CERAWeek by S&P Global

March 23-27, 2026
Houston, Texas

"Convergence and Competition: Energy, Technology, and Geopolitics"

2026 Themes

Texts and graphics sourced from the CERAWeek 2026 Website

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Established in 1977

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Convergence and Competition: Energy, Technology and Geopolitics

Energy markets and existing and new technologies are increasingly entwined; it is essential to align energy expansion with sustainable economic growth. This at a time when convergence as well as competition are reshaping the global energy industry and supply chains.
Convergence is front and center as AI is yoking together the energy and tech industries as never before, making them mutually dependent and creating challenges for both. Regional energy markets are fusing into global markets, and metals and minerals are becoming an essential part of the energy spectrum.

Competition is also having profound effect. Geopolitical rivalries and economic competition are fraying alliances, fracturing supply chains and partitioning energy markets that have been integrated globally for decades.

Economic nationalism and trade barriers are complicating corporate and investment decision-making. New energy sources and new technologies are competing to fuel the vehicles of the future and provide power for a world that is rapidly electrifying. This is why “convergence and competition” will drive the dialogue at CERAWeek 2026 and inform the thinking that comes out of it.

Through 16 dynamic themes, CERAWeek spotlights the breakthroughs, cross-industry connections, and partnerships accelerating the transformation of the global energy system.

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2026 Themes

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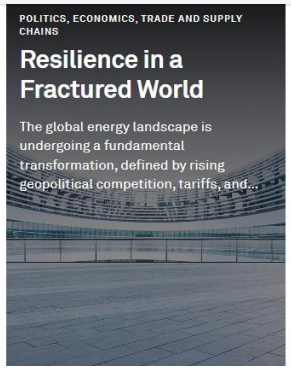

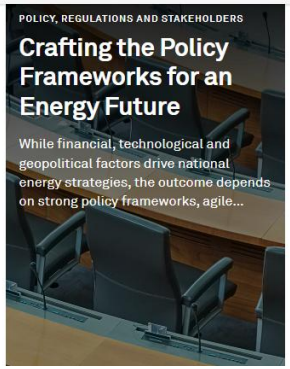

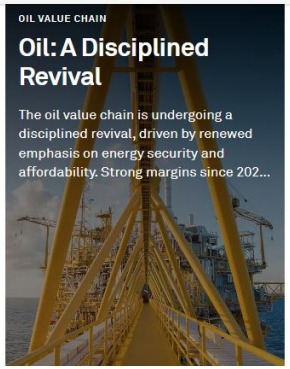

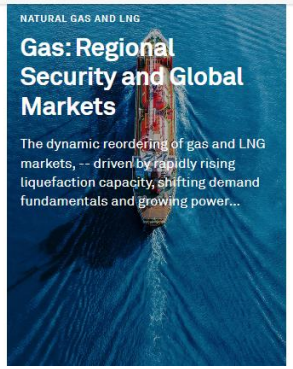

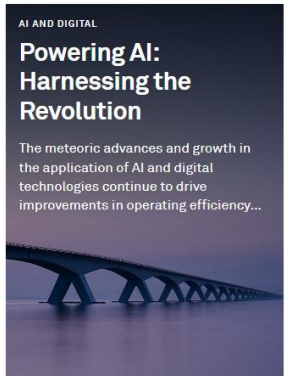

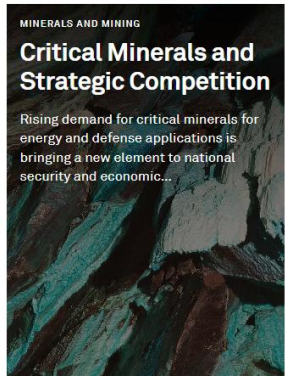

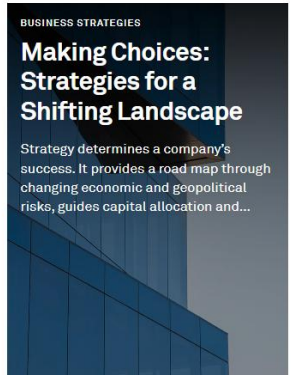

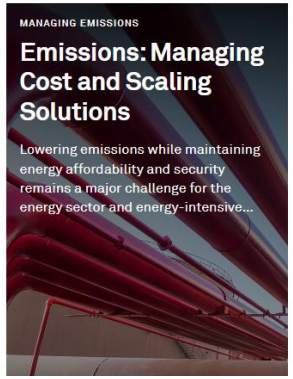

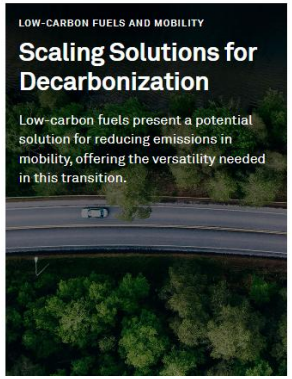

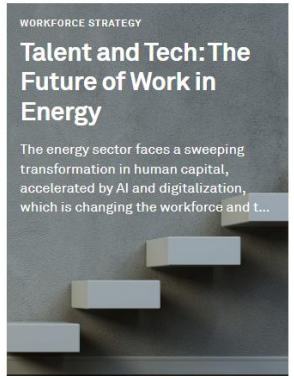

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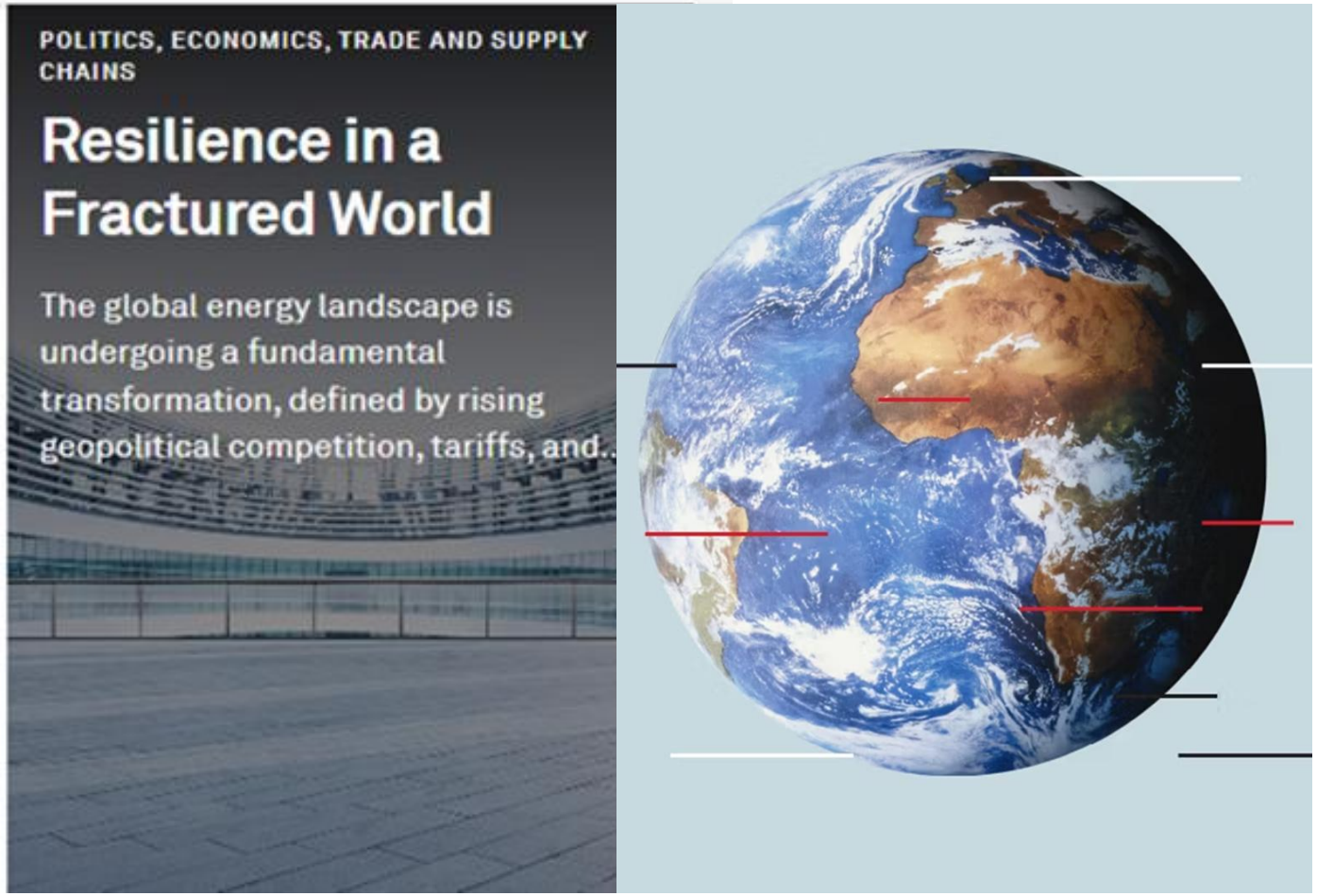
Politics, Economics, Trade, and Supply Chains



