A REGION AT THE CROSSROADS

Africa's Next Power Corridor Runs Through the Horn

For two thousand years, the Red Sea and the Horn have connected Africa to the world;
From the expansive Harbors of Djibouti and the water tables above the Ethiopia's highlands;
From Kenya's geothermal fields and Somalia's vast coastline plus South Sudan's basins —

the Horn is home to over 200 million people and one of Africa's last unconnected power corridors, and one of its greatest opportunities.

Mission 300's pledge to connect 300 million and other continent-wide initiatives, will be won or lost, succeed or fail in corridors such the Horn.

This report tracks whether the Horn is building that corridor — commitment by commitment, country by country.

HORN OF AFRICA INITIATIVE

Ministerial Implementation Tracking

Energy Sector Pilot

Regional Summary

Djibouti · Ethiopia · Kenya · Somalia · South Sudan

21	18	609	4
Respondents	Agencies	Tracked Reports	Ministerial Sessions (2019–2026)

FOR MINISTERIAL DISCUSSION ONLY

METHODOLOGY

How to Read This Report

Final Revised Survey Data · 19 Respondents across 17 Agencies · 609 Tracked Reports · Four Ministerial Sessions (2019–2026)

1

29 questions, 20 commitments

The tracker survey asks 29 individual questions, grouped under 20 broader ministerial commitments. A handful of commitments are checked with two separate questions rather than one.

2

One consolidated rating per country

Every question gets exactly one rating per country: whichever answer — Yes, Partial Progress, No, or Not Applicable — most of that country's respondents agreed on.

3

An identical, apples-to-apples basis

All comparative figures in this report use each country's consolidated rating, so Djibouti, Ethiopia, Kenya, Somalia and South Sudan are compared on an identical basis regardless of how many respondents each returned.

Reading “Mixed”

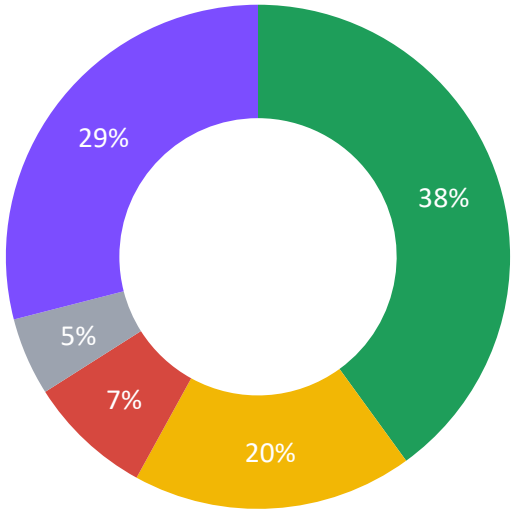
“Mixed” covers two situations: a country's own respondents were evenly split on a question (only possible for Ethiopia and Kenya, the region's only multi-respondent countries) — or, at the commitment level, a commitment's two tracked questions pointed in different directions.

REGIONAL SNAPSHOT

Every Country, Every Question — At a Glance

145 country-question ratings region-wide (5 countries × 29 questions) — each rating's share of the total

38%	20%	7%	6%	29%
Yes	**Partial Progress**	**No**	**Mixed**	**Not Applicable**
(55 of 145 ratings)	(29 of 145 ratings)	(10 of 145 ratings)	(9of 145 ratings)	(42 of 145 ratings)



Reading the Snapshot

Across all five member states, this report rates each country on every one of the 29 tracked questions — giving Djibouti, Ethiopia, Kenya, Somalia and South Sudan an identical basis for comparison regardless of how many respondents each returned.

A healthy 38% Green share signals real progress; an 20% Yellow share shows a sizeable amount of work still under way. Region-wide, 42 ratings (29%) are Not Applicable — see the data-governance note in Key Findings.

Country Response & Institutional Coverage

All comparative figures use each country's consolidated rating — one per question — so countries are compared on an identical basis, not raw per-institution response counts

