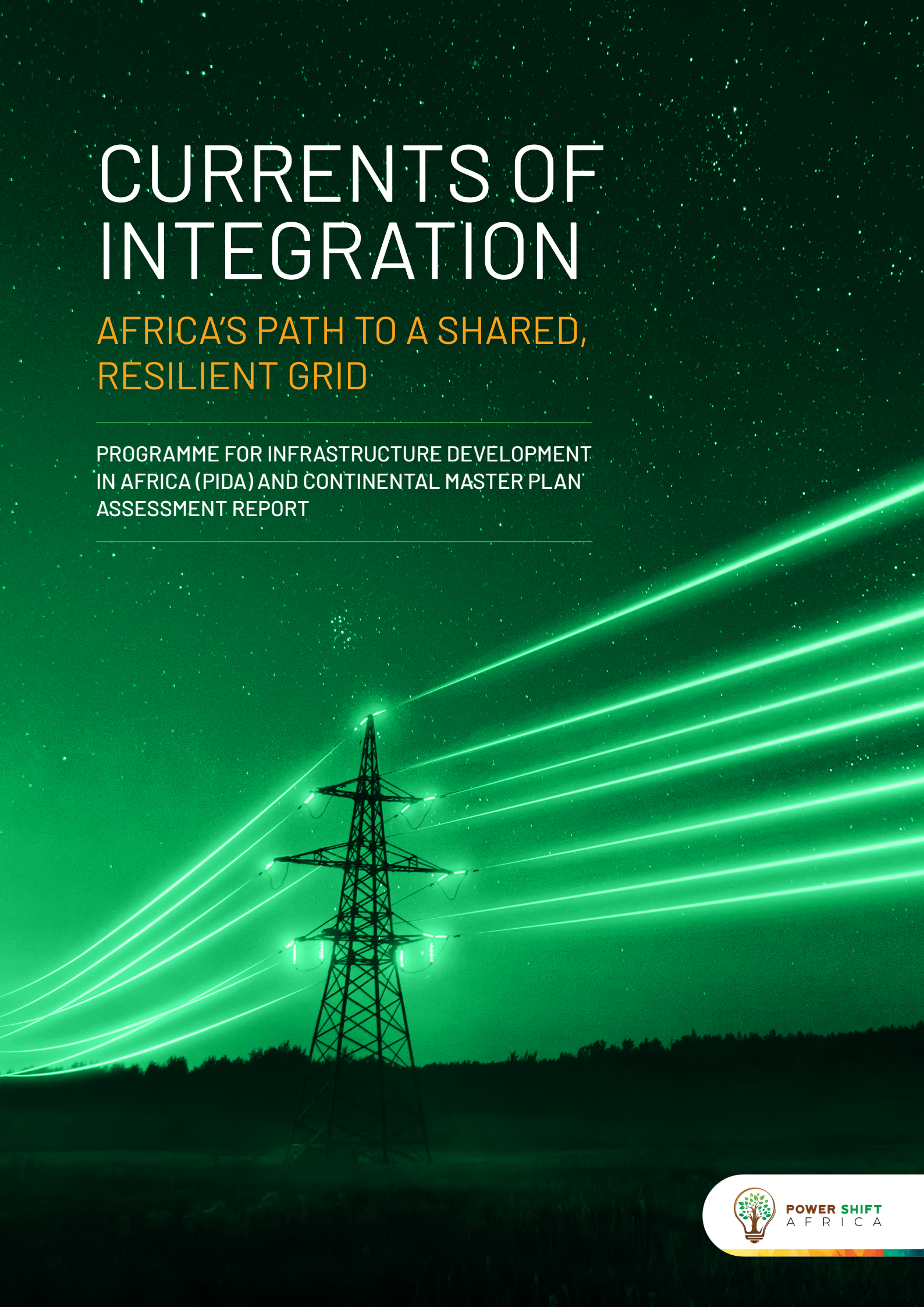
CURRENTS OF INTEGRATION

AFRICA'S PATH TO A SHARED, RESILIENT GRID

PROGRAMME FOR INFRASTRUCTURE DEVELOPMENT IN AFRICA (PIDA) AND CONTINENTAL MASTER PLAN ASSESSMENT REPORT



POWER SHIFT AFRICA

ACRONYMS

AfCFTA	African Continental Free Trade Area
AfDB	African Development Bank
AfSEM	African Single Electricity Market
AGII	African Green Industrialisation Initiative
AGMS	Africa's Green Minerals Strategy
AMDC	African Minerals Development Centre
AU	African Union
AUC	African Union Committee
AUDA	NEPAD – African Union Development Agency
CAPP	Central African Power Pool
CMP	Continental Power Systems Master Plan
COMELEC	North African Power Pool
EAPP	Eastern African Power Pool
EU	European Union
IRENA	International Renewable Energy Agency
MDB	Multilateral Development Bank
PIDA	Programme for Infrastructure Development in Africa
REC	Regional Economic Communities
REE	Rare Earth Elements
SAPP	Southern African Power Pool
SDG	Sustainable Development Goals
UNECA	United Nations Economic Commission for Africa
WAPP	West African Power Pool

EXECUTIVE SUMMARY

Africa's twin frameworks for infrastructure and energy development - the Programme for Infrastructure Development in Africa (PIDA) and the Continental Power Systems Master Plan (CMP) - aim to coordinate investments, harmonise policy, and build a unified, low-carbon energy system for Africa. Together, they provide a continental vision for industrial growth, regional integration, and sustainable development.

While both have strengthened regional cooperation and improved institutional alignment, delivery remains limited. Many projects are still in early stages, and neither framework has enforceable commitments, clear performance metrics, nor integration into national budget cycles or other related continental initiatives, such as Mission 300 or the African Green Industrialisation Initiative. Without stronger governance and coordination, the risk of duplication, policy incoherence, and external dependency remains high.

To achieve Africa's development ambitions, green industrialisation must become the driving force of both initiatives. This requires aligning the CMP and PIDA with the African Green Minerals Strategy (AGMS) to account for energy transition minerals and material requirements. Without this integration, Africa risks supplying the materials for global decarbonisation while missing out on the industrial value capture that will generate African prosperity in the 21st century.

Key recommendations of this assessment include:

- Strengthen political leadership and cross-regional coordination.
- Embed PIDA and CMP within national planning and financing cycles.
- Integrate AGMS to align energy, industry, and mineral strategies.
- Develop a unified, climate-aligned project pipeline.
- Support decentralised, off-grid renewable solutions alongside grid expansion.
- Expand state-led finance to discipline private capital.
- Enhance transparency, monitoring, and citizen oversight mechanisms.

With these reforms, PIDA and the CMP could provide an anchor for what could become a transformative African energy transition; one that builds resilience, sovereignty, and prosperity.

