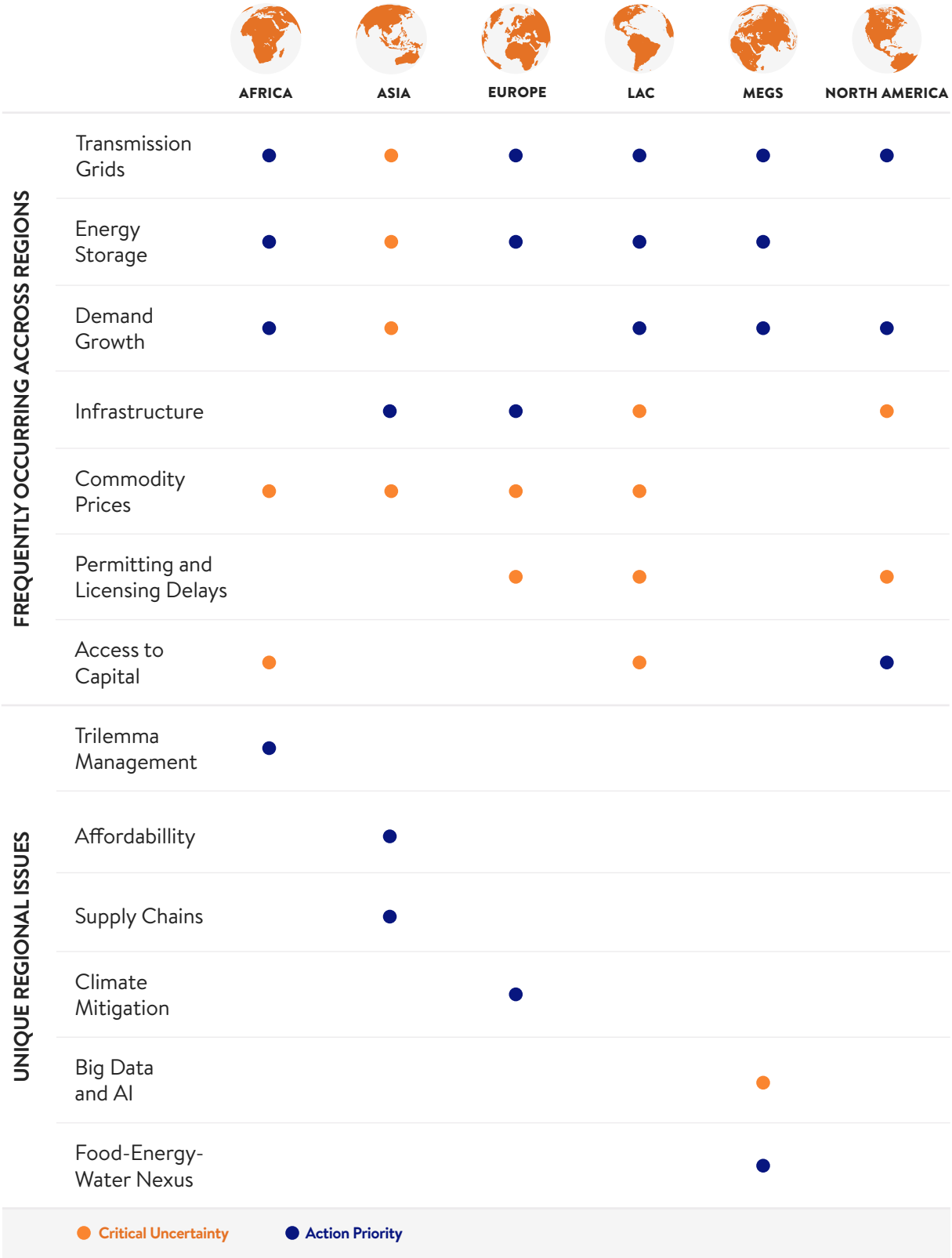
In contrast, **Transmission Grids** are viewed with less uncertainty and very high impact, emerging as this year's top **Action Priority.**

- ENABLER OF ELECTRIFICATION AND RENEWABLES
  Grid expansion and modernisation underpin rising shares of solar, wind, and other clean power sources.

