Africa Unleashed: Bridging Africa's Infrastructure Execution Gap

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Contents

Forewords

Africa's infrastructure ambitions have long been bold —and rightly so. Our continent's prosperity hinges on energy to power economies, roads and rails to move goods and people, digital networks to fuel innovation, and water infrastructure to support communities. Yet, despite robust planning and a shared vision, the pace of infrastructure delivery has too often fallen short of our potential.

Today, we face a sobering reality: fewer than 10% of cross-border priority projects have progressed to construction, and our infrastructure gaps continue to constrain growth, deepen inequality, and limit resilience. Cross-border initiatives, in particular, are mired in complexity—from regulatory misalignment to financing bottlenecks and fragmented governance. These are not mere technical delays; they are lost opportunities for transformation.

And yet, there is cause for optimism. A determined infrastructure ecosystem has emerged—with AUDA-NEPAD, the African Development Bank, Africa50, regional economic communities, national ministries and the private sector—working to advance priority corridors, power pools, and digital integration. These partners are building a new foundation for delivery, and we must now equip them to decisively break through the execution bottlenecks that persist.

As I assume the role of Commissioner for Infrastructure and Energy, I believe it is time to go further. We must breach all barriers to accelerated implementation. This sharp focus on execution will start from the centre. My department will build the muscle to drive action hard through determined co-ordination of our continent's infrastructure ecosystem and partnership with all stakeholders, including the private sector.

Critically, we must embrace the private sector not as a supporting actor but as a core partner in delivery. Public resources alone cannot finance Africa's infrastructure future. We need blended capital, commercially viable projects, and instruments that unlock institutional and climate finance. This is not a concession to market forces—it is a call to build with scale, discipline, and sustainability.

Finally, we must elevate infrastructure as a truly continental agenda. The Presidential Infrastructure Champion Initiative (PICI), under the leadership of our Heads of State, has shown what high-level political commitment can unlock. Working in partnership with the PICI platform, we will ensure that infrastructure remains not only a development priority, but a strategic imperative for integration, trade, and prosperity.

This report takes stock of where we are and makes the case for action. It is now our shared responsibility—across governments, financiers, technical partners, and communities—to turn plans into projects, and projects into progress.

Let us move from vision to execution—together.

H.E. LERATO MATABOGE
Commissioner for Infrastructure, Energy and Digitalisation - African Union Commission

From cross-border transmission lines to integrated transport corridors and digital backbones, infrastructure is the lifeblood of a connected, competitive, and resilient continent. Yet too many projects remain on paper. The challenges are well known: complex execution environments, fragmented mandates, and financial bottlenecks that deter long-term investment.

What is needed now is execution at scale. And that requires partnrship

As representatives of Africa's leading financial institutions, investors, developers, and operators, the private sector is not only ready—but eager—to step up. We bring capital, technical expertise, risk management capabilities, and above all, a deep commitment to Africa's future. But to unlock this contribution at scale, we need a new approach to delivery: one that de-risks early, co-ordinates consistently, and focuses relentlessly on moving projects from feasibility to financial close.

As the Chair of the B20 Finance and Infrastructure Task Force, I have seen first-hand the appetite among global and African investors to back Africa's infrastructure story—if execution frameworks are in place. As Group CEO of Standard Bank, I reaffirm our commitment to working with the African Union Commission, AUDA-NEPAD, regional bodies, and our public-sector partners to make this vision real. Together, we can build blended finance platforms, scale regional infrastructure marketplaces, and create viable co-investment pathways that crowd in capital where it is needed most.

This is a moment of convergence: the AU's leadership and the ambition of Africa's private sector are aligned. What we now require is delivery momentum and mutual trust.

The infrastructure agenda is not governments's burden alone. It is a shared responsibility. And it is also our shared opportunity—to transform Africa's connectivity, unlock its productivity and build a better future for generations
to come

Let us act—together.

SIM TSHABALALA
Group CEO - Standard Bank Group,
Chair - B20 Finance and Infrastructure Task Force

Key Takeaways

1 **Africa's infrastructure gaps are vast—and delivery is falling behind.** Although Africa has a large infrastructure portfolio[1], which includes ~130 African Union backed transnational projects and programs across energy, transport, digital, and water, only ~eight (6%) are currently under construction and about 65% are stalled at pre-Final Investment Decision (FID). This gap costs the continent an estimated $500 billion in lost GDP, 74 million jobs, and one million lives annually.

2 **Execution—not ambition—is the defining challenge of Africa's infrastructure agenda.** Fragmented and overlapping mandates of regulatory and developmental bodies, limited project bankability, and limited private sector involvement are stalling progress. Only 3% of infrastructure funding is private, and it is restrained by insufficient risk management and a crucial lack of execution certainty. Africa's ~$100 billion annual infrastructure financing gap will persist without stronger co-ordination, funding tools, and local delivery capacity.

3 **Unlocking execution requires three bold levers: private capital, regulatory alignment, and stronger project bankability.** Africa must mainstream private sector participation to unlock both funding and delivery expertise, harmonize cross-border regulations to accelerate regional projects, and manage operational and commercial risks early to make infrastructure truly investable.

4 **A focus on execution led from the apex can turn systemic fragmentation into delivery momentum.** The AU Commission must unlock the most intractable challenges blocking the infrastructure delivery ecosystem. By integrating political, technical, and financial functions across stakeholders and engaging the private sector as co-builders, not bystanders, the Infrastructure and Energy Department can provide the leadership muscle to drive feasibility, fast-track financing, and unblock stalled projects.

5 **Africa's infrastructure vision is achievable—but only if execution takes centre stage.** With up to $6 billion in GDP unlocked for every $1 billion invested, the opportunity is clear. The time is now for public and private actors to align behind delivery, mobilize investment, and translate ambition into transformative, continent-wide impact.

1. PIDA PAP II, PICI, RECs and other public/private infrastructure portfolios

Current Landscape:
Immense Needs, Limited Progress

Infrastructure is foundational for prosperity. Roads link people to opportunity; power energizes economies; and internet connectivity fuels education and innovation. Africa remains underserved in all these dimensions of infrastructure.