KEY FINDINGS

- PIDA and the CMP aim to bring continental coherence to Africa's energy and infrastructure planning by providing a strategic vision and a sequenced portfolio of phased priority projects. Both initiatives integrate national and regional strategies into a shared infrastructure and investment platform, backed by high-level political support from the AU, AfDB, and other African institutions. Through extensive consultation processes, they have enhanced regional power pools and entrenched the concept of industrial corridors - an approach that remains influential across the continent.
- The CMP offers a strong strategic basis for expanding energy access, low carbon generation, driving economic development, and embedding environmental sustainability. Its modelling tools, regional coordination frameworks, and renewables-led orientation position it as a potentially transformative initiative. However, it remains primarily a planning instrument, rather than an instrument of delivery and implementation.
- Despite advances in project coordination and preparation, the CMP lacks clear delivery metrics - such as those on energy accessibility or affordability - and its project pipeline remains weakly defined. Crucially, there is no binding framework for implementation, which undermines accountability, permits policy reversals from national governments, and risks policy and industrial fragmentation across Africa.
- A major gap lies in the failure to integrate energy transition minerals and other critical inputs into infrastructure planning. The African Union's Green Minerals Strategy (AGMS), led by the AMDC, is not aligned with either PIDA nor the CMP. Although the AGMS remains in its nascent stages and is not a comprehensive strategy by any means, there is a need to integrate these policy programmes to further green industrialisation. Without this integration, Africa risks remaining a supplier of raw materials rather than capturing value through domestic green industry development, manufacturing, and circular economy strategies. Alignment with the AGMS is essential to secure a stronger position in global green value chains and use the continent's rich resource base for leverage to secure technology transfer and favourable investment terms. More recently, the mobilisation of capital via the Africa Green Industrialisation Initiative (AGII) also poses concerns over policy coherence and coordination.
- The CMP's energy pipeline leans heavily on hydropower, which - while historically central to African electricity generation - is increasingly vulnerable to climate change and has a variety of negative environmental impacts. Hydropower output is sensitive to changing rainfall patterns, shifting seasonal flows, and rising temperatures that increase evaporation. With some countries (e.g., DRC, Uganda, Zambia) already sourcing over 80% of electricity from hydro,[1] the CMP risks deepening structural dependence on a volatile source. PIDA and CMP must update their risk analysis of these types of projects. What's more, the pursuit of hydropower can have fierce and protracted political implications for African regions, as is clear with the experience of the Grand Ethiopian Renaissance Dam (GERD).[2]

1 IEA, 2020, 'Climate Impacts on African Hydropower', https://www.iea.org/reports/climate-impacts-on-african-hydropower

2 Climate Diplomacy, 2024, 'The politics of the Grand Ethiopian Renaissance Dam', https://climate-diplomacy.org/magazine/conflict/politics-grand-ethiopian-renaissance-dam

- PIDA and the CMP are promoted as mechanisms to reposition Africa in a shifting global order by building a continent-wide infrastructure and energy market. This could attract investment and support green industrial industrialisation. But significant risks remain. Export-oriented green industrial strategies (e.g. energy transition minerals) may reinforce extractive patterns, while growing reliance on foreign capital - particularly from China, the EU, and the US - could erode African sovereignty without stronger continental governance and a more assertive deployment of public finance.
- PIDA and the CMP inadequately reflect the realities of global geopolitical shifts. Africa risks being drawn into strategic rivalries - particularly between the US and China - over control of green supply chains and wider trade dynamics. Chinese finance continues to dominate across Africa, but is increasingly channelled through commercial banks rather than development institutions.[3] This shift brings higher costs, lower risk tolerance, and a tendency to favour wealthier African countries, as evidenced by the concentration of recent China-backed renewable projects in South Africa.[4] This threatens to widen intra-continental disparities and limit access to finance for least developed countries.
- PIDA and the CMP stand at critical junctures where targeted engagement and advocacy could shape their future direction. While many projects remain at the feasibility stage, debates continue over governance, financing and institutional design. These frameworks offer a foundation for a potentially transformative break from the historic shortcomings of development, energy, and climate finance across Africa. Yet without intervention, they risk defaulting to business as usual. Strategic engagement in the near term will be essential to shift their trajectory and realise their full potential.

3 Dialogue Earth, 2025, 'Understanding China's evolving role in overseas development finance', https://media.licdn.com/dms/document/media/v2/D4E1FAQG8q67qa76CJw/feedshare-document-pdf-analyzed/B4EZh.hiIKHEAc-/0/1754469379030?e=1755129600&v=beta&t=TL39wjlk3WKI8vXcSj3pTIYm8vCVGpDz-sN4jbamS1I

4 Ibid.

I. ASSESSMENT REPORT

PIDA Analysis

The Programme for Infrastructure Development in Africa (PIDA) is a continental initiative launched in 2010 by the African Union (AU), the African Development Bank (AfDB), the United Nations Economic Commission for Africa (UNECA), and the African Union Development Agency (AUDA-NEPAD).[5] It aims to accelerate regional integration and boost intra-African trade and sustainable development through strategic infrastructure projects across four key sectors deemed essential for Africa's economic development and industrialisation:

- Energy
- Transport
- ICT
- Transboundary Water Resources

PIDA PAP 1 (2012–2020) included over 400 regional infrastructure projects, spanning energy, transport, ICT, and water sectors.[6] By early 2021, about 50% of these had reached operation, construction, tendering, or financial close; approximately 30% remained in early feasibility stages.[7] PIDA PAP 2 (2021–2030) now includes 69 priority projects across transport, energy, ICT, and transboundary water sectors. These final projects were whittled down from a long list of 240 proposed by the AU member states, regional economic communities (RECs), and other notable institutions.[8] Of the 69 regional Priority Projects, 18 are energy projects, covering both generation and transmission.[9] Many of these projects are still in the preparation and feasibility stage, with full delivery expected later in the decade or in the early 2030s.

In terms of impact, it is argued that PIDA has made a sizable contribution to Africa's energy infrastructure and wider economic development. Integrated regional projects supported by PIDA (especially hydropower, interconnectors, and mini-grids) have helped over 30 million Africans gain access to electricity, raising continental electrification rates to around 44% during PIDA PAP 1 (2012–2020).[10] In the next phases, PIDA seeks to extend energy access to approximately 80% of the population by 2040, through new generation, grid integration and inter-regional trade of electricity.[11] These boosts to infrastructure and economic activity have created an estimated 160,000 direct and indirect jobs.[12]

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5 AfDB, 2010, 'Official Launch of PIDA', https://www.afdb.org/en/news-and-events/official-launch-of-pida-7073

6 The Nation, 2019, 'Charting path for Africa's infrastructure drive', https://thenationonlineng.net/charting-path-for-africas-infrastructure-drive/

7 AUDA-NEPAD, 2021, 'Infrastructure key to realisation of the African Continental Free Trade Area', https://nepad-new.assyst-uc.com/news/infrastructure-key-realisation-of-african-continental-free-trade-area

8 AU et al., 2023, '2nd PIDA Priority Action Plan (2021-2030) - Projects Prospectus', https://www.au-pida.org/wp-content/uploads/2023/08/EN-NEPAD-PIDA-PAP2-Project-Prospectus-Web.pdf

9 Ibid.

10 The Point, 2025, 'Unlocking Africa's potential!', https://thepoint.gm/africa/gambia/editorial/unlocking-africas-potential

11 AUDA-NEPAD, n.d., 'The African Continental Master Plan', https://www.nepad.org/continental-master-plan

12 The Point, 2025, 'Unlocking Africa's potential!', https://thepoint.gm/africa/gambia/editorial/unlocking-africas-potential

Table 1. Capital mobilised under PIDA

According to the PIDA Progress Report, at the close of PIDA PAP 1 in 2020, investment commitments totalled approximately US $82 billion, which was 20% above the initial target ($68 billion).[13]

Key financing sources included:[14]

- 42% from AU Member States
- 24% from Development Finance Institutions and MDBs
- 24% from China
- 3% from the private sector

PIDA PAP 2 is estimated to require investment of around US $160–161 billion through to 2030.[15] While this is a substantial amount of capital that will transform parts of Africa's energy and infrastructure systems, it falls far short of the AU's own modelling that estimates $1.32 trillion is needed to realise full continental energy access and integration by 2040.[16]