- COLLABORATION AND CAPITAL
  Regions that coordinate early – e.g., on permitting, financing, and community engagement – are moving faster to expand or reinforce grids, reducing overall system costs and boosting reliability.

- INTERCONNECTED CHALLENGES
  Grid development is not a single-issue agenda. Permitting delays, energy storage constraints, and uneven access to capital all influence grid investment and deployment. Addressing these interlinked barriers is essential for accelerating progress.

Figure 3. Comparison of Regional Action Priorities and Critical Uncertainties



BLIND SPOTS AND BRIGHT SPOTS

Energy transitions are enabling some industries and communities to thriving in some areas; but decarbonisation of the whole energy system has yet to truly begin and transition processes are start-stop and/or underdeveloped in others. The 2025 data reveals:

BLIND SPOTS

- COMMUNITY ENGAGEMENT & SOCIAL LICENCE
  Social dimensions – such as **acceptability, energy literacy, and community buy-in** – often rank low in perceived impact. However, ignoring local sentiments can stall or derail projects and trigger populist policy 'flip-flop'. A user-centric energy system and 'whole' society mindset – including women and future energy leaders — underpins the World Energy Council's call to **"humanise energy"** and align political will with citizen needs.

- NATURE AND CIRCULAR ECONOMY
  Too often, transitions focus on decarbonising supply while ignoring deeper system changes – like **circularity or ecosystem restoration.** Shifting from the dominant linear, extractive industrial economy 'growth' models to new models of **'shared and inclusive', 'regenerative'** and **ecological civilisation** models will be crucial for truly **sustainable** transitions.

- WORLD ENERGY TRILEMMA: FROM BALANCE TO JUSTICE AND RESILIENCE
  The World Energy Trilemma – balancing energy security, equity, and sustainability – is evolving, and simply **managing trade-offs is no longer enough.** Transformation requires connecting diverse and uneven energy systems while fostering synergies to ensure resilience, justice, and a healthy planet. It's time to move beyond trilemma management to trifecta design – **a combination of policies, incentives,** and **collaboration choices.**

BRIGHT SPOTS

- BRAZIL
  New momentum in reversing Amazon deforestation and protecting ecosystems demonstrates a powerful link between environmental stewardship and energy transitions and the importance being given to managing the food-energy-water nexus in emerging economies.