Resilience in a Fractured World

The global energy landscape is undergoing a fundamental transformation, defined by rising geopolitical competition, tariffs, and fragmented supply chains that are disrupting global investments and cooperation. The concept of energy security has expanded, now encompassing rivalry over critical mineral supply chains, industrial capacity, and the technologies that will define the future. In this new era of strategic fragmentation, energy policies emphasize resilience to ensure a nation's security and economic strength.

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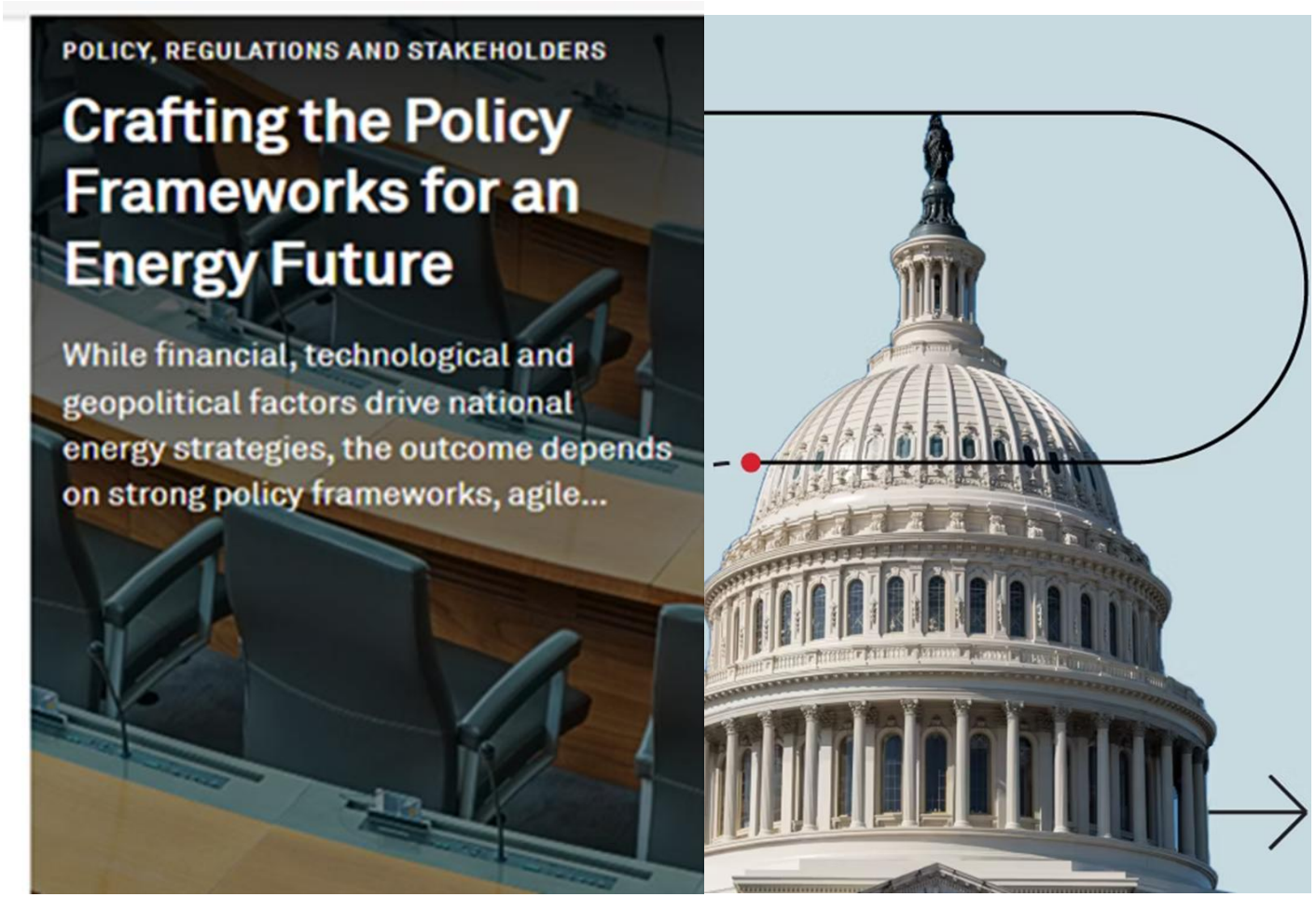
Policy, Regulations and Stakeholders



Crafting the Policy Frameworks for an Energy Future

While financial, technological and geopolitical factors drive national energy strategies, the outcome depends on strong policy frameworks, agile regulations, and efficient permitting that keep pace with innovations. Aligning governmental actions and regulatory structures with economic incentives and public consent to implement durable policy frameworks not only requires strategic alignment and dialogue but also manage trade-offs at a time when meeting energy demand growth is becoming an essential element to harness new technologies and maintain strategic relevance.

