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The Evolving Role of Gulf States in Africa's Energy Transition

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Summary

- The Gulf states —particularly the United Arab Emirates (UAE) and Saudi Arabia— are increasingly adopting rule-shaper and rule-promoter roles in their energy and climate relations and partnerships in Africa. They do so by providing financing and investment in renewable energy and hydrogen projects, and exporting low-carbon technologies and expertise, as part of their global diversification strategies.
- Notable examples of projects and initiatives include the Aysha-1 project, which was initiated in an agreement signed between UAE-based renewable developer AMEA Power and Ethiopia's state-owned electricity company for the development and operation of a 300-megawatt onshore wind project; UAE's Masdar and Infinity Power co-developing the 10 GW AMAN green hydrogen project in Mauritania, as well as large-scale solar and wind ventures in Egypt; and Saudi Arabia's ACWA Power involvement in green hydrogen development in Egypt's Suez Canal and green ammonia production in Morocco, while also exploring opportunities in South Africa.
- As these projects and initiatives, from both the public and private sectors continue to expand, it is essential to understand the opportunities and risks of Gulf-Africa energy and climate engagements. It is equally important to articulate how Gulf countries could exercise caution to achieve sustainable, mutually beneficial outcomes and foster win-win partnerships in their relatively new roles in Africa.
- This Insight begins by examining the growing energy transition initiatives undertaken by Gulf economies in African countries, highlighting their experiences, opportunities and challenges. It then draws on the case study analyses to explore the desirable future of these collaborations and concludes with recommendations aimed at promoting a sustainable, balanced, and mutually beneficial climate partnership between Gulf and African countries.
- Opportunities of Gulf state involvement in Africa's energy transition include accelerated renewable deployment and infrastructure development, technology transfer, resource access and economic diversification, and geopolitical influence and strategic alliance.
- Risks include environmental and social concerns, especially regarding labour rights and environmental impacts, geopolitical tension and sovereignty issues, regulatory challenges and investment risks, competition with other global powers, 'greenwashing' and fossil lock-in.
- The Insight argues that ensuring sustainable, mutually beneficial outcomes will require strategies that align with international best practices, strengthen Africa's development goals, and protect the long-term interests of Gulf economies.
- Achieving this will essentially require that Gulf economies position themselves as reliable, long-term partners in Africa's energy transition by emphasizing sustainability, transparency and mutual benefit. In so doing, they can stand out as trusted partners of choice, strengthening both their influence and long-term investment returns at a time when many African countries are diversifying partnerships beyond the West to include China, Gulf states, and other global actors
- Gulf investors adopt international standards in procurement, environmental and social impact assessments and labour rights. At the same time, African governments can play a vital role by streamlining regulatory frameworks to attract and retain foreign investment, while ensuring fair and transparent governance.
- Gulf projects proactively involve local communities, respecting land rights and mitigating environmental impacts, and empowering affected populations through participatory decision-making processes. Beyond compliance, such measures strengthen the social licence to operate and reduce project risks.

- Gulf investments incorporate training programmes, skills development and local manufacturing components that maximise domestic employment and ensure technology transfer. This approach not only supports Africa's socio-economic transformation but also strengthens Gulf investors' reputational standing and secures long-term returns.

The Issue

The Gulf states — particularly the UAE and Saudi Arabia — are undergoing a strategic transformation.[1,2] Once primarily focused on hydrocarbons, they are now positioning themselves as major investors, rule-shapers and rule-promoters in Africa's renewable energy and low-carbon initiatives. This shift is driven by economic diversification strategies, climate diplomacy and geopolitical ambitions. The deepening of Gulf–Africa energy partnerships offer promising opportunities, but also raises important questions regarding sustainability, transparency, and impact.

Rule-shapers and Strategic Financing Drivers

The Gulf states have adopted a nuanced approach to the global energy transition—balancing the reduction of emissions while investing in low-carbon technologies. Their strategy of "conditional participation" emphasises that, with effective deployment of advanced technologies like carbon capture, utilisation, and storage (CCUS) and zero-flaring practices, fossil fuel emissions can be reduced, while parallel investments in renewable energy and low-carbon solutions advance the transition.[3]

Several factors drive some Gulf states to become architects of the rulebook in geopolitics of energy and climate rather than passive recipients:

- Contributing to the global narrative – Gulf companies want to contribute to the international debate on the energy transition. Saudi Aramco's central role in the "Aiming for Zero Methane Emissions" initiative exemplifies this shift — from regulatory compliance to proactive global leadership on methane standards.[4]
- Leveraging comparative advantages – Firms like Saudi Aramco and Abu Dhabi National Oil Corporation (ADNOC) have among the lowest CO_2 emission intensities in the oil sector, earning them a social licence to continue operations well into the transition period.[5]
- Aligning with economic diversification – Investments in low-carbon industries dovetail with national strategies to reduce oil dependency. For instance, Emirates Global Aluminium produces solar-powered green aluminium.[6]

The Gulf's influence extends beyond its borders — increasingly in Africa. The UAE has committed over $110 billion to African projects from 2019 to 2023, with $72 billion directed specifically toward renewable energy—surpassing contributions from China, France and the UK.[7,8] Saudi Arabia, under its Vision 2030 framework, plans to allocate $190 billion toward clean energy and reach net zero carbon emissions by 2060.[9,10] This pivot reflects a broader "and-and" energy philosophy: maintaining robust oil exports while aggressively investing in renewables, hydrogen and battery storage.[11]

Rule-promoters Offering Geopolitical and Market Incentives

The Gulf countries have aligned themselves to formal institutional engagements and adopted Global agreements on energy transition. Every Gulf Cooperation Council (GCC) country has signed the Paris Agreement and set net-zero or emissions reduction targets.[12] The UAE has led the region: in 2016, it launched the Gulf's inaugural Ministry of Climate Change and Environment. Abu Dhabi has set a 2035 goal for 60% of its energy to come from clean sources, including solar.[13] Even Bahrain, despite lacking available land, has recently intensified its solar energy rollout.[14]

Overtime, the Gulf engagement has evolved from domestic policy adoption to global advocacy, offering geopolitical and market incentives. Gulf states have moved beyond simply following international norms to actively shaping the emerging architecture of the energy transition. Some Gulf nations have progressed to exporting low-carbon technology, capital and knowledge. Through the Abu Dhabi Fund for Development, the UAE finances renewable energy projects in remote, underfunded regions— such as the Pacific Islands and Maldives.[15] Saudi Arabia's ACWA Power has made enormous investments in Uzbekistan, completing 13 projects, spanning solar, wind and green hydrogen and totalling approximately $8.4 billion by the close of 2023. This places Uzbekistan as ACWA's second largest international investment destination, after the U-AE.[16]

Proximity to Africa gives the GCC a logistical edge, facilitating supply chains and reducing costs. Institutions like DP World and ADNOC are actively expanding infrastructure across the continent, handling energy products and port investments. Gulf involvement offers rapid, flexible financing, often with fewer political strings — making it appealing to African governments facing funding gaps totalling around $150 billion.[17]

Gulf–Africa Energy Transition Projects

This section presents four case studies that illustrate the dynamics of Gulf–Africa energy and climate partnerships. Each case provides insights into the opportunities, challenges and policy implications of these engagements, offering a basis for comparative analysis and forward-looking recommendations.

Aysha-1 Wind Project (Ethiopia)

Aysha-1 is a 300 MW onshore wind farm being developed in the Somali Region of Ethiopia through a partnership between UAE-based AMEA Power and Ethiopia's state utility, Ethiopian Electric Power.[18] Spanning approximately 18,000 hectares, this is the largest wind energy project in the Horn of Africa. The construction cost is estimated at $620 million.[19] It forms part of a broader $4.5 billion UAE clean energy initiative in Africa.[20] Upon completion, the wind farm is expected to produce around 1,400 GWh of electricity per year — powering over four million households,[21] while preventing about 690,000 tonnes of CO_2 emissions annually.[22] The project is anticipated to create approximately 1,500–2,000 direct jobs during construction and operations.[23]

A 25-year Power Purchase Agreement (PPA) and Implementation Agreement were signed with Ethiopian Electric Power in August 2024 to ensure long-term operation and energy off-take, and a Letter of Award was issued during COP28 in Dubai (December 2023).[24] Following the signing, the project is moving toward financial close and construction phases. While exact timelines for completion haven't been disclosed, groundbreaking is expected in the near future.[25] This project is expected to significantly expand Ethiopia's renewable capacity, contribute to climate mitigation, and stimulate local economic growth.

AMAN Green Hydrogen (Mauritania)

A consortium of Masdar (Abu Dhabi Future Energy), Infinity Power (a joint venture between Masdar and Egypt's Infinity) and Conjuncta GmbH has signed an MoU with the Mauritanian government to develop the AMAN green hydrogen plant in four phases.[26] The facility will host electrolyser capacity of up to 10 GW, enabling the production of up to 8 million tonnes of green hydrogen (or equivalent renewable fuels) per year for export.[27] The initial phase (approximately 400 MW) is planned to begin operations by 2028, with full roll-out expected over several subsequent phases.[28]

Situated northeast of Nouakchott, the plant will leverage a dedicated zone with ample solar and wind potential.[29] The electrolyser infrastructure will be powered entirely by renewable energy, optimizing production efficiency and sustainability.[30] Construction is projected to create around 3,000 jobs, with approximately 1,000 ongoing operational roles once fully active.[31] The agreement includes facility design, land-use, revenue-sharing frameworks, and collaboration principles detailed in the MoU.[32] Estimated project is approximately $34 billion to support all four phases.[33] Economic modelling anticipates a 40–50% GDP increase by 2030, with further growth (50–60%) by 2035. Industrial sector employment is also expected to rise significantly, reducing national unemployment by nearly one-third.[34]

The primary output — green hydrogen, ammonia, and other renewable fuels — will be exported, primarily targeting European markets.[35] Mauritania's rich solar and wind resources, combined with its coastal access (e.g., Nouadhibou), make it strategically positioned to serve global clean energy demand — particularly in Europe.[36] This mammoth project is one of the largest green hydrogen initiatives globally, signalling Mauritania's ambition to become a leading exporter of clean fuels. With its scale and transformative implications, AMAN highlights the strategic intersection of renewable potential, economic innovation and international collaboration.

ACWA Green Hydrogen and Wind Initiatives (Egypt and Morocco)

In December 2023, ACWA Power signed a framework agreement worth over $4 billion with Egypt's Sovereign Fund, Suez Canal Economic Zone, NREA, EETC, and others to build a green hydrogen-to-ammonia plant. The first phase is expected to produce 600,000 tonnes of green ammonia per year, powered by solar and wind energy, with ambitions to scale to 2 million tonnes annually in a proposed second phase.[37] The project is scheduled to reach completion by 2028, aligning with Egypt's broader green energy goals. ACWA Power already operates or has under-construction over 1.4 GW of renewable capacity in Egypt and plans to invest around $15 billion in the country by 2028.

Similarly, in January 2025, ACWA Power and HAU Energy closed nearly $703.6 million in financing for the 1.1 GW Suez Wind Farm — Egypt's largest onshore wind farm to date.[38] Located in the Gulf of Suez, this $1.2 billion project includes 138 turbines (8 MW each) and anticipates eliminating 1.1 million tonnes of CO_2 annually, with commercial operations expected by Q2 2027.[39]

ACWA Power has also further committed approximately $800 million to develop a 500 MW wind farm integrated with 2,000 MWh battery storage, powering Gotion High-Tech's mega EV battery factory in Kenitra.[40] This project supports the first of its kind African gigafactory, set to produce 20 GWh (with expansion plans to 100 GWh) of EV batteries by mid 2026 and create an estimated 17,000 jobs.[41] The integration of renewables and storage ensures stable, green power tailored for heavy industry.

These projects enhance Egypt and Morocco's energy security and support national decarbonization efforts — Egypt aims for 42% renewables by 2040; Morocco targets 52% by 2030. Projects like Suez Wind and the Kenitra-backed EV battery plant represent multi billion-dollar investments that combine utility-scale renewables with industrial applications. Egypt's green hydrogen is aimed at meeting European demand, and Moroccan EV battery manufacturing is placed strategically to serve export markets (Ibid). These ambitious endeavours underscore ACWA Power's escalating role in driving large-scale renewable and green-hydrogen infrastructure across North Africa, aligning economic growth with sustainable energy pathways.[42]

ACWA Concentrated Solar Power (CSP) in South Africa

The 100 MW Redstone Concentrated Solar Power (CSP) plant, a pioneering project in subSaharan Africa, is operated by a consortium led by ACWA Power and SolarReserve, with engineering and construction by China's SEPCOIII.[43] It features a central solar tower with moltensalt storage, providing 12 hours of full-load energy — allowing electricity delivery continuously, both day and night, to over 200,000 homes.[44]

Total project cost ranges between $715 million and $1.2 billion (estimates vary), with ACWA Power holding roughly 36–49% ownership.[45] A 20-year build–own–operate PPA with Eskom guarantees energy off-take.[46] Achieved financial close in May 2021, marking it the largest single renewable energy investment in South Africa at that time.[47] The project was grid-connected for final commissioning in September 2024, with full commercial operations expected by Q2 2025, following delays caused by legal and financing setbacks.[48]

The CSP tower stretches approximately 248 m high, surrounded by over 40,000 heliostats, achieving an annual output of about 480 GWh.[49] With 12 hours of thermal storage, Redstone delivers dispatchable power, contributing approximately 440,000 tonnes of CO_2 emissions savings per year.[50] It created around 2,500–4,000 jobs during construction, including 650 local hires, and roughly 100 permanent operational jobs. Local project content accounted for around 44% of spending.[51]

Redstone is a flagship case of ACWA Power's strategic push into dispatchable renewable energy and thermal storage. It demonstrates how CSP can meet base-load needs, support grid stability, and catalyze skill development and sustainable infrastructure across Africa. It builds on ACWA's earlier CSP track record in South Africa, including the 50 MW Bukuport project in 2015.[52] It underscores ACWA's leadership in large-scale renewables across Africa—together with over US $7 billion invested in projects like Egypt's Kom Ombo PV plant and green hydrogen initiatives.[53]

Opportunities and Risks of Gulf States Involvement in Africa's Energy Transition

As these energy transition projects from Gulf states, particularly the UAE, Saudi Arabia and Qatar, increasingly play a role in Africa's energy transition landscape, they present both significant opportunities and notable risks.

Opportunities

- Accelerated Renewable Deployment, Strategic Alliance and Geopolitical Influence — Gulf countries have emerged as major financiers of Africa's energy transition, collectively investing hundreds of billions of dollars in infrastructure projects, with a significant share dedicated to renewable energy. The UAE alone committed $110 billion between 2019 and 2023, of which $72 billion targeted green and renewable projects such as Ethiopia's Aysha-1 Wind Project, Mauritania's AMAN Green Hydrogen initiative, and ACWA Power's portfolio of solar, wind and hydrogen plants across the continent.[54] These mega-projects position Gulf investors as global leaders in clean energy deployment while directly addressing Africa's estimated $150 billion annual infrastructure funding gap.[55] By expanding Africa's renewable energy base, these investments not only diversify the continent's electricity mix, particularly vital as gas remains around 42% of power generation on the continent[56] – but also align with regional and global climate goals to cut emissions.[57] Furthermore, they enhance Gulf–Africa cooperation, enabling Gulf states to strengthen their political influence, deepen South–South climate diplomacy, and reinforce their roles as indispensable actors in global decarbonization.

- Market Access and Economic Diversification — For Gulf states, Africa's vast resource base and renewable potential create avenues for economic diversification beyond oil and gas. At the same time, Gulf-backed renewable projects are integrated with industrialization initiatives. Morocco's EV gigafactory, supported by ACWA Power's wind and storage projects, exemplifies how Gulf capital underpins industrial hubs that promote value-added manufacturing in Africa. Such linkages provide Gulf investors with long-term, diversified income streams while catalysing Africa's industrial transformation. Additionally, secure Power Purchase Agreements (PPAs), as in Ethiopia's Aysha-1 Wind and South Africa's Redstone CSP, assure predictable cashflows, reduce investment risks, and enhance bankability, reinforcing the stability of Gulf investments. Investments in mining sectors linked to clean energy — copper, lithium, cobalt, and rare earth elements — are also strategic. For instance, the UAE's International Holding Company acquired a 51% stake in Zambia's Mopani Copper Mines, gaining access to one of Africa's largest copper reserves — an indispensable input for global clean technology supply chains.[58]

- Job Creation, Technology Transfer and Strategic Positioning — large-scale renewable projects generate thousands of skilled, semi-skilled, and unskilled jobs across construction, operations, and maintenance. Importantly, these initiatives also foster skills development in advanced technologies such as hydrogen production, energy storage, and grid management. Gulf companies are actively involved in building local human capital through training programmes and knowledge transfer, embedding long-term capacity within African economies. Examples such as ACWA Power's Redstone CSP plant in South Africa, which incorporates local content requirements, demonstrate how Gulf investments can be aligned with African governments' socio-economic priorities. Gulf firms also bring technical expertise, project structuring know-how, and operational capacity. Drawing on their own domestic successes, such as the UAE's National Energy Strategy and the development of solar parks like Mohammed bin Rashid Al Maktoum Solar Park, Gulf actors are exporting lessons in auction-based project design, cost optimization, and grid integration.[59] This knowledge transfer improves Africa's renewable deployment capacity, strengthens institutional frameworks, and fosters greater efficiency in project delivery. By embedding local benefits, including jobs, training, and technology transfer, Gulf states strengthen their reputational standing and differentiate themselves from purely extractive actors. This positioning as reliable, responsible, and long-term partners enhances Gulf economies' attractiveness at a time when African states are deliberately diversifying partnerships beyond the traditional Western actors to include China and the Gulf.

Risks

- Political and Regulatory Uncertainty — African host countries often present volatile political and regulatory environments, marked by shifting policies, sudden tariff adjustments, and governance challenges. Such unpredictability increases investor risk profiles and complicates long-term planning. For example, Ethiopia offers vast opportunities for renewable energy development, yet its institutional fragility, exemplified by recent political instability, weak enforcement mechanisms, and underdeveloped regulatory frameworks, poses potential threats to project continuity and stability. This environment underscores the importance of robust risk-mitigation strategies, including contractual protections, political risk insurance, and strong partnerships with local institutions.

- Social and Environmental Concerns — Large-scale renewable energy projects frequently intersect with sensitive land rights, community livelihoods, and biodiversity. Wind and solar farms require significant land areas, raising the potential for displacement and land-use conflicts. If community concerns are not adequately addressed through inclusive consultation, compensation, and benefit-sharing, opposition can delay construction, generate reputational risks or lead to costly legal disputes. Proactively engaging local communities, ensuring fair land acquisition, and implementing rigorous environmental safeguards are therefore essential for building trust and securing the social license to operate.

- Overdependence on Export Markets — Mega-projects such as Mauritania's AMAN green hydrogen initiative are largely export-oriented, with Europe identified as the primary offtake market. While this provides access to high-value demand, it also exposes Gulf investors to external risks such as volatile hydrogen and ammonia prices, fluctuating European energy policies, and evolving carbon border adjustment mechanisms (CBAM). Overreliance on external buyers without developing local or regional demand may create structural vulnerabilities, particularly if demand growth slows or regulations shift. Diversifying export markets and exploring intra-African energy trade could mitigate such risks.

- Financial and Legal Delays — Complex financing structures, competing stakeholder interests, and underdeveloped local capital markets frequently create delays in financial close for large-scale projects. South Africa's Redstone CSP plant, for example, experienced significant setbacks due to financing bottlenecks and legal disputes. Such delays not only erode projected returns but can undermine investor confidence and increase project costs through extended development timelines. Gulf investors must anticipate these risks by structuring resilient financial models, securing strong guarantees, and engaging in early alignment with host-country legal frameworks.

- Perceptions of Extractive Engagement — Without clear evidence of local benefit through job creation, skills transfer, community empowerment, and industrial linkages, Gulf investments may be perceived as extractive or neo-colonial. Such perceptions can erode trust, fuel nationalist or protectionist responses, and ultimately threaten the durability of partnerships. Integrating local content requirements, supporting vocational training and fostering transparent benefit-sharing frameworks are therefore critical. Demonstrating tangible socio-economic benefits ensures that Gulf states are viewed as genuine long-term partners in Africa's development, rather than as short-term resource extractors.

Conclusion and Recommendations for Responsible and Equitable Partnerships

Gulf states — most notably the UAE, Saudi Arabia and Qatar —have rapidly emerged as pivotal financiers and strategic partners in Africa's energy transition. By investing and contributing towards closing Africa's energy infrastructure funding gap, diversifying the continent's electricity mix and aligning with global decarbonization goals, Gulf actors are positioning themselves as indispensable players in both Africa's development and global climate diplomacy.

The opportunities are substantial. Gulf capital accelerates renewable deployment, supports industrial transformation, and underpins Africa's entry into global clean technology supply chains. Projects generate jobs, foster local skills and bring advanced technical expertise in areas such as hydrogen, energy storage and auction-based project structuring. Secure Power Purchase Agreements (PPAs) enhance bankability, while linkages to industrial hubs — such as Morocco's EV gigafactory — demonstrate how Gulf investments can enable Africa's industrial leapfrogging. At the same time, Gulf states enhance their geopolitical influence through strategic infrastructure investments in ports, airports and logistics networks, further embedding their role as reliable long-term partners.

Yet these engagements also present risks that could undermine their transformative promise. Political and regulatory volatility in host countries, as seen in Ethiopia, raises uncertainty for long-term investments. Large-scale wind and solar projects intersect with land rights, biodiversity and community livelihoods, creating potential for social opposition and reputational harm if not inclusively managed. Export dependence — particularly evident in Mauritania's Europe-oriented hydrogen projects — exposes investors to market volatility and evolving EU regulatory frameworks such as CBAM. Financing bottlenecks and legal disputes, exemplified by South Africa's Redstone CSP delays, threaten project timelines and profitability. Finally, without tangible evidence of local benefits — jobs, training, technology transfer — Gulf investments risk being perceived as extractive, fuelling nationalist backlash and undermining trust.

To maximize opportunities while mitigating risks, Gulf–Africa partnerships must be embedded in principles of transparency, inclusivity and mutual benefit. Four strategic priorities emerge:

- **Transparency and Standards** — Gulf investors should align with international best practices in procurement, environmental and social impact assessments, and labour rights, with oversight mechanisms involving multilateral institutions and civil society. In parallel, African governments should streamline regulatory processes to attract investment while safeguarding environmental integrity and commercial viability.

- **Inclusive Stakeholder Engagement and Frameworks** — Projects must engage communities from the outset, ensuring respect for land rights, fair compensation, and participatory decision-making. Establishing robust monitoring frameworks to track social and environmental outcomes will help mitigate risks, strengthen the social license to operate and build durable trust.

- **Collaborative and Diversified Partnerships** — Joint ventures that leverage Gulf financing alongside European technological expertise and African development priorities can yield more resilient outcomes. Africa should maintain a balanced strategy by engaging multiple partners — including Gulf states, China, and Western actors — to reduce dependency and foster competitive, innovative solutions that align with national energy transition plans.

- **Capacity Building and Local Content** — Gulf investments should integrate vocational training, skills development and local manufacturing components to maximize employment and ensure technology transfer. Such measures not only strengthen Africa's socio-economic transformation but also enhance Gulf investors' reputational standing and secure long-term returns.

In conclusion, Gulf engagement in Africa's energy transition represents both a historic opportunity and a strategic test. If guided by principles of shared governance, local empowerment, and long-term resilience, these partnerships can set a global model for equitable South–South climate cooperation. Conversely, without transparency, inclusivity, and tangible local benefits, they risk being perceived as extractive, undermining both African development goals and Gulf states' reputational and financial interests. The pathway forward must therefore be one of responsible, balanced, and future-oriented collaboration.

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