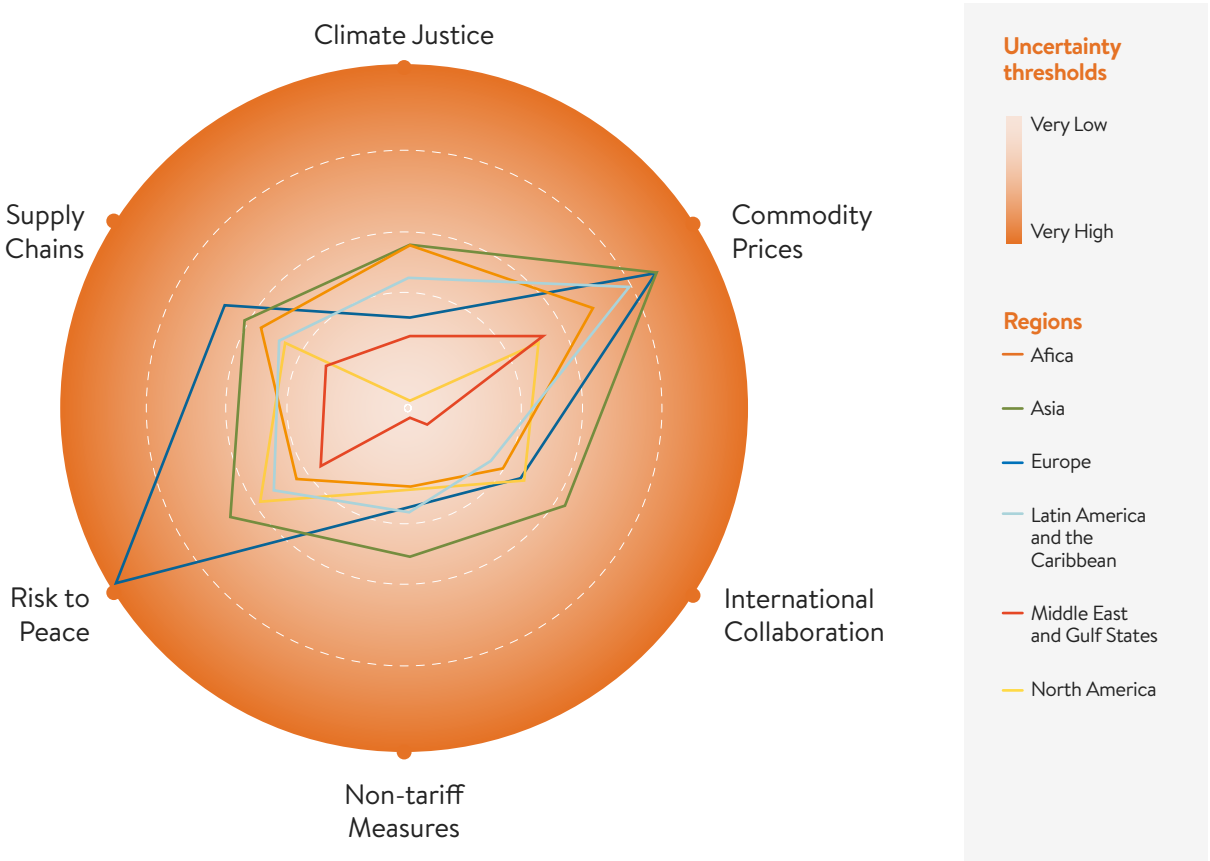
- CHINA
  Rapid grid expansion enables record renewable-energy deployment and robust electrification and supports affordability and supply chain exports. Despite differences in governance models, other regions can learn from China's speed and scale in manage the energy trilemma and progressing energy transitions for trade, industries and communities.

- SAUDI ARABIA
  Ambitious diversification – investing heavily in solar, hydrogen, and advanced transmission – underscores that hydrocarbon-focused economies can pivot successfully, given political commitment and financial resources.

- NEW ZEALAND
  A multi-stakeholder approach is strengthening coordination among industry players while making the energy transition more accessible to communities. Efforts to simplify technical concepts, highlight local success stories, and communicate trade-offs bridge the gap between high-level discussions and public understanding, fostering trust and participation.

- SPAIN
  Managing stranded assets and supporting communities affected by the closure of coal mines and power plants underscores Spain's commitment to a just energy transition. The Just Transition Strategy, aims at providing economic alternatives and social safety nets for workers and communities impacted regions. What can different regions learn from each other about what works and what doesn't?

Figure 4. Regional Variations in Geopolitical Issues



ROCKS AND RIVERS ARE HELPING FRAME THE FUTURE

The World Energy Council's **Rocks and Rivers** scenario foundations acknowledge the current era of disruption and transition, emphasising that shifts are often shaped by powerful, sometimes divergent self-interests. Devised to explore two different key modes of cooperation, the two scenario foundations are **visible in different regions:**

