AUDA-NEPAD
AFRICAN UNION DEVELOPMENT AGENCY

ANNUAL REPORT FOR 2024

The Programme for Infrastructure Development in Africa (PIDA)

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Abbreviations

Term	Description
AfDB	African Development Bank
AIP	Africa Water Investment Programme
AUC	African Union Commission
AUDA-NEPAD	African Union Development Agency-New Partnership for Africa's Development
COMESA	Common Market for Eastern and Southern Africa
EAC	East African Community
ECCAS/CEEAC	Economic Community of Central African States
ECOWAS/ CEDEAO	Economic Community of West African States
ESIA	Environmental and Social Impact Assessment
IBN	Infrastructure Business Network
ICT	Information and Communication Technology
IGAD	Intergovernmental Authority on Development
LAPSSET	Lamu Port-South Sudan-Ethiopia Transport Corridor
NPCA	NEPAD Planning and Coordinating Agency
NR	National Report
PAP	Priority Action Plan
PAP1	Priority Action Plan (2012-2020)
PAP 2	Second Priority Action Plan (2021-2030)
PCM	Project Concept Memorandum
PEAC	Pool Énergétique de Afrique Centrale (Central African Power Pool)
PICI	Presidential Infrastructure Champion Initiative
PIDA	Programme for Infrastructure Development in Africa
PIM	Project Information Memorandum
PISP	PIDA Implementation Support
PPP	Public-Private Partnerships
REC	Regional Economic Community
S0	Enabling Environment and Needs Assessment
S1	Project Definition
S2A	Pre-Feasibility
S2B	Feasibility
S3A	Project Structuring
S3B	Transaction Support and Financial Close
S4A	Tendering
S4B	Construction
S4C	Operation
SADC	Southern African Development Community
SAPP	Southern African Power Pool
SDM	Service Delivery Mechanism
ToR	Terms of Reference
vPIC	Virtual PIDA Information Centre
WAPP	West African Power Pool

Preface

PIDA remains our continent's central, shared platform for moving priority infrastructure from ideas to assets. This report takes stock of where we advanced, where we stalled, and what we must change to accelerate delivery. It is deliberately technical in tone because the audience—Member States, RECs, project owners, financiers and advisors; needs precision more than platitudes.

Across 69 projects in transport, energy, water and ICT, the portfolio recorded a net advancement of 8.7% over 2023–2024. Yet the signal in the noise is clear: 43.5% of projects now sit at Feasibility (S2B), up sharply year-on-year, while shares at earlier and later stages have declined. This "feasibility bottleneck" is the single most important constraint to unlock. Sector performance diverged: ICT led with a 36.4% net advancement, water followed at 26.6%, transport was modest at 8%, and energy regressed at –16.7%; with hydro projects most affected and transmission comparatively steadier. Regionally, Continental initiatives advanced 100%, West and Southern Africa each achieved +25%, while Central Africa regressed (–12.5%). These are not statistics for their own sake; they tell us where capability, coordination and capital are (and aren't) doing their jobs.

The financing picture underscores the scale: USD 151.54 billion total portfolio value—69% transport, 22% energy, 6% water, 3% ICT. Deals moved when preparation was disciplined, risks were allocated credibly, and governance was predictable. They slowed when studies were fragmented, standards varied, or cross-border institutions lacked teeth. Our job at AUDA-NEPAD is to tilt more projects into the first category.

Three instruments proved decisive in 2024:

- Service Delivery Mechanism (SDM)—to diagnose gaps early, set a consistent quality bar, and bring in targeted expertise (from concept notes to transaction support).
- AID & vPIC—to make progress, gaps and opportunities visible in real time, enabling evidence-based steering rather than intuition.
- PIDA Quality Label & early-stage toolkits—to standardize what "bankable enough to move" means across sectors and regions.

Partnerships also mattered. The Dakar process and subsequent workstreams sharpened our financing playbook; PIDA Week 2024 aligned policy and preparation; the Africa Water Investment Platform showed how political traction plus bankable pipelines can compress time from concept to implementation; and the Afreximbank collaboration on project preparation began to fill the most chronic funding gap of all: rigorous, timely feasibility and structuring.

What, then, is our operating mandate for the next cycle?

1. Break the feasibility gridlock. We will scale SDM deployment precisely where the data show clustering at S2B, enforce common scopes of work and peer-review protocols, and link every funded study to a pre-agreed transaction pathway. Feasibility is not a milestone; it's a gateway—treat it as such.
2. Go programmatic on corridors. Rather than one-off projects, we will structure multi-asset, multi-country corridor programs with shared standards, synchronized procurement, and dedicated authorities—reducing transaction costs and accelerating readiness across entire routes (road, rail, power, water and fiber).
3. Harden governance, then crowd in capital. Institutional predictability precedes finance. We will back RECs with lagging advancement to adopt the governance templates already working elsewhere (ECOWAS, SADC), and we will lean on guarantees and blended facilities where risk, not returns, is the binding constraint.
4. Standardize quality; reward velocity. The PIDA Quality Label will be used earlier and more often. Projects that maintain data integrity in AID/vPIC, hit review gates on time, and close gaps promptly will receive priority access to technical support and market-sounding platforms.
5. Mainstream climate, gender and jobs as deal enablers. Integrating resilience metrics, gender-responsive design and credible job-creation pathways is not a compliance exercise; it expands the investor base (climate funds, DFIs, institutional capital) and strengthens public buy-in.

Momentum has been built. We remain confident in maintaining it and that the next Report present documented closures, groundbreakings, and service entries tied to AfCFTA trade flows and measurable household benefits. That is the standard the African public expects, and the one we set for ourselves.

Mr. Amine Idriss Adoum
Director of Economy-Infrastructure, Industrialization, Trade & Regional Integration
African Union Development Agency (AUDA-NEPAD)

Executive Summary on PAP 2 Performance Analysis and Strategic Outlook (2023-2024)

Overview

The Programme for Infrastructure Development in Africa Priority Action Plan 2 (PIDA PAP 2) represents a cornerstone initiative in Africa's quest for enhanced regional integration and sustainable development through strategic infrastructure investments[1]. As the continent faces an annual infrastructure investment gap of USD 68-108 billion[2], with total infrastructure needs projected between USD 181-221 billion annually through 2030, PIDA PAP 2 emerges as a critical framework for coordinated action. The analysis of 69 projects[3] spanning transport (36%), energy (26%), water (22%), and ICT (16%) reveals encouraging progress in advancing the continent's infrastructure agenda with 23% of projects successfully progressing towards maturity stages during the 2023-2024 reporting period[4].

The overall portfolio shows a net advancement rate of 8.7% obtained by calculating the percentage of projects advancing (23.2%) minus the percentage regressing (14.5%). This demonstrates modest positive momentum across PIDA projects though significant sectoral variations exist. Most projects (62.3%) maintained their development status indicating potential stagnation in moving projects toward implementation. Below is a summary of the overall performance based on data from all sectors:

Sector	Total	#Changes	Adv.	% Adv.	Reg.	% Reg.	Net Adv.
ICT	11	6	5	45.5%	1	9.1%	36.4%
Water	15	6	5	33.3%	1	6.7%	26.6%
Transport	25	7	4	16.0%	3	12.0%	8.0%
Energy	18	7	2	11.1%	5	27.8%	–16.7%
Overall	69	26	16	23.2%	10	14.5%	8.7%

Sectoral Performance Analysis

ICT Sector

Digital infrastructure shows the strongest performance with a 36.4% net advancement rate, as 5 projects progressed while only 1 regressed. The Trans-Saharan Optic Fiber project's remarkable advancement from pre-feasibility to construction demonstrates how digital projects can accelerate once initial barriers are overcome. West African countries achieved 100% advancement in their ICT projects, while fiber optic initiatives (66.7% advancement) outperformed data centre developments.

Water Sector

PIDA transboundary water projects are demonstrating solid positive momentum with a 26.6% net advancement rate, as 5 projects moved forward and 1 regressed. The Continental Africa Water Investment Support Programme made an extraordinary leap from project definition directly to implementation. Multipurpose water projects (60% advancement) significantly outperformed single-purpose initiatives thus suggesting integrated approaches attract stronger stakeholder support and financing. Regional performance varied considerably, with SADC showing 50% advancement while some ECCAS projects remained stalled at early stages.

1 African Union Development Agency – NEPAD, 2nd PIDA Priority Action Plan (2021–2030) – Projects Prospectus (Midrand, South Africa: AUDA-NEPAD, June 2023), accessed May 1, 2025, https://www.nepad.org/file-download/download/public/139692.

2 African Development Bank. (2023). Africa Infrastructure Development Outlook, https://www.afdb.org/fileadmin/uploads/afdb/Documents/Publications/African_Economic_Outlook_2018_-_EN.pdf

3 Ibid,1

4 Raw Data Analysis for PIDA Projects 2022-2024 from multiple sources including the PISP, AID and vPIC.

Transport Sector

The transport sector with an advancement rate of 8% shows a concentration of development at the feasibility stage which has since increased from 28% to 40% of projects between 2023 and 2024. While this indicates progress from conceptual phases, there was an 8% decline in projects at the structuring stage which suggests challenges in moving toward implementation. This pattern reveals a critical bottleneck in the transport sector whereby projects successfully completed initial studies but encounter barriers in securing financing and stakeholder agreements for actual construction.

Energy Sector

The energy sector faces the most significant challenge with a negative net advancement rate of -16.7%, as only 2 projects advanced while 5 regressed. Hydroelectric projects struggled the most with 5 of 8 projects moving backward, while transmission projects performed better with 28.6% advancement. Central Africa experienced difficulties with 4 of 5 energy projects regressing. The WAPP Solar Park in West Africa represents a notable success which suggests that renewable technologies beyond traditional hydropower may offer more implementation-friendly alternatives for addressing Africa's energy needs.

Regional Implementation Dynamics

The report reveals distinct regional performance patterns across PIDA projects. West Africa achieved 100% advancement in ICT projects, 50% advancement in transport projects, and 33.3% advancement in water projects, though two energy projects regressed. Central Africa experienced 66.7% advancement in transport projects but 80% regression in energy projects, with 20% advancement in water initiatives. East Africa showed 25% advancement in energy projects with no regressions, but experienced regression in two major railway projects while maintaining status in most transport projects. Southern Africa demonstrated consistent performance with 50% advancement in water projects, 50% advancement in ICT projects, and all transport and energy projects maintaining their status. North Africa maintained status across most projects with one transport project regressing due to cross-border coordination challenges. Regional Economic Communities with established corridor authorities and implementation mechanisms (like ECOWAS and SADC) showed higher advancement rates than regions with less developed coordination frameworks.