Energy Infrastructure

Energy access is a major constraint. Over 600 million Africans still lack access to electricity. Sub-Saharan Africa's (SSA) electrification rate stands at just 51%, far behind North Africa's, which has near-universal coverage. Fossil fuels continue to dominate the energy mix while only 17 countries have articulated Just Energy Transition strategies. Grid coverage is sparse and lags other emerging markets—transmission line density per population in SSA is less than half that of Brazil.

Transport and Digital Infrastructure

Transport infrastructure is similarly underdeveloped. Half of the continent's roads are unpaved, and fewer than 10% of airports meet IATA ground safety standards.

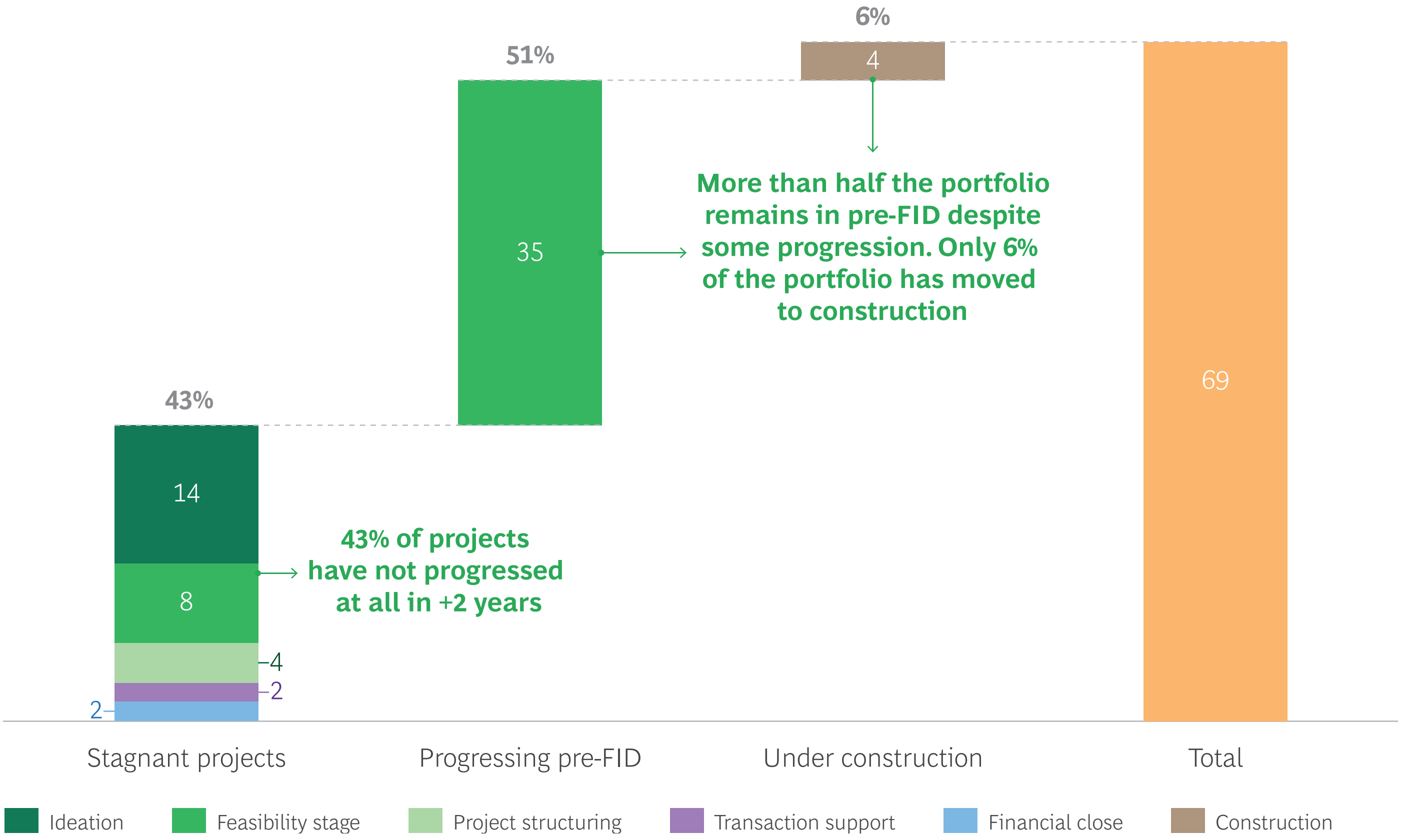
Digital infrastructure, a critical enabler of inclusive growth, is nascent. Internet penetration stands at just 27%, and data center capacity is below 1 MW per million people, compared to a global benchmark of 29–89 MW. These gaps risk stalling Africa's digital transformation just as it begins.

Slow Pace of Delivery

Perhaps most concerning is the pace of delivery. Between 2022 and 2024, 43% of projects in the second phase of the Programme for Infrastructure Development in Africa Priority Action Plan (PIDA PAP II) did not progress, while more than half of the portfolio remained in pre-FID phase (Exhibit 1). At current trajectories, many of the continent's 2040 development targets are at risk. This reality is not due to a lack of ambition or opportunity, but the result of persistent and embedded challenges that have constrained Africa's infrastructure delivery for years.

EXHIBIT 1

Number of projects stagnant and progressing in PIDA PAP II (2022-2024)



Source: PIDA; BCG Analysis

Challenges:
Execution is the Missing Link

Despite decades of planning and commitment, infrastructure delivery continues to falter. Three fundamental challenges observed across the project lifecycle dominate the execution landscape (see Exhibit 2).