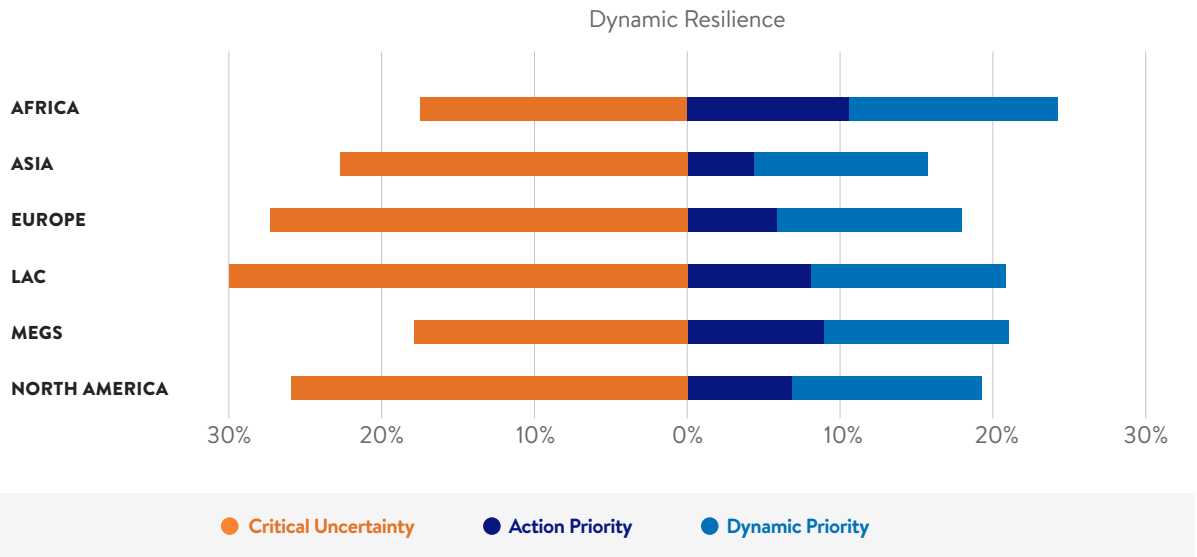
- ROCKS
  Reliance on incumbents, slow policy shifts, and enduring geopolitical frictions. In a **Rocks** world, disruption unfolds through frictions and conflicts, with collaboration mainly occurring among established allies. The continued dependence on fossil fuels and the centrality of commodity prices align with this **Rocks** worldview.

- RIVERS
  Local innovations, community-driven projects, and accelerating technology deployment, as exemplified by bright spots like China's grid upgrades or Brazil's environmental leadership. In a **Rivers** world, disruptions spur fluid alignments across traditional business and public boundaries.

Recognising that both **Rocks** and **Rivers** patterns exist helps leaders **balance near-term realities with long-term ambitions.** And in doing so, collaboration – across regions, sectors, and generations – becomes essential, not merely a choice.

Figure 5. Dynamic Resilience – a common ground collaboration space?

Dynamic Resilience is a Critical Uncertainty for 24% of global respondents, while a cumulative 18% consider it a current priority influencing resource allocation – 6% as an action priority and 12% as a dynamic priority.



WORLD ENERGY TRILEMMA

The World Energy Trilemma – energy security, equity, sustainability – remains a central framework for interpreting this year's results:

ENERGY SECURITY

- **Risk to Peace** and **commodity price volatility** keep security top-of-mind.
- **Grid modernisation** and **storage** are shifting perceptions of what energy security means in an electrifying world.

ENERGY EQUITY

- **Access to capital, equity**, and **economic growth** reveal stark differences in how easily regions or demographics can invest in clean technologies.
- Failure to ensure affordable solutions raises social barriers and undermines overall momentum.

ENVIRONMENTAL SUSTAINABILITY

- **Climate Mitigation** and **adaptation** see patchy implementation, influenced by local politics, finance, and competing priorities.
- **Circular Economy** and **restoration** rank lower globally, suggesting many places still regard sustainability too narrowly, focusing on emissions without embracing deeper systemic shifts.

CONCLUSION

Much like when observing flocks of birds, there are distinct patterns in energy transitions – emergent clusters of movement, sometimes swirling and uncertain, other times aligning and purposeful. These patterns confirm:

- A single **Critical Uncertainty** – commodity prices – still reflects our collective reliance on fossil fuels, highlighting how geopolitical tensions and fuel markets frame every decision.
- **Transmission grids** top the global agenda. If we truly aim to decarbonise, modern grids must be in place to handle distributed renewables and rising demand.
- **Social licence** and **circular economy** are **blind spots** that deserve more urgent attention. Community pushback and a lack of resource cycling can stall transitions just as effectively as high commodity prices can.
- **Bright spots** – in nations like Brazil, China, and Saudi Arabia – are proof that local leadership and innovation can create powerful momentum, even if **global consensus** feels fragmented.
- **Rocks and Rivers** scenarios are "alive" in the data, illustrating how both entrenched systems and new waves of progress coexist, and why collaboration is essential.
- The **World Energy Trilemma** provides a unifying frame: security, equity, and sustainability remain the **three guiding stars** to navigate an increasingly complex energy reality.