Strategic Recommendations

To accelerate PIDA PAP 2 implementation and maximise its contribution to Agenda 2063's Moonshot 2 for a more integrated Africa, five strategic interventions emerge as priorities:

1. Scale up the Service Delivery Mechanism for Project Preparation Acceleration by focusing on the 70% of projects to overcome feasibility stage bottlenecks.
2. Deploy specialised technical assistance teams to regions with lower project advancement rates (ECCAS, UMA) while facilitating peer learning from high-performing RECs (ECOWAS, EAC).
3. Shift from project-by-project development to programmatic corridor approaches to help reduce transaction costs and preparation timeframes.
4. Scale successful digital infrastructure implementation models across all sectors particularly leveraging ICT success patterns to digitalize transport corridors and energy systems.
5. Standardize feasibility study requirements and quality assurance processes across RECs to enhance investor confidence and accelerate financial close.

Projected Impact and Future Outlook

With strategic interventions to address identified bottlenecks, PIDA PAP 2 can potentially increase its overall portfolio advancement rate from 26% to 40% over the next implementation period. Successfully completed projects are projected to deliver transformative economic impacts including reduced intra-African trade costs, enhanced regional GDP through improved connectivity, creation of approximately 500,000 direct and indirect jobs, and climate resilience benefits for approximately 400 million people.

As Africa confronts unprecedented demographic growth, with the population projected to reach 2.48 billion by 2050, PIDA PAP 2's implementation takes on heightened urgency. The program's emphasis on regional integration, climate resilience, and digital transformation positions it as a cornerstone of the continent's strategy to accelerate the production of goods and services for both domestic consumption and international trade.

PIDA PAP 2 represents a collection of projects that supports Agenda 2063 for realising ***"The Africa We Want"*** for an integrated, prosperous, and peaceful continent driven by its own citizens and representing a dynamic force in the global arena.

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1. Introduction

1.1. Background of the Continental Infrastructure Development in Africa

Infrastructure is the cornerstone of Africa's development, playing a pivotal role in driving economic growth, reducing poverty, and achieving the Sustainable Development Goals (SDGs). It is essential for fostering regional trade, integration, and the long-term aspirations set out in Africa's Agenda 2063 and its Ten-Year Implementation Plan. Despite these imperatives, Africa continues to confront a substantial infrastructure deficit, with an estimated annual investment gap ranging from USD 68 to USD 108 billion[5]. Recent figures from the African Development Bank (AfDB) indicate that the continent's infrastructure needs alone are projected to require between USD 181 and USD 221 billion annually over the period from 2022 to 2030[6].

As the second-largest continent, with a population of 1.18 billion in 2015 and projected to grow to 1.68 billion by 2030 and 2.48 billion by 2050[7], Africa must accelerate the production of goods and services for both domestic consumption and international trade to achieve sustainable economic growth and improve living standards. Yet, the continent faces significant challenges that hinder its progress toward these goals. Inadequate infrastructure remains a formidable barrier to seizing emerging opportunities for trade, economic expansion, and job creation. This shortfall not only drives up production and transaction costs but also erodes business competitiveness and impedes broader economic and social development. Furthermore, inadequate infrastructure creates an unfavourable business climate, deterring foreign direct investment and exacerbating challenges for vulnerable populations by limiting their access to essential services.

To overcome these challenges, African Union (AU) Member States have increasingly recognised the necessity of collective action. Under the leadership of the AU and Regional Economic Communities (RECs), the Programme for Infrastructure Development in Africa (PIDA) was launched in 2012 during the 18th AU Summit held in Addis Ababa, Ethiopia. PIDA aims to develop robust infrastructure across critical sectors such as transport, energy, transboundary water, and ICT. The program prioritises the efficient preparation, execution, and management of projects to ensure the delivery of essential services and the improvement of living conditions across the continent.

Central to PIDA's success is the African Union Development Agency (AUDA-NEPAD), which is charged with coordinating the planning, resource mobilisation, and implementation of infrastructure projects. AUDA-NEPAD works in close partnership with the African Union Commission (AUC), RECs, the AfDB, the United Nations Economic Commission for Africa (UNECA), and other key stakeholders. Through these collaborative efforts, AUDA-NEPAD seeks to close the infrastructure gap, thereby unlocking Africa's full potential for growth, development, and regional integration.

5 African Economic Outlook (2018), AfDB

6 Scaling up financing is key to accelerating Africa's structural transformation, AfDB (2024). https://www.afdb.org/en/news-and-events/scaling-financing-key-accelerating-africas-structural-transformation-73244

7 Income Inequality Trends in Sub-Saharan Africa, UNDP (2017)

1.2. Alignment of the Infrastructure Development under Agenda 2063

Agenda 2063, adopted during the 24th Session of the AU Assembly of Heads of State and Government in Addis Ababa in January 2015, is a strategic framework that captures the collective aspirations of the African people. This vision, known as "The Africa We Want," is structured through a series of five Ten-Year Implementation Plans. The first plan covered the period from 2014 to 2023, while the Second Ten-Year Implementation Plan (STYIP) guides progress from 2024 to 2033. This second decade emphasises accelerating implementation, building on the foundational convergence achieved during the first decade.

Agenda 2063 is deeply rooted in the AU's vision of "an integrated, prosperous, and peaceful Africa, driven by its own citizens and representing a dynamic force in the global arena". Within this framework, the STYIP (2024–2033)[8] outlines seven "Moonshots," or ambitious goals, that guide the continent's development trajectory. Moonshot 2 specifically targets the creation of a more integrated and connected Africa.

PIDA is critical in driving the success of Moonshot 2 within the STYIP of Agenda 2063. This phase of the agenda marks a significant shift from laying foundational work to accelerating Africa's socio-economic transformation through focused and strategic infrastructure initiatives. PIDA stands at the core of this transformation, offering a continent-wide strategic framework that not only prioritises infrastructure development but also addresses key enablers for economic growth, regional integration, and sustainable development. PIDA's role extends beyond mere infrastructure development; it is about fostering interconnectedness across Africa, breaking down barriers to trade, and enhancing mobility for goods, services, and people. By focusing on critical sectors such as transport, energy, ICT, and transboundary water, PIDA aims to reduce costs, improve efficiency, and create synergies between AU Member States. This aligns directly with the aspirations of Moonshot 2, which seeks to create a more integrated and connected Africa.

Moreover, PIDA's approach is comprehensive and holistic, emphasising not only the construction of physical infrastructure but also the development of policies, institutional frameworks, and capacity building necessary to sustain and maximise the impact of these projects. Through these efforts, PIDA is setting the stage for Africa's long-term economic resilience, ensuring that infrastructure development translates into real, tangible benefits for all Africans. This includes boosting intra-African trade, enhancing the competitiveness of African economies on the global stage, and ultimately supporting the continent's collective aspiration for prosperity as envisioned in Agenda 2063.

1.3. PIDA Background and Objectives

PIDA's journey has been marked by several key stages, each building upon the previous one. The initial phase focused on developing a comprehensive framework for infrastructure development which culminated in the adoption of the Priority Action Plan (PAP1) in 2012[9]. PAP1 identified 51 priority programmes across key sectors, including transport, energy, water, and ICT. This phase also saw the establishment of the African Infrastructure Database (AID) and the Virtual PIDA Information Center (vPIC) which are crucial tools for monitoring and knowledge sharing. In total, PAP1 consisted of 406 projects in all regions of the continent.

Figure 1: PIDA Week 2019

The second phase, marked by the launch of PIDA PAP 2 in 2021, expanded the scope to include 69 projects, with a stronger emphasis on regional integration, climate resilience, and digital infrastructure. PIDA PAP 2 also introduced the Service Delivery Mechanism (SDM)[10] to provide technical support to projects to help them reach a stage where they are ready for implementation. The SDM plays a crucial role in ensuring the feasibility, bankability, and sustainability of PIDA projects through the provision of technical expertise, financial modelling, and project management support.

8 African Union, *Agenda 2063: Second Ten-Year Implementation Plan (2024 – 2033)* (1 February 2024), p. 14.

9 African Union. "Program Infrastructure Development for Africa (PIDA)." African Union Official Website. Accessed May 19, 2025. https://au.int/en/ie/pida.

10 African Union Development Agency-NEPAD. "PIDA PAP 2 Implementation Guidelines." Programme for Infrastructure Development in Africa, 2021. https://www.au-pida.org/documents/

1.4. Instruments for PIDA Implementation

PIDA employs a range of instruments to implement its priority projects. These instruments are designed to address various challenges, from project preparation and financing to capacity building and knowledge sharing. Here are some of the key instruments:

1.4.1. The Service Delivery Mechanism (SDM)

The Service Delivery Mechanism (SDM) plays a pivotal role in supporting PIDA projects during their early stages, ensuring that they progress towards implementation readiness. The SDM provides a wide range of technical assistance, including feasibility studies, project structuring, financial modelling, and expert advisory services, helping projects navigate the complex initial phases[11]. It also focuses on capacity building through training and mentoring for project stakeholders, equipping them with the skills necessary for effective project management. Additionally, the SDM connects projects with potential financiers and grant opportunities, offering crucial funding support.

Key instruments within the SDM framework include the SDM Expert Pool, which comprises a diverse group of professionals from various fields who are readily available to provide tailored support to PIDA projects. The SDM Early-stage Project Evaluation Toolkit offers a standardised and efficient approach to assessing the feasibility and potential impact of projects, streamlining the evaluation process. Furthermore, the PIDA Quality Label is awarded to projects that meet international best practices in preparation and structuring, significantly enhancing their attractiveness to investors. Some of the key stakeholders and functions include:

	Stakeholders			Functions
Continental Level	**African Union Commission**	**AUDA-NEPAD**	**African Development Bank**	▪ AUC and AUDA-NEPAD: Monitoring and advocacy of the implementation at the continent level ▪ AfDB: financial leadership
Regional Level	**Regional Economic Communities (REC)**	**Transport Corridor Authorities**	**Power Pools**	▪ RECs responsible of project-level monitoring ▪ Ensure the harmonization and implementation of "soft" policy measures across countries
National Level	**Individual countries and their correspondent Government Agencies**			▪ Devise master plans and identify integrative regional infrastructures ▪ Countries will drive and own projects ▪ Create the SPV needed for each project

Figure 2: SDM Stakeholder Mapping

Some of the activities being implemented by the SDM include:

- Assist Chad in structuring a Special Fund for infrastructure projects.
- Develop a Quality Manual for project execution standards.
- Support the National Electricity Company of Chad (SNE) in upgrading the energy sector.
- Foster collaboration among Member States for regional infrastructure projects.
- Promote sustainable development and capacity building.

11 African Union Development Agency-NEPAD. "Service Delivery Mechanism (SDM)." Programme for Infrastructure Development in Africa. Accessed May 19, 2025. https://www.au-pida.org/service-delivery-mechanism-sdm/.

