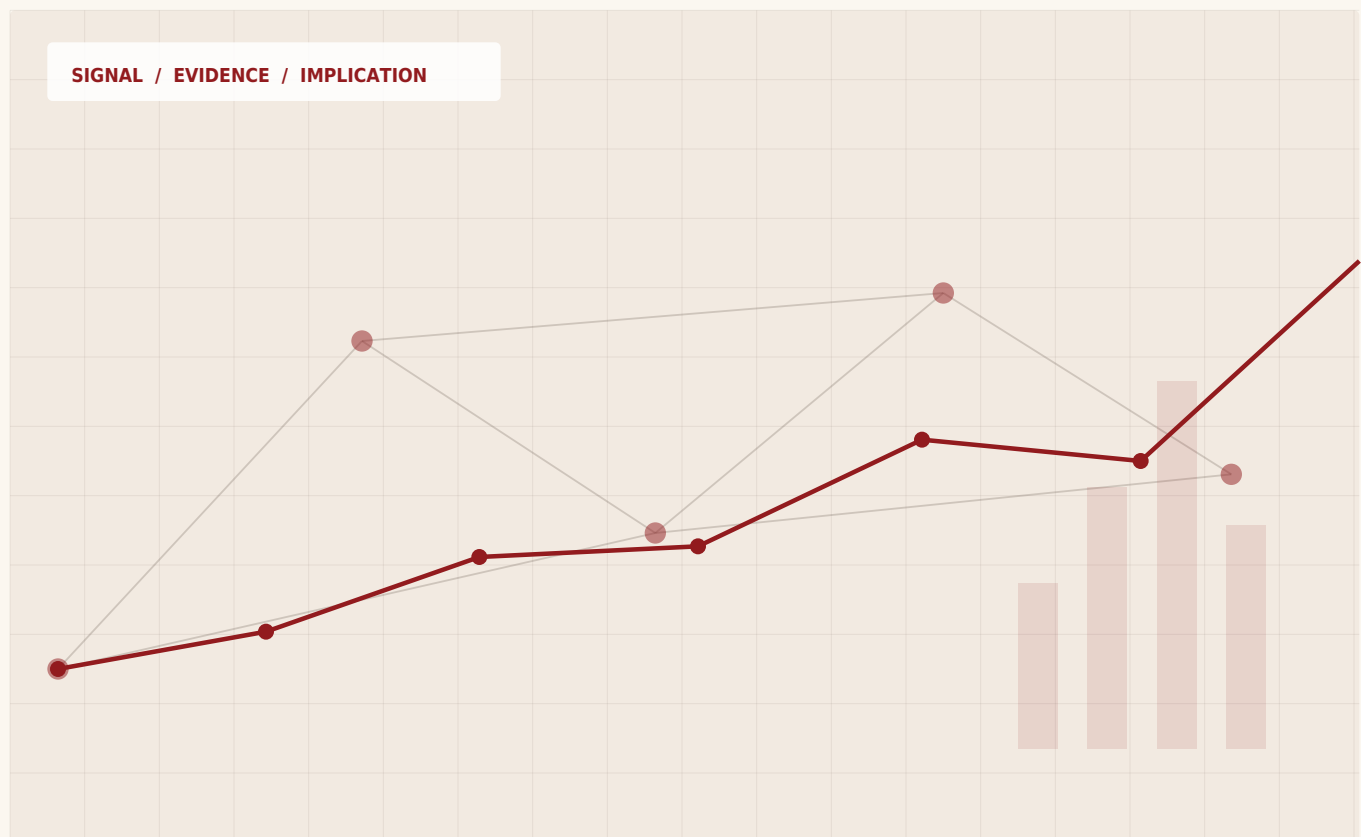




The Grid Is Green. Not Yet Universal.

Ethiopia's COP32 Moment, Renewable-Energy Strength, and the Electricity-Access Gap



01 KPI DASHBOARD

2027 Year Ethiopia hosts COP32 in Addis Ababa <i>African Union / UNFCCC, confirmed Nov 2025</i>	5,150 MW Capacity added by the Grand Ethiopian Renaissance Dam <i>Webuild Group, Sept 9, 2025</i>	97% Of Ethiopia's electricity generation that is renewable <i>Enerdata, 2024 data</i>
44% Ethiopians with reliable (Tier 1+) electricity service <i>World Bank Energy Access Survey, Jan 2025</i>	\$424M New World Bank financing to connect 6M more Ethiopians <i>World Bank ASCENT program, Aug 2025</i>	8B Tree seedlings targeted in the 2026 Green Legacy campaign <i>Green Legacy Initiative, 2026</i>

DATA INTEGRITY NOTE: Ethiopia's 44% Tier 1+ access figure and the Nigeria/DR Congo benchmark comparison (charted in Section 4) are each drawn from World Bank sources but were not independently corroborated by a second outlet at time of writing. The 8 billion 2026 Green Legacy seedling target comes from a single publication and has not been independently confirmed elsewhere.