By celebrating the diversity of emergent patterns, accelerating peer learning, and humanising the approach to energy development, stakeholders can help shape how this flock moves next. It is an adaptive, iterative journey: there is no singular perfect roadmap but rather a collective process of responsive navigation – turning local successes into global transformation.

As we stretch and sustain more effective collaboration across geographies, genders, and generations, we encourage you to ask better questions and actively listen:

- **What are the implications of regional diversity in energy?**
- **What is working, and how can it work in other places?**
- **As we grapple with connected challenges – and social, environmental, geopolitical, and financial risks – what are the opportunities?**

ABOUT THE WORLD ENERGY ISSUES MONITOR

Energy transitions are complex, evolving, and deeply interconnected – shaped by shifting priorities, emerging uncertainties, and regional realities. The World Energy Issues Monitor has tracked these patterns for over 16 years, providing a unique lens into the dynamic forces driving energy transitions worldwide.

This year, more than 3,000 energy leaders across 100+ countries assessed the impact and uncertainty of key transition issues. Their perspectives highlight where momentum is building, where tensions are rising, and how priorities can shift suddenly in response to geopolitical, economic, and technological developments.

The 2025 edition continues to expand the depth and diversity of insights, segmenting responses by gender, age, seniority, and sector representation. This year's survey underwent a thorough review, refining 39 core transition issues across six categories to capture blind spots, new signals, and emerging leadership priorities.

Energy transitions are not linear. They are shaped by financial flows, technological breakthroughs, social attitudes, and political will. The World Energy Issues Monitor helps leaders navigate this landscape, translating global insights into local actions and informing strategies that balance energy security, equity, and sustainability for billions of better lives and a thriving planet.

Table 1: Issues' Categories and Definitions

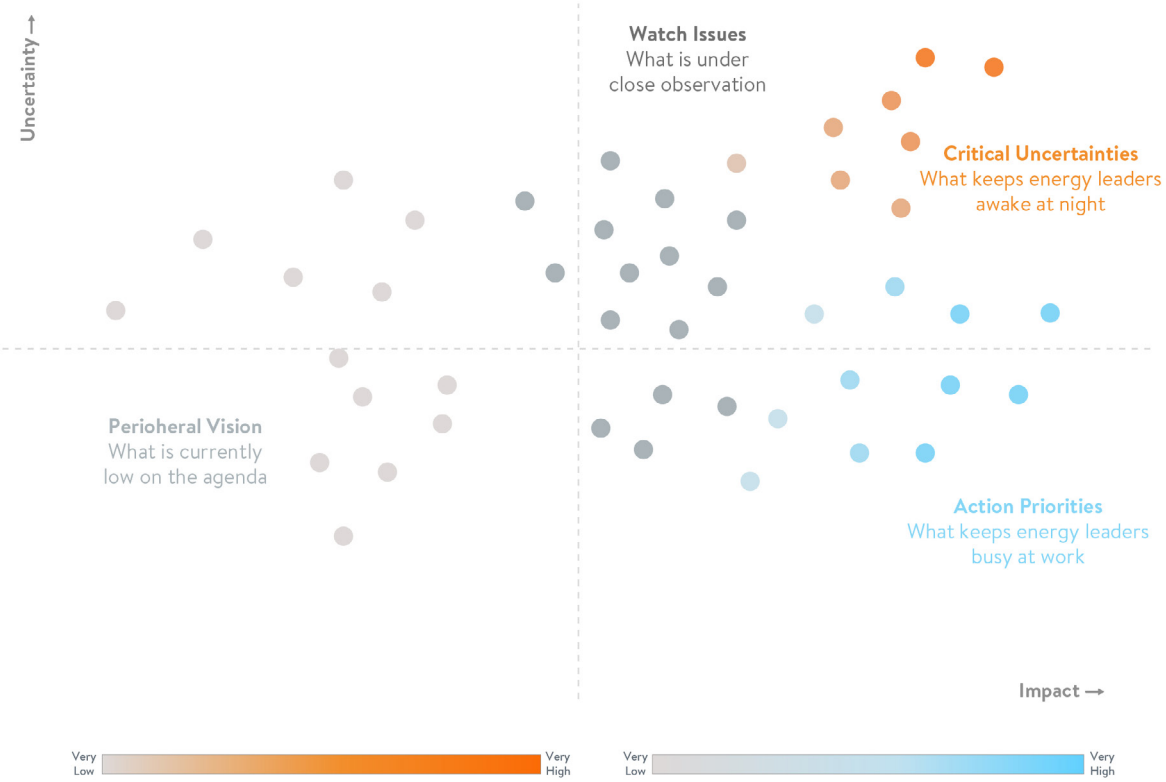
Category	Issue name	Issue description
Geopolitical Issues *Geopolitical issues shaping energy transitions including the impacts of war and extended crisis, international collaboration, supply chain disruptions and climate justice on energy transition efforts*	Risk to Peace	War, extended crisis, fragmentation and extreme polarisation, and tensions from a multipolar world order
	Supply Chains	Supply chains disruptions and resource bottlenecks, including shortages of critical minerals and raw material access
	Commodity Prices	Global energy market instability and volatility in commodity prices, including electricity, oil and gas
	International Collaboration	Outlook for multilateralism, shifts in alliances, global energy governance challenges, and new models of public-private partnerships
	Non-tariff measures	Environmental standards, ESG requirements, and compliance with international sustainability policies
	Climate Justice	Addressing inequalities in climate vulnerability and responsibility for solutions and burden sharing