Continental Power Systems Master Plan Analysis

The Continental Power Systems Master Plan (CMP), another initiative under the AU that is led by AUDA-NEPAD, was launched under the PIDA Priority Action Plan 2 (PIDA PAP2, 2021-2030) with a sole focus on increasing the provision of energy throughout Africa. The CMP is a specific, long-term master plan for both generation and transmission infrastructures adopted under the PIDA framework, aimed at supporting the realisation of the African Single Electricity Market (AfSEM), as well as some of the key aspirations of Vision 2063 and the AU's Pan-African vision.[17] AfSEM is expected to be fully operational by 2040, will serve 1.3 billion people and, when operational, will be the largest single electricity market in the world.[18]

The CMP came into existence in 2019 and consists of three phases. Phase I was a baseline analysis of existing and planned power generation and transmission projects across Africa, which was completed in 2020.[19] Phase II saw the development of the Master Plan, running from 2021 to 2023,

13 AU, 2023, 'Programme for Infrastructure Development in Africa (PIDA): First 10-Year Implementation Report', https://www.au-pida.org/wp-content/uploads/2023/09/PIDA-Progress-Report_WEB.pdf

14 Ibid.

15 AU, 2023, 'Experts in infrastructure and energy sectors push to accelerate development in Africa', https://au.int/en/pressreleases/20230913/experts-infrastructure-and-energy-sectors-push-accelerate-development-africa

16 AUDA-NEPAD, 2023, 'The African Continental Power Systems Masterplan - Synthesis Report – Quantifying the Transformative Value of a Continent-Wide Electricity Power Network' https://www.nepad.org/publication/african-continental-power-systems-masterplan-synthesis-report-quantifying

17 AUDA-NEPAD, 2023, 'How to effectively fund Africa's energy infrastructure projects?', https://www.nepad.org/news/how-effectively-fund-africas-energy-infrastructure-projects

18 AU et al., 2021, 'TOWARDS AN AFRICAN SINGLE ELECTRICITY MARKET-AFSEM', https://cmpmwanga.nepad.org/files/Comms/Publications/AfSEM_Policy_Paper_and_Roadmap_2040_03122021.pdf

19 AUDA-NEPAD, 2023, 'The African Continental Power Systems Masterplan - Project Studies - Green Hydrogen', https://africa-eu-energy-partnership.org/wp-content/uploads/2023/08/GH-Summary-Report_Final-clean.pdf

where in-depth modelling, scenario analysis, and integration studies, all building on the baseline data, were used to assess resource needs and plan transmission networks.[20] Phase III, launched in 2024, focuses on implementation and delivery, primarily the creation of the AfSEM. While this was formally endorsed by the AU leadership in 2024, the official start of the CMP and AfSEM implementation was 2025.[21] The CMP is both the technical and strategic backbone for AfSEM and its creation was purported to be highly collaborative. Over 100 stakeholders contributed to the CMP process, including AU agencies, the five African regional power pools (see below), RECs, ministries of energy, national regulatory authorities, financiers (like the AfDB), technical partners, and global organisations.

Several of the most important drivers behind the creation of the CMP and its implementation includes:

- **Economic development:** AU's Agenda 2063 has the objective of Africa achieving middle-income status by 2035. According to officials interviewed as part of this project, the CMP works backwards from this ambition to model what generation and transmission infrastructure is needed to achieve this objective. This, in part, can explain the preference towards large scale projects, such as hydro plants, in order to maximise generation capacity.
- **Surging demand for energy:** Africa's energy demand is expected to triple or quadruple by 2040. Meeting this demand means rapidly scaling up both electricity generation, with between 1,600-2,300 TWh required annually by 2040,[22] and transmission networks to improve the stability and security of electricity supply.
- **Persistent energy poverty and inaccessibility:** Many parts of Africa still face significant electricity deficits and energy poverty, despite substantial gains within some states. The CMP seeks to address this by enabling affordable, secure, and clean energy access across the continent, with the ultimate aim of achieving universal electricity access.
- **Growing finance gap to meet Africa's infrastructural needs:** The total infrastructure investment needs across Africa are estimated at roughly $360 billion by 2040, with a significant portion directed towards energy projects. The current mobilized infrastructure investment is around $82 billion.[23]
- **Modernising and strengthening Africa's energy system:** The CMP aims to build a more resilient and flexible regional energy system that can absorb new generation, storage and transmission technologies once they become operational.
- **Coordinating and stabilising investment and planning:** Meeting Africa's growing energy needs requires bridging a substantial finance gap. The CMP provides a continent-wide roadmap for power generation and transmission investments that should - in theory - attract investment and reduce financial risk by presenting both a portfolio of projects and policy certainty.

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20 Ibid.

21 AUDA-NEPAD, 2023, 'African Continental Power Systems Masterplan (CMP) - PHASE III', https://www.nepad.org/publication/african-continental-power-systems-masterplan-cmp-phase-iii

22 IEA, 2019, 'Africa Energy Outlook 2019', https://www.iea.org/reports/africa-energy-outlook-2019

23 African Business, 2025, 'Unlocking Africa's potential', https://african.business/2025/01/partner-content/unlocking-africas-potential

- **Aligning national policy and interests:** The CMP, supported by all 55 AU member states, seeks to align and integrate national policies and interests to drive regional connectivity and development.

Although the role of the CMP - and its relationship with PIDA - is still evolving, its objectives include:

- Scale up electricity generation and transmission through a well-balanced sharing of affordable, reliable, and clean energy resources across the continent.[24]
- Support the creation of the African Single Electricity Market (AfSEM) through coordinated planning and interconnection of national power systems.[25]
- Establish the long-term framework required for efficient and competitive cross-border electricity trade, leveraging national and regional generation surpluses and deficits.[26]
- Optimise decision-making on the location, size, and timing of electricity generation and transmission infrastructure investments.[27]
- Prioritise the integrated development of Africa's power sector, improving system reliability, flexibility, redundancy, security of supply, and operational efficiency.[28]
- Enable the sustainable development and use of Africa's diverse energy resources, including renewables such as solar, wind, hydro, geothermal, battery storage, and green hydrogen.[29]
- Coordinate with regional power pools and national plans to ensure political, technical, and financial alignment for a continent-wide power strategy.[30]
- Align planning for energy infrastructure with broader continent-wide policy programmes, such as the Sustainable Development Goals (SDGs), and international climate commitments, like the Paris Agreement.[31]

The CMP follows the policy heuristic of the African regional power pools. There are five African power pools: the Southern African Power Pool (SAPP), West African Power Pool (WAPP), the Eastern African Power Pool (EAPP), the Central African Power Pool (CAPP), and the North African Power Pool (COMELEC). These are regional organisations created to coordinate electricity generation, transmission, and trade among neighboring countries. They aim to enhance energy cooperation, improve grid reliability, streamline resource use, and facilitate cross-border electricity trade that supports regional integration and economic development. To do this, they provide vital technical expertise, data, and operational governance that feed into continent-wide planning and investment prioritisation.

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24 AUDA-NEPAD, n.d., 'The African Continental Master Plan', https://www.nepad.org/continental-master-plan

25 Ibid.

26 AUDA-NEPDA, 2023, 'The African Continental Power Systems Masterplan. Support Studies – Pumped Storage Hydropower (PSP)', https://africa-eu-energy-partnership.org/wp-content/uploads/2023/08/PSP-Summary-Report_Final-clean.pdf

27 Ibid.

28 Ibid.

29 AUDA-NEPAD, 2023, 'The African Continental Power Systems Masterplan - Project Studies - Green Hydrogen', https://africa-eu-energy-partnership.org/wp-content/uploads/2023/08/GH-Summary-Report_Final-clean.pdf

30 AUDA-NEPAD, n.d., 'The African Continental Master Plan', https://www.nepad.org/continental-master-plan

31 Ibid.

Although the power pools were not originally created by the AU, RECs and member states' agreements, the AU and its agencies, such as AUDA-NEPAD, actively support, coordinate, and integrate the regional power pools into both the CMP and PIDA. Specifically relating to the CMP, the initiative coordinates activities across the five regional power pools to enable the African Single Electricity Market (AfSEM). What's more, the CMP relies on power pools as primary regional implementing bodies for project development, technical planning, and operational coordination. In practice, the relationship between the CMP and the power pools is bi-directional. On one hand, the power pools provide the CMP with context-specific data, technical expertise and leads on project implementation, while on the other the CMP supports and strengthens the power pools' master plan and helps with coordination to create a unified approach to electricity market integration.