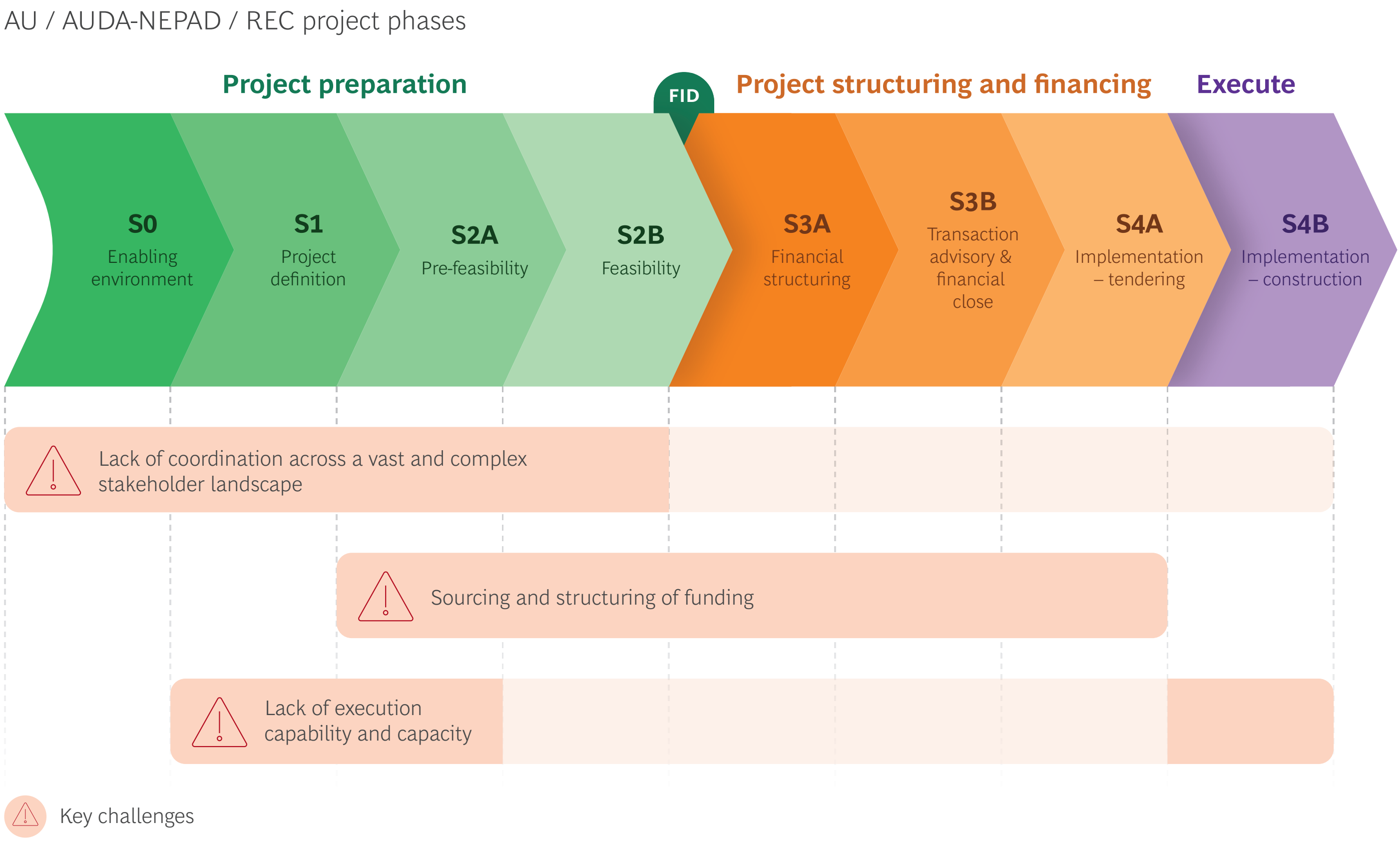
Lack of co-ordination across a vast complex stakeholder landscape

Difficulties in sourcing and structuring funding

Lack of execution capability and capacity

EXHIBIT 2

Challenges mapped along project development lifecycle[2]



Source: PIDA website; BCG analysis

Lack of Co-ordination Among a Vast Complex Stakeholder Landscape

Africa's infrastructure execution ecosystem is complex. The African Union Commission (AUC), AUDA-NEPAD, Regional Economic Communities (RECs), sovereign ministries, specialized agencies, private sector and development finance institutions each plays a role (See Exhibit 3 – simplified from IAIDA Handbook). Within the delivery structure, AUDA-NEPAD collaborates closely with institutions like the African Development Bank (AfDB) and other development partners to provide financing and technical support, while private sector engagement typically occurs through RECs and in-country parastatals. Co-ordination and facilitation responsibilities are shared across the AUC, AUDA-NEPAD, and RECs, but actual project execution is largely driven at the national and regional level, with AUDA-NEPAD supporting alignment and monitoring.

This evolving infrastructure ecosystem has scored some important milestones. The Africa50 Fund, co-financed by 20 African countries and the African Development Bank (AfDB), has mobilized $830 million in share capital to support PIDA and other regional infrastructure projects. This demonstrates a clear pooled continental commitment to infrastructure preparation and financing. The AfDB has injected more than $ 50 billion into African infrastructure projects. The AU and AUDA-Nepad have supported 41 Member States and RECs to develop performance progress reports aligned with Agenda 2063, covering 56% of the continent's geography and involving six RECs.