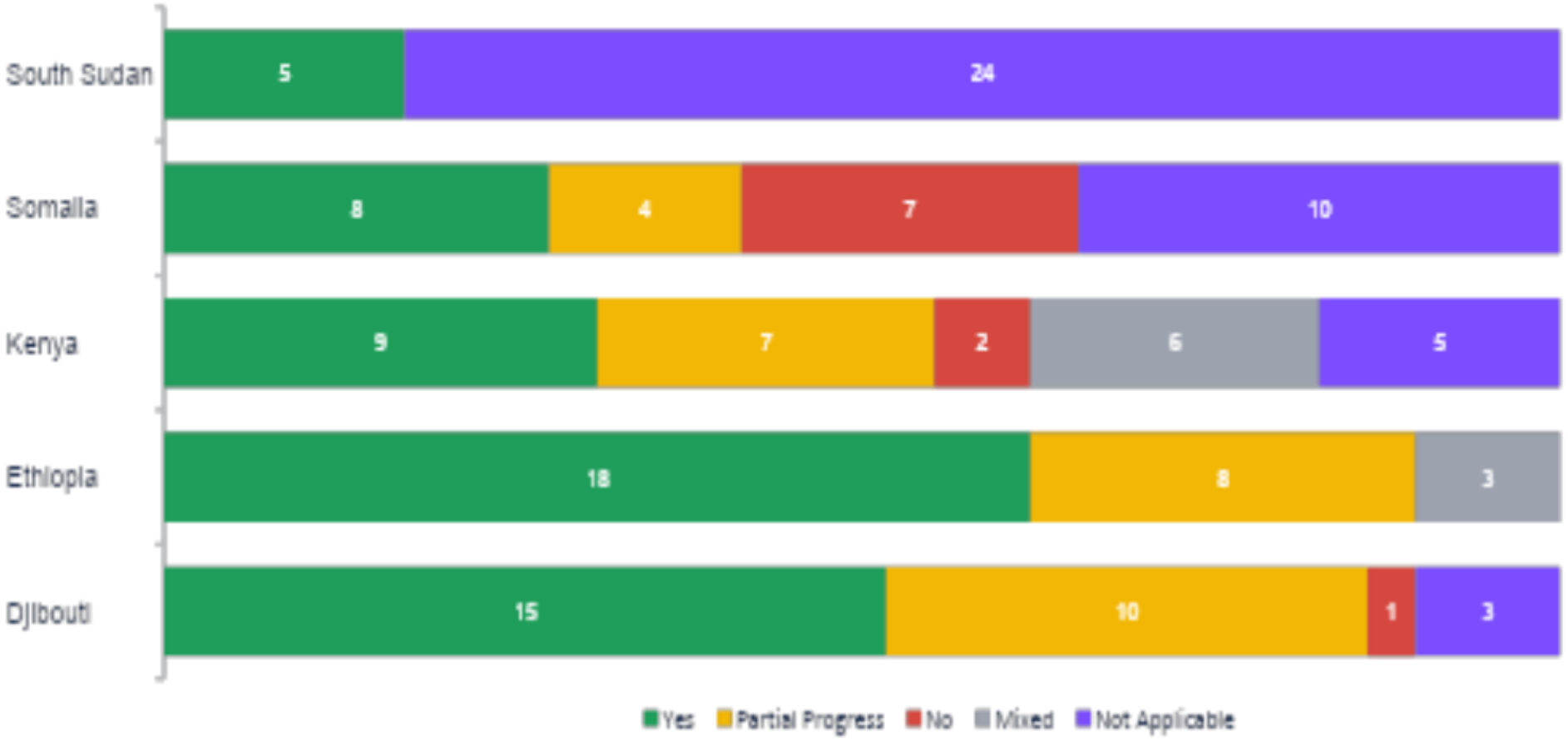
Country	Respondents	Agencies	Reports	Institutional Coverage
Djibouti	1	1	29	Single national ministry administers the sector
Ethiopia	11	9	319	Most differentiated structure in the region: Ministry, regulator, transmission, distribution, EAPP and 4 development partners
Kenya	7	6	203	Second-most differentiated: regulator (EPRA), transmission (KETRACO), distribution (KPLC), Ministry, development partner
Somalia	1	1	29	Single national ministry administers the sector
South Sudan	1	1	29	Single national ministry administers the sector

Agencies Administering the Power Sector, by Country



Country Comparison — Consolidated Basis

One rating per question, N = 29 per country — Ethiopia (11 respondents/9 agencies) and Kenya (7/6) vs. Djibouti, Somalia and South Sudan (1/1 each)