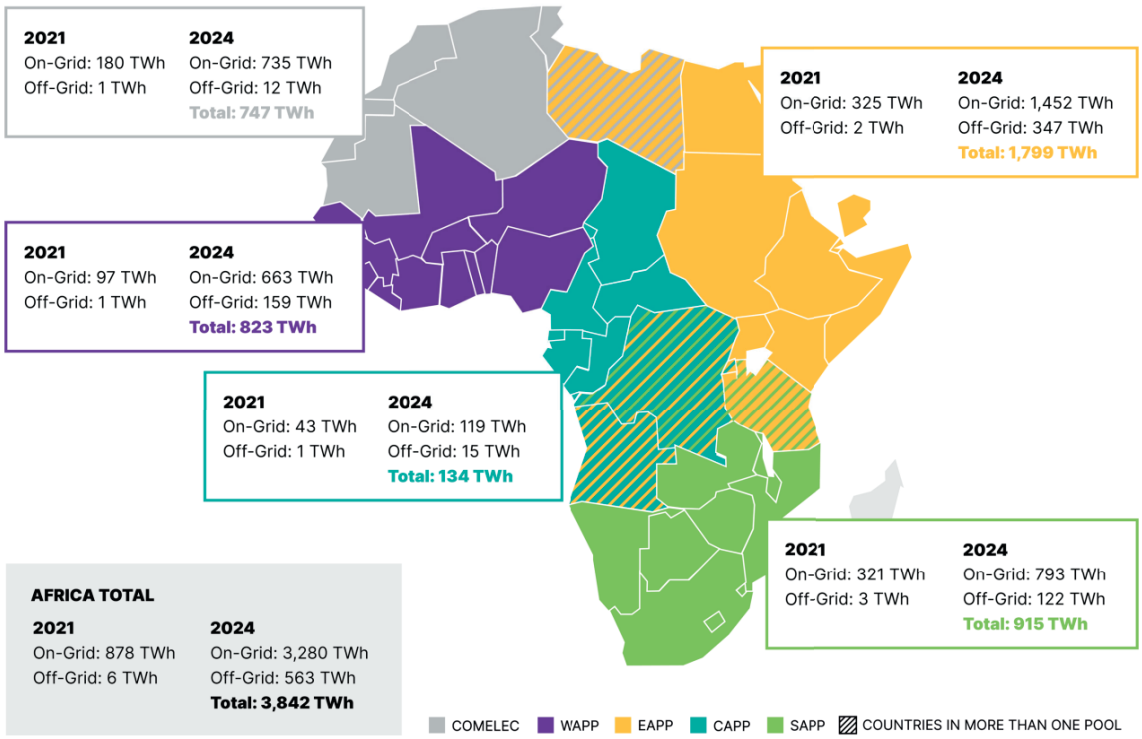


Figure 7: On- and off-grid contribution to the medium-growth scenario by 2040 across power pools

Source: The African Continental Power Systems Masterplan, Synthesis Report

Despite its focus on coordination and collaboration, both PIDA and the CMP are not fully integrated with other policy programmes and institutional strategies, such as the AGII, that directly and indirectly impact Africa's aspirations to industrialise through the development of green technologies. The African Union's Green Minerals Strategy (AGMS) is a foundational policy framework launched in March 2025, led by the African Minerals Development Centre (AMDC) and endorsed by senior AU technical committees.[32] While the AGMS is purportedly aligned with Africa Mining Vision (AMV),

32 AMDC, 2024, 'Africa's Green Minerals Strategy', https://au.int/sites/default/files/documents/44539-doc-AGMS_Final_doc.pdf

Agenda 2063, and calls from the Africa Mining Forum to ensure mineral extraction drives regional industrialisation, job creation, and equitable growth,[33] it is not fully integrated with either PIDA or the CMP.

Unless this is rectified, it remains a major omission in African institutions' push for regional and cross-regional development and fostering value-add green industries. For instance, without the full integration of these programmes, mineral-rich corridor targeting (e.g. for lithium or cobalt hubs) bypasses infrastructure planning frameworks. What's more, strategic infrastructure development via PIDA and the CMP, will miss industrial opportunities unless energy transition mineral requirements through Industrial Resource Plans (IRPs), which are only loosely assessed and outlined in AGMS, are embedded throughout and regularly updated.

Structure & Governance

AUDA-NEPAD leads the CMP development and implementation process, coordinating closely with the African Union Commission (AUC), regional power pools, and other stakeholders like the African Development Bank (AfDB) and international partners (EU, USAID, IRENA, IAEA). The initiative makes use of Ministerial Committees, which sit under the AU's Specialized Technical Committee on Infrastructure and Energy and are coordinated by AUDA-NEPAD, to provide political oversight and strategic direction, ensuring CMP aligns with continental and national priorities. It is at Ministerial and Heads of State Summits where projects and priorities are finalised and endorsed.

The decision-making structure of the CMP includes the CMP Steering Committee, an institutional advisory body that includes AUDA-NEPAD, AUC, AfDB and UNECA, and the Technical Working Groups, which are composed of technical experts from regional power pools, utilities, and national institutions. These groups are supposed to guide the development and validation of CMP deliverables. The overall objectives of the CMP are purported to be developed through a wide-ranging consultation with regional economic communities, regulators, renewable energy centers, and multiple training and capacity-building initiatives for national and regional experts.

Technical experts from institutions and organizations, such as IRENA, provide the quantitative modelling and scenario analyses underlying the CMP, with the view of creating cohesive and coordinated national and regional planning capabilities. RECs and national focal points manage the aggregated data, subregional priorities and project-specific operations. However, there are questions to be asked on whether this process adequately includes affected communities and their concerns, as well as capturing the shifting energy needs of communities, due to the dominance of a 'state lens' where who gets access is determined by the government. More often, this will mean that industry takes priority over, for example, rural communities. What's more, it is unclear what measures are in place to verify the data and re-run modelling to ensure that projects remain aligned with needs.

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33 AU, 2025 'African Forum on Mining Calls for Bold Action to Transform the Continent's Mineral Sector', https://au.int/en/pressreleases/20250328/african-forum-mining-calls-bold-action-transform-continents-mineral-sector

How does the CMP work?