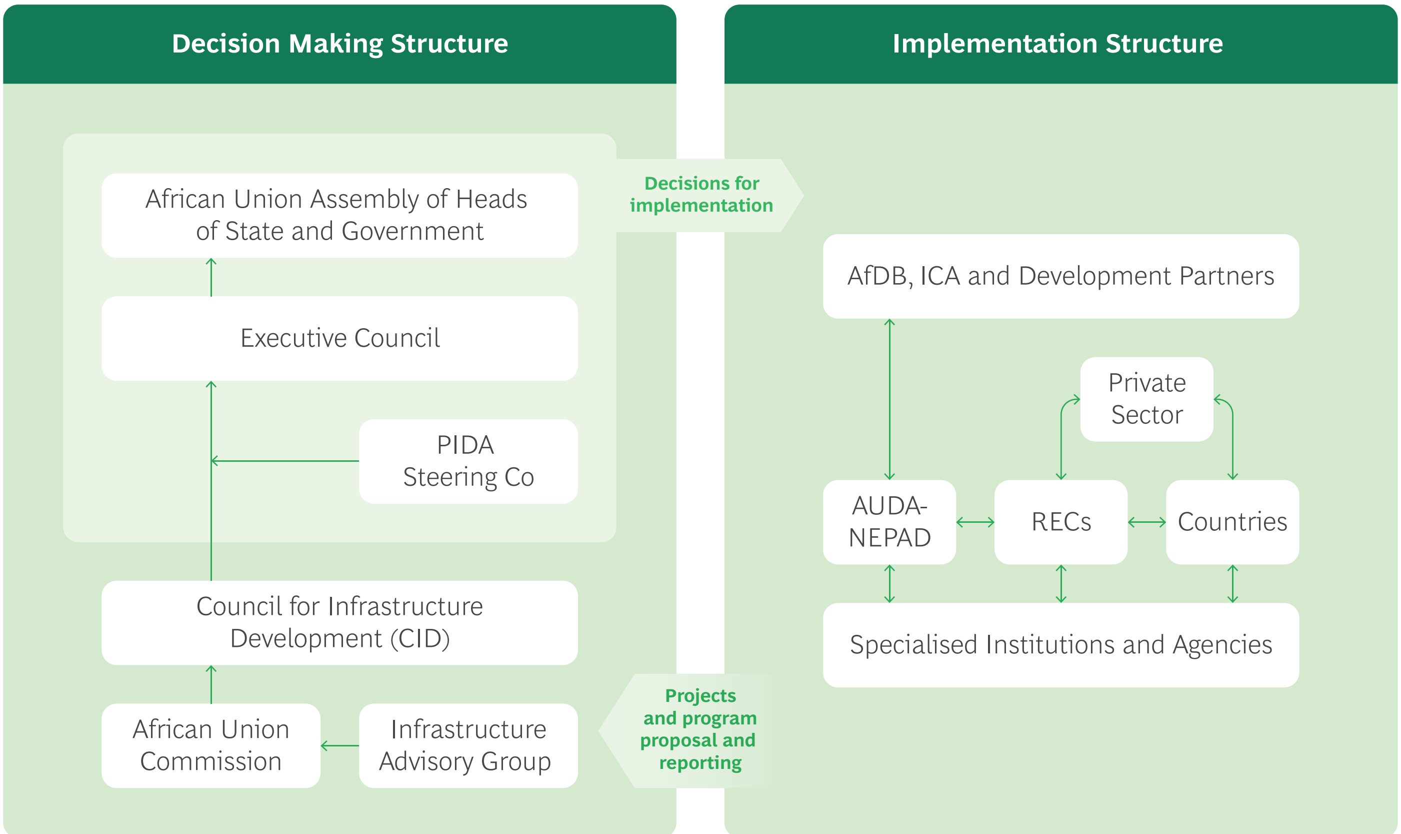
2. Note that the precursors to "S0 – enabling environment" are the national and regional infrastructure plans formulated by each nation and the corresponding REC. If the project is not prioritized in these plans, it will not be developed.

In this constellation, many stakeholder groups, besides funders and investors, have historically focused on policy development and reform, often duplicating efforts to influence systemic change. While branches of the AU have also been tasked with supporting implementation, the required co-ordination of stakeholder groups has proven challenging and needs to be streamlined, either through large-scale transformational shifts in the internal structures and governance, or through targeted interventions to streamline decision-making and deploy resources for execution.

Cross-border projects are especially vulnerable, with treaty negotiations, regulatory approvals, and financing structures often stalling for years. The Lobito Corridor, for instance, remained stalled for over a decade due to lack of harmonized standards, unratified treaties, and missing institutions. Only recently have targeted interventions begun to unlock progress.

EXHIBIT 3

The decision-making and implementation structures in the AUC are complex and result in a lack of co-ordination



Source: Institutional Architecture for Infra Development in Africa (IAIDA) Handbook

This fragmentation is not unique to Africa. However, global comparisons suggest practical solutions exist. The ASEAN regional model offers a compelling example of structured, effective co-ordination. Its tiered governance framework—anchored by a Co-ordinating Council and supported by technical community councils—provides clarity of function and alignment across economic, political, and social sectors. Crucially, ASEAN also separates strategic decision-making from operational delivery. Sectoral ministers meet regularly and are empowered to address strategic issues swiftly, while implementation is backed by a lean but capable Secretariat that ensures decisions cascade into action.

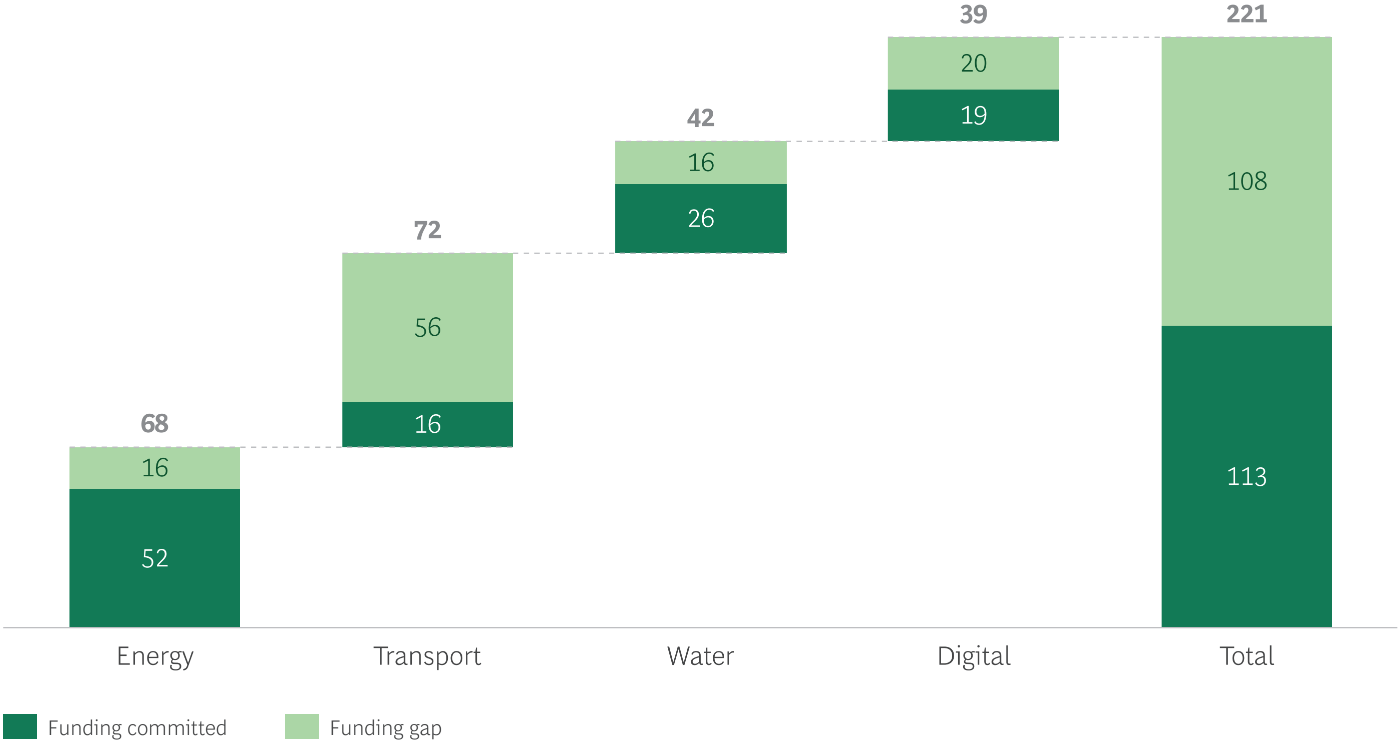
ASEAN offers a structured co-ordination model—with distinct layers for strategy and execution—that Africa can learn from. While the AU's infrastructure ecosystem faces greater scale and complexity, opportunities exist to streamline ministerial engagement, clarify mandates, and empower a central co-ordinating secretariat.