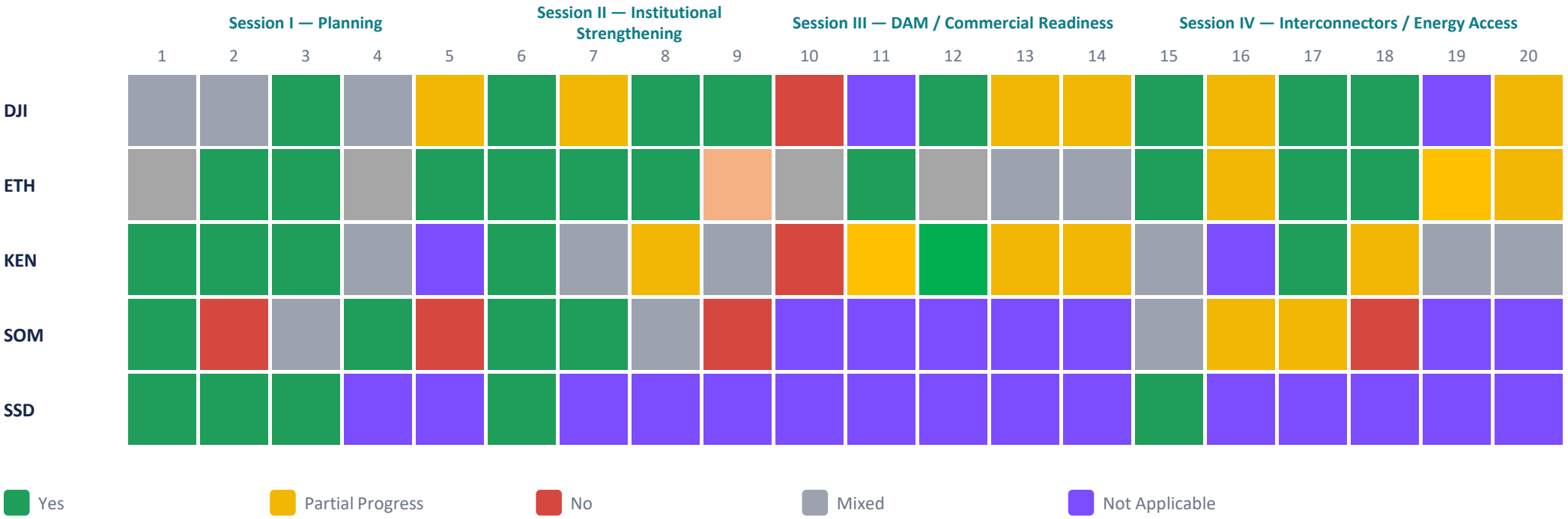


Every country bar totals 29 — the full tracked question set — so Green/Yellow/Red/Mixed/N-A shares compare directly across countries regardless of respondent count.

REGIONAL COMMITMENT HEAT-MAP

20 Commitments Across 5 Countries

Each cell is a country's consolidated response for one broader ministerial commitment. Where a commitment's two tracked questions disagree, the cell is Mixed (grey) rather than a resolved winner.



- Column 6 — EAPP technical-committee participation — is the region's only commitment rated Yes by every country: the clearest sign of unanimous engagement.
- Column 10 — DAM trading-unit readiness — is the clearest single regional gap: Red or Not Applicable in four of five countries, and Mixed in the fifth (Ethiopia's own respondents were evenly split).
- Grey "Mixed" cells appear only for Ethiopia and Kenya, where several institutions tracked the same commitment and disagreed.

REGIONAL INDIVIDUAL QUESTION HEAT-MAP

29 Questions Across 5 Countries

Djibouti, Somalia and South Sudan (1 respondent each) show direct answers; Ethiopia and Kenya cells marked Mixed reflect an exact split among that country's respondents, not a resolved answer.



- Columns 10 and 23 — EAPP technical-committee participation and investment-ready transmission pipeline — are solid green for every country: the region's clearest unanimous successes.
- Column 15 — DAM trading-unit readiness — is Red or Not Applicable for most countries: the clearest single regional gap, and the granular view behind Commitment 10 above.
- 38% of ratings are Green and 20% Yellow — notable progress, with a sizeable share of work still in motion.

KEY FINDINGS I

Interconnectors & Regional Engagement

The region's clearest achievements: physical cross-border build-out and unanimous participation in EAPP's technical organs

1 Interconnector build-out: the region's clearest achievement

All five countries are investing heavily in cross-border interconnection. The Second Ethio-Djibouti line is under construction (AfDB/World Bank financed); Ethio-Somalia feasibility studies are complete and awaiting financing; the Ethio-South Sudan line is under feasibility study, confirmed independently by both countries. Kenya reports the Ethio-Kenya and Kenya-Tanzania lines as operational, and the Lake Victoria Ring study (Kenya-Tanzania-Uganda) is complete but unfinanced.

2 EAPP participation is unanimous — but utilization of its instruments is low

Engagement in EAPP's technical committees (Planning, Marketing, Operations, HR/Governance) is the only commitment rated Yes by all five countries, corroborated independently by EAPP. Yet active participation has not translated into adoption of EAPP's standards and procedures.

KEY FINDINGS II

Power Trade & National Compacts

Bilateral trade is deepening outside EAPP's framework, while Mission 300-aligned National Energy Compacts gain ground

3 Power market integration is the region's weakest link

Bilateral trade is deepening — Ethiopia-Kenya volumes grew from ~1,308 to ~1,410 GWh in 24 months, a Tanzania-Ethiopia wheeling test through Kenya's grid succeeded, and Kenya holds bilateral PPAs with Ethiopia, Tanzania and Uganda — but entirely outside EAPP's approved framework. Despite Council of Ministers approval, no country has adopted EAPP's power-trade standards and protocols: a critical gap suitable for Ministerial intervention.