Figure 3: FIDIT 2025 Event in Chad

1.4.2. The PIDA Implementation Support Programme (PISP)

The PISP is a vital initiative, using the SDM approach, aimed at providing technical support for the 69 projects under the PIDA Priority Action Plan 2 (PAP 2)[12]. This program is designed to strengthen the capacities of key institutions, including the African Union Development Agency (AUDA-NEPAD), the African Union Commission (AUC), and Regional Economic Communities (RECs). Launched in 2022, PISP is set to run for four years by focusing on enhancing infrastructure development across Africa. The PIDA Implementation Support Project (PISP) is committed to providing tailored and direct support to Member States, with a particular focus on enhancing their infrastructure development capabilities. This support is designed to empower countries to effectively implement the PIDA Priority Action Plan 2 (PAP 2) projects, ensuring that they can meet their specific infrastructure needs and challenges.

Key activities under implementation through the PISP are:

- Establishment of an Expert Service Pool (ESP) with a specialised infrastructure development consultant firm to provide technical assistance to PIDA projects owners for a 3-year period from 2024 to 2027.
- Reinforcement of AUDA-NEPAD technical capacity with new staffs to coordinate the 04 PIDA sectors and manage the overall African infrastructure data platforms.
- Reinforcement of AUC capacity with new staffs for PIDA policy and communication improvement.
- Enhancement of the PIDA implementation action plans framework by elaborating a Domestic resource and climate finance action plan, a PIDA Climate, gender and youth guidelines as well as a PIDA Communication strategy.
- Support for marketing and promotion of PIDA projects at continental and global events (PIDA weeks), production of PIDA progress reports and organisation of PIDA steering committees.

1.4.3. The PIDA PAP II Implementation Strategy

The strategy is articulated as a feedback-driven framework that establishes continental infrastructure development within Agenda 2063 and AU Flagship Programmes. It adopts an Integrated Corridor Approach to select and prioritise cross-border projects across transport, energy, ICT and trans-boundary water resources[13]. Projects progress through a four-stage cycle (S0–S4, from enabling environment and definition, through development and transaction advisory, to financial close, underpinned by methodologies such as the Quick Check and the Service Delivery Mechanism. Central to this strategy are the African Infrastructure Database (AID) and the Virtual PIDA Information Centre (vPIC), which provide real-time monitoring, evaluation and adaptive learning loops to ensure projects respond to evolving Member State and regional priorities. The Implementation Guidelines aim to serve as a concise introduction for stakeholders new to PIDA PAP 2 by enabling them to engage effectively in project preparation and delivery while equipping users with a clear understanding of institutional frameworks and guiding them through the

12 African Union Development Agency-NEPAD. "Service Delivery Mechanism (SDM)." Programme for Infrastructure Development in Africa. Accessed May 19, 2025. https://www.au-pida.org/pisp/

13 Ibid,14.

broader PIDA ecosystem of policies, strategies, tools and methodologies. The guideline also facilitates the optimal use of PIDA's strategic documents, including the Financing and Partnership Strategies to fast-track priority projects through key milestones toward financial close and construction.

1.4.4. The PIDA PAP II Financing Strategy

The PIDA PAP 2 Financing Strategy aims to overcome PAP 1 bottlenecks by fully embedding institutional learning and private sector engagement throughout the PIDA PAP 2 project life cycle. It emphasises national ownership by mainstreaming projects into national and REC plans, strong advocacy by AU bodies and MDBs, and enhanced quality through the PIDA Quality Label[14]. The strategy mobilises resources from public budgets, multilateral and development finance institutions, bilateral ODA and private investors using blended finance, guarantees, PPPs, project bonds, tax-increment financing and revolving funds. Strategic platforms such as the ICA, G20 Compact with Africa, PICI, EU-Africa Investment Platform and Africa50 support a robust roadmap tracked via AID and vPIC.

1.4.5. Risk Mitigation and Investment Mobilisation Instruments

The Continental Business Network (CBN) serves as a platform designed to "crowd-in" financing and support for infrastructure projects across Africa by fostering collaboration between the public and private sectors. The CBN facilitates dialogue, partnership, and the exchange of best practices, bridging the gap between governments, investors, and developers to accelerate the delivery of critical infrastructure projects.

The 5% Agenda and the Africa Infrastructure Guarantee Mechanism (AIGM) are targeted initiatives aimed at mobilizing institutional investment in Africa's infrastructure, specifically focusing on tapping into capital from pension funds and sovereign wealth funds. These instruments are crucial in addressing the financing gaps in PIDA projects by mitigating associated risks and enhancing the bankability of projects, thereby attracting more private sector participation in the continent's infrastructure development.

1.4.6. Steering Initiatives

The PIDA Steering Committee plays a pivotal role in guiding and overseeing the implementation of PIDA. This high-level body, comprised of representatives from AUC, AUDA-NEPAD, RECs, and key partners, provides strategic direction and ensures that PIDA aligns with continental priorities. Through regular meetings and strategic engagements, the PIDA Steering Committee reviews the performance of PIDA projects, provides guidance on project prioritisation, and advocates for the necessary reforms to enhance the overall enabling environment for infrastructure development.

Figure 4: PIDA Steering Meeting Held in July 2024

The Presidential Infrastructure Champion Initiative (PICI) accelerates the implementation of key infrastructure projects by leveraging high-level political visibility and commitment. Led by Heads of State and high-level decision-makers, PICI mobilises resources, addresses bottlenecks, and ensures the prioritisation of strategically important projects. This initiative enhances accountability and speeds up project delivery by securing top-level political support, fostering cross-border cooperation, and drawing attention to projects critical for regional integration and economic development.

1.4.7. The PIDA Week 2024

The PIDA Week 2024, convened in Addis Ababa, Ethiopia, and held between the 24th and 29th of November 2024. The event marked a watershed moment in Africa's infrastructure agenda by bringing together high-level stakeholders across government, private sector, and development institutions to accelerate sustainable infrastructure implementation. The forum facilitated critical dialogue on transformative financing mechanisms, institutional capacity enhancement, and implementation modalities required to advance the continent's priority infrastructure projects.

Deliberations focused on strategic approaches to overcome persistent bottlenecks in project preparation and implementation, with particular emphasis on strengthening cross-border coordination for complex regional initiatives. Stakeholders committed to deploying innovative blended finance solutions to address the significant infrastructure investment gap while ensuring projects incorporate climate resilience and digital transformation principles aligned with Agenda 2063's vision for an integrated Africa. PIDA Week 2024 culminated in concrete commitments to strengthen institutional frameworks for project acceleration with RECs pledging enhanced coordination mechanisms for cross-border initiatives.

14 African Union Development Agency – NEPAD (AUDA-NEPAD). *PIDA-PAP 2 Financing Strategy – Final Report*. April 2021. Retrieved from https://www.au-pida.org

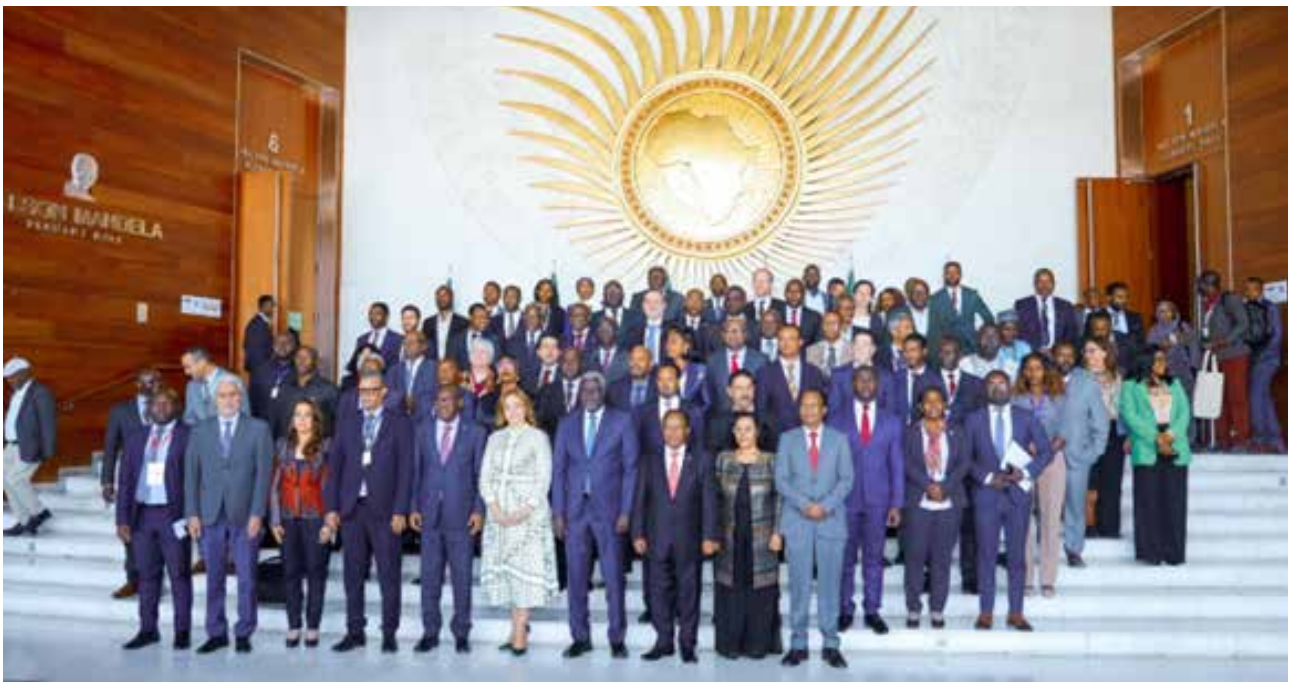


Figure 5: PIDA Week 2024, Addis Ababa, AU Headquarters

1.4.8. Information Management, Monitoring and Evaluation and Knowledge Capitalisation Instruments

The African Infrastructure Database (AID) is an extensive digital repository that compiles detailed information on infrastructure projects across the African continent. It is designed to enhance transparency by providing up-to-date data on project status, funding, and implementation progress, which helps foster coordination among governments, investors, and development partners. In the reporting year, the Database underwent significant enhancements and upgrades by incorporating advanced features such as artificial intelligence (AI), interactive dashboards, and interactive maps. These upgrades have added functionality to track projects in real-time and effectively providing users with a dynamic and user-friendly interface to access and analyse data.