Economic Issues *Economic factors influencing energy transitions from access to capital and demand growth to workforce adaptation and securing investment and how each factor shapes the energy transition journey*	Access to Capital	Risk allocation, inflation, cost of debt servicing, insurance, and climate finance access
	Global Finance for Just Energy Transitions	Securing investment for socially inclusive, low-carbon growth
	Demand Growth	Drive for human development, demographic shifts, urbanisation, industrialisation, and AI/ data centres
	Stranded Assets	Early decommissioning of economic assets (energy infrastructure) and impacts on local economies
	Economic Growth	Global economic slowdown, national growth outlook, recession risks, and balancing emissions with development
	Workforce	Skills and workforce transitions, adapting to automation, and promoting green jobs
	Carbon Pricing	Market incentives and market-based adjustment mechanisms
Societal Issues *Societal dimensions of energy transitions such as accessibility, affordability, public acceptance, and societal engagement, and how these factors shape society's evolving relationship with energy*	Accessibility	Access to modern and productive energy services, alleviating energy poverty, and enabling equitable access
	Acceptability	Public acceptance and community support for new energy technologies and projects, NIMBYISM, and licensing/permitting delays
	Affordability	Ability and willingness to pay, perceived benefits, and systems costs for reliable and resilient energy services
	Energy Literacy	People's understanding of how energy fits into their everyday lives - their roles and choices
	Social Engagement	Active engagement from a critical mass representing diverse societal needs, interests and generations
	Multi-stakeholder Solutions	Complex coordination and collaboration among multiple stakeholders to advance energy transition
	Mindset Shift	Change in the fundamental relationship between energy and society, user-centric models, emergence of ecological civilisation, and evolving intergenerational perspectives
Environmental Issues *Critical environmental issues including the balance between food, energy, and water needs, advancing climate adaptation and mitigation, and promoting circularity and ecosystem restoration*	Food-Energy-Water	Balancing food, energy, and water needs
	Climate Adaptation	Adaptation to withstand the impacts and risks of climate change
	Climate Mitigation	Mitigation/net zero implementation to reduce, prevent or offset emissions
	Circularity	Closed-loop systems that minimise waste, extend the life cycle of materials, and optimise resource use