Difficulties in Sourcing and Structuring Funding

One of the consequences of co-ordination challenges among key stakeholders manifests in the amount of funding committed to African infrastructure projects. The continent faces a persistent and widening infrastructure funding gap—estimated at ~$100 billion for energy, transport, water and digital infrastructure in 2025 alone (see Exhibit 4).

EXHIBIT 4

Funding committed vs remaining gap for project execution by sector ($Bn)



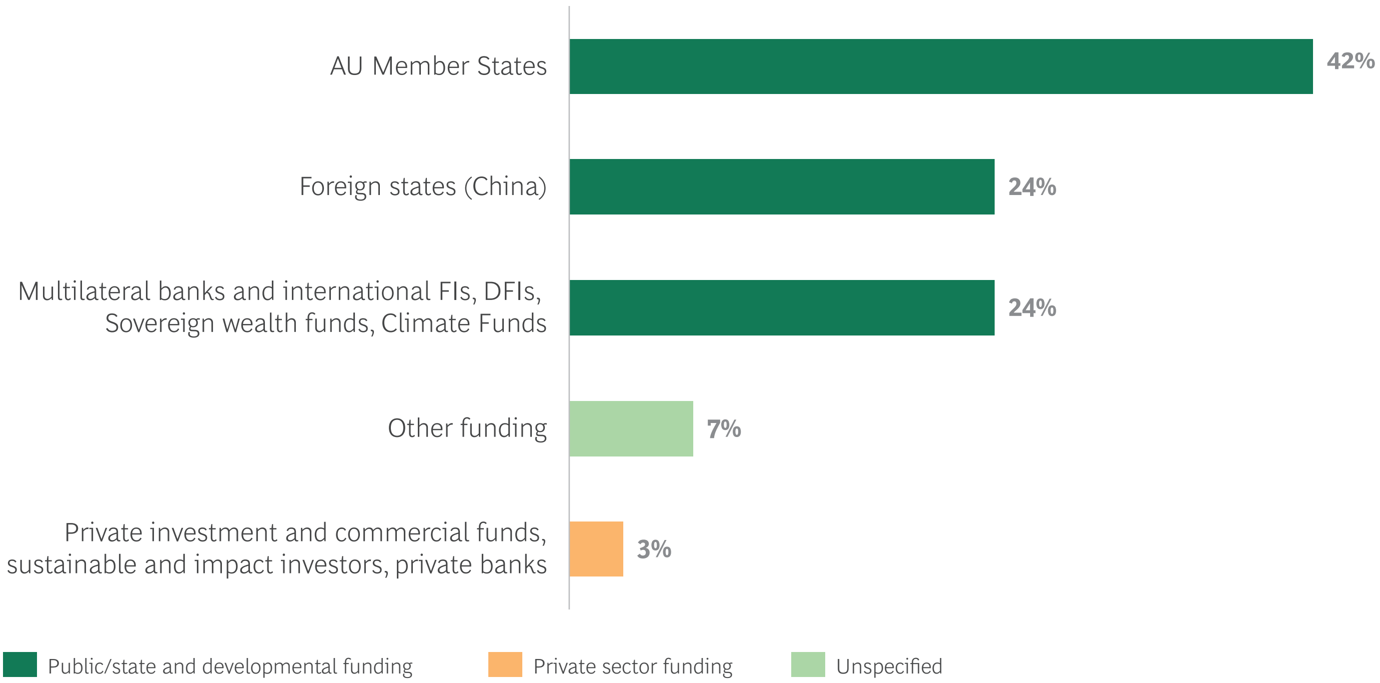
Note: Sector funding gaps approximated from proportional projected shortfalls and stated total portfolio shortfall of up to ~$108bn as reported by UNECA
Source: UNECA, AfDB, G20 Global Infrastructure Outlook Africa 2025 projections

Most critically, private sector participation remains minimal: in the PIDA PAP I portfolio, just 3% of total funding came from private investors (see Exhibit 5). In the absence of deeper commercial engagement, 42% of funding was provided by African national governments, often under fiscal stress, with 24% sourced from China, whose support is increasingly selective and could be tied to geostrategic priorities.