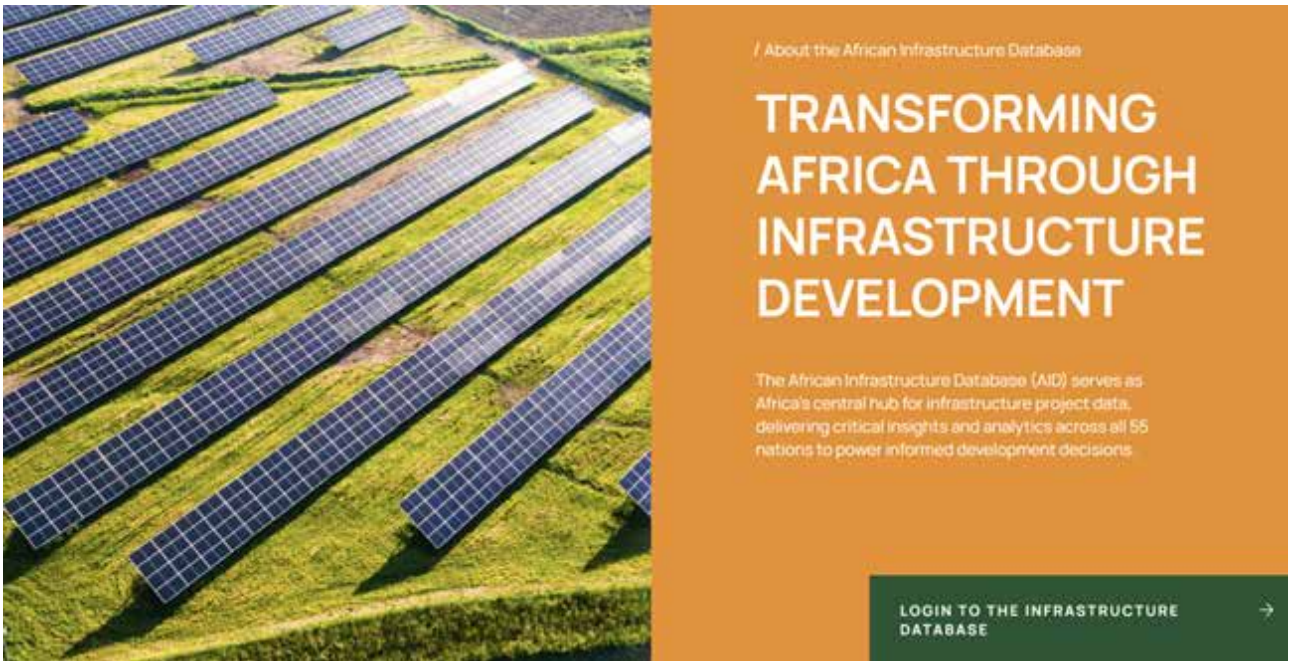


Figure 6: The Landing Page for the African Infrastructure Database

The Virtual PIDA Information Centre (vPIC) is an interactive online platform dedicated to providing comprehensive information on PIDA projects, including updates on activities, reports, and strategic resources. vPIC serves as a hub for stakeholders, including governments, private sector entities, and international partners, enabling them to access valuable insights into ongoing projects. Similarly, the vPIC also underwent significant upgrades to enhance its functionality and user engagement. These upgrades include the integration of interactive dashboards and maps, which provide users with a more intuitive and engaging way to

access and analyse project data. The enhanced vPIC now offers real-time updates and visualisations, allowing stakeholders to track the progress of PIDA projects more effectively and make informed decisions based on the latest information.

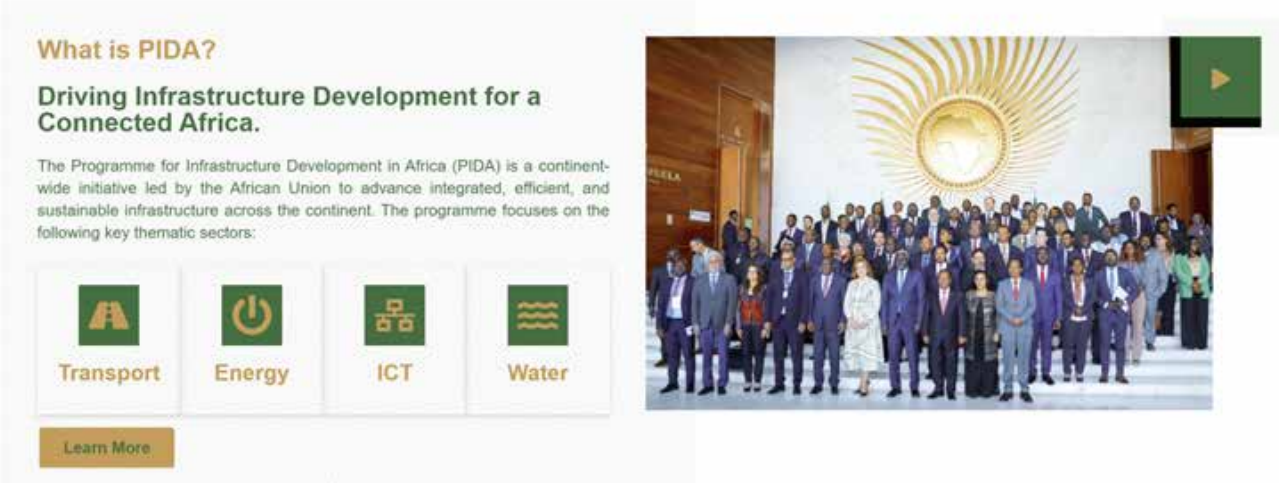


Figure 7: Landing Page of the vPIC

The PIDA Job-creation Toolkit is a strategic instrument that assists in assessing the potential employment impacts of PIDA projects. It provides methodologies and tools to estimate the number and types of jobs that can be generated through infrastructure investments, helping stakeholders optimize projects for maximum socio-economic benefits. The toolkit supports the development of targeted strategies to enhance job creation, particularly in sectors where infrastructure can drive significant employment opportunities, thus contributing to broader economic development and poverty reduction goals across Africa. During the reporting period the job creation tool kit was used to estimate jobs to be created by three projects within the central corridor and two of the projects received commitments, USD 100,000 for construction and EUR 1 million for a feasibility study.

1.4.9. Integrated Corridor Approach

PIDA Integrated Corridor Approach is a multi-sectoral framework that enhances infrastructure development along economic corridors by integrating various sectors. This holistic model maximizes the impact of investments by creating synergies, boosting connectivity, and supporting sustainable development, ultimately transforming corridors into dynamic hubs of economic activity and regional integration.

1.5. Transition from PAP1 to PAP 2

The first phase laid the groundwork for PIDA by identifying and implementing foundational projects that demonstrated the potential for significant impact. As PAP1 concluded, the transition to PAP 2 marked a new chapter in PIDA's evolution. Building on the successes and lessons learned from PAP1, PAP 2 was launched to accelerate infrastructure development with a refined focus on high-impact projects. This transition was driven by the need to address emerging challenges and opportunities to ensure that Africa's infrastructure development remains aligned with the continent's long-term goals.

PAP 2 aims to expedite the development of critical infrastructure projects that are essential for Africa's economic transformation. The strategic objectives include enhancing regional connectivity, improving access to essential services, and fostering sustainable economic growth. To achieve these goals, PAP 2 prioritizes 69 high-impact projects selected based on specific criteria, including:

1. **Regional Significance:** Projects that enhance cross-border connectivity and integration.
2. **Economic Impact:** Initiatives that contribute significantly to economic growth and job creation.
3. **Sustainability:** Projects that promote environmental sustainability and resilience.
4. **Feasibility and Readiness:** Initiatives that are technically and financially viable with a clear implementation pathway.

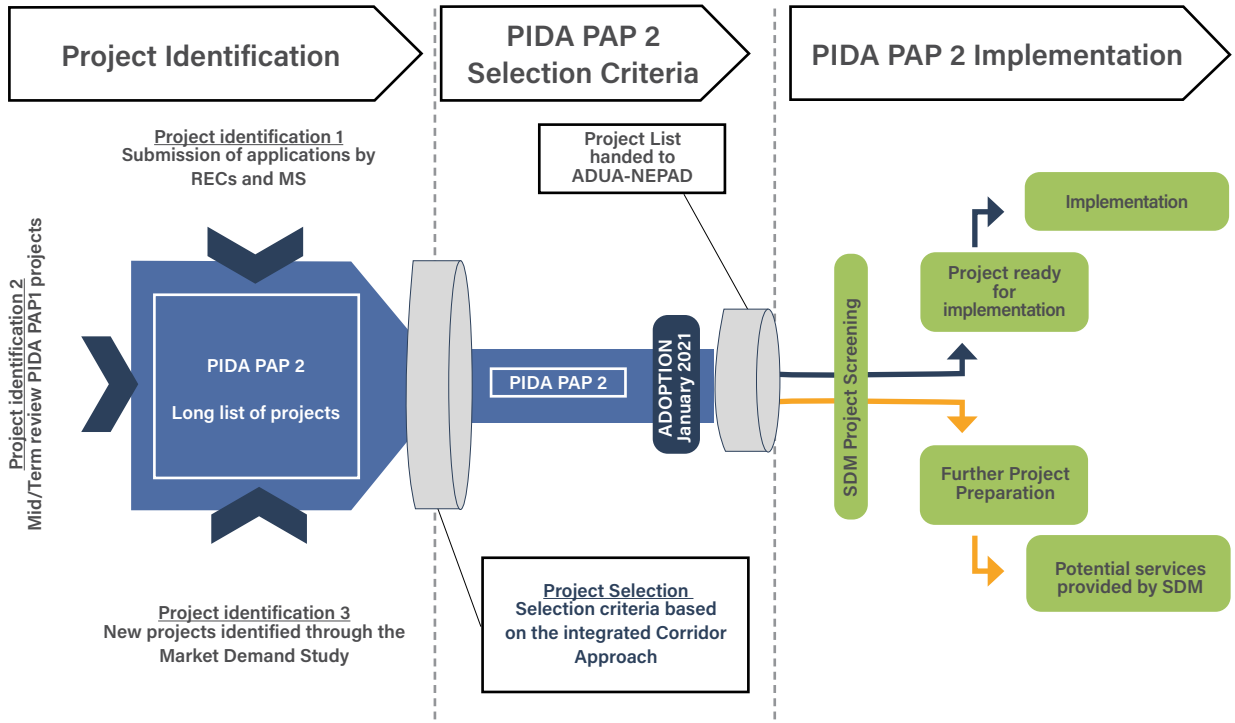


Figure 8: PIDA PAP 2 Project Selection Process

The second phase of PIDA is intricately aligned with Africa's Agenda 2063 which envisions a prosperous and integrated continent driven by its own citizens[15]. The projects under PAP 2 are designed to contribute to the aspirations of Agenda 2063 by focusing on areas of infrastructure development, economic integration, and sustainable development. Additionally, PAP 2 supports the achievement of the Sustainable Development Goals (SDGs) by addressing infrastructure-related targets such as building resilient infrastructure, promoting inclusive and sustainable industrialisation, and fostering innovation.