	Life Cycle Impact	Energy and environmental footprint of energy technology solutions
	Restoration	Repairing/restoring ecosystems and natural processes
Regulatory Issues *Regulatory factors that influence energy transitions, the role of fossil fuel subsidy reforms, strategic infrastructure planning, demand management policies, and the importance of resilience and aligned incentives*	Fossil subsidies	Removal/reduction of fossil subsidies/tax breaks
	Infrastructure Action Planning	Strategically building and upgrading physical systems
	Demand Management	Policy environment to transform energy demand across sectors
	Trilemma Management	Leveraging policies and incentives, performance and pathfinding in managing connected challenges of energy security, affordability, and sustainability
	Dynamic Resilience	Capacity and capability of a system to adapt in time to disruptions while evolving and strengthening systems
	Permitting and Licencing Delays	Time and costs overruns in the development of energy projects due to permitting and licensing issues
	Aligned Incentives	Alignment of diverse needs and interests across multiple stakeholders and/or geographies/regions
Technology gamechangers *Technology gamechangers that could transform the energy landscape - big data and AI, energy storage, the future of fuels, next-gen nuclear, and grid innovations and how each may shape the energy transition*	Big Data and Artificial Intelligence (AI)	Utilising big data & AI to optimise energy production and consumption, enhance renewable integration, empower localised and distributed energy services
	CCUS	Carbon Capture, Utilisation and Storage
	Energy Storage	Technologies for efficient energy storage to support grid stability and renewable integration
	Future Fuels and Infrastructure	Developing hydrogen-based and synthetic fuels (P2X, SAF) and adapting critical infrastructure (e.g., ports, pipelines)
	Next-Gen Nuclear	Innovations in small and modular reactor technologies, advanced reactor design, and fusion energy
	Transmission Grids	Grid extension and strengthening to enhance flexibility and resilience, facilitate cross-border energy trade, and support electrification

This year's data visualisation has been refined for greater clarity. Previously, axes intersected at zero, clustering many issues in the top-right. Now, the intercept is at the medium perception level, distinguishing high-impact and high-uncertainty issues more effectively. While the colour scheme remains unchanged, this adjustment enhances the ability to track how issues interrelate and evolve over time.

Figure 6: How to Read an Issues Map



Each Issues Map provides a visual snapshot of Critical Uncertainties and Action Priorities for policymakers, CEOs, and experts. The map plots issues based on respondents' perceived levels of uncertainty and impact. This year new quadrants of Watch Issues and Peripheral Vision were added to further deepen the granularity of the analysis:

- CRITICAL UNCERTAINTIES (orange, top-right): High impact and high uncertainty.
- ACTION PRIORITIES (blue, bottom-right): High impact, low uncertainty.
- WATCH ISSUES (grey, centre): Moderate-impact issues with varying uncertainty.
- PERIPHERAL VISION (grey, left-side): Low-impact issues with varying uncertainty.

Beyond these defined categories, some issues do not fit neatly into a single quadrant. When exploring individual responses to issues in more detail, **Dynamic Priorities** emerge – high-impact issues with moderate uncertainty that require continuous recalibration based on evolving data and trends.

ACKNOWLEDGEMENTS

The project team extends its sincere gratitude to all individuals and organisations who contributed to this report by sharing insights, providing information, and reviewing drafts. Special thanks to the 3,000+ energy leaders who participated in the survey, making this work possible.

We also recognise the dedicated efforts of our Future Energy Leaders Issues Monitor Ambassadors, along with State Grid Corporation of China (SGCC), China Electricity Council (CEC), and Arpel, for strengthening country and regional representation in the 2025 World Energy Issues Survey.

A special acknowledgment goes to the top five contributing Member Committees—China, India, Türkiye, Burkina Faso, and Saudi Arabia—for their exceptional engagement in gathering survey responses. Their leadership has been instrumental in shaping a truly global perspective on energy challenges.

These collective contributions reinforce the World Energy Council's mission to foster inclusive dialogue and collaboration across the energy sector.

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Botswana
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Bulgaria
Burkina Faso
China
Chile
Colombia
Congo (Dem. Rep.)
Croatia
Cyprus
Dominican Republic
Ecuador
Egypt (Arab Rep.)
Estonia
Eswatini (Kingdom of)
Ethiopia
Finland
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Germany
Greece
Hong Kong (China)
Iceland
India
Indonesia
Italy
Japan
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Kazakhstan
Kenya
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Latvia
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Mongolia
Morocco
Namibia
Nepal
Netherlands
New Zealand
Nigeria
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Panama
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