EXHIBIT 5

Case study | Despite the variety of available financiers, only 3% of funding came from the private sector while 42% came from national governments for PIDA PAP I

Committed funding by institutions in PIDA PAP I projects (% of total)



Source: PIDA Progress Report; BCG analysis

Several interconnected forces underpin this financing bottleneck:

Lingering operational and commercial feasibility concerns post-FID

Operational and commercial feasibility concerns are a key contributor to the inability to secure infrastructure funding in Africa. Operationally, projects face delays from land acquisition issues, regulatory fragmentation, and inadequate cross-border support (for example tariff regulation), all of which increase risk and deter investment. Commercially, inaccurate or outdated financial projections—such as unrealistic cost estimates, demand forecasts, or weak offtake agreements—erode investor confidence. These challenges result in uncertainty around project completion and return on investment, making funders hesitant. Strengthening project preparation through robust technical assessments, harmonized regulations, and reliable financial modelling is essential to improve bankability and unlock capital for transformative infrastructure development.

High sovereign debt levels and perceived credit risk

Many African governments face growing constraints on public borrowing due to unsustainable sovereign debt levels: the majority of countries' debt ranges from 50% to over 70% of GDP, and some exceed 100%. This fiscal pressure has sharply curtailed their ability to provide credit enhancements, absorb foreign exchange volatility, or co-invest in early-stage infrastructure. The result is a shrinking fiscal pool that pushes policymakers to divert resources toward urgent social outlays—such as food, fuel, and subsidies—at the expense of long-term infrastructure delivery.

As African governments increasingly turn to off-balance-sheet mechanisms to deliver infrastructure, such as public-private partnerships (PPPs) and blended concessional finance, they face a parallel obstacle: the perception of high sovereign risk. Institutional investors often apply elevated risk premiums that overstate the continent's historical default rates (Africa's default rate is ~1.9% vs. 6.6% in the US and higher in South America), resulting in higher financing costs and tighter lending conditions.

There is, however, significant variation in creditworthiness across the continent, which directly affects the flow of private capital (Exhibit 6). Countries with weaker sovereign ratings—often those with the most urgent infrastructure needs—struggle to attract financing, particularly for projects where governments are expected to serve as offtakers or provide guarantees. The result is a systemic distortion. Even bankable projects fail to reach financial close, not due to their design, but because they are anchored in jurisdictions with constrained fiscal profiles. Overcoming this challenge will require not only risk-sharing tools, but also efforts to correct mispriced perceptions of African credit risk and build confidence in sovereign and sub-sovereign partners.

Stagnant foreign direct investment and retreating ODA

Foreign direct investment into Africa has stagnated in recent years. FDI inflows have flatlined since 2021, and concessional financing from donors has plateaued amid rising domestic pressures in contributing countries. Official Development Assistance (ODA) budgets have faced cuts as political scrutiny over aid effectiveness grows and economic cycles tighten. Without significant new sources of external capital, project pipelines remain constrained, and Africa's infrastructure deficit is deepening.

While international development finance remains vital, a significant opportunity lies closer to home. Africa is home to close to $4 trillion in capital markets, including pension funds, sovereign wealth funds, and insurance assets, according to the Africa Finance Corporation. Yet only a fraction of these resources is allocated to infrastructure, due to restrictive investment mandates, shallow secondary markets, and the absence of appropriately structured instruments.

Unlocking this domestic capital requires bold regulatory reforms and the creation of investment vehicles tailored to institutional preferences, such as long-duration, inflation-linked instruments, risk-participation structures, and diaspora bonds. Reforms that widen eligible infrastructure asset classes, harmonize listing rules across exchanges, and develop credit enhancement mechanisms will be essential to crowd in these pools. If mobilized effectively, even a small reallocation from Africa's own capital markets could outstrip current annual infrastructure financing flows—transforming the continent from aid recipient to investment destination.

Underutilization of risk mitigation instruments

Despite the availability of risk mitigation tools—such as Partial Risk Guarantees (PRGs), Multilateral Investment Guarantee Agency (MIGA) coverage, and viability gap funding mechanisms—Africa has struggled to deploy them effectively at scale. Many project sponsors are unaware of, or lack the technical expertise, to structure these tools into financial packages. Others encounter institutional resistance or legal bottlenecks when attempting to implement complex blended finance structures. The result is a landscape dominated by projects that are either too risky for commercial finance or too reliant on already-constrained public sector resources.

Without innovative and unified efforts to mobilize, structure, and de-risk financing, Africa's infrastructure ambitions will remain stuck in feasibility studies. Closing the gap requires not just capital, but also trust, built through more bankable projects, more transparent financial models, and more effective partnerships across governments, DFIs, and private investors. In the absence of a vibrant and well-supported financing ecosystem, even the most strategically vital infrastructure projects will fail to move from concept to construction.

Lack of Execution Capability and Capacity

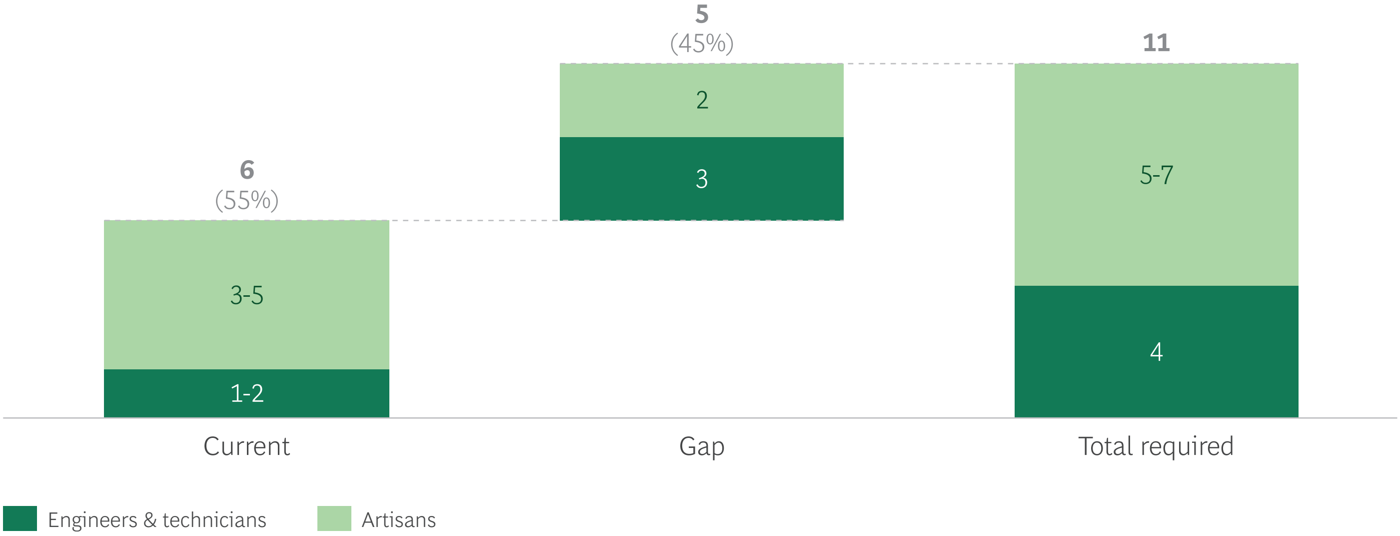
Africa faces an acute skills deficit in core infrastructure roles. It is estimated that the continent requires an additional ~5 million skilled professionals, including engineers, technicians, and artisans, to meet its infrastructure and Sustainable Development Goals (SDGs) (see Exhibit 8). Much of this gap stems from a mismatch between demand and training systems: technical and vocational education and training (TVET) institutions are often underfunded, disconnected from industry needs, or focused on outdated curricula.