The implementation timeframe for PAP 2 spans from 2021 to 2030 by providing a decade-long window to achieve its ambitious objectives. The expected outcomes of PAP 2 include:

1. **Enhanced Infrastructure Networks:** Development of robust transport, energy, ICT, and water infrastructure that facilitates regional trade and integration.
2. **Economic Growth and Job Creation:** Stimulation of economic activities and creation of employment opportunities across the continent.
3. **Improved Access to Services:** Increased access to essential services such as electricity, clean water, and digital connectivity for African populations.
4. **Sustainable Development:** Promotion of environmentally sustainable practices and resilience in infrastructure development.

1.6. Methodology, Rationale and Objectives of the 2023–2024 PIDA Progress Report

The PIDA Progress Report 2023–2024 offers a review of PIDA projects by highlighting the advancement of PIDA projects during the stated reporting period. The report employs a performance assessment using a standardised 8-stage classification system for tracking projects from initial concept (S1: Project Definition) through completion (S4C: Operation). This structured approach enables objective measurement of advancement through critical development milestones. The methodology quantifies progress using key metrics including Net Advancement Rate (percentage of projects advancing minus those regressing), Implementation Stage Growth (year-over-year increase in construction/operational projects), and Stage Transition Efficiency (time spent at each phase). Data collection integrates multiple sources including the African Infrastructure Database, RECs, project owners, and PIDA Sector Experts. Data was fed into an analysis framework comparing the above metrics for the 2023/2024 reporting period.

Looking ahead, the report serves as a crucial bridge to the forthcoming mid-term review of PIDA PAP 2, which covers the period from 2021 to 2030. PIDA PAP 2 emphasises accelerating project implementation, improving coordination, and addressing new challenges. It advocates for sustainable infrastructure development by integrating green technologies, renewable energy solutions, climate adaptation measures, and disaster risk management strategies. Additionally, PIDA PAP 2 aims to enhance

15 Ibid,8.

private sector participation through public-private partnerships (PPPs) and innovative financing approaches. The PIDA Progress Report 2024 highlights the ongoing commitment and collaborative efforts of all stakeholders in advancing toward a prosperous, interconnected, and sustainable Africa.

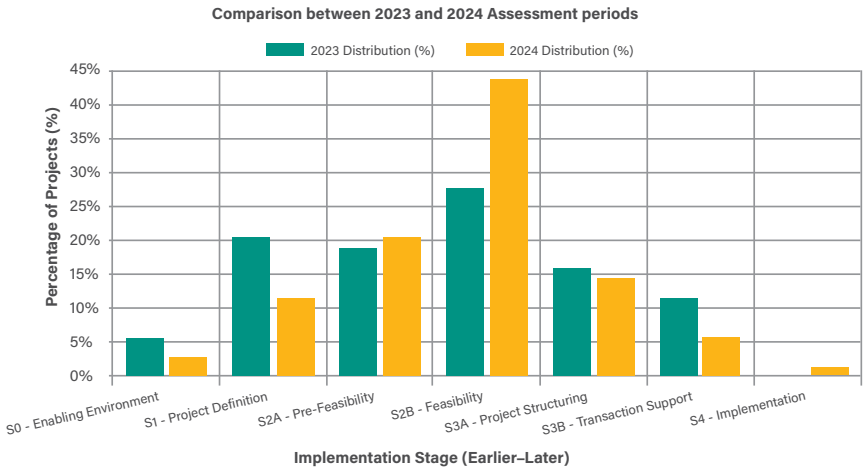
2. Status of Implementation of PIDA PAP 2 Projects 2023–2024

2.1. Overview of the Status of PIDA PAP 2 Projects for 2024 Reporting Period

In 2023-2024, notable advancements and trends have emerged which showcase both success and areas that warrant additional focus. This analysis examines the implementation status and progress of these projects between 2023 and 2024 by highlighting the status of project progression across the four PIDA priority sectors. Overall, PIDA projects have shown a positive trajectory of +8.7% net advancement from 2023 to 2024. Despite the positive movement, the following table illustrates the significant concentration of projects at the Feasibility stage (S2B) in 2024 (43.5%), which increased notably from 2023 (27.5%). It also shows the decrease in projects at both early stages (S0, S1) and transaction support stage (S3B) indicating the "bottleneck" effect at the feasibility stage. This insight is consistent across all sectors and validates the overall portfolio-level findings that requires targeted intervention strategies.

Development Stage	2023 Distribution	2024 Distribution	Net Change
S0 - Enabling Environment	4 (5.8%)	2 (2.9%)	-2.9%
S1 - Project Definition	14 (20.3%)	8 (11.6%)	-8.7%
S2A - Pre-Feasibility	13 (18.8%)	14 (20.3%)	+1.5%
S2B - Feasibility	19 (27.5%)	30 (43.5%)	+16.0%
S3A - Project Structuring	11 (15.9%)	10 (14.5%)	-1.4%
S3B - Transaction Support	8 (11.6%)	4 (5.8%)	-5.8%
S4 - Implementation	0 (0%)	1 (1.4%)	+1.4%

From the above table and the chart below, there appears to be a systematic challenge in moving projects beyond this stage towards structuring, transaction support, and implementation.



2.2. Regional Performance

Region	Total Projects	Advanced	Maintained	Regressed	Net Advancement Rate	Project Distribution
West Africa	12	5	5	2	+25.0%	17.4% of portfolio
Central Africa	16	3	8	5	-12.5%	23.2% of portfolio
East Africa	16	1	13	2	-6.3%	23.2% of portfolio
Southern Africa	12	3	9	0	+25.0%	17.4% of portfolio
North Africa	9	0	8	1	-11.1%	13.0% of portfolio
Continental/multi-regional	4	4	0	0	+100.0%	5.8% of portfolio
Total Portfolio	**69**	**16**	**43**	**10**	**+8.7%**	**100%**

Continental initiatives demonstrate exceptional progress (100% advancement), while West and Southern Africa maintained strong positive momentum (+25% each). Central Africa faces the greatest challenges (-12.5%) with 5 of 16 projects regressing, particularly in energy. East Africa shows mixed results with strong maintenance (13 of 16 projects) but limited advancement. Regions with balanced sector portfolios outperform those with high concentration in single sectors. The advancement-to-regression ratio varies dramatically from Continental (4:0) and Southern Africa (3:0) to Central Africa (3:5), indicating pronounced differences in implementation capacity across regions.

SECTORIAL PERFORMANCE

3. PIDA PAP 2 Sectorial Performance for 2023– 2024

3.1. Transport Sector

3.1.1. Overview of the PIDA Transport Sector

The PIDA PAP 2 (2021-2030) project portfolio features 25 strategic transport projects that form a critical foundation for Africa's connectivity and economic integration agenda. The 2023-2024 assessment period reveals a mixed performance pattern with a modest positive trajectory overall. The portfolio demonstrated varied progression, with 18 projects (72%) maintaining their development status, while 7 projects (28%) experienced stage changes. Of these, 4 projects (20%) advanced to more mature stages, while 3 projects (12%) regressed to earlier phases, resulting in a net positive movement rate of 8%.

This year-over-year analysis reveals a significant shift in the project maturity profile. While 2023 showed a relatively balanced distribution with 36% of projects at advanced stages (S3A and S3B), 2024 demonstrates a pronounced concentration at the Feasibility stage (S2B), which increased from 28% to 40% of the portfolio.

Regional performance diverged between 2023 and 2024. East Africa, hosting the largest project share (32%), experienced a concerning regression trend with two flagship railway corridors retreating from advanced stages. Conversely, Central Africa achieved an exceptional +67% positive movement rate, followed by West Africa at +40%, demonstrating effective coordination mechanisms through their respective RECs.

3.1.2. Project Distribution

PIDA transport projects span all five African regions, with the following distribution:

Region	Number of Projects	Percentage	Net Movement Rate
East Africa	8	32%	-13%
North Africa	7	28%	-14%
West Africa	5	20%	+40%
Central Africa	3	12%	+67%
Southern Africa	2	8%	0%

East Africa's dominance in project volume (32%) contrasts sharply with its negative movement rate (-13%), representing a reversal from its more promising trajectory in 2023. The region hosts three major railway corridors and two inland waterway initiatives which reflect ambitious connectivity goals for the region. The most dramatic positive

shift occurred in Central Africa, with a remarkable +67% movement rate despite hosting only 12% of projects. This outstanding performance was driven by two significant advancements, evidently through the "Construction of a Bridge over the Oubangui River" progressing from Project Definition to Pre-Feasibility, and the "Maritime Link between the Comoros Islands" leaping from Enabling Environment to Project Structuring, the most dramatic single-project advancement in the entire transport portfolio.

This regional performance comparison highlights significant disparities in implementation capacity and coordination effectiveness. The contrasting trajectories between East Africa's regression and Central/West Africa's advancement suggests different approaches to project development and stakeholder coordination that merit further examination.

3.1.3. Technology Distribution

The modal composition of Africa's transport portfolio reflects both continental priorities and implementation realities:

Transport Mode	Number of Projects	Percentage	Net Movement Rate
Roads/Highways	10	40%	0%
Railways	4	16%	-25%
Maritime/Ports	4	16%	+25%
Bridges	2	8%	+50%
Aviation	1	4%	0%
Multimodal/Other	4	16%	+25%

This performance comparison highlights important lessons about project complexity and implementation conditions. The contrasting trajectories between railways (-25%) and bridges/maritime (+50%/+25%) suggest that smaller and more defined projects with clearer institutional arrangements may be progressing more effectively than complex multi-country corridors.

3.1.4. Development Stage Distribution

The maturity profile of Africa's transport infrastructure portfolio reveals critical insights about the project development pipeline:

Development Stage	2023 Projects	2024 Projects	Net Change
S0 - Enabling Environment	1 (4%)	1 (4%)	0%
S1 - Project Definition	4 (16%)	3 (12%)	-4%
S2A - Pre-Feasibility	4 (16%)	4 (16%)	0%
S2B - Feasibility	7 (28%)	10 (40%)	+12%
S3A - Project Structuring	6 (24%)	4 (16%)	-8%
S3B - Transaction Support	3 (12%)	3 (12%)	0%

The most significant shift between 2023 and 2024 is the pronounced concentration at the Feasibility stage (S2B), which increased from 28% to 40% of the portfolio. This 12-percentage point increase represents both the advancement of projects from earlier stages and, more concerningly, the regression of previously more advanced projects back to this middle phase. The bottleneck is particularly evident when comparing 2023's relatively balanced distribution (44% in middle stages S2A/S2B, 36% in advanced stages S3A/S3B) with 2024's more concentrated profile (56% in middle stages, 28% in advanced stages).

When comparing this stage distribution to other infrastructure sectors, we observe similar patterns. The energy portfolio shows an even more pronounced concentration at Feasibility (44% at S2B), with an 80% reduction in projects at Transaction Support between 2023 and 2024. The ICT sector demonstrates a more balanced progression, with 54.5% of projects advancing during the same period.