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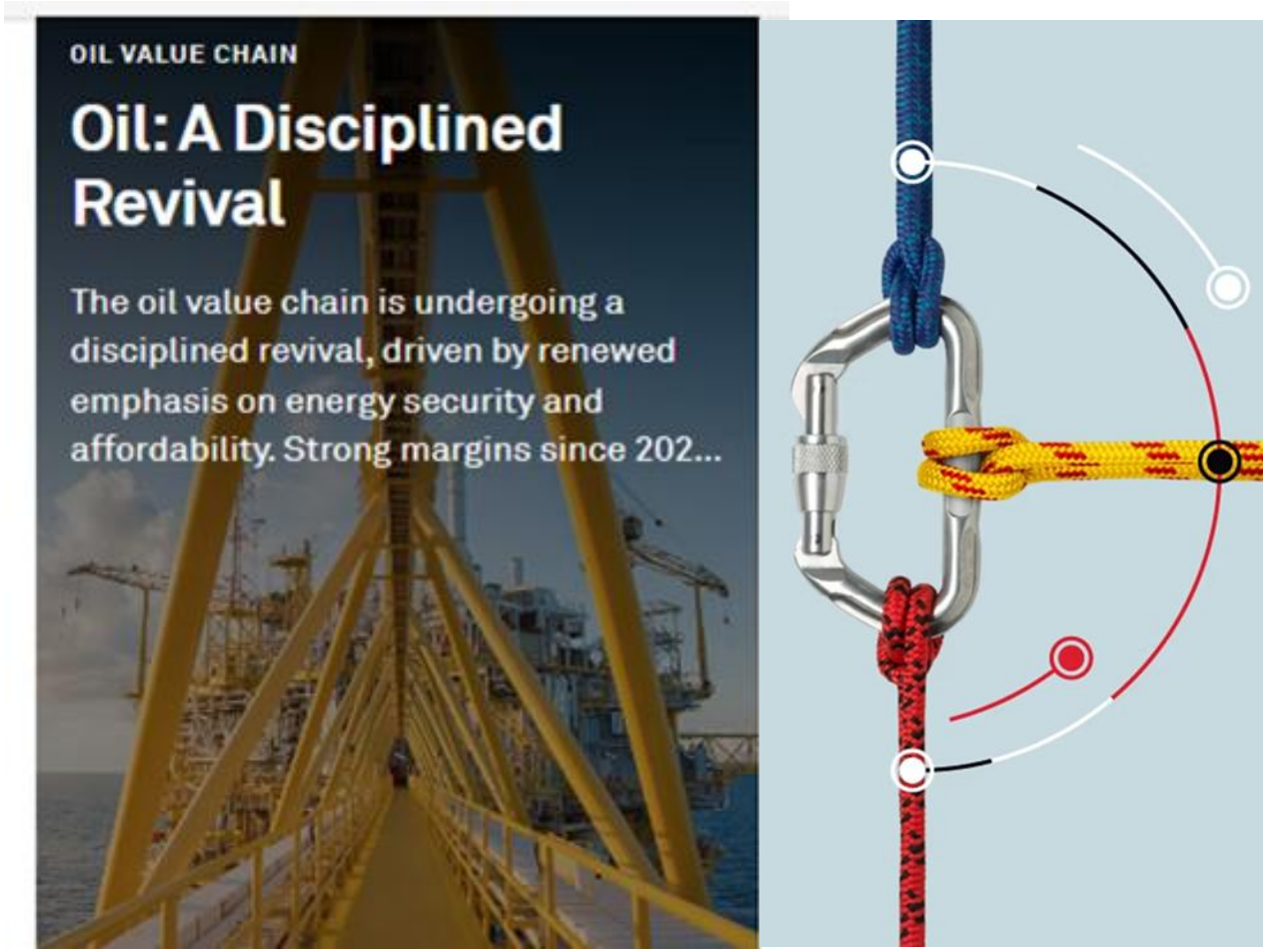
Oil Value Chain



Oil: A Disciplined Revival

The oil value chain is undergoing a disciplined revival, driven by renewed emphasis on energy security and affordability. Strong margins since 2022 have restored profitability, allowing companies to confidently reinvest in operations. Yet, looming challenges threaten price stability and shareholder return strategies. In response, firms are streamlining investment, focusing on efficiency, proven assets and infrastructure-rich regions, while hoping AI can unlock cost reductions. This revival is not about expansion at any cost—it's about resilient, focused growth in a complex energy landscape.

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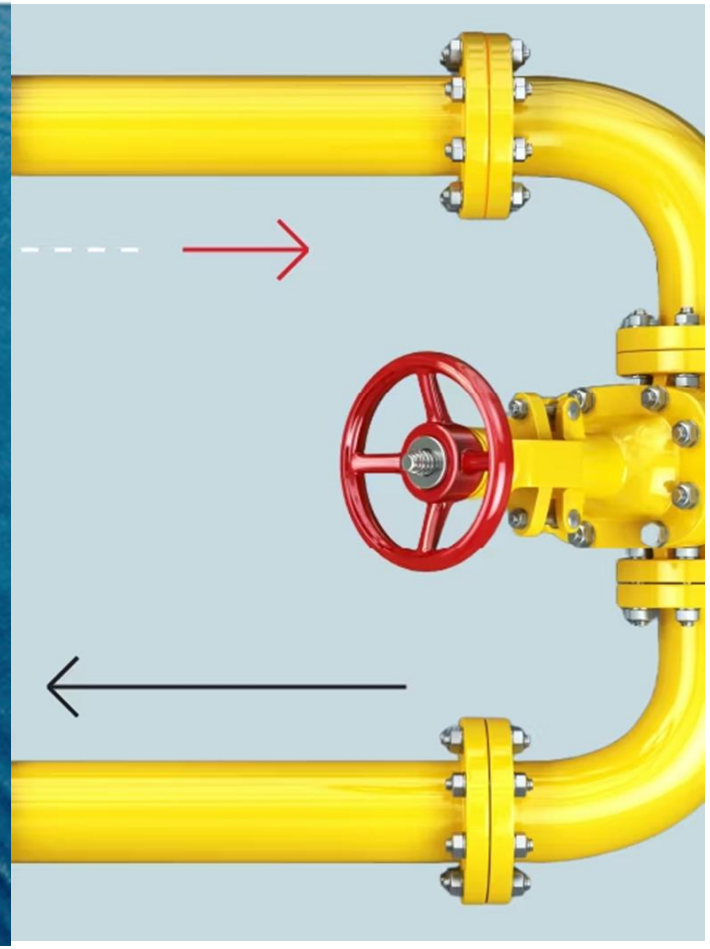
Natural Gas and LNG



Gas: Regional Security and Global Markets

The dynamic reordering of gas and LNG markets, -- driven by rapidly rising liquefaction capacity, shifting demand fundamentals and growing power demand -- is opening a new phase. The rise of LNG as a flexible solution has created an interconnected global gas market, reshaping competitiveness, policy and energy security worldwide. Gas is emerging as a backbone and backup for power systems impacted by rising demand for AI and economic growth, and re-drawing companies' strategies and priorities as well as government policies.