4 Mission 300 and National Energy Compacts are landing

Djibouti, Ethiopia and Kenya report Compacts substantially complete or validated. Ethiopia's was endorsed Sept. 2025 (75% electricity access / 57.74% clean cooking targets); Kenya validated its plan Aug. 2025 (5.1M new connections); Djibouti presented its updated Compact at the June 2026 Africa Energy Forum. Somalia's launches Sept. 2026; South Sudan reports Not Applicable.

KEY FINDINGS III

Market Launch, Resourcing & Data Gaps

Three structural constraints behind the region's red and grey ratings

5 The Day-Ahead Market has not launched

Commitment 10 (national DAM trading-unit readiness) is the region's lowest-rated commitment — Red in Djibouti and Kenya, Yellow in Ethiopia, N/A elsewhere. EAPP's Market Rules are approved and a settlement bank and regional office (Cairo) are in place, but an unresolved dispute over the independent market operator's host country is blocking launch.

6 Institutions exist, but resourcing lags

The region's institutional structures range from a single ministry to an eight-agency multi-utility system — but agency count is only half the picture. Ethiopia's EEP reports a DAM trading unit that exists on paper but is not fully staffed; Kenya's KPLC needs explicit Ministerial direction on how its three-utility structure should conduct EAPP trading. Under-resourcing is a region-wide constraint.

7 The high "Not Applicable" rate is partly a data-governance gap

42 of 145 consolidated ratings (29%) are Not Applicable, but only 4 individual responses explain why. Much N/A reporting is genuine (e.g. market-settlement questions that don't yet apply to a non-interconnected country) — but without an explanation, an N/A answer is as likely to reflect a data or reporting gap as a true non-applicability.

STRATEGIC OUTLOOK

A Two-Tiered Region With a Shared Opportunity

How the five member states are integrating at different speeds — and what full integration could unlock

8 A two-tiered integration pattern is emerging

Two countries are advancing a dynamic, market-based power sector and positioning to lead regional trade. One is integrating physically through multiple transmission lines while its national sector remains weakly regulated. Two others — emerging from conflict and infrastructure loss — remain focused on rebuilding at home while beginning to connect with neighbors.

9 Regional integration is a low-hanging opportunity, but not an automatic one

The Horn already has the building blocks: diversified energy sources, growing demand, cross-border interconnections and an established platform (EAPP). A fully integrated Horn would let countries trade surplus power, lower generation costs and improve energy security — with spillover potential into the Southern and Central Africa Power Pools and new private investment at scale.

Fix the Market, Formalize the Objective

Priority Recommendations for Ministerial Decision

01

Resolve the Day-Ahead Market impasse

call on national authorities to propose a firm EAPP DAM launch date and resolve the independent market-operator hosting dispute — the single unresolved decision behind most of the region's red and grey ratings.

02

Formalize a Regional Electricity Market

Adopt a fully functioning **Regional Electricity Market** as a formal HoAI objective, and encourage members to migrate at least one active bilateral PPA to the EAPP standard template in 2026 — Ethiopia, Kenya and Djibouti all have qualifying PPAs in force today.

03

Harmonize national standards and regulations

Mandate EAPP to launch a Regional Energy Regulatory Forum to progressively harmonize national regimes. Regional power trade cannot operate efficiently while member states retain substantially different standards.

Resource, Finance & Rebuild

Priority Recommendations for Ministerial Decision

04

Resource and staff DAM trading units

Invite EAPP and development partners to commission a regional staffing initiative for DAM trading units and market-operations roles — Ethiopia and Kenya both self-report units that exist but are not fully staffed; Somalia reports an eight-person capacity gap with no training plan.

05

Table a financing package for Somalia

Table a dedicated financing and technical-assistance package for Somalia and other requesting members as they modernize, decentralize and climate-proof their power systems. Somalia self-reports zero financing commitments to date against its request.

06

Launch a Power Reconstruction Investment Facility

Endorse a dedicated **Power Reconstruction Investment Facility** using concessional finance to mobilize private investment through blended-finance and risk-guarantee instruments — rebuilding power in conflict-affected areas is a strategic investment in peace and recovery.

HORN OF AFRICA INITIATIVE

Ministerial Discussion

The single most urgent ask: a firm EAPP Day-Ahead Market launch date; and resolution of the market-operator hosting dispute behind most of the region's red and grey ratings.

FOR MINISTERIAL DISCUSSION ONLY

Prepared by the HoAI Secretariat · Regional Summary, September 2026