3.1.5. Regional Economic Community (REC) Involvement

The transport projects benefit from engagement with multiple RECs, with varying levels of performance between 2023 and 2024:

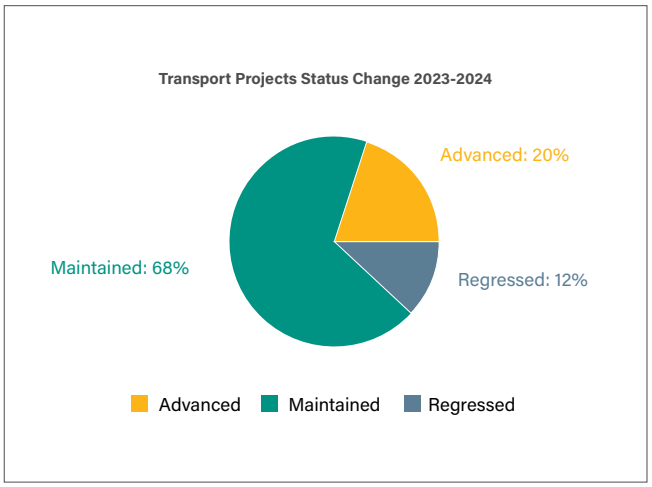
Regional Economic Community	Number of Projects	Net Movement Rate
AMU (Arab Maghreb Union)	7	-14%
EAC (East African Community)	5	-20%
ECOWAS (Economic Community of West African States)	4	+50%
ECCAS (Economic Community of Central African States)	3	+67%
COMESA (Common Market for Eastern and Southern Africa)	2	+50%
SADC (Southern African Development Community)	2	0%
CEN-SAD (Community of Sahel-Saharan States)	1	0%
Continental	1	0%

This comparative REC performance analysis reveals significant disparities in regional implementation capacity and coordination effectiveness. The contrasting trajectories between EAC's regression (-20%) and ECOWAS/ECCAS's advancement (+50%/+67%) suggest different approaches to project development, stakeholder coordination, and implementation oversight that could inform best practices across the continent.

3.1.6. Overall Portfolio Performance

The year-over-year assessment reveals important performance trends compared to other infrastructure sectors:

Status Change	Transport (25 Projects)
Advanced	5 (20%)
Maintained	17 (68%)
Regressed	3 (12%)
Net Movement Rate	+8%



The transport sector occupies a middle ground in Africa's infrastructure development landscape. Its +8% net movement rate demonstrates modest positive momentum.

Within the transport portfolio, we observe important shifts in project maturity between 2023 and 2024:

Pipeline Stage	2023 Distribution	2024 Distribution	Change
Early Stage (S0-S1)	5 projects (20%)	4 projects (16%)	-4%
Middle Stage (S2A-S2B)	11 projects (44%)	14 projects (56%)	+12%
Advanced Stage (S3A-S3B)	9 projects (36%)	7 projects (28%)	-8%

The regional performance comparison shows dramatic shifts between 2023 and 2024:

Region	2023 Net Movement	2024 Net Movement	Year-Over-Year Change
Central Africa	+33%	+67%	+34% improvement
West Africa	+20%	+40%	+20% improvement
Southern Africa	0%	0%	No change
East Africa	+12.5%	-13%	-25.5% decline
North Africa	0%	-14%	-14% decline

Central Africa demonstrated the most dramatic improvement, accelerating from +33% movement in 2023 to +67% in 2024. East Africa experienced the most concerning trajectory shift by declining from +12.5% positive movement in 2023 to -13% negative movement in 2024 – a 25.5 percentage point deterioration that has significant implications for continental connectivity objectives.

3.1.7. Detailed Project Progress

North Africa Region

Project Name	2023 Status	2024 Status	Status Change	Key Development
Bousalemn Highway in Tunisia at the Algerian Border	S3A	S2B	⚠ Regressed	Regression requiring reassessment of cross-border coordination mechanisms; financing strategy being re-evaluated
Highway Linking the Terminal Part of the Fez–Oujda Highway to the Algerian East–West Highway	S1	S1	☑ Maintained	Ongoing coordination between Morocco and Algeria on border section details; project definition phase continuing as planned
Libyan Alternative Freeway	S3A	S3A	☑ Maintained	Project structuring advancing despite regional challenges; financing mechanism being finalised with public investment focus
Modernisation of the RN01 (Trans-Saharan) between Ghardaia and Tamenrasset	S3A	S3A	☑ Maintained	Implementation planning progressing with financing commitments secured; detailed design documents being prepared
Doubling of the RN06 between Mascara and Bechar and the RN50 between Béchar and the Algeria–Mauritania Border	S3A	S3A	☑ Maintained	Construction phasing plan developed; technical specifications finalised for this strategic North-South corridor
Rehabilitation, Modernisation and Improvement of the Services of the Trans-Maghreb Railway Line	S2B	S2B	☑ Maintained	Technical studies advancing with electrification subsystem (2x25 kV) and ERTMS N2 train management specifications defined
Rehabilitation and Creation of Cross-border Centres as Multi-service Logistics Zones	S1	S1	☑ Maintained	Stakeholder consultations completed; early-stage planning for border logistics infrastructure continuing as scheduled

East Africa Region

Project Name	2023 Status	2024 Status	Status Change	Key Development
Construction of Central Corridor Standard Gauge Rail (SGR)	S3B	S2B	⚠ Regressed	Significant regression due to financing constraints; cross-border implementation mechanisms being reassessed; feasibility studies being updated
Construction of Standard Gauge Railway (SGR): Mombasa–Nairobi–Malaba–Kampala–Kigali line with Malaba–Nimule–Juba	S3A	S2B	⚠ Regressed	Major regression requiring revaluation of financial viability; implementation approach being restructured with segment prioritisation strategy
LAPSSET Railway Project	S2A	S2A	☑ Maintained	Pre-feasibility studies advancing for Kenyan segment; route optimisation ongoing with Ethiopian and South Sudanese segments requiring further integration
Establishment of a Navigational Line Between Lake Victoria and the Mediterranean Sea–Feasibility Study Phase 2 (VICMED)	S2B	S2B	☑ Maintained	Phase 2 Feasibility studies progressing across 10 countries with complex coordination; navigational route assessments being finalised
Akagera River Transport	S2B	S2B	☑ Maintained	Environmental impact assessments and waterway optimisation studies continuing with focus on navigation enhancement and port facilities
Construction of Standard Gauge Railway (SGR) from Mtwara/Mbamaba–Liganga to Mchuchuma	S3B	S3B	☑ Maintained	Transaction documentation being finalised; expected construction commencement within planned timeframe despite regional challenges
El Fasher–Kabkabiya–El Geneina–Adri	S3B	S3B	☑ Maintained	Financial close achieved; contractor mobilisation underway with construction expected to begin shortly
Rihaid El Birdi–Om Dafug	S2B	S2B	☑ Maintained	Technical specifications and cost estimates being finalised; geological studies and design work advancing as scheduled

Central Africa Region

Project Name	2023 Status	2024 Status	Status Change	Key Development
Maritime Link between the Comoros Islands	S0	S3A	→ Advanced	Exceptional advancement by accelerating early stages; vessel specifications finalised; terminal designs completed with strong political backing
Construction of a Bridge over the Oubangui River and Development of Missing Links	S1	S2A	→ Advanced	Pre-feasibility initiated with bridge design options being evaluated; stakeholder engagement advancing for this transformative connectivity project
Project for the Construction of the Bridge Over the Ntem River	S3B	S3B	☑ Maintained	Final contract negotiations underway; construction mobilisation expected soon for this critical Cameroon-Equatorial Guinea connection

West Africa Region

Project Name	2023 Status	2024 Status	Status Change	Key Development
Abidjan–Lagos Corridor Highway Plans	S2B	S3A	Advanced	PPP structuring studies launched; corridor authority strengthened with phased implementation strategy developed; strong regional coordination
Abidjan–Ouagadougou–Niamey–Cotonou–Lomé Regional Rail Loop Project	S1	S2B	Advanced	Substantial advancement with completed technical studies; corridor sections prioritised, and phasing strategy developed for five-country network
Praia–Dakar Shipping and Maritime Services Project	S2B	S2B	Maintained	Feasibility studies nearing completion; vessel specifications and terminal requirements finalised with service frequency optimisation
Praia–Dakar–Abidjan Multimodal Transport Corridor	S2A	S2A	Maintained	Pre-feasibility assessments advancing with integrated corridor development approach; multi-modal interchange specifications being developed

Southern Africa Region

Project Name	2023 Status	2024 Status	Status Change	Key Development
Beira Port Development	S2B	S3A	Maintained	Container terminal expansion parameters defined; multipurpose terminal designs being finalized; environmental assessments ongoing
Construction of Petroleum Jetty and Associated Storage Facilities at Albion, Mauritius	S1	S2B	Maintained	Technical specifications for petroleum handling facilities being finalised; environmental impact assessments completed; ready to advance to structuring

Continental Initiative

Project Name	2023 Status	2024 Status	Status Change	Key Development
Continental Seamless Airspace in Africa in the Context of SAATM	S0	S0	Maintained	Terms of reference developed for continental aviation infrastructure Master Plan; regulatory harmonisation assessment continuing as planned

► Case Studies of PIDA PAP 2 Transport Projects

Bridge Over the Ntem River

Cameroon, Equatorial Guinea

€73.4m
Total Investment

972m
Bridge Length

2028
Completion Year

2
Countries Connected

Project Overview

The Bridge Over the Ntem River project aims to connect Campo in Cameroon with Rio Campo in Equatorial Guinea, filling a critical missing link on the Yaoundé-Bata-Libreville corridor. This strategic cross-border infrastructure has progressed from Project Structuring stage in 2023 to Under Construction in 2024.

The project received a significant boost when the African Development Bank approved €73.44 million in financing in November 2023, with implementation beginning shortly thereafter. The bridge is part of the broader Regional Trade and Transport Facilitation Project for the economic corridor between Cameroon, Equatorial Guinea, and Gabon.

Strategic Importance

The bridge will significantly improve the transport logistics chain along the corridor between Yaoundé, Bata, and Libreville, facilitating movement of goods and people across the border. More importantly, it will contribute to the emergence of an industrial-port activities hub in the area between the deep-water port in Kribi (Cameroon) and its counterpart in Bata (Equatorial Guinea).

This project forms part of a broader effort by the African Development Bank to support regional integration in Central Africa. By enhancing connectivity between these neighbouring countries, the bridge will stimulate cross-border trade, create jobs, and promote economic development in the region.