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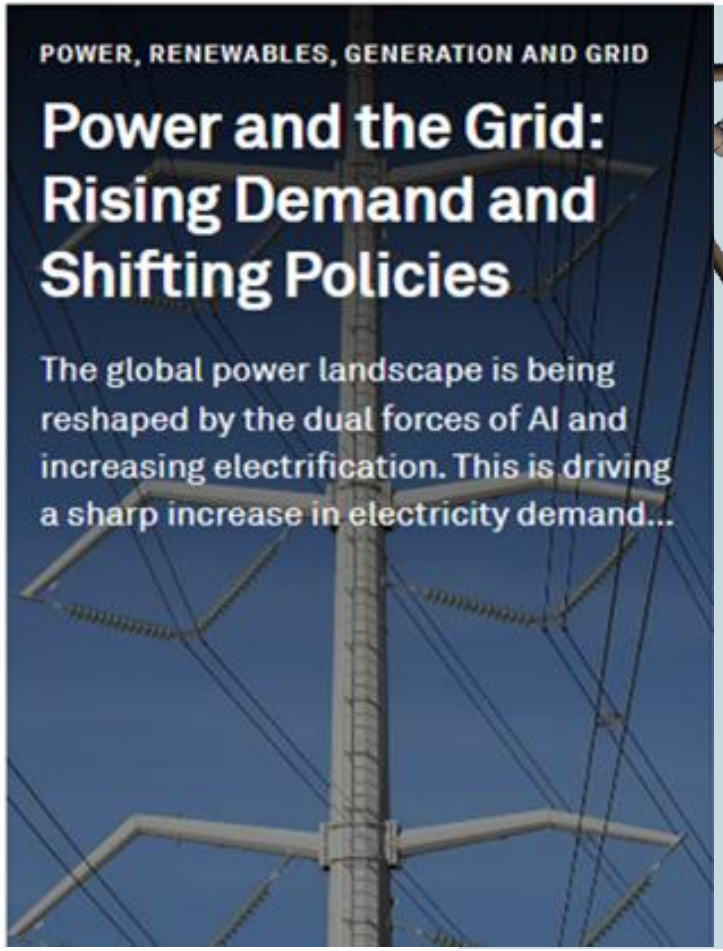
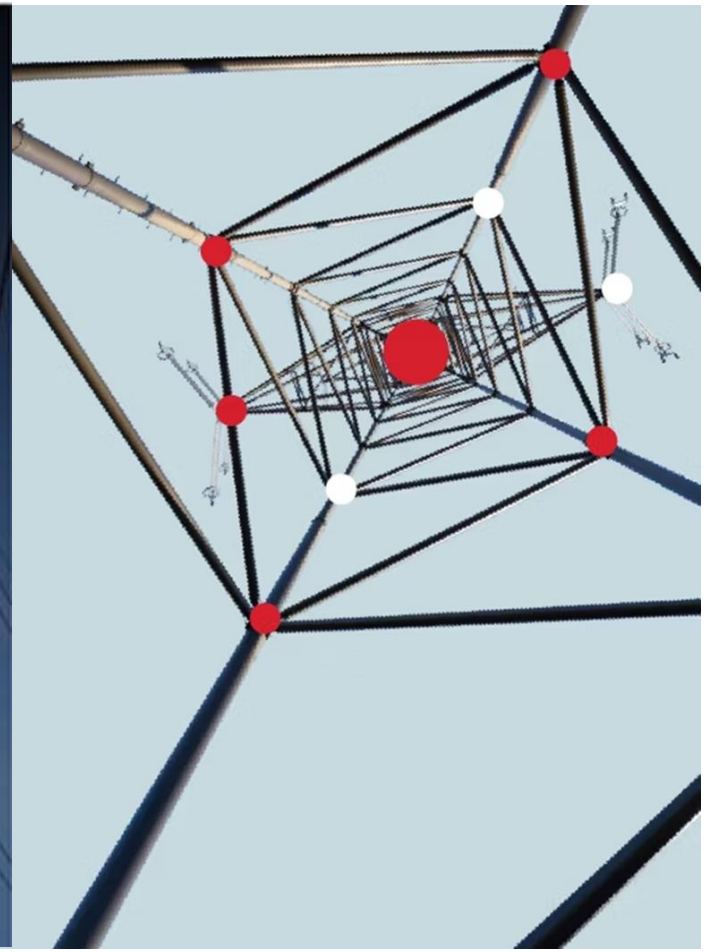
Power, Renewables, Generation, and Grid





Power and the Grid: Rising Demand and Shifting Policies

The global power landscape is being reshaped by the dual forces of AI and increasing electrification. This is driving a sharp increase in electricity demand and raising concerns about generation capacity and grid resilience. Different regions are taking varying approaches to policy, financing and technology—some are turning to conventional sources like natural gas and nuclear, while others grapple with integrating renewables. How are regions adapting and developing strategies for financing new generation, modernizing grids and overcoming these challenges?

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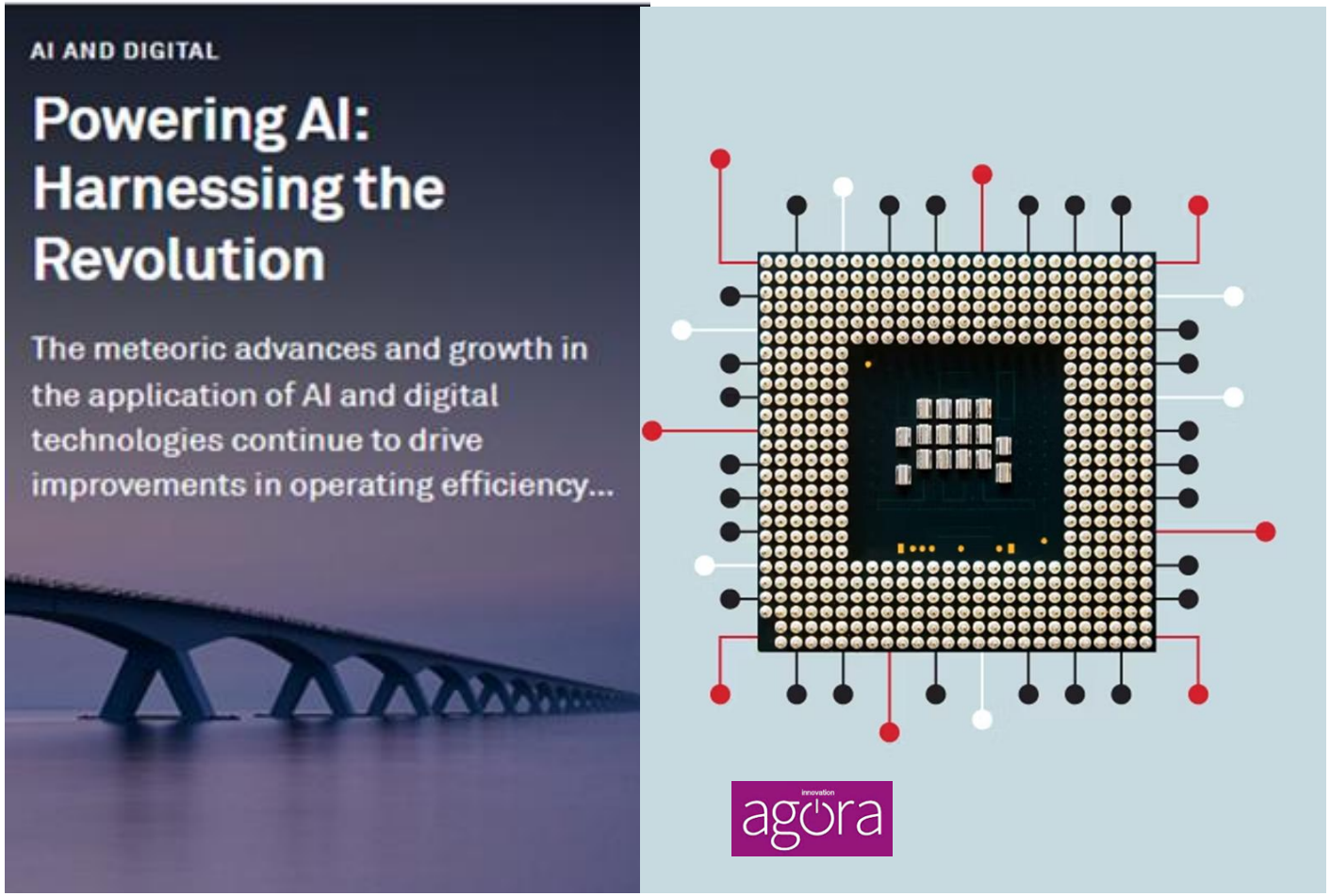
AI and Digital



Powering AI: Harnessing the Revolution

The meteoric advances and growth in the application of AI and digital technologies continue to drive improvements in operating efficiency and sustainability. These technologies have the potential to transform how energy is produced, managed, and consumed, while also altering the nature of work across various industries. Meanwhile, utilities, power companies, and hyperscalers are all seeking ways to respond to the surging electricity demands from data centers. This requires unprecedented levels of investment and greater speed in permitting and execution. How can industries effectively balance these urgent needs with the challenges of implementation?

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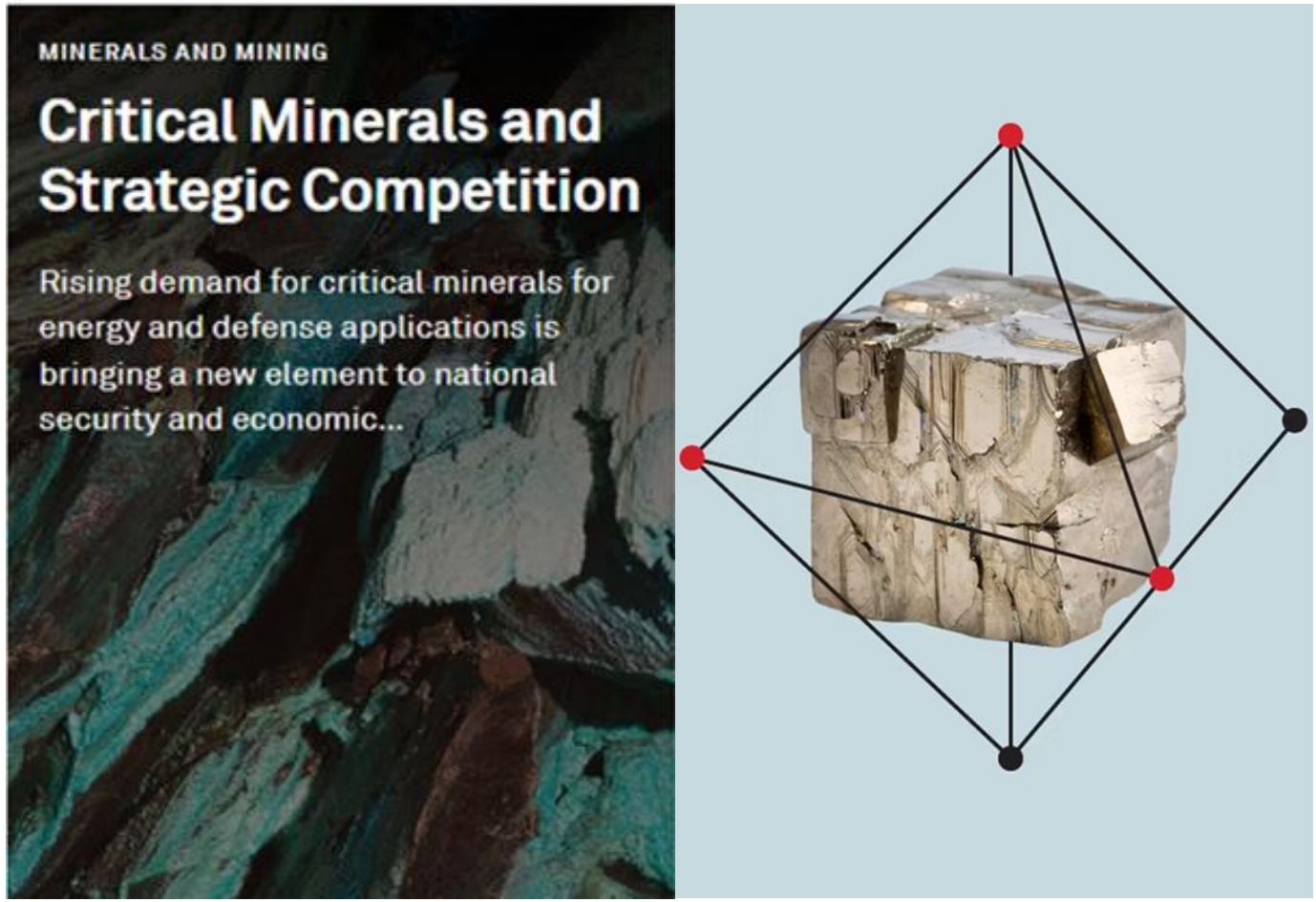
Minerals and Mining



Critical Minerals and Strategic Competition

Rising demand for critical minerals for energy and defense applications is bringing a new element to national security and economic competitiveness. Supply chain concentration and technological advancements present pressing strategic challenges. In response, policies are being pursued to secure resources, diversify supply chains, unlock financing and guarantee demand and investments. Secure access to critical minerals is now seen as inseparable from a nation's prosperity and security. The risks are most evident today with rare earths, but increasing attention will be paid to copper as 'the metal of electrification".

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Electrification Technologies

Electrification: Technologies for the Future

Emerging technologies are transforming the electricity system, with innovation spanning wind, solar, enhanced geothermal, advanced batteries, small modular reactors (SMRs), fusion and next-generation grid solutions. These electron-based technologies are critical for electrification, decarbonization, reliability and meeting rising demand. Their success depends on complex global manufacturing supply chains, specialized fabrication, and engineering expertise. Technology readiness, cost curves and commercialization pathways differ, with divergent policy push, climate drivers and regulatory hurdles shaping pathways. – with AI affecting both supply and demand.

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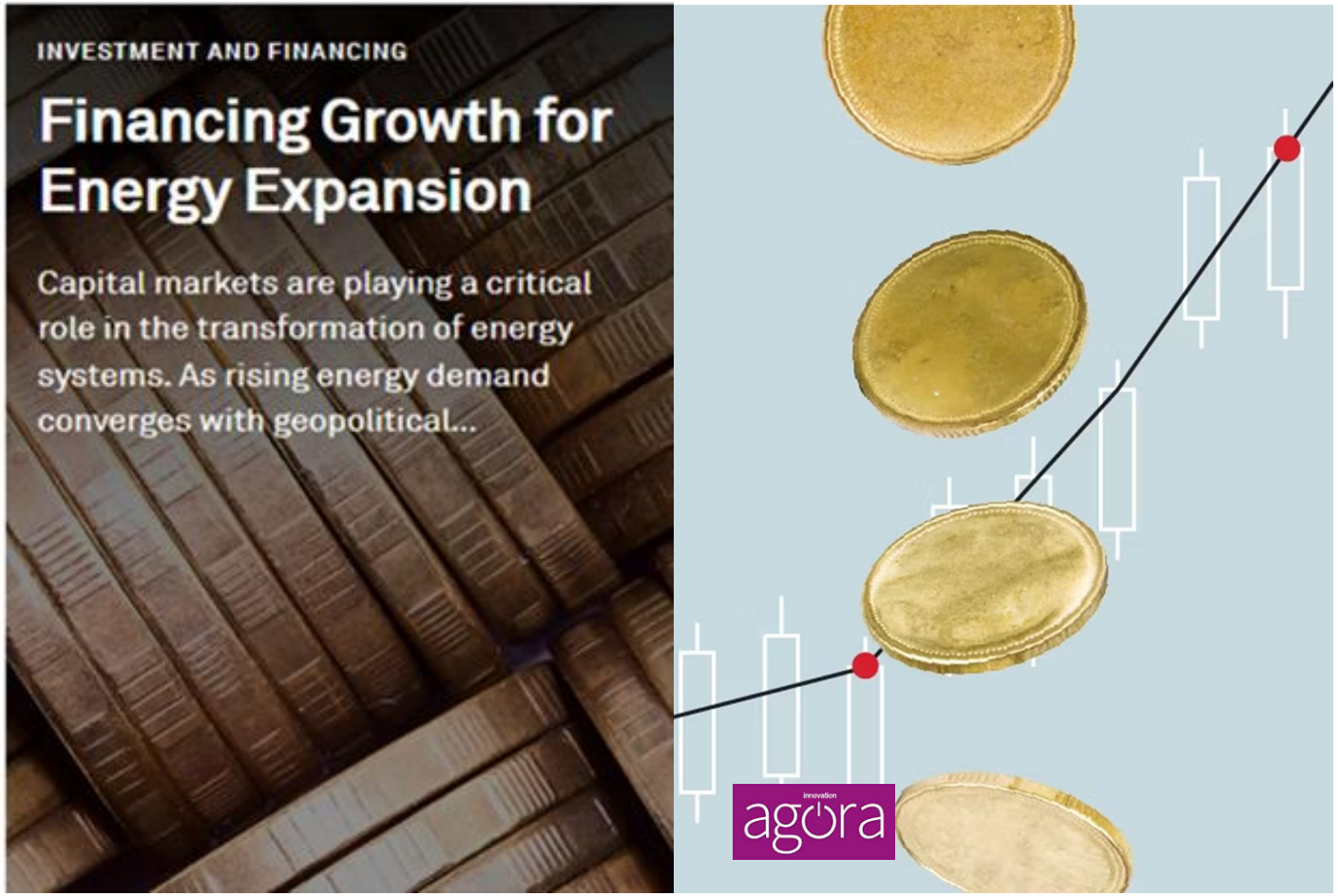
Investment and Financing