02 KEY FINDINGS

WHY ETHIOPIA WON THE BID

At COP30 in Belem in November 2025, the African Group endorsed Ethiopia's bid to host COP32 over a competing offer from Nigeria, citing Addis Ababa's diplomatic infrastructure as home to the African Union headquarters, its track record hosting major summits, and the government's Green Legacy reforestation program. The African Union Commission formally congratulated Ethiopia days later. When the conference convenes in November 2027, it will be the first COP hosted on African soil since Egypt's COP27 in 2022.

WHAT THE GRID ACTUALLY LOOKS LIKE

Ethiopia's electricity generation is roughly 97 percent renewable, anchored by the Grand Ethiopian Renaissance Dam, which added 5,150 megawatts of hydropower capacity when it was inaugurated on September 9, 2025. But a January 2025 World Bank survey found that only 44 percent of Ethiopians have a Tier 1 or higher, meaning reasonably reliable, level of electricity service. The country set to showcase its clean-energy credentials to the world in 2027 is still extending basic power to a large share of its own population.

03 AT A GLANCE

- **HOSTING:** Ethiopia will host COP32 in Addis Ababa in November 2027, the first COP held on African soil since Egypt's COP27 in 2022, after the African Group endorsed its bid over Nigeria's at COP30 in Belem.

- **PREPARATION:** Ethiopia's Foreign Minister and the African Union Commission Chairperson met in Addis Ababa on August 5, 2026, specifically to accelerate COP32 preparations alongside talks on regional peace and security.
- **GENERATION:** The Grand Ethiopian Renaissance Dam, inaugurated September 9, 2025, added 5,150 megawatts of hydropower capacity, pushing Ethiopia's electricity generation mix to roughly 97 percent renewable.
- **ACCESS:** A January 2025 World Bank survey found only 44 percent of Ethiopians have a Tier 1 or higher level of electricity service; close to 71 million people remain underserved, most of them in rural areas.
- **FINANCING:** The World Bank approved a \$424 million program in mid-2025, a \$400 million IDA credit plus a \$24 million Danish grant, aimed at connecting six million more Ethiopians to clean, reliable power.
- **REFORESTATION:** Ethiopia's Green Legacy Initiative is targeting 8 billion tree seedlings planted in 2026 alone, part of a cumulative national target of 65 billion.

04 ANALYSIS

Why Ethiopia Won the Bid

Ethiopia's COP32 bid beat a competing offer from Nigeria on a combination of infrastructure and narrative. Addis Ababa already hosts the African Union's headquarters and a steady calendar of continental summits, giving it logistics and diplomatic capacity that a first-time host city would need years to build. The Green Legacy Initiative, the government's mass tree-planting program, and the Grand Ethiopian Renaissance Dam gave Ethiopia a genuine substantive claim to green leadership, not just a diplomatic one. The African Group's endorsement at COP30 in November 2025, followed by formal congratulations from the African Union Commission, settled the question well ahead of the conventional COP host selection timeline.

Winning the bid was the easier half of the assignment. Addis Ababa now has roughly fifteen months to build the infrastructure, security architecture, and negotiating substance that turn a hosting slot into a summit people remember for what it delivered rather than where it happened.

The Grid Behind the Green Story

The credentials behind Ethiopia's bid are real. The GERD alone added 5,150 megawatts of hydropower capacity when it was inaugurated in September 2025, and Ethiopia's overall generation mix runs at roughly 97 percent renewable, among the cleanest profiles of any economy set to host a global summit. Ethiopia is already exporting power to Sudan, and transmission upgrades could extend that further across the Eastern Africa Power Pool.

Generation is not the same as delivery. A January 2025 World Bank survey found that only 44 percent of Ethiopians have a Tier 1 or higher level of electricity service, a reasonably reliable supply rather than intermittent or off-grid power. Close to 71 million people fall short of that threshold, and the gap is heavily rural: urban electrification runs above 90 percent while large stretches of the countryside remain unconnected or dependent on solar home systems. The World Bank's newly approved \$424 million ASCENT program, a \$400 million IDA credit paired with a \$24 million Danish grant, is aimed squarely at that gap, targeting six million additional connections. It is real money moving in the right direction, but it closes only a fraction of the shortfall the survey identified.

The Investment Case: Building Toward 2027

A COP host city typically welcomes tens of thousands of delegates, negotiators, journalists, and side-event organizers over a two-week conference, which means a genuine, time-boxed demand shock for hospitality capacity, conference infrastructure, transport, and logistics services in Addis Ababa between now and late 2027. That is a concrete, near-term opportunity distinct from Ethiopia's longer-running investment story.