Key Features

The project involves the construction of a pre-stressed concrete box bridge built by successive corbels with a total length of 972 meters. It will feature six intermediate spans of 135 meters each and two side spans of 81 meters each. The bridge will include a bidirectional roadway 7 meters wide, two cycle paths of 1.5 meters each, and two sidewalks of 1.5 meters each. Additionally, the project includes the development of 933 meters of connecting road to Campo in Cameroon and 600 meters of connecting road to Rio Campo in Equatorial Guinea, along with comprehensive environmental measures to minimise ecological impact.

Project Timeline

2013 - Initial Funding Commitment AfDB agreed in principle to provide initial funding for the project

2016 - Technical Study Contract signed with ECTA BTP/Tractebel consortium for technical studies

2019 - Memorandum of Understanding Agreement reached between Cameroon and Equatorial Guinea on bridge location and type

2023 - AfDB Financing Approval Board of Directors of the African Development Bank approved €73.44 million in financing

2024 - Construction Begins Implementation of the project with construction activities underway

2028 - Expected Completion

PIDA ENERGY

3.2. The Energy Sector

3.2.1. Overview of the Energy Sector

PIDA PAP I, covering the period from 2012 to 2020, included a significant focus on the energy sector. This phase aimed to address Africa's energy deficit by enhancing energy generation, transmission, and distribution across the continent. The energy projects under PAP I were designed to improve access to reliable and affordable energy which is crucial for economic development and poverty reduction. Moving forward, PIDA PAP 2 facilitated several cross-border energy projects, including the development of regional power pools, with the aim of enhancing energy trade between countries and improving energy security. Additionally, there was a strong emphasis on renewable energy sources, such as hydroelectric, solar, and wind power, to diversify the energy mix and reduce reliance on fossil fuels.

The portfolio consists of 18 strategic energy projects distributed across the continent which represent critical investments to address Africa's energy challenges. During the 2023-2024 reporting period, the portfolio demonstrated varied progression with 11 projects (61%) maintaining their development stage, while 7 projects (39%) experienced stage changes. Of these changing projects, 5 major projects (28%) regressed from Transaction Support (S3B) to earlier Feasibility stages (S2B), while 2 projects (11%) advanced to Project Structuring (S3A). This resulted in an overall advancement rate of 11.11% and a regression rate of 27.8% which has consequently led to a net advancement rate of -16.7% of the portfolio.

The most significant movement occurred in Central Africa, where 3 of 5 projects underwent status changes, while West Africa showed more positive momentum with its renewable energy initiatives such as the WAPP Regional Solar Power Park in Mali. The portfolio's technology diversity reflects Africa's substantial hydroelectric potential (9 projects) while acknowledging the critical need for improved regional transmission infrastructure (6 projects).

18	61%	11%	28%	-17%
TOTAL PROJECTS	MAINTAINED STATUS	ADVANCED	REGRESSED	NET MOVEMENT

3.2.2. Project Distribution

PIDA energy projects are distributed across regions with the following distribution:

Region	Number of Projects	Percentage
Central Africa	5	28%
East Africa	4	22%
Multiregional	1	6%
North Africa	2	11%
Southern Africa	3	17%
West Africa	3	17%

This regional spread highlights the continental approach to addressing Africa's energy challenges as demonstrated in the above table which show a particular concentration of projects in Central and followed by East Africa representing half of the total portfolio.

3.2.3. Technology Distribution

The portfolio demonstrates technological diversity across several energy subsectors as presented in the following table:

Technology Type	Number of Projects	Percentage
Hydroelectric Power	9	50%
Transmission Interconnectors	6	33%
Renewable Energy (Solar)	1	6%
Oil/Gas Infrastructure	1	6%
Mixed/Multiple Technologies	1	6%

The predominance of hydroelectric projects (50%) reflects Africa's substantial untapped hydropower potential whilst the significant proportion of transmission projects (33%) emphasises the critical importance of regional power pooling and cross-border energy trade.

3.2.4. Development Stage Distribution

The current development stages reflect a portfolio at various maturity levels as shown in the following table:

Development Stage	Number of Projects	Percentage
S0 - Enabling Environment	1	6%
S1 - Project Definition	2	11%
S2A - Pre-Feasibility	4	22%
S2B - Feasibility	8	44%
S3A - Project Structuring	3	17%
S3B - Transaction Support	1	6%

With 66% of projects at the pre-feasibility and feasibility stages, the portfolio shows a concentration in the middle phases of project development which can indicate a significant preparatory work that needs to be undertaken to move the projects forward.

3.2.5. Regional Economic Community (REC) Involvement

The projects benefit from engagement with multiple RECs, these include:

Regional Economic Community	Number of Projects
COMESA	6
ECCAS	5
SADC	5
EAC	4
ECOWAS	3
IGAD	2

Several projects involve multiple RECs which highlights the cross-border and collaborative nature of energy development in Africa. COMESA has the highest involvement with 6 projects, followed by ECCAS and SADC with 5 projects each.

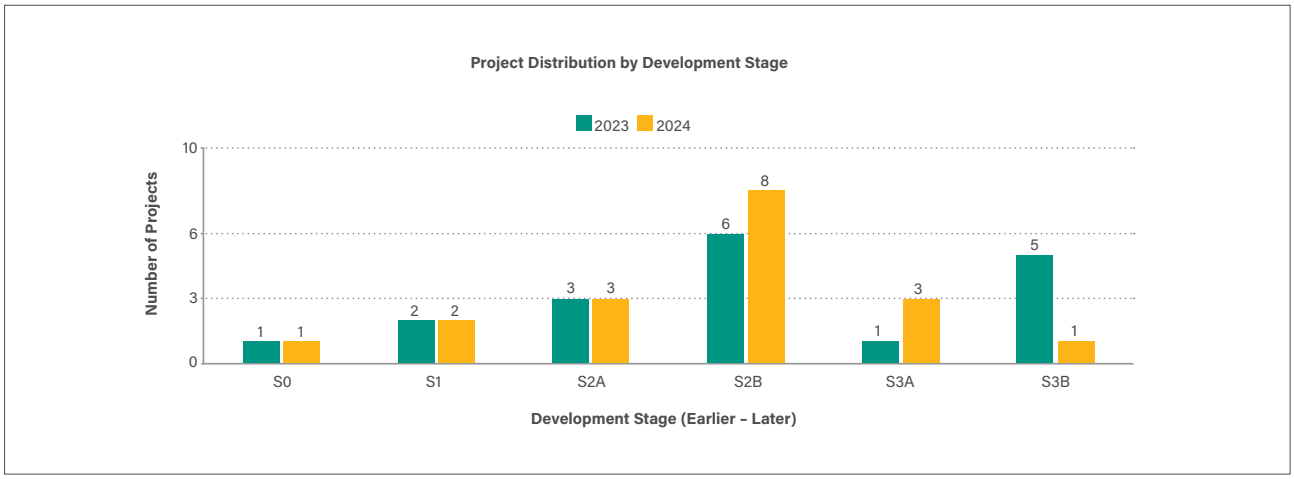
3.2.6. Overall Portfolio Performance

The year-over-year assessment reveals important performance trends as demonstrated in the following table:

Regional Economic Community	Number of Projects	Percentage
Advanced	2	11.11%
Maintained	11	61.11%
Regressed	5	27.78%
Net Movement Rate		-16.67%

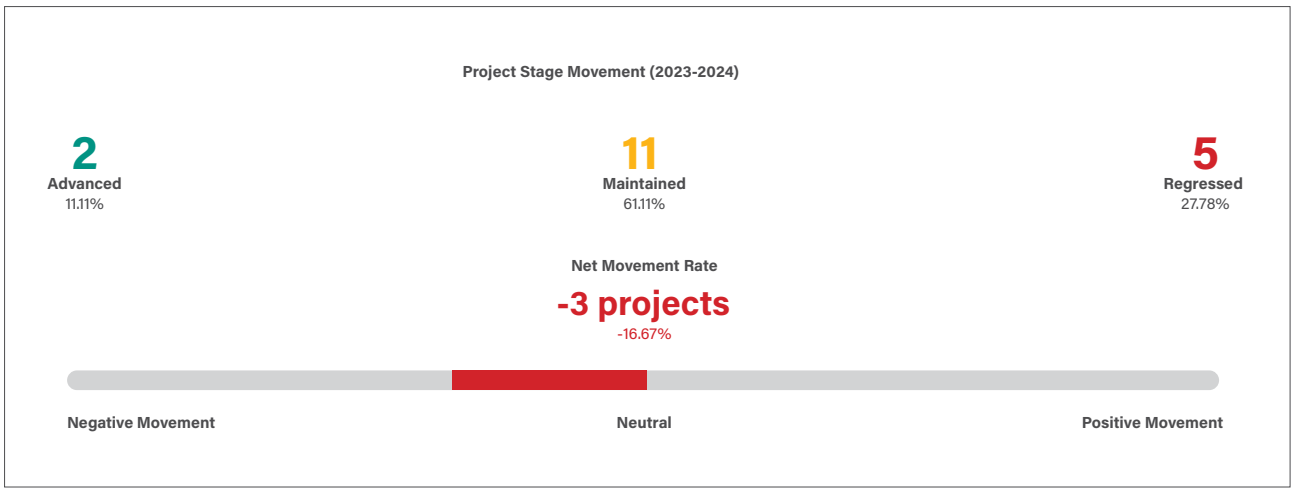
This reflects an overall negative movement in the portfolio with regression outweighing advancement during the assessment period.

The performance of the portfolio between 2023 – 2024 shows that the number of projects in the Transaction Support phase (S3B) dropped from five to one, while those in the Project Structuring phase (S3A) rose from one to three; at the same time, feasibility-stage projects (S2A and S2B) increased slightly which is signalling a shift from implementation towards planning. The following charts demonstrates the movement of projects during the reporting period:

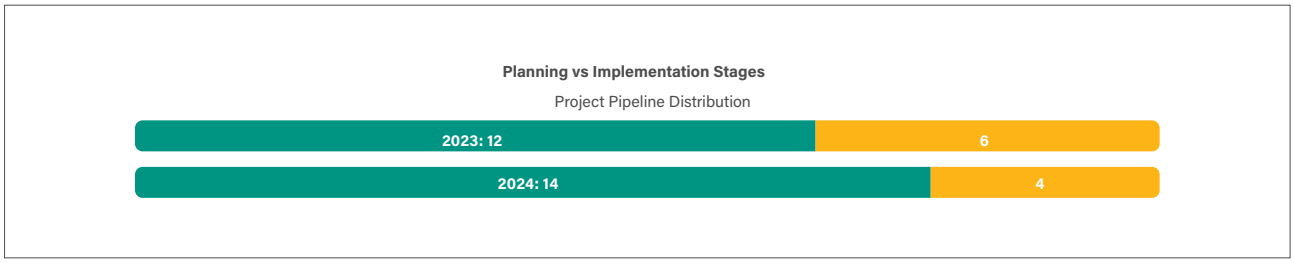


Key Chart Observations

- In 2023, 12 projects (66.67%) were in planning stages and 6 projects (33.33%) in implementation stages.
- In 2024, 14 projects (77.78%) are in planning stages and 4 projects (22.22%) in advanced stages.