Financing Growth for Energy Expansion

Capital markets are playing a critical role in the transformation of energy systems. As rising energy demand converges with geopolitical uncertainties and the imperatives for resilient and sustainable infrastructure, securing capital for all energy sources has become paramount. Allocating capital in an uncertain world, where the demands of economic growth and new technologies such as AI require speed, necessitates a rethinking of how to finance energy projects – whether from venture capital, private equity, institutional investment, or sovereign capital.

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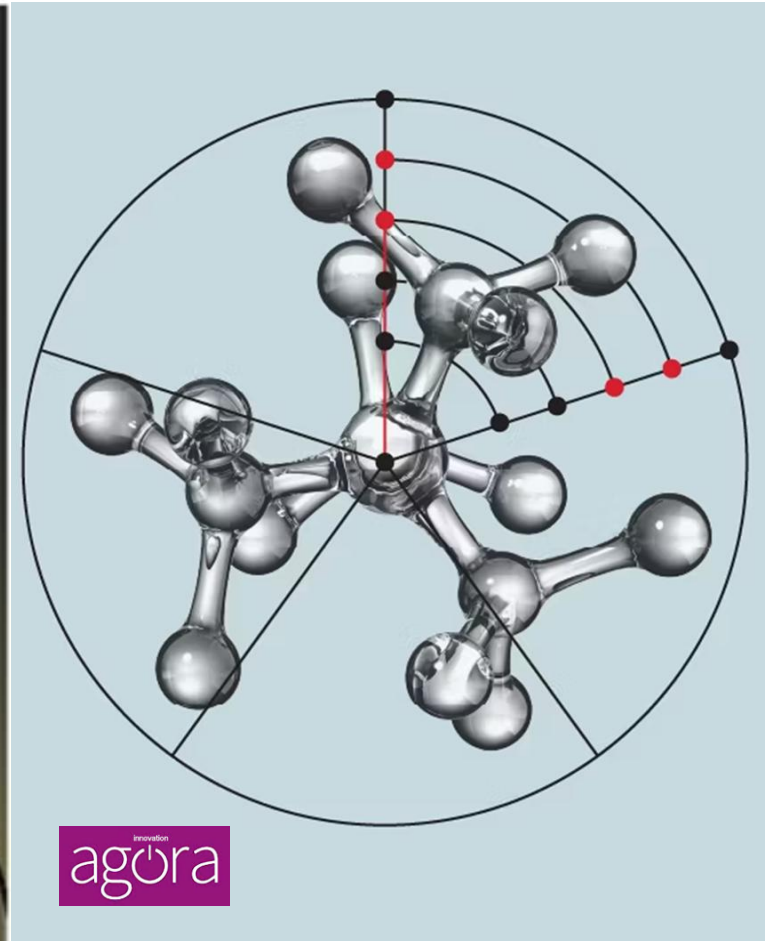
Chemicals and Materials



Chemicals: Strategies for Market Challenges

Mounting pressure in global chemical markets, disruptive trade flows and the march toward sustainability are redefining competitiveness and innovation across the chemicals and materials value chain. The interplay of recycling, AI-driven operations and novel feedstocks signals a paradigm shift leading to new business models, and partnerships to navigate regulatory and market headwinds. Chemical and material stewardship has become a strategic priority, linked to economic resilience, emissions, and advances in science.

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Business Strategies

Making Choices: Strategies for a Shifting Landscape

Strategy determines a company's success. It provides a road map through changing economic and geopolitical risks, guides capital allocation and investment decisions and manage resources. In an era marked by rapid technological advancements and increasing competition, energy companies must prioritize the integration of AI and other innovative technologies into their strategic frameworks. This approach is not just about sustaining growth; it's about transforming how energy is produced, distributed, and consumed.

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The Innovation Ecosystem

Maintaining the Innovation Momentum

The rapidly evolving innovation ecosystem underscores the critical importance of technology and innovation in propelling the energy sector forward. Innovation now spans the entire technological continuum, from groundbreaking discoveries in the lab to large-scale commercial deployment. In addition, the importance of platform technologies has never been more significant to scale energy technologies. This evolution highlights the necessity of maintaining momentum in a fast-changing environment to develop effective solutions for the future.

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Managing Emissions

Emissions: Managing Cost and Scaling Solutions

Lowering emissions while maintaining energy affordability and security remains a major challenge for the energy sector and energy-intensive industries. Emissions-reducing technologies and approaches are available, supported by a range of government policies. Costs and returns continue to loom large for managing emissions, complicating deployment at scale while demonstrating project bankability. Additionally, a focus on carbon accounting to enhance transparency is providing further impetus for these efforts.

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Low Carbon Fuels and Mobility

Scaling Solutions for Decarbonization

Low-carbon fuels offer the versatility and scalability required to reduce emissions in mobility and challenging sectors such as heavy industry and long-haul transportation. National and regional policies are supporting the adoption of these fuels—including sustainable biofuels, hydrogen and ammonia—to establish energy systems that are clean, resilient and secure. Commercial and technological approaches for financing, developing and deploying low-carbon fuels continue to advance in response to the changing demands of industry and transportation.

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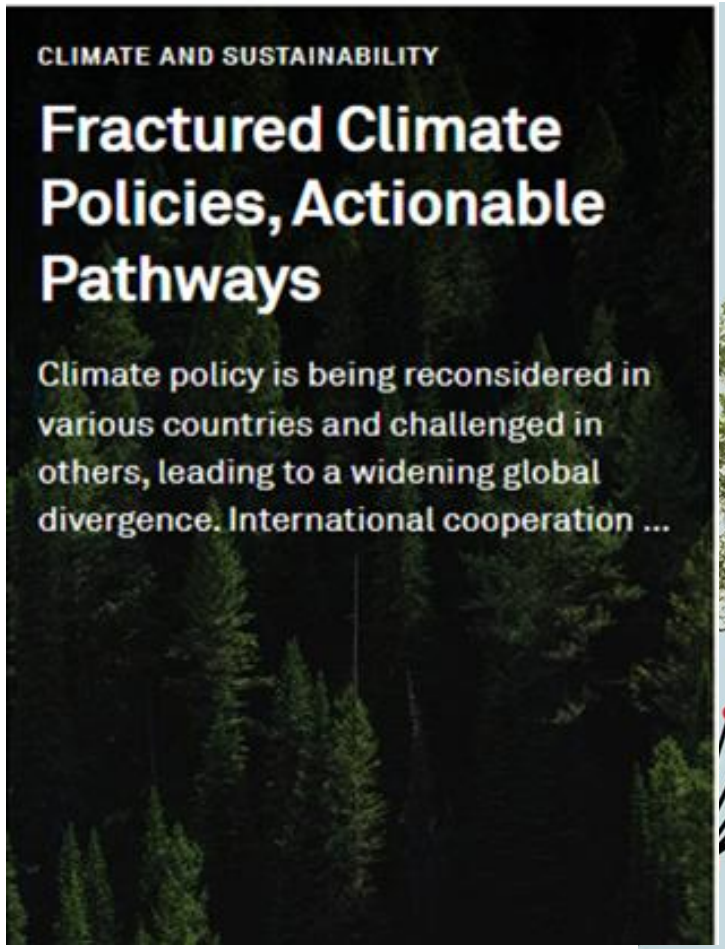
Climate and Sustainability