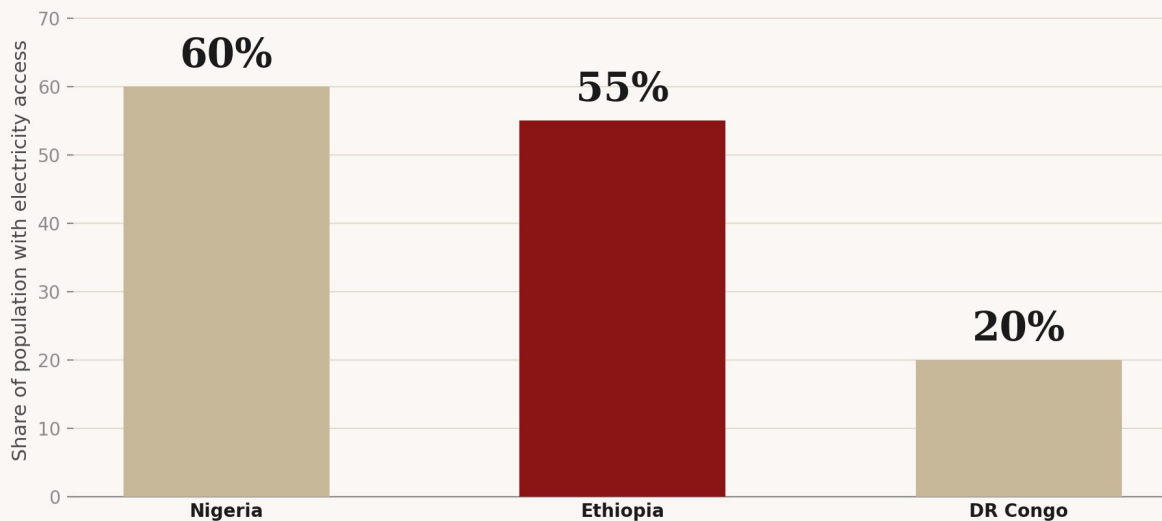
The renewable energy pipeline offers a second, longer opportunity. Ethiopia's Climate Resilient Green Economy strategy, the government's own 20-year framework running from 2010 to 2030, targets 25 gigawatts of renewable capacity by 2030: 22 gigawatts of hydro, 2 gigawatts of wind, and 1 gigawatt of geothermal. That is a policy target, not a delivery guarantee, and wind and geothermal in particular have moved more slowly than hydro historically. Ethiopia's participation in the World Bank-backed Mission 300 initiative, which aims to connect 300 million people across Sub-Saharan Africa to electricity by 2030, gives the access-expansion push a regional financing structure to plug into, separate from what Ethiopia funds on its own.

The Real Test: Will the Access Gap Close by 2027

Climate policy researchers at Columbia University's Center on Sustainable Investment have argued publicly that Ethiopia's COP32 presidency is only as credible as the work that happens before delegates arrive, building coalitions on regional energy integration, reforming how climate risk gets assessed, and financing resilient food and nature systems well ahead of the conference itself. Applied to Ethiopia's own domestic picture, the same logic holds: a presidency built partly on green-energy credibility will face a natural question in November 2027 about whether the 44 percent access figure has moved, and by how much.

One complicating factor sits outside Ethiopia's control. A regional water-security dispute with Egypt and Sudan over the GERD remains unresolved, and it adds diplomatic complexity to a summit explicitly organized around international cooperation. That is worth flagging as a reputational and planning risk for anyone evaluating Ethiopia's regional power-trade ambitions, independent of how the underlying dispute is eventually settled.

Electricity Access: Ethiopia vs. Regional Peers



Source: World Bank Atlas of Global Development, electrification data through 2023. Ethiopia's rate reflects any household access; a separate 2025 World Bank survey found a lower share (44%) with a reliable (Tier 1+) level of service, shown in Figure 2.

Figure 1: Share of population with electricity access. Source: World Bank Atlas of Global Development, data through 2023. Ethiopia's figure here reflects any household access; Figure 2 shows the smaller share with reliable service.

Ethiopia's Electricity Access Gap



Source: World Bank National Energy Compact for Ethiopia, citing the Ethiopia Energy Access Survey, January 2025. Tier 1+ denotes a basic, reasonably reliable level of electricity service.

Figure 2: Ethiopia's Tier 1+ (reliable) electricity access gap. Source: World Bank National Energy Compact for Ethiopia, citing the Ethiopia Energy Access Survey, January 2025.

05 EDITOR'S OUTLOOK

Ethiopia earned this hosting slot on substance, not just diplomatic maneuvering. The GERD is a genuine engineering achievement, the Green Legacy Initiative has planted at a scale few countries attempt, and the renewable generation mix is real. None of that was manufactured for the bid. But hosting a COP starts a fifteen-month countdown to a specific, unavoidable question: does Ethiopia's clean-energy story include its own people, or mainly its export capacity and its diplomatic guest list.

What we're watching next: further COP32 preparatory committee announcements and any formal host country agreement details; measurable progress against the ASCENT and ELEAP connection targets; whether Ethiopia files an updated Nationally Determined Contribution ahead of the summit; and how the government's own COP32 messaging handles the domestic access gap, whether it is addressed directly or left out of the narrative entirely.

For now: the bid is won, the dam is built, and the grid is still growing into both.