The CMP has a number of operational features and tools at its disposal. These include:

a. Integrated planning and scenario modelling:

The CMP makes use of several advanced modelling tools, most notably the System Planning Test-Continental Masterplan (SPLAT-CMP) model (derived from IRENA's SPLAT-MESSAGE framework), to coordinate generation and transmission infrastructure across the African continent. The modelling operation includes forecasting future electricity demand, supply scenarios (especially renewables), and system integration pathways that connect the five African power pools (WAPP, SAPP, EAPP, CAPP, COMELEC) into a unified grid. As far as this research could find, the scenario modelling does not include the forecast material and energy transition minerals input, gathered as part of Industrial Resource Plans, for the manufacture of generation and transmission technologies and infrastructures. What's more, the quality of the modelling is highly dependent on the accuracy and timeliness of input data supplied by AUDA-NEPAD, regional power pools, and external agencies. There is also no publicly available schedule for routine data updates, which means that some models may be running on outdated input data.

b. Consultative governance and stakeholder involvement:

The CMP process is consultative and follows a politically and technically aligned governance model spearheaded by AUDA-NEPAD and the AU with ministerial committees, the AU Commission, regional power pools, regulators, development banks, and international partners. It is hoped that through this process policies will become harmonised and investments are coordinated around shared objectives (PIDA, Vision 2063 etc.).

c. Building capacity and providing technical assistance:

The CMP has an ongoing training and knowledge sharing programme, using the modelling tools (SPLAT, MESSAGE, PSS®E), as well as demand projection methodologies, and awareness raising on regulatory frameworks. In practice, this sees roadshows and consultations to ensure country ownership and readiness for AfSEM integration. The CMP also helps stakeholders navigate funding landscapes and compliance requirements to secure finance and manage project delivery.

d. Regulatory harmonisation and "market readiness":

The CMP creates framework conditions for cross-border power trade by harmonising technical standards, regulations, and planning processes across countries and regions to lay the foundations for AfSEM and entice investment.

e. Investment planning and prioritisation:

CMP provides a harmonized, evidence-based platform to guide investment decisions on the timing, sizing, and location of generation and transmission projects. In practice, this streamlines project planning, which is believed to reduce risk and improve the "bankability" of projects for both public and private investors.

How are CMP projects funded?

There is no single dedicated funding source for the CMP. Instead, projects identified through the CMP process rely upon multiple sources of funding, combining concessional finance, donor grants, development bank loans, and private investment mobilised through its coordinated continental strategy. This means that the CMP is vulnerable to the same dynamics and forces that other energy, climate and development initiatives are. These vulnerabilities range from the rigidity of derisking approaches, whereby the desires of private capital for investable assets can override public need, or blended finance initiatives exacerbating sovereign debt distress and foreign exchange risks.[34] Unfortunately, it appears that PIDA and the CMP do not break with this dominant approach to development financing, though they could attempt to.

Key funding sources and financial mechanisms for CMP projects include:

- **Development banks and multilateral partners:** The African Development Bank (AfDB) is a major financier of CMP-related infrastructure projects and technical assistance. Other international bodies such as the European Union, IRENA, and International Atomic Energy Agency (IAEA) have also provided grants, technical assistance, and concessional financing for CMP projects.
- **Continental and regional funding frameworks:** As mentioned above, the CMP is closely aligned with continental policy agendas like PIDA, which enables CMP projects to access multinational financing pools and donor funding aimed at transnational electricity infrastructure.
- **Public and private investment:** Given that the CMP facilitates investment planning and project prioritization, it is deemed attractive to both public sector and private sector investors. Interviewees stressed that there are ongoing conversations with asset managers, hedge funds and pension providers to try and scale up private investment into PIDA and CMP projects.
- **Grants, loans, and technical assistance programmes:** CMP projects leverage grants and low-interest loans, as well as technical support programmes from governments and international development agencies to support project development.

Examples of Projects

There are approximately 18 CMP projects under PIDA PAP2 (2021-2030).[35] Here we collate a number of them to highlight the scope and scale of CMP projects and the number of stakeholders involved. It is important to stress that transparency over deal structures and relevant stakeholders is sorely lacking across CMP projects, such as accurate data on project status and timelines.

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34 EURODAD, 2024, 'Blended finance for climate action: good value for money?', https://www.eurodad.org/blended_finance_for_climate_action_good_value_for_money

35 AUDA-NEPAD, 2023, '2nd PIDA Priority Action Plan (2021-2030) - Projects Prospectus', https://www.au-pida.org/wp-content/uploads/2023/08/EN-NEPAD-PIDA-PAP2-Project-Prospectus-Web.pdf

Transmission and Interconnection Projects:

Central to CMP's strategy is continental grid interconnection linking the five African power pools to enable the African Single Electricity Market (AfSEM). Prioritized interconnections include multiple cross-border and regional transmission lines.

Project (Location)	Regional Power Pool	Details	Relevant stakeholders
Zimbabwe Zambia Botswana Namibia (ZIZABONA) Interconnector Project	SAPP	A 422km multi-country interconnector linking Zimbabwe, Zambia, Botswana, and Namibia via transmission lines aimed at enhancing regional power trade. The project is targeting the transfer of 300MWs upon completion. Total estimated cost is believed to be $223 million, comprising $67 million equity and $156 million debt (AfDB are shouldering 40% of total debt).	Zimbabwe Electricity Supply Authority (ZESA); Zambia Electricity Supply Corporation (ZESCO); Botswana Power Corporation (BPC); Namibia Power Company (NamPower); African Development Bank (AfDB); Development Bank of Southern Africa (DBSA); European Investment Bank (EIB); French Development Agency; Stanbic Botswana; Southern African Development Community (SADC).
Zambia-Tanzania Interconnector Project (ZTIP)	SAPP & EAPP	A 620km long (on the current route) and built at 400 kV / 330 kV capacity, as a double-circuit transmission line, to connect the grids on Zambia and Tanzania, spanning two RPPs. Set for completion in 2028, overall project cost is unknown, but at least $292 million of grants have been deployed by the World Bank to support the project. This project will be the first interconnector, connecting the SAPP and EAPP power pools.	Government of Zambia (Ministry of Energy & Presidential Delivery Unit Zambia); Government of Tanzania (relevant Ministries of Energy); ZESCO Limited (Zambia); TANESCO (Tanzania); AUDA-NEPAD, World Bank, EU, UK Foreign Office.

INGA 3 Transmission Interconnector	SAPP	Transmission project related to the Grand INGA hydropower development connecting the Congo Basin with regional grids. It is expected to provide 5,000 MW from the Inga 3 hydropower project in the Democratic Republic of Congo (DRC) to South Africa, traversing Zambia, Zimbabwe, or Botswana. Currently in the feasibility stage, the success of this project is wholly dependent on the realisation of the Grand INGA development. Finance is yet to be secured.	African Union Commission (AUC); AUDA-NEPAD; AfDB World Bank; EU-Africa Infrastructure Trust Fund; Regional Regulators Association of Southern Africa (RERA); DRC; SNEL (Société Nationale d'Électricité); Eskom.
Eastern Africa Green Power Transmission Network Project (Guba to Khartoum)	EAPP	580km transmission network connecting multiple Eastern African countries from Ethiopia (Guba) to Sudan (Khartoum), enabling power transfer across borders. 500 kV line to Khartoum, including substations at Rabak and Jebel Aulia. Capacity initially ~4,000–5,000 MW. Currently still in the feasibility stage.	African Union Commission (AUC); AUDA-NEPAD; AfDB; World Bank; COMESA; EAC; IGAD; African Energy Commission (AFREC); Ethiopian Electric Power (EEP); Sudanese Electricity Transmission Company (SETCO)
Integration of Electrical Networks between Inga, Cabinda, and Pointe Noire (Inga–Cabinda–Pointe-Noire loop)	CAPP	Part of power pool integration in Central Africa around the Inga hydropower site and key cities with build-out of transmission infrastructure. The 400 kV transmission line will connect Angola, Burundi, Cameroon, CAR, Chad, Congo, DRC, Equatorial Guinea, Gabon, Rwanda (through ECCAS).	African Union Commission (AUC); AUDA-NEPAD; AfDB; World Bank; SNEL; PEAC (CAPP); Cowater, ARE (DRC)

Egypt and Libya Regional Electrical Interconnection	COMELEC	A transmission interconnection project between Egypt and Libya. It will connect Egypt's grid at Saloum with Libya's grid at Tobruk, forming a 165 km interconnection between 500 kV and 400 kV systems and supporting up to 1,000 MW transfer capacity. This project will align with Egypt's ambition to become a regional energy hub capable of exporting electricity both within Africa and to Europe (e.g. via EuroAfrica Interconnector).	African Union Commission (AUC); AUDA-NEPAD; AfDB; EIB; Arab Fund for Economic and Social Development; Egypt; Libya

Generation Projects:

While the primary focus of the CMP is purportedly improving transmission and interconnection across the African continent, it does also aim to scale up electricity generation across a whole suite of technologies.