Fractured Policies, Actionable Pathways

Climate policy is being reconsidered in a number of countries, widening global divergence. International cooperation is fractured and the COP process is looking for a new breath. Corporations and private actors remain engaged, focusing on realistic, pragmatic and profitable climate actions rather than lofty pledges. The under 2°C warming goal remains the North Star, while efforts to innovate and scale mitigation technologies continue. For developing nations, a just transition remains central. Meanwhile, extreme weather amplifies physical risks, straining insurance markets. Adaptation and financing resilience are now urgent priorities as climate impacts deepen and political consensus frays.

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Workforce Strategy

Talent and Tech: The Future of Work in Energy

The energy sector faces a sweeping transformation in human capital, accelerated by AI and digitalization, which is changing the workforce and the nature of work. Companies are confronting how to adopt new technologies, as well as rethinking how they attract, develop and retain talent equipped for rapid change. As new skill sets become essential, how do organizations focus on cultivating a dynamic, adaptable talent base in an evolving industry landscape? How do educational institutions provide foundations for learning and upskilling the energy workforce of tomorrow?

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Innovation Agora Hubs

The CERAWeek 2026 Hubs will focus on New Energies, Carbon and Climate, and AI

The Innovation Agora Hubs are dedicated zones for sharing ideas and insights, exploring the technology frontiers around a central topic for the industry.

Amphitheater sessions feature panels and one-on-one conversations focus on critical challenges, Agora Pod presentations dive into emerging technologies and solutions, and Partner Installations and evening receptions in each Hub foster relationship-building and enhanced engagement.

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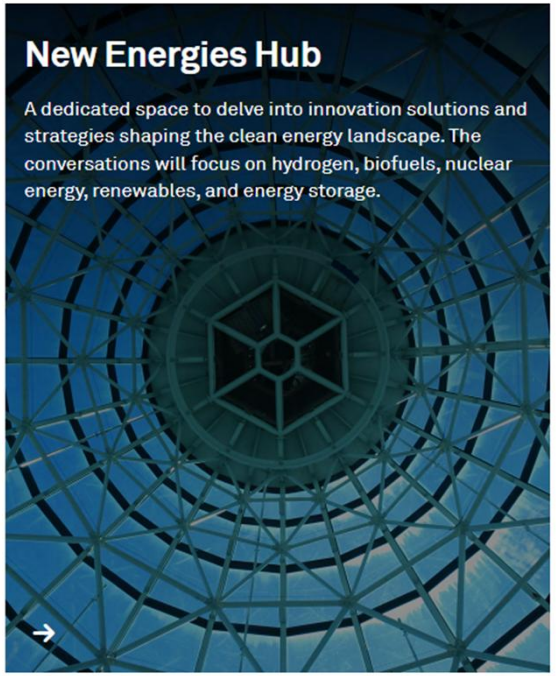
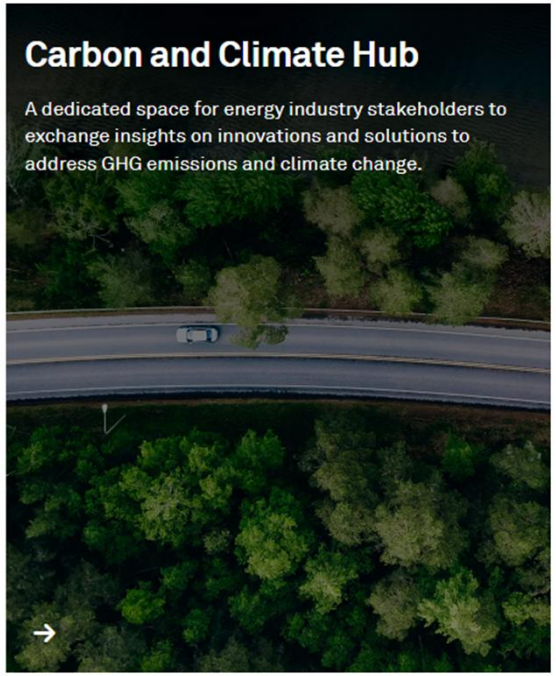
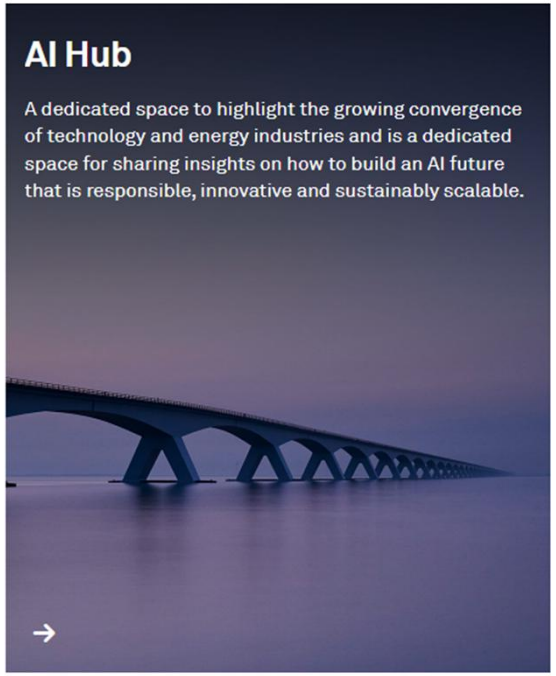
Innovation Agora Hubs







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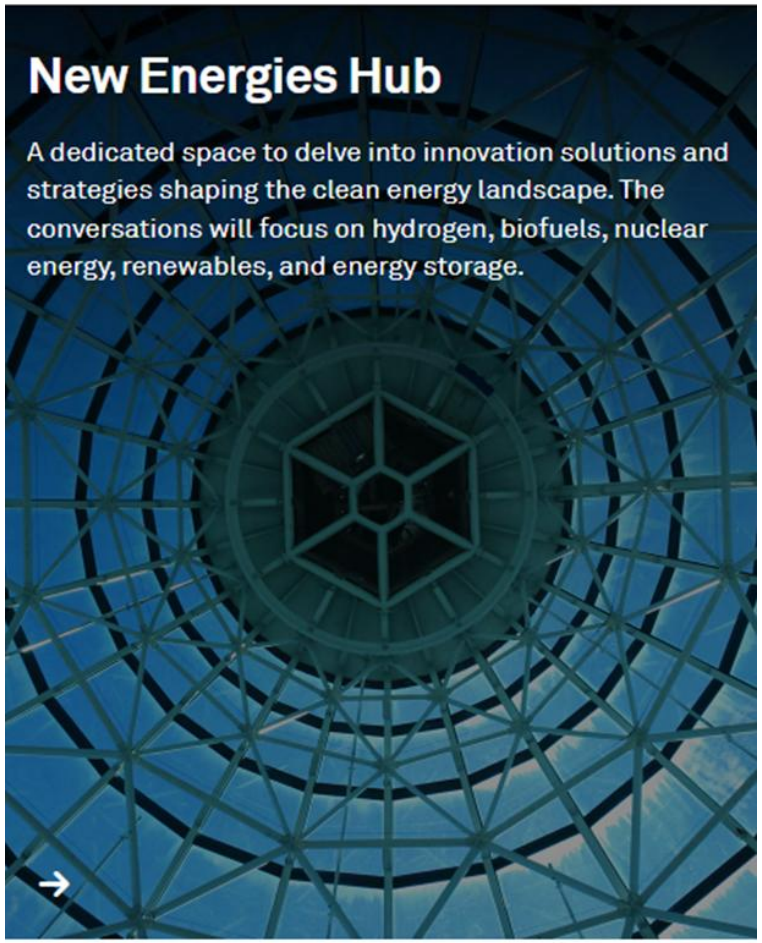
New Energies Hub