EXHIBIT 6

~5 million skilled professionals required to meet core infrastructure goals in Africa

There is a 45% shortage of skilled professionals required to meet core infrastructure goals in Africa

Current and required skills for infrastructure delivery by type in Africa (Mn people)



Source: STIPRO: Engineering Practitioners in Sub-Saharan Africa: Demand, Supply, Capacity and Quality report; Engineering Numbers and Needs in the SADC Region (2018); World Bank: Science, Technology and Skills for Africa's Development; Caterpillar: Bridging the technical skills gap in Africa

This execution shortfall results in an over-reliance on foreign firms and expatriate technical staff, raising project costs and limiting local value capture. While foreign expertise can offer temporary relief, sustainable delivery will require building indigenous capabilities that can manage projects end-to-end, from concept to commissioning.

Recognizing this need, the AU has established the **Skills Initiative for Africa (SIFA),** in partnership with AUDA-NEPAD and the German Development Agency (GIZ).

These efforts mark a promising step toward systemic capability-building. However, **scaling the impact of such initiatives will require deeper co-ordination with project pipelines,** clearer workforce forecasting at regional levels, and stronger enforcement of local content and skills-transfer provisions in major infrastructure contracts.

While these three challenges are complex and systemic, they are not insurmountable. In fact, they point directly to the areas where strategic, co-ordinated interventions can unlock transformative progress.

Opportunities:
3 Levers to Accelerate Execution

To shift from planning to action, Africa must rewire its delivery architecture. Execution cannot be achieved in silos—it requires synchronized institutions, credible projects, catalytic finance, and private sector capacity working in lockstep. The following three levers, operated together, form the basis of a practical roadmap to move infrastructure from intention to impact.

1 Targeted private sector participation to unlock funding and capability

The private sector remains a significantly underutilized force in African infrastructure development, despite its potential to provide capital, as well as critical delivery capabilities, operational know-how, and technological innovation. In other emerging regions, structured efforts to attract private investment (for example, through robust PPP frameworks, transparent procurement pipelines, and targeted de-risking tools) have helped to push private participation rates to **15% or higher.** For Africa, achieving even that benchmark would represent a **fivefold increase** in capital mobilized, unlocking billions in new investment without further straining public balance sheets.

Private sector participation also serves as a driver of technical and commercial excellence. Engineering firms, logistics operators, infrastructure developers, and technology companies can accelerate execution by injecting delivery discipline and project preparation expertise. Private actors also enhance cost estimation, construction scheduling, and governance practices—areas where public delivery mechanisms often struggle.

To activate this potential, governments and pan-African institutions must:

- Identify and structure commercially-viable projects earlier in the pipeline, with clear revenue models and transparent procurement processes
- Create credible investment platforms, including blended finance showcases and regional infrastructure marketplaces that match capital to opportunity
- Deepen public-private collaboration beyond funding by bringing together sector leaders early in the planning and prioritization process, inviting technical input on project structuring, and fostering co-investment partnerships throughout the delivery lifecycle.

Africa cannot deliver its infrastructure ambitions through public funds and capabilities alone. It must engage the private sector as a core partner in the infrastructure transformation.

2 Strengthen cross-border capabilities for regulatory harmonisation

Many of Africa's most impactful infrastructure projects span multiple countries. Yet execution is frequently delayed by fragmented regulatory frameworks, divergent technical standards, and stalled bilateral or multilateral agreements.

Establishing strong cross-border co-ordination mechanisms is essential to accelerate delivery. This includes harmonizing legal and regulatory protocols, aligning tariffs and wheeling agreements, and fast-tracking treaty negotiation and ratification processes. The success of the Lobito Corridor (see Lobito Case Study) demonstrates what is possible when regulatory frameworks are aligned and governments work collaboratively. Similarly, East Africa's progress on trade facilitation offers proof of what aligned cross-border governance can deliver. Through measures like one-stop border posts, harmonized customs systems, and standardized documentation, the East African Community (EAC) significantly reduced trade frictions.

CASE STUDY

The Lobito Corridor

The Lobito Corridor is a major trans-African logistics and infrastructure initiative connecting the Port of Lobito in Angola to mining and industrial hubs in Zambia and the Democratic Republic of Congo (DRC). Spanning over 1,300 kilometers of rail and road infrastructure, the corridor offers a strategic export route for critical minerals such as copper and cobalt from the Central African Copperbelt to global markets.

Challenges Encountered

Despite its strategic value, the Lobito Corridor remained underutilized for over a decade, hampered by multiple cross-border challenges:

- **Regulatory misalignment:** lack of harmonized customs, axle-load standards, and visa protocols across Angola, DRC, and Zambia delayed the movement of goods and people

- **Institutional void:** for years, no single body was empowered to drive co-ordinated decision-making or dispute resolution across the three countries
- **Infrastructure bottlenecks:** deteriorating rail infrastructure and outdated border processes added days to transit times, pushing shippers toward slower, more expensive road alternatives
- **Commercial uncertainty:** without clear offtake volumes or credible governance, attracting investment to modernize the corridor proved difficult.

