



ENERGYSTRAT.
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NAMIBIA OIL AND GAS CONFERENCE AND EXHIBITION

Southern Africa's Energy Story: From Fragmentation to Integration

How Namibia's Orange Basin can catalyse integrated gas, power and green energy corridors.

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August 2026

What we'll cover

01

The Contradiction



Natural resource wealth, fragmented systems

02

The Namibia Catalyst



Orange Basin discoveries change the equation

03

Global Benchmarks



Lessons from the EU, WAGP and Gulf LNG

04

Three Corridor Models



Gas, power and green-energy pathways

05

Financing & Sequencing



Scaling investment across borders

06

The Path Forward



A corridor-first development approach



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ACT 1

The Opportunity

A region defined by contradiction

Southern Africa holds abundant hydrocarbon, renewable and mineral resources, yet continues to operate through fragmented infrastructure, uneven market development and chronic power deficits.



Natural resource wealth



Hydrocarbons, renewables and critical minerals across multiple jurisdictions

Fragmented infrastructure



National grids and pipelines built in isolation, with limited interconnection

Uneven markets



Wide disparities in regulatory maturity and investment readiness

Chronic power deficits



Persistent supply shortfalls constrain industrial growth

Rising regional demand, combined with connectivity and cross-border trade constraints, necessitates a shift toward regional energy corridors.

Namibia's Orange Basin changes the equation

Offshore discoveries in the Orange Basin have **created an opportunity to rethink regional energy architecture** beyond isolated national projects.



Atlantic coastline

Direct access to global shipping lanes



Established port access

Existing logistics and export infrastructure



Proximity to demand centres

Short connective distance to regional markets

WHY THIS MATTERS

Beyond the upstream sector

- A single-country upstream success story that can seed multi-country infrastructure
- A coastal anchor point linking offshore supply to inland demand across the region
- A catalyst to rethink national projects as components of shared regional systems

CENTRAL THESIS

With the support of upstream success, the next phase of regional development can create integrated energy corridors linking infrastructure, markets and long-term industrial demand.

From fragmentation to integration

An integrated energy future works on strengths of the countries of the region

TODAY: FRAGMENTED APPROACH

Country A
Domestic Project



Country B
Domestic Project



Country C
Domestic Project



FUTURE: INTEGRATED ENERGY CORRIDORS



Resources



Infrastructure



Markets



Industries



Investment

ACT 2

Building the Case

Lessons from established energy markets

Not direct templates — but reference points for the institutional and commercial conditions required for successful regional integration.



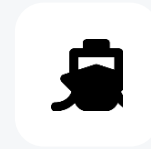
European Union Energy Market

Cross-border regulatory harmonisation and interconnected transmission enabling a single traded market



West African Gas Pipeline

Multi-country pipeline infrastructure linking upstream supply to regional downstream demand



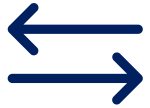
Gulf LNG Export Systems

Large-scale liquefaction and export logistics built around anchor demand and long-term offtake

CENTRAL THESIS

What infrastructure must be built?

Infrastructure, and not the discoveries, is the real critical bottleneck



Pipelines



Transmission lines



LNG



Storage facilities



Port/Logistics

H2

H2/New energies
facilities



Digital
infrastructure

2026-2035

Foundation Phase

*Build core infrastructure and regional
connectivity*

2035-2045

Expansion Phase

*Scale capacities, integrate markets, and
enable exports*



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ACT 3

The Framework

Three corridor models for Southern Africa



Gas Corridor

Pipeline networks, LNG infrastructure and downstream gas utilisation linking Namibia's offshore resources to regional demand centres, particularly South Africa.



Regional Power Corridor

Gas-to-power capacity, renewable assets and cross-border electricity trade through mechanisms such as the Southern African Power Pool.



Green Energy Corridor

Hydrogen, ammonia and renewable exports linked to future decarbonisation markets.

Three complementary pathways to an integrated regional energy economy

The Gas Corridor



Connecting Namibia's offshore resources to major regional demand centres, particularly South Africa



Pipeline networks

Cross-border transport infrastructure linking supply basins to demand markets



LNG infrastructure

Liquefaction and receiving terminals extending reach beyond pipeline networks



Downstream gas utilisation

Industrial, power and feedstock demand anchoring long-term offtake

ILLUSTRATIVE VALUE CHAIN

Offshore Production



Subsea & Pipeline Transport



LNG / Domestic Processing



Regional Demand Centres

The Regional Power Corridor



Integrating generation and trade across borders to strengthen regional power security



Gas-to-power capacity

New generation capacity fed by regional gas supply



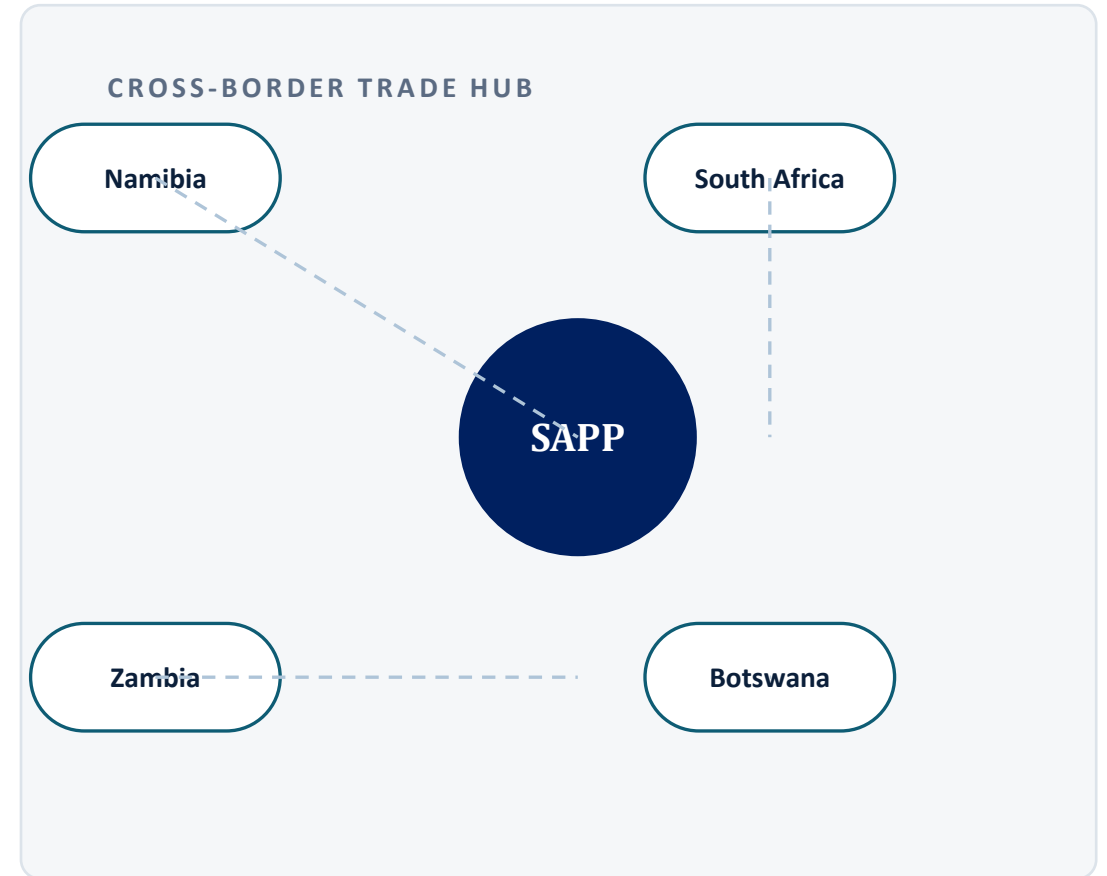
Renewable energy assets

Solar and wind capacity complementing thermal generation



Cross-border electricity trade

Trade coordinated through the Southern African Power Pool (SAPP)



The Green Energy Corridor



An emerging model oriented toward future decarbonisation-linked export markets



Hydrogen production

Renewable-powered electrolysis building on coastal and solar/wind resource access



Ammonia processing

Downstream conversion for storage, transport and export economics



Renewable exports

Long-term supply positioning for decarbonisation-linked global demand

WHY IT'S 'EMERGING'

- Dependent on future global demand signals for green hydrogen and ammonia
- Requires large-scale renewable buildout beyond current regional capacity
- Positioned as a longer-horizon complement to gas and power corridors, not a near-term substitute

ACT 4

Making it Happen

Scale and sequencing of investment

Cross-border pipelines, LNG terminals, transmission infrastructure, storage and export logistics all require long investment horizons and coordinated planning across jurisdictions.



Financing structures

Blended capital stacks
matched to infrastructure risk
profiles



Phased development

Staged build-out sequencing
capacity to demonstrated
demand



Anchor-demand economics

Long-term offtake
commitments underwriting
early-stage investment



Blended finance & PPPs

Public-private structures
reducing project and country
risk

Investment follows demand certainty and coordinated infrastructure planning.

What continues to slow regional integration



Regulatory fragmentation

Divergent national frameworks slow cross-border project approval



Limited domestic industrial capacity

Anchor demand for gas and power remains underdeveloped in parts of the region



Financing challenges

Long-horizon infrastructure struggles to match available capital structures



Coordination gaps

Misalignment between governments, utilities and private investors

A corridor-first development approach

Prioritising integrated infrastructure planning, regulatory alignment and scalable market creation over fragmented project-by-project expansion.



Integrated infrastructure planning

Design pipelines, power and export systems as a shared regional network, not isolated national assets



Regulatory alignment

Harmonise cross-border frameworks to enable coordinated investment and trade



Scalable market creation

Build anchor demand and phased capacity that can grow with regional consumption

ACT 5

Conclusion

CONCLUSION

From disconnected systems to a regional energy economy

Namibia's emerging energy position has implications well beyond its upstream sector. With coordinated infrastructure and market integration, Southern Africa can evolve from disconnected national systems into an integrated regional energy economy.



Improved energy security



Stronger industrial growth



Long-term capital at scale

Thank you!



About EnergyStrat Consulting

EnergyStrat is an energy-sector-focused business intelligence and consulting firm, with expertise across oil & gas, petrochemicals, power, renewables, and emerging energy segments such as hydrogen and CCUS.

Our recent flagship reports, **Global FID Outlook 2026** and **Global LNG Projects Risk Outlook 2026–2030** have gained strong traction among industry stakeholders worldwide.

About Presenter

Raj Shekhar is a seasoned energy sector analyst with a focus on oil & gas strategy.

He currently leads EnergyStrat Consulting, advising clients across the energy value chain.

An MBA with an engineering background, he brings over 25 years of industry and consulting experience across India and international markets, having worked with Deloitte, GlobalData Plc, and HPCL.

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