A focus on the clean energy economy

The Innovation Agora New Energies Hub is a dedicated space focused on the clean energy landscape.

Participants explore innovative solutions and strategies shaping the clean energy landscape, with discussions that span hydrogen, biofuels, nuclear energy, renewables, and energy storage. These conversations will address the challenges, advancements, and policies required to scale technologies and achieve global energy transition goals.

Hydrogen
Nuclear Energy
Energy Storage
Biofuels and SAF
Renewables

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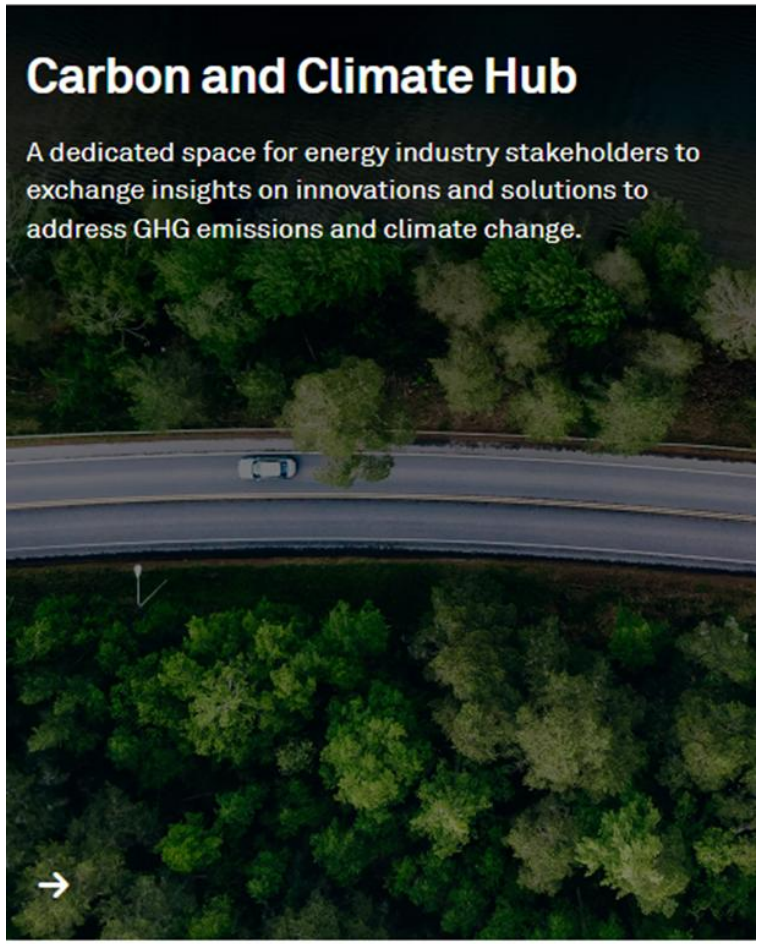
Carbon and Climate Hub



A focus on the decarbonization ecosystem and solutions for climate change

The Innovation Agora Carbon and Climate Hub is a dedicated space for energy industry stakeholders to exchange insights on innovations and solutions to address GHG emissions and climate change.

In open amphitheater conversations, leading experts in energy, energy-intensive industries and associated financial, policy and academic communities explore key experiences and learnings surrounding existing efforts and how to pursue efforts to address emissions and climate.

Reducing Industrial Greenhouse Gas
Physical Climate Risk and Adaptation
Established Decarbonization Solutions
CCUS, CDR, Methane Management
Policy, Carbon Markets and Accounting
Emerging Innovations
Business and Finance

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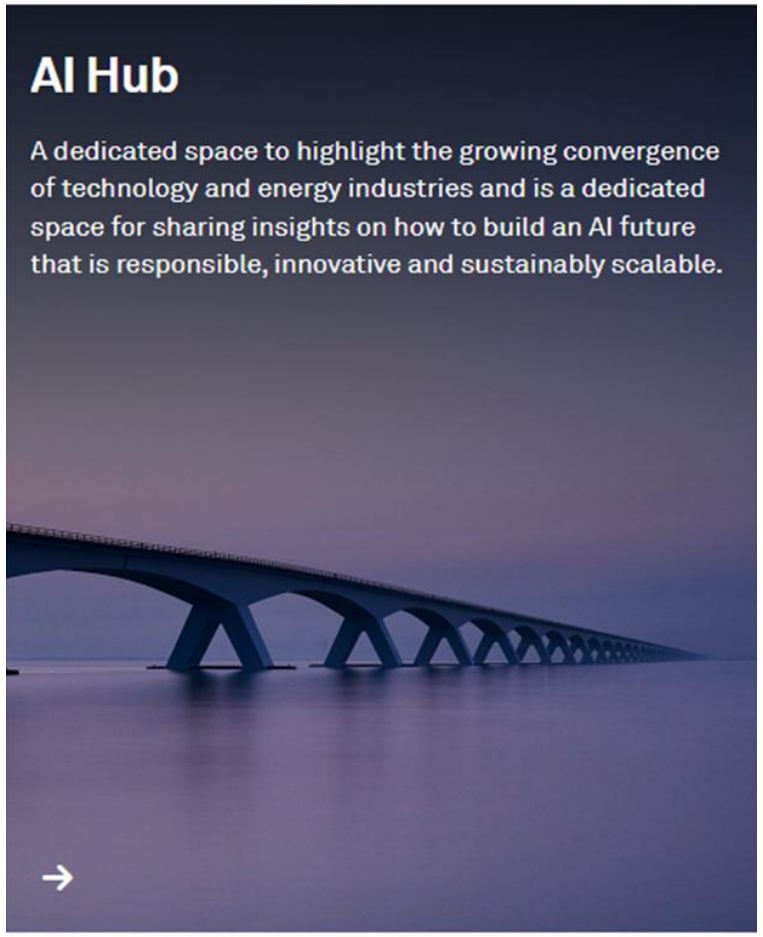
AI Hub



A focus on Responsible, Sustainably Scalable, Disruptive AI Innovation

The AI Hub highlights the growing convergence of technology and energy industries and is a dedicated space for sharing insights on how to build an AI future that is responsible, innovative and sustainably scalable.
In open amphitheater conversations designed to spark collaboration, inspire new ideas, leading experts from across the AI and Energy value chain come together to examine critical themes such as governance and risks, breakthrough applications, agentic AI, edge intelligence, and innovation across the AI infrastructure stack.

Governance and Risks
Agentic AI and Human Collaboration
Innovation in Chips and AI Infrastructure
AI Applications
Edge AI
Startup and Market Trends

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