1. The above charts demonstrate an 11.11% shift towards earlier planning stages.
2. 80% reduction in projects at Transaction Support stage (S3B).
3. The portfolio shows increasing concentration in middle development stages (S2B).



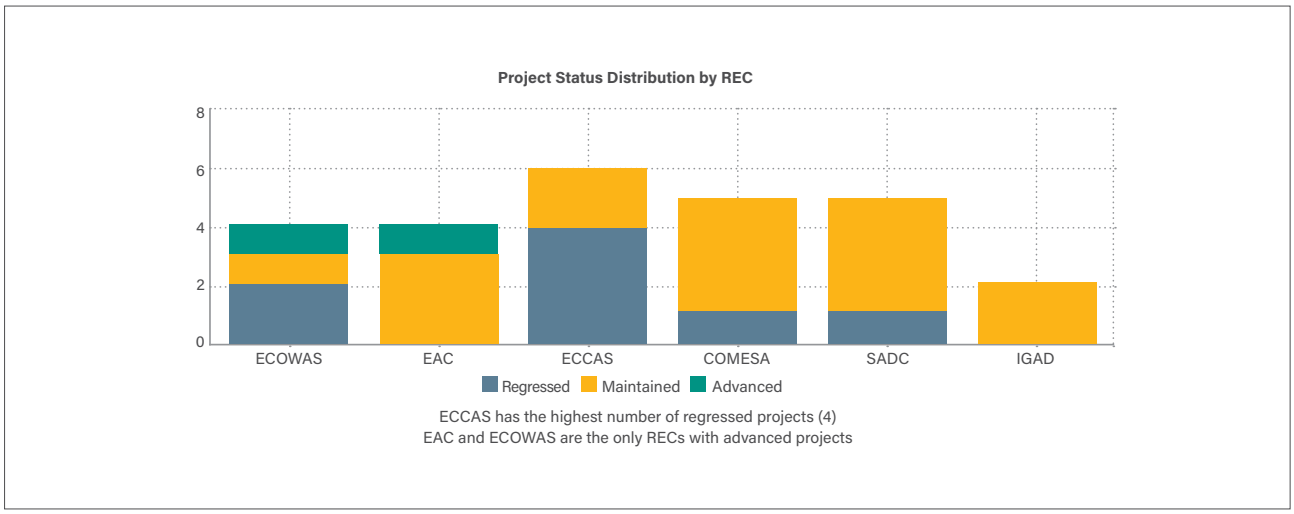
Regional and REC Performance Analysis

Regional performance varied significantly across the continent as demonstrated in the following tables and charts:

Region	Advanced	Maintained	Regressed	Net Movement
Central Africa	0	1	4	-80%
East Africa	1	3	0	+25%
Multiregional	0	1	0	0%
North Africa	0	2	0	0%
South Africa	0	3	0	0%
West Africa	1	0	2	-33%

REC Performance Metrics

REC	Total Projects	Advanced	Maintained	Regressed	Net Movement	Implementation Rate
ECCAS	6	0	2	4	-4 (66.7%)	16.7%
COMESA	5	0	4	1	-1 (-20%)	0%
SADC	5	0	4	1	-1 (-20%)	0%
EAC	4	1	3	0	+1 (+25%)	25%
ECOWAS	4	1	1	2	-1 (-25%)	50%
IGAD	2	0	2	0	0 (0%)	0%



3.2.7. Detailed Project Progress

Central Africa Region

Project Name	Technology	Stage	Status	Comment on Progress
Grand INGA Phase 1	Hydroelectric	S2B	Regressed	Requires update of previous Feasibility Studies (dated 2014); resource mobilisation needed
INTECONNEXION DES RESEAUX ELECTRIQUES	Transmission	S3B	Maintained	European Union funding secured; MoU between Angola, Congo and DRC signed
Aménagement des sites hydroélectriques de BOOUE et de TSENGUE-LELEDI	Hydroelectric	S2B	Regressed	-
Aménagement des sites hydroélectriques du BAC et de LOTEMO	Hydroelectric	S2B	Regressed	-
Aménagement du site hydroélectrique de CHOLLET	Hydroelectric	S2B	Regressed	-

Central Africa's energy portfolio faces the most significant challenges, with 4 of 5 projects regressing during the assessment period. The hydroelectric-dominated portfolio reflects the region's vast hydropower potential, particularly in the Congo Basin. However, implementation capacity, financing constraints, and governance issues have hampered progress.

East Africa Region

Project Name	Technology	Stage	Status	Key Issues
Masaka–Mwanza Transmission Line	Transmission	S3A	Advanced	Strong implementation progress; regional cooperation effective
Eastern Africa Green Power transmission Network Project 6	Transmission	S2A	Maintained	Complex multi-country coordination; steady progress
LAPSSET Crude Oil Pipeline	Oil/Gas	S1	Maintained	Early stage; complex geopolitical considerations
Rusizi IV Hydropower project	Hydroelectric	S2B	Maintained	Stable progress; building on Rusizi III experience

East Africa demonstrates the strongest performance in the portfolio with one project advancing and none regressing. The region benefits from effective coordination mechanisms through the East African Power Pool and strong implementation capacity. The diverse technology mix addresses both generation and transmission needs.

Multiregional

Project Name	Technology	Stage	Status	Key Issues
Inga 3 Transmission Interconnector	Transmission	S0	Maintained	Early stage; dependent on Inga 3 development progress

This continent-spanning transmission project remains at an early development stage but has maintained its status. As a critical component of Africa's power interconnection vision, it depends on the progress of the broader Inga development.

North Africa Region

Project Name	Technology	Stage	Status	Key Issues
Egypt–Sudan electrical grid interconnection	Transmission	S1	Maintained	Stable progress; part of broader North-South corridor
Egypt–Libya regional electrical interconnection	Transmission	S2A	Maintained	Regional integration challenges; stable progress

North Africa's two transmission projects have maintained their status, reflecting steady if unspectacular progress. Both projects form part of North Africa's strategy to strengthen grid connections with neighbouring regions.

Southern Africa Region

Project Name	Technology	Stage	Status	Key Issues
Baynes Hydropower Project	Hydroelectric	S2B	Maintained	Binational project between Angola and Namibia; stable progress
ZIZABONA Transmission Power Interconnector	Transmission	S2B	Maintained	Multi-country coordination proceeding well; SAPP oversight
Luapula Hydropower project	Hydroelectric	S2B	Maintained	Steady progress; environmental assessments ongoing

Southern Africa's portfolio demonstrates stability with all three projects maintaining their status. The region benefits from the well-established Southern African Power Pool (SAPP) coordination mechanisms and mature institutional frameworks.

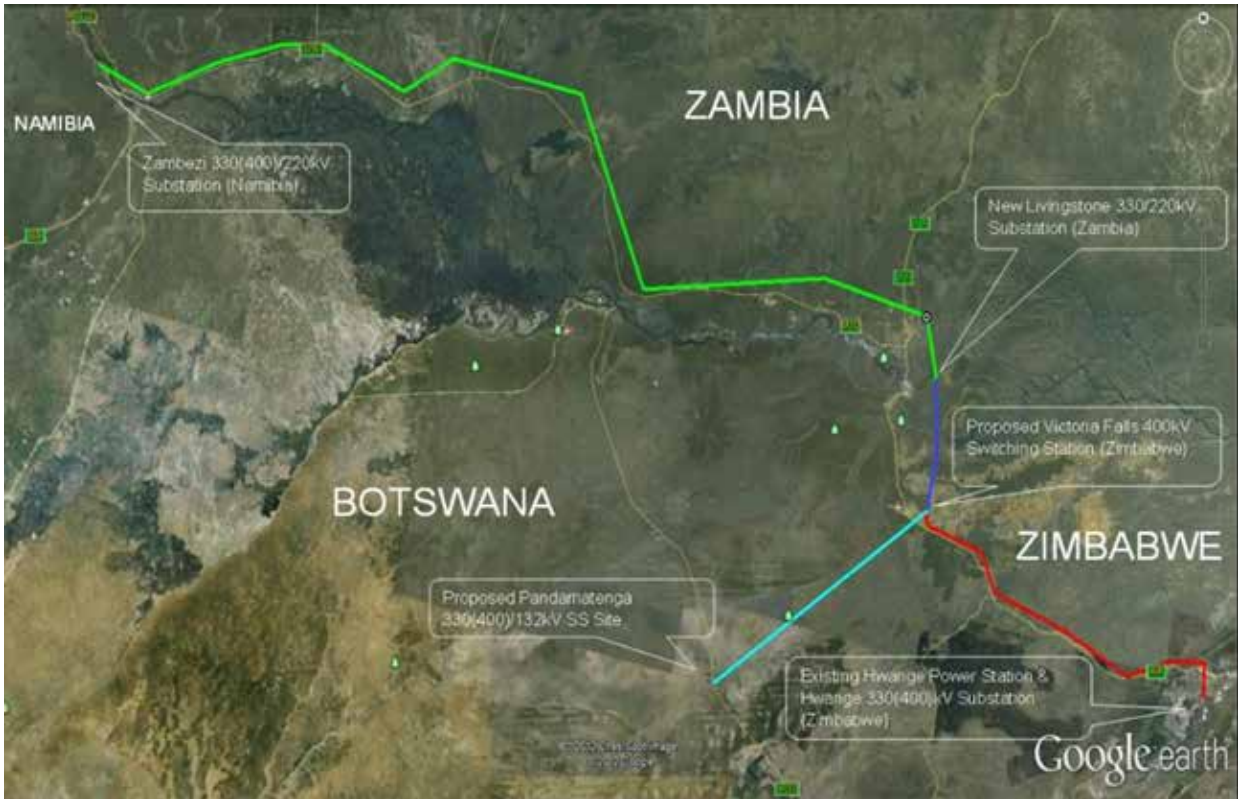
West Africa Region

Project Name	Technology	Stage	Status	Key Issues
WAPP Regional Solar Power Park in Mali	Solar	S3A	Advanced	Strong implementation progress; renewable energy flagship
Mambillla Hydroelectric Power Project	Hydroelectric	S3A	Regressed	Financial structuring challenges; slight regression
Centrale Hydroelectrique de Louga 1 et 2	Hydroelectric	S2A	Regressed	Technical redesign requirements; significant regression

West Africa shows mixed performance with one project advancing and two regressing. The WAPP Solar Power Park demonstrates the region's commitment to renewable energy diversification, while the hydroelