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THEME:

Toward Integrated Governance, Regional Power Integration, and Resilient Energy Systems in Eastern Africa

This week's Influential Bulletin focuses on building resilience in Eastern Africa's energy security through governance reform, regional integration, and system transformation. The analysis highlights that energy vulnerability in the region is not driven by resource scarcity, but by gaps in institutional coordination, long term planning, and regulatory effectiveness. These constraints have historically produced reactive energy governance systems that struggle to anticipate and manage shocks.

Global oil market dynamics present an opportunity to accelerate diversification, strengthen domestic energy systems, and attract investment into more resilient and sustainable energy sources. At the same time, energy systems remain central to economic stability, meaning that infrastructure expansion, redundancy, and resilience improvements can directly enhance both security and growth outcomes. Regional power pools further offer a pathway to optimise supply, reduce costs, and deepen integration through coordinated markets and shared infrastructure.

The brief therefore calls for an integrated regional energy security compact. This compact should align institutional reform, regulatory enforcement, energy transition investment, protection against illicit energy economies, and full operationalisation of regional power pools into a coordinated resilience framework.

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Institutional Reform as the Foundation of Energy Security

Energy security in Eastern Africa is fundamentally shaped by the strength and effectiveness of governance systems rather than the availability of resources. Across the region, institutional weaknesses continue to constrain the ability of states to regulate markets, plan long term investments, and coordinate across sectors and borders. This results in fragmented energy systems where policies are often reactive and short term, limiting resilience to both domestic and external shocks. The persistence of these governance gaps explains why significant energy potential has not translated into consistent and reliable supply.

The uneven development of institutional capacity across countries further complicates regional energy dynamics. While some states have made progress in regulatory reform and renewable energy integration, others remain constrained by weak oversight, limited technical capacity, and underdeveloped infrastructure. This disparity creates an uneven landscape where resilience varies significantly across borders, undermining the potential for collective regional stability. As a result, interdependence remains shallow and

coordination mechanisms underperform. Weak regulatory systems also reduce transparency and accountability in energy markets. Inefficient procurement processes, limited oversight of large scale investments, and exposure to elite capture distort market outcomes and discourage private sector participation. These conditions not only increase costs but also slow the pace of infrastructure development and innovation. Over time, this reinforces a cycle of underperformance that constrains both access and reliability.

Strengthening institutional capacity is therefore a foundational priority for improving energy security. Governments should focus on building independent regulatory authorities with the mandate and capability to enforce standards, ensure transparency, and coordinate planning processes. Improving procurement systems and accountability mechanisms will reduce inefficiencies and build investor confidence. At the same time, integrating cybersecurity frameworks into governance structures is increasingly important as energy systems become more digitized.



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At the regional level, institutional alignment is critical to unlocking the benefits of cooperation. Stronger coordination across countries can improve planning, reduce duplication, and enhance the efficiency of cross border energy flows. By addressing governance constraints at both national and regional levels, Eastern Africa can shift from reactive management to strategic control of its energy systems. This transition is essential for building a resilient and integrated energy future.



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Tuesday 21st April 2026

Oil Shocks as a Catalyst for Illicit Energy Economies

Eastern Africa's energy systems are highly exposed to global oil market volatility, making external shocks a critical driver of domestic instability. Disruptions in key global supply routes transmit rapidly into the region through rising fuel prices, increased import costs, and pressure on foreign exchange reserves. For economies that rely heavily on imported refined petroleum products, these shocks directly affect inflation, fiscal stability, and energy affordability. As a result, global market dynamics become embedded within domestic economic and governance challenges.

These external pressures interact with internal institutional weaknesses to create conditions conducive to illicit economic activity. When fuel prices rise sharply or supply becomes constrained, incentives for smuggling, diversion, and informal distribution networks increase significantly. Weak enforcement capacity and regulatory gaps further enable these activities to expand with limited resistance. Over time, illicit energy flows can become structurally embedded within both formal and informal market systems.

The expansion of illicit energy economies has far reaching implications beyond immediate economic losses. It undermines state revenue collection, distorts market pricing, and weakens public trust in governance institutions. In addition, transnational organized crime networks are increasingly exploiting these opportunities, embedding themselves within supply chains and logistics systems. This blurs the boundary between legal and illegal markets, creating systemic governance and security risks.

Addressing this challenge requires a shift toward integrated and security oriented energy governance. Governments must strengthen intelligence coordination across customs, regulatory agencies, and security institutions to detect and disrupt illicit flows. Enhancing monitoring systems for fuel imports, pricing mechanisms, and cross border transactions will improve transparency and accountability. Financial tracking tools are particularly important in identifying anomalies linked to criminal activity.

Regional cooperation is essential given the cross border nature of energy crime. Harmonizing regulatory frameworks, sharing intelligence, and coordinating enforcement efforts can significantly improve effectiveness. By treating energy security as both an economic and security issue, Eastern Africa can reduce

vulnerability to illicit flows and strengthen the integrity of its energy systems. This approach transforms external shocks from sources of instability into catalysts for institutional strengthening.resilience.

Wednesday 22nd April 2026

Energy Systems as Strategic Assets and Systemic Risk Nodes

Energy systems in Eastern Africa function as critical strategic assets that underpin state authority, economic continuity, and social stability. Reliable energy supply supports industrial production, public service delivery, and the functioning of key governance institutions. As such, energy infrastructure is not merely technical but deeply embedded in the broader architecture of state power. Disruptions to these systems therefore have immediate and far reaching consequences.

A defining feature of energy systems in the

region is their vulnerability to cascading failures. Disruptions in electricity grids, fuel supply chains, or hydropower systems can rapidly spread across sectors, affecting governance, security, and financial systems. These cascading effects highlight the interconnected nature of energy infrastructure and the limited capacity of states to absorb shocks. In many cases, response systems are overwhelmed, exposing underlying institutional fragilities.

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Structural characteristics of the energy system further amplify these risks. High import dependence increases exposure to global market volatility, while the concentration of infrastructure in key nodes creates single points of failure. Ports, pipelines, and transmission corridors become critical vulnerabilities, where localized disruptions can generate regional consequences. These dynamics are compounded by geopolitical competition and maritime insecurity, which add external pressure to already fragile systems.

Building resilience requires a system wide approach that goes beyond incremental improvements. Expanding strategic fuel reserves can provide a buffer against supply disruptions, while diversifying energy sources reduces dependence on imports. Strengthening infrastructure redundancy ensures that systems can continue functioning even when individual components fail. These measures collectively enhance the ability of states to manage and recover from shocks.

As energy systems become increasingly digitized, cybersecurity must also be integrated into resilience planning. Protecting grid systems and control networks from cyber threats is essential for maintaining stability and public confidence. At the same time, strengthening crisis response coordination at both national and regional levels can improve the speed and effectiveness of interventions. Treating energy systems as core components of national resilience is essential for long term stability.



Energy Sovereignty Through Investment and Regional Integration

Energy sovereignty in Eastern Africa is emerging as a strategic objective shaped by the need to reduce vulnerability to external shocks and strengthen domestic control over energy systems. The region's reliance on imported refined fuels continues to constrain economic stability and expose countries to global price volatility. Limited strategic storage capacity further reduces the ability of governments to manage supply disruptions effectively. These structural constraints highlight the importance of moving toward a more self-determined and resilient energy system.

Achieving energy sovereignty requires a coordinated approach to investment and regional integration. Developing joint refining capacity across countries can reduce dependence on imports while strengthening regional value addition. Shared infrastructure investments allow for economies of scale, improved efficiency, and enhanced bargaining power in global energy markets. This approach shifts the region from passive consumption to active participation in energy value chains.

Renewable energy offers a critical pathway for strengthening sovereignty and sustainability. Eastern Africa has significant geothermal and hydropower potential, particularly along the Rift Valley and major river systems. Scaling these resources can provide stable baseload energy while reducing reliance on imported fuels. At the same time, integrating solar and wind energy can diversify the energy mix and support long-term transition goals.

Cross border electricity integration further enhances system efficiency and resilience. By connecting national grids, countries can balance supply and demand more effectively and reduce the need for redundant infrastructure investments. This creates a more flexible and adaptive energy system capable of responding to fluctuations and shocks. Regional integration also strengthens interdependence, which can enhance collective stability.

Financing this transformation will require innovative partnerships and strong institutional frameworks. Regional development banks and international partners can play a catalytic role in mobilizing capital for large scale infrastructure projects. Blended financing models can combine public and private investment to reduce risk and attract long term funding. Energy sovereignty, in this context, is achieved through strategic interdependence rather than isolation.



Photo Credit: Linked In

Unlocking Regional Power Pools for System Wide Resilience

Regional power pools represent the operational backbone of an integrated energy system in Eastern Africa. The region is endowed with diverse and complementary energy resources, including hydropower, geothermal, wind, and thermal generation. This diversity creates significant potential for shared supply, where countries can support each other during periods of peak demand or supply shortages. However, this potential remains largely underutilized due to structural and institutional constraints.

Electricity markets in the region remain predominantly national, limiting the scale and efficiency of energy systems. Cross border electricity trade is still relatively low, reflecting gaps in coordination, infrastructure, and regulatory alignment. As a result, surplus energy in one country often coexists with shortages in another, leading to inefficiencies and higher system costs. This fragmentation reduces overall resilience and undermines the benefits of regional cooperation.

Recent investments in transmission infrastructure and emerging plans for regional electricity markets indicate progress toward integration. These developments reflect growing recognition of the value of coordinated energy systems. However, challenges remain, including inconsistent regulatory frameworks, non-harmonized tariffs, and limited enforcement mechanisms. Sovereignty driven policies also continue to favor bilateral agreements over broader regional platforms.

Unlocking the full potential of regional power pools requires deeper institutional reform and regulatory harmonization. Establishing common market rules, aligning grid codes, and strengthening regional governance mechanisms can improve coordination and efficiency. Expanding transmission networks will also be critical for enabling the physical flow of electricity across borders. These measures collectively support the development of a more integrated and resilient system.

A fully operational regional power pool would deliver significant economic and strategic benefits. It would reduce costs by optimizing generation across borders, enhance reliability through shared reserves, and support the integration of renewable energy by balancing variability. Ultimately, regional power integration represents the transition from fragmented national systems to a coordinated energy architecture capable of sustaining long term resilience and economic transformation.



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