How the Challenges Were Overcome

A breakthrough came in 2023, when the three governments, supported by the SADC, development financiers and private stakeholders signed the Lobito Corridor Transit Transport Facilitation Agreement. The deal introduced:

- A new **corridor-level governance body,** including a Council of Ministers and a professionally-staffed secretariat
- **Harmonized operating standards** across customs, axle loads, and vehicle dimensions
- A multi-entry visa system and unified transit bond to **reduce border friction**
- A **30-year concession** to the Lobito Atlantic Railway consortium, enabling investment in rolling stock and signalling upgrades
- **Guaranteed offtake agreements** with mining companies to underpin freight volumes and unlock financing.

Within two years, rail transit times for copper shipments dropped from 25 days to ~6 days, freight rates fell below road transport alternatives, increasing competitiveness, and the corridor attracted over $500 million in blended financing, backed by development banks and commercial lenders.

The Lobito Corridor's progress illustrates what is possible when cross-border political alignment, institutional co-ordination, and commercial structuring come together. It is a model for how infrastructure execution can be accelerated through purpose-built co-ordination mechanisms—especially for high-impact, multi-country projects.

3 Increase bankability by managing operational, commercial and financial risks

Investors will not deploy capital into highly uncertain environments, but appropriate risk-mitigation instruments can resolve this hurdle. Africa has access to a growing suite of financial tools that can lower perceived and real risks. These include partial risk and credit guarantees (for example MIGA, African Trade and Investment Development Insurance, escrow structures, blended finance stacks, and viability gap funding). Structured appropriately, these tools can make projects bankable without distorting fundamentals. For example, Morocco's Tanger Med Port mobilized over $10 billion with less than 40% public funding by layering state grants, concessional finance, and long-term PPP concessions.

However, no degree of innovative financial structuring can overcome fundamental feasibility challenges. Unresolved operational risks (such as land disputes or grid connectivity gaps) and commercial uncertainties (like uncreditworthy offtakers or unrealistic demand forecasts) result in projects with weak bankability. Specialized technical support, often sought through private sector involvement, is needed to resolve these challenges effectively. To convey commercial feasibility, teams must develop robust, market-tested business cases that illustrate viability across various input sensitivities, revenue models, and implementation pathways. Structured problem-solving teams, with sector specialists and financial advisors, can be deployed to improve feasibility and reduce time to financial close.

Power Interconnectors: A Backbone for Africa's Energy Future

Africa's path to energy access and a just transition depends not only on generation—but on interconnection. While new generation assets are coming online, many remain underutilized due to the lack of cross-border transmission infrastructure. Power interconnectors enable countries to share surplus generation, trade energy cost-effectively and stabilize national grids, reducing outages and volatility.

Several cross-border interconnectors offer a glimpse of this potential:

- The ZIZABONA line (Zimbabwe–Zambia–Botswana–Namibia) aims to reinforce the Southern African Power Pool and enable surplus hydro and solar trade
- The North–South Interconnector seeks to link Egypt with Sudan and eventually with East Africa
- The West African Power Pool (WAPP) is gradually connecting Ghana, Côte d'Ivoire, Nigeria, and others—but still faces regulatory and financing hurdles
- The Ethiopia–Kenya Interconnector is operational, enabling low-cost hydro exports—but further market integration is needed

Despite their promise, many interconnectors are stuck in early development or delayed by:

- Regulatory misalignment between national energy regulators
- Unco-ordinated technical standards (for example grid codes, load balancing rules)
- Lack of bankable offtake agreements and clear payment security
- Inconsistent political commitment and insufficient cross-border planning.

As Africa embraces decentralized, optimised energy systems, interconnectors will be the connective tissue—turning isolated investments into regional energy ecosystems. Strategic, cross-border co-ordination is no longer a luxury; it is a prerequisite for a resilient, integrated, and affordable African power future.

Pulling the Levers Through Political Commitment, Delivery Muscle, and Private Sector Partnership

Fragmentation across Africa's infrastructure ecosystem remains one of the most persistent and systemic barriers to delivery. Achieving impact at scale will not come from new bureaucratic layers or passive co-ordination—it will require bold, hands-on leadership from the African Union, empowered to pull together political, technical, and financial capabilities into a unified execution drive. The 2025 to 2029 term of office is faced with a pressing mandate: to rally political and private sector leadership around a shared commitment to project delivery—and to do so with urgency, focus, and measurable results.

A Leadership-Driven Delivery Platform

The African Union can anchor this new push through a delivery-oriented platform that is political at its apex and practical in its function. This leadership engine would:

- Deepen support for **Heads of State and Government** under the PICI (Presidential Infrastructure Champion Initiative) umbrella to champion priority regional projects and overcome political bottlenecks
- Actively engage the **private sector as co-builders,** not bystanders—inviting technical input, co-investment, and operational leadership.
- Track and transparently report on delivery milestones across a focused portfolio of high-impact projects.

It is time for the African Union to spend its convening power—backed by political will, execution resources, and private sector trust—to shift the continent from fragmented ambition to disciplined action.

A growing number of stakeholders—governments, financiers, technical partners—are ready to support this next phase. What's needed is leadership that connects them, focuses them, and drives shared accountability for results. The African Union, through its infrastructure portfolio and the energy of its new leadership, has the opportunity to define that path—and turn decades of planning into a decade of progress.

Conclusion: From Vision to Reality

Africa's infrastructure deficit is deep but solvable. The economic returns are clear: for every $1 billion invested in African infrastructure, up to $6 billion in GDP value can be unlocked, driven by increased productivity, job creation, improved logistics, and expanded access to essential services.

The focus must now shift to delivery. Execution must become the centerpiece of development planning, and private sector participation must be recognized by all stakeholders-public and private -as the pivotal unlock to accelerate it. The private sector, in partnership with the AU Commission's Infrastructure and Energy department as well as AUDA-NEPAD and the RECs, must champion a new era of implementation.

With targeted reforms, catalytic investments, and co-ordinated action, the continent can move from plans to progress. If delivered at scale, infrastructure can be the engine that powers Africa's development—creating jobs, lifting incomes, and transforming lives for generations.

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