The CMP aims to raise Africa's installed capacity to about 1,218 GW by 2040, with roughly 700 GW coming from renewables such as solar, wind, hydro, geothermal, and battery storage.[36] The focus on clean sustainable energy generation aligns with climate goals, but there are risks that the CMP's portfolio approach will allow further investment into fossil fuel infrastructures.

Project (Location)	Regional Power Pool	Details	Relevant stakeholders
Namaacha Wind Farm (Mozambique)	SAPP	A 120 MW wind farm connected to a strategic transmission project that will provide 331.6 GWh of renewable electricity mainly to Mozambique and the Southern African Power Pool (SAPP). This project has been earmarked to provide electricity to rural and underserved communities.	Electricidade de Moçambique (EDM); Fundo de Energia (FUNAE); Globeleq Africa Ltd.; Source Energia; AfDB; International Finance Corporation (IFC); U.S. International Development Finance Corporation (DFC);

36 African Energy, 2024, 'Emerging Continental Master Plan sets agenda for Africa-wide electricity reform', https://www.africa-energy.com/news-centre/article/emerging-continental-master-plan-sets-agenda-africa-wide

Mambilla Hydroelectric Power Project (Nigeria)	WAPP	Largest hydropower project on the Dongo River, with a capacity of 3,050 MW, aimed to increase Nigeria's electricity capacity by 30%, expected operational in 2030, cost approx. $5.8 billion. Upon completion, it will be Nigeria's largest power plant.	Federal Ministry of Power, Nigeria; Nigerian Electricity Regulatory Commission (NERC); AfDB; China Gezhouba Group Corporation (CGGC); China Export-Import Bank (China Exim Bank)
Luapula Hydropower Project (DRC)	CAPP	Hydropower plants on Luapula River with transmission, supporting grid stability and expanding access. Total capacity is estimated to be 789MV. Total cost of the project is expected to be in the region of $540 million.	Governments and utilities of DRC and Zambia; AfDB; Development Bank of Southern Africa (DBSA); World Bank; KfW; AUDA-NEPAD; Southern African Development Community
WAPP Regional Solar Power Park Project (Mali)	WAPP	The WAPP Regional Solar Power Park Project in Mali of potential capacity 150 MW. The estimated cost is $250 million.	Énergie du Mali (EDM-SA); ECOWAS; West African Development Bank (BOAD); International Development Association (IDA); AfDB

CMP's Limits and Omissions

Given the initiative's objectives, and the reflections of interview participants for this assessment report, we can infer the following omissions and limitations of the CMP:

- **Insufficient continental coverage:** The CMP's current planning and reference scenario will only deliver electricity access to approximately 82% of Africa's total population (2.03 billion) by 2040.[37] This falls short of achieving universal access as well as the aspirations of Agenda 2063 and the SDGs. To achieve these goals, the CMP needs to be supplemented by national projects, which may in turn dilute the CMP's potential to ensure regional and cross-regional collaboration and coordination. What's more, given its insufficient generation and access targets, the CMP will fail to raise African states to low and low-middle income status by 2035.
- **Limited short-term improvements to energy access:** Many of the CMP projects are large scale, capital intensive projects that will take many years to become operational. While projects like these will be essential for delivering generation by 2040 (and need to begin construction immediately), immediate developmental gains that could be delivered via the rapid deployment

37 AUDA-NEPAD, 2023, 'The African Continental Power Systems Masterplan - Synthesis Report', https://www.nepad.org/publication/african-continental-power-systems-masterplan-synthesis-report-quantifying

of mini- and off-grid solutions have been overlooked.[38] Although the CMP does acknowledge the role that offgrid and mini-grid electricity systems can play in driving African development, the CMP's focus remains on utility-scale on-grid infrastructures. This underestimation may ultimately slow progress towards the CMP's objectives in certain regions.

- **Not an entirely energy-led strategy:** Though the CMP is closely related to PIDA, the overarching strategy of PIDA positions energy alongside other infrastructural sectors (ICT, water etc,). This structure perhaps downplays the centrality of energy generation and transmission to sustainable development and green industrialisation throughout Africa. What's more, both PIDA and the CMP fail to acknowledge the importance of fostering domestic manufacturing for low-carbon technologies and ensuring circularity across these value chains. For instance, the job creation and economic development potential of the CMP would be bolstered by mandating domestically manufactured components and stewarding investment into recycling and circular industries.
- **Long-term regional plans may be inflexible and adaptive to shifting national needs:** Related to the point above, the long-term regional approach taken by the CMP (and PIDA) may reduce stakeholders' ability to react to immediate challenges, policy changes and shifting energy needs. For instance, how would PIDA and the CMP suddenly react to the introduction of carbon-border adjustments that impact the regional corridors? Long-term plans to bolster Africa's regional development are essential, but in a world of shifting (geo)political relations, climate upheavals and supply-chain disruptions, flexibility and reactivity can be useful tools of governance and development.
- **Underestimation of climate risks and derailment potential:** Many of the energy generation projects identified by the CMP are large-scale hydropower facilities. Though their generational capacity is vast, these infrastructures are highly susceptible to climate impacts, such as drought. As such, the overall contribution that hydropower can make to African energy generation is highly contingent on the impacts of climate change.
- **Little to no attention paid to industrial and energy transition minerals:** The CMP only tangentially engages with matters of resource needs and the energy transition minerals required for green industrialisation, as it is not fully integrated with the African Union's Green Minerals Strategy (AGMS). Interviewees close to the CMP and PIDA processes stressed that energy transition minerals assessments are provided by national governments, rather than regional power pools, and it remains unclear how PIDA and the CMP relate to the AGMS.[39] This poses a major oversight for the CMP and its ability to leverage mineral-rich corridors and foster value-add green industries across the continent.
- **Risks of fragmentation and duplication:** Regional green industrialisation depends on coordinated, complementary industries and self-sustaining value chains. Yet PIDA and the CMP risk duplicating infrastructure along similar corridors without accounting for regional strengths,

38 Power Shift Africa, 2025, 'African Energy Leadership Report: The Case for 100% Renewable Energy', https://www.powershiftafrica.org/publications/african-energy-leadership-report

39 AMDC, 2024, 'Africa's Green Minerals Strategy', https://au.int/sites/default/files/documents/44539-doc-AGMS_Final_doc.pdf

continental priorities or national competitive advantages. Despite their consultative nature, the long-term lock-in of major infrastructure projects limits flexibility to adjust industrial strategies later.

- **Continued compatibility with fossil fuel infrastructures:** While PIDA PAP 2 (2021–2030) attempts to integrate national climate commitments, and all the current CMP projects are low-carbon, the initiatives remain compatible with fossil fuel expansion and development - especially fossil gas, which continues to be framed as both a transnational 'bridge' fuel and an essential tool for economic development. What's more, PIDA's transport portfolio is integrated with fossil fuel infrastructures, such as pipelines and refineries. There appears to be a tacit acceptance of fossil fuels in Africa's developmental pathway, which will lock-in further high-carbon infrastructures.
- **Misalignment with national and regional plans:** While the CMP seeks to align with regional power pool masterplans and national energy and infrastructure plans, there remain gaps in the consistency and salience of these regional master plans. Indeed, interviewees cited the need to update plans, such as the Eastern and Central African Power Pools, to ensure they reflect current needs.
- **Growing risks to implementation and delivery:** The effectiveness of the CMP and its ability to achieve its stated objectives is contingent on strong political will, robust governance, comprehensive regulatory frameworks, capacity building (regionally and nationally), and accelerated coordinated delivery. Barriers in these domains, which are extremely common for large-scale infrastructure projects across Africa, pose ongoing risks to the CMP's goals.
- **Financing gaps:** As with many development initiatives in Africa, there is a substantial gap between the current levels of financing and what is needed to achieve the CMP's targets. This is especially true for large-scale transmission interconnections,[40] which are a central pillar of the plan. Indeed, interviewees cited that many of the CMP corridors require financing that Africa's current instruments cannot fully provide. Garnering the necessary investment and introducing new financial mechanisms remains one of the greatest challenges facing the CMP.
- **No legally binding framework:** Unlike the AfCFTA and other continental policy initiatives, the CMP does not have enforceable commitments from African states. A lack of legal compliance weakens incentives for project implementation and may dissuade investors. Moreover, there is a sense that binding legal frameworks create a normative lock-in, where the risk of policy reversals is reduced and coordination is increased.
- **Weak institutionalisation:** CMP is not yet embedded in the national infrastructure planning cycle or budget processes in most AU member states and remains primarily a tool for planning, modelling and coordination. This can create a disconnect between regional and cross-regional ambitions and national policy plans. In turn, these disparities can lead to funding and finance bottlenecks, and reduce CMP projects' ability to access public funding.

40 African Energy, 2023, 'What can the Continental System Masterplan achieve for Africa's electricity supply industries? - Webinar', https://www.africa-energy.com/aix/what-can-continental-system-masterplan-achieve-africas-electricity-supply

- **Low public visibility:** CMP remains technical and elite-led, with limited public awareness or civil society participation. This may ultimately reduce the impact of CMP projects and due to a lack of public and community consultation, CMP projects may be met with resistance on the ground. Such resistance and public backlash could lead to additional project delays. What's more, the lack of public visibility poses a risk that the CMP will be overtaken by newer continental initiatives, such as Mission 300, which may pull attention and resources away from the CMP, despite their similar objectives.

II. LESSONS LEARNED

This section of the report identifies several lessons that can be learned from PIDA and the ongoing implementation of the CMP.

1. Importance of coordinated and integrated planning for Africa

Both PIDA and CMP frameworks prioritise cross-sector and cross-border coordination and integration as central principles of project planning. One of the early criticisms leveled at Phase I of PIDA (PAP1) was its poor coordination, duplication of projects and the uneven distribution of projects across the regional corridors. PIDA PAP 2 sought to remedy this by introducing a bottom-up project selection methodology, where regional and national priorities were aligned with continental goals. This second phase also sought to integrate climate/social impact into selection criteria too, although this has been ad hoc.

As these initiatives have co-evolved, a key learning has been that coordination matters for all engaged stakeholders. From national governments and MDBs to private investors, there is a shared acceptance that infrastructure cannot be planned and delivered in fragmented silos. Successful examples of industrialisation highlight the importance of ecosystems, where industries overlap and regulatory frameworks function in unison. The policy imperatives behind both AfSEM and African Continental Free Trade Area (AfCFTA) have further cemented the importance of coordinated and integrated planning for the entire continent.

2. Continental, cross-regional and regional collaboration is essential

Without thorough and robust collaboration - continental, cross-regional and regional - Africa's energy and development needs will not be met. Nor will its ambitions for green industrialisation. Both the PIDA and CMP have strengthened the regional power pools but the capacity, political alignment, and technical strength of each varies widely. Greater political leadership is needed to achieve parity across each regional power pool. Interviewees stressed that collaboration greatly improved project preparation and implementation under both PIDA and the CMP. They cited that deeper collaboration, enabled through these processes, reduces duplication across Africa and improves the "bankability" of projects.

3. Unlocking finance for Africa required regional and cross-regional coordination

Interviewees consistently noted that unlocking finance - particularly private capital - required regional and cross-regional coordination. Given the scale and capital-intensity of large infrastructure projects, national leadership is technically and financially unfeasible. As such, coordination across corridors and between states enables economies of scale, improves project viability and attracts international investors. Indeed, many international financial institutions, such as the AfDB, EU, GIZ, and World Bank, require infrastructure proposals to incorporate the potential for regional integration, alignment with continental policy programmes (AfCFTA and AU Agenda 2063 etc.) and cross-border value chains. By prioritising coordination, PIDA and the CMP have adjusted to meet both investor sentiment and behaviour.

4. Infrastructure enables socio-economic transformations

A major lesson learnt through PIDA and CMP processes, which was acknowledged by interviewees, is that infrastructure is not just a driver of economic development, but an enabler. This lesson is reflected in the strategic goals, implementation experiences, and observed impacts of both the PIDA and CMP. For instance, the trade corridors developed during the first phase of PIDA (PAP1) have reduced transportation costs and enabled the development of regional value chains. As the processes have evolved, so has the understanding of infrastructure's importance for Africa. PIDA PAP2's explicit focus on people-centred, climate-resilient, and inclusive infrastructure reflects this shift, as does the CMP's emphasis on integrated, multi-modal corridors that connect urban centres, rural economies, and regional markets.

5. Need for accelerated implementation and renewed political commitment

The first phase of PIDA (PAP1) was plagued by implementation issues, with only a fraction of the 51 priority projects having reached financial close or construction. This was blamed on weak project preparation capacity, inadequate coordination between countries and regional power pools, and bureaucratic inertia or shifting national priorities (in response to domestic politics or external pressures). PAP2 was accompanied by an acknowledgement that technical planning alone is not enough to accelerate implementation, success depends on consistent, top-level political commitment from national governments and regional champions. Through both the PIDA and CMP, infrastructure is increasingly pushed as a strategic and time-sensitive political priority which requires high-level political leadership. This is a timely lesson given the renewed interest in green industrial policy around the world and the rush to develop industries that capture the value chains of the future, in which Africa is well-placed to benefit from.

6. Primary focus on green industrialisation driven by low-carbon energy generation

This is by no means an established lesson - it is an emerging one. While PIDA and CMP have historically focused on connectivity, access, and regional integration, a growing lesson from implementation and global market shifts is the need to reorient infrastructure planning toward green industrialisation. Africa's competitive edge in renewable resources, energy transition minerals, and youthful labour force can only be realised if future infrastructure, energy and industrial corridors are designed to support low-carbon value chains, renewable energy generation, and resilient manufacturing ecosystems that allow Africa to capture the value chains of future industries. This shift is beginning to take root in the second phase of PIDA, but requires deeper integration into CMP priorities and national project pipelines in order to become an established principle of organising and planning.

However, there are aspects of both PIDA and the CMP that may scupper progress. The CMP and PIDA still include fossil-fuel-enabling infrastructure (especially gas pipelines and transport infrastructure serving extractive industries) and many of the national government plans that these initiatives combine, continue to prioritise fossil gas infrastructure as a transitional or bridge fuel.

III. RECOMMENDATIONS

This section of the report lays out recommendations for how the PIDA and CMP can be improved. These recommendations surfaced throughout the research and interview process of this project.

1. Mainstream green industrialisation as a core planning principle across PIDA and the CMP

Infrastructure should be planned not just for access or trade, but to enable low-carbon value chains and green manufacturing hubs across Africa. This is particularly important in regards to aligning with AfCFTA and global industrial shifts and policy trajectories. If green industrialisation was to be incorporated as a core planning principle across PIDA and the CMP, it may require slight adjustments of processes. While the institutions supporting PIDA and the CMP - AU, AUDA-NEPAD, AfDB etc. - have been supportive of green industrialisation-adjacent infrastructure development, there needs to be greater coordination to deliver a continent-wide green industry. For instance, many African nation states are pursuing specific low-carbon and green technologies as a route to industrialisation and export growth. South Africa, Namibia, Egypt, Mauritania and Kenya are all pursuing green hydrogen. This may prove to be a flawed strategy, as in a highly competitive and integrated global economy, not all industries will prove viable and overcapacity may quickly bite. As such, PIDA and the CMP can not only prioritise regional projects and help plan and sequence support for industries that fosters industrial ecosystems that leverage the skills, natural resources and infrastructure of specific states and regions.

2. Strengthen political leadership and coordination

Strong and consistent support from high-level political champions is essential for project acceleration, cross-border cooperation, and aligning national priorities with continental goals. For instance, it remains unclear how PIDA and the CMP relate to the AGMS, a key component of the continent's green industrial push. Both PIDA and the CMP enjoy high-level political leadership from the likes of the AU and via the supporting agencies - AUDA-NEPAD, AfDB etc. - but it could be enhanced. For example, the Presidential Infrastructure Champion Initiative (PICI) could be expanded into a continental infrastructure steering council, with annual reviews at the AU Summit. What's more, AUDA-NEPAD could ringfence some technical assistance funds to deploy regular political economy diagnostics to identify blockages for greater political leadership and coordination, with a view of finding solutions.

3. Enhance institutional and governance frameworks

Many of the delays in project implementation partly stem from institutional silos, weak regional power pool capacity, and unclear roles. Strengthening AUDA-NEPAD, the power pools, and national infrastructure authorities would improve project delivery. This could be achieved by increasing core funding for these organisations and institutions, establishing regional infrastructure delivery hubs or multi-level coordination committees for the regional power pools. Introducing a binding legal framework for compliance would greatly improve coordination and enhance institutional buy-in.

4. Focus on equity and community stakeholders

Large-scale infrastructure projects in Africa (and elsewhere) have often bypassed or displaced communities. PIDA PAP 2's shift to people-centered planning must be deepened with social safeguards, gender equity, and community benefits frameworks. This is particularly true regarding some of the biggest projects, including hydropower projects, which can displace communities and disrupt livelihoods. There are many ways to institutionalise equity and community engagement, including embedding Free, Prior, and Informed Consent (FPIC) for all large-scale infrastructure projects, aligned with the African Commission on Human and Peoples' Rights guidelines.[41] This would also be strengthened by the creation of 'Community Liaison Units' within both the regional power pools and national ministries to better coordinate engagement and grievance redress. The PIDA and CMP processes could also include community representatives (e.g. traditional leaders, women's groups, youth networks) in early-stage planning committees for priority projects. To ensure that the benefits of CMP and PIDA projects are felt immediately, community benefit-sharing schemes and co-investment opportunities could also be implemented.

41 ACHPR, n.d., https://achpr.au.int/sites/default/files/files/2021-08/achprinstrguidedraftescrightseng.pdf

5. Do not overlook off-grid, mini-grid and other decentralised solutions

Although large, utility-scale generation and infrastructure projects are essential, the potential of off-grid, mini-grid and other decentralised solutions should not be overlooked. In remote or vulnerable regions, these technologies could be a faster, more cost-effective, and more resilient means of improving energy access, energy security and sustainable development. Indeed, as many of the largest CMP projects are hydropower, which have lengthy lead times and are vulnerable to drought, off-grid solutions may provide immediate improvements in energy access. Ways of achieving this could be to mandate a certain percentage of off-grid and mini-grid projects under the CMP, ringfencing dedicated funding for these projects, expanding PIDA PAP eligibility to incorporate these projects, and harmonising regulation for mini-grid licensing under AfSEM and national regulatory bodies. Coupled with prioritization of feed-in tariff policies and regulations, huge energy capacity can be added to Africa's power grid through existing and increasing community investments also reducing the state financial strain of funding energy needs on the continent. These technologies are crucial for enabling Africa's leapfrogging potential in the green energy space and could be integrated with specific low-carbon industries to accelerate development, such as REE mines or agriculture processing zones.

6. Develop an 'African Infrastructure Sovereignty Framework'

In a multipolar world, where power struggles between the USA and China are impacting trade and investment flows and policy responses, it is vital for Africa to set standards and safeguards for all foreign-led infrastructure investments. Developing a bold, ambitious and high-level policy instrument that empowers Africa to set its own infrastructure priorities, standards, and conditionalities, rather than deferring to foreign financiers or extractive interests would break with a long history of extraction and rent-seeking across the African continent. This framework could be incorporated into the PIDA Strategic Framework update or during a CMP review. Rather than a technical or administrative add-on, this would be a political tool to ensure African autonomy and control of strategically important resources and industries.

7. Experiment with more inclusive and state-led financing options

Many development projects, including those under PIDA and the CMP, follow the dominant derisking approach. While this may be the most attractive way of structuring finance for private capital, the need for African institutions to be the masters of their own industrial destiny demands new ways of financing infrastructure and energy projects. This could be achieved via MDBs or national development banks, where increased disbursements are earmarked for highly concessional finance and grants. Differing degrees of state and/or community ownership should be prioritised. Stimulating this step change in financing, however, requires all African institutions to be onboard, including AFREXIM, AfDB and regional and national development banks.

8. Incorporate energy transition mineral based Integrated Resource Plans into CMP and PIDA processes

Although national governments purportedly assess energy transition mineral reserves, there is only a rough continental mapping of resources within the AGMS. This is a major omission for PIDA and CMP projects, as well as broader political and economic ambitions to accelerate green industrialisation and develop value-add industries. The AGMS contains rough estimations of Africa's energy transition mineral reserves,[42] but these assessments need to be improved, regularly updated and integrated with what is required for renewable energy technologies (CMP), electric mobility corridors, transmission lines, digital infrastructure (PIDA), as well as strategically important green industries (green steel, fertilisers, EV component manufacturing). This assessment should then be embedded into CMP project prioritisation and used as a basis for global partnerships that enable technology transfer and industrialisation. Such an approach would avoid dependence and unlock African value capture on African terms. To do this, there needs to be full integration between PIDA, the CMP and AGMS, which could be achieved through AMDC and AUDA-NEPAD co-designing joint corridor profiling and the CMP including mineral-heavy clusters in corridor planning and PIDA PAP project pipelines.

9. Strengthen regional project preparation

Many projects stall due to poor preparation. Strong regional project preparation facilities are the backbone of creating impactful and attractive energy and infrastructure projects with terms that align with continental goals. Without them, the CMP and PIDA remain visions rather than deliverables. Strengthening AUDA-NEPAD's Service Delivery Mechanism would streamline project preparation and regional capacities.

10. Embed monitoring, transparency, and citizen oversight

Citizen and community engagement in energy and infrastructure projects are prerequisites for successful delivery of CMP projects. When taking a regional approach, the input of frontline and affected communities can be difficult to incorporate. PIDA and CMP projects are well placed to include community monitoring tools, transparent procurement systems, and public dashboards to track project progress. In practice, this would help to reduce corruption and build public trust in regional and cross-regional infrastructure projects, as well as political support for the objectives of PIDA and the CMP. This political support and legitimacy can help overcome changes in national governments and the threat of policy reversal. A pivotal reason for the success of the GERD project was the inclusion of Ethiopian nationals in the raising of funds for the dam through bonds and donations. This turned the project into a nationally loved project and has had the outcome of steering Ethiopians public consciousness to relying on renewable energy supply for their livelihoods, away from fossil fuels. The clearest evidence of this is the increasing uptake of EVs.

42 AMDC, 2024, 'Africa's Green Minerals Strategy', https://au.int/sites/default/files/documents/44539-doc-AGMS_Final_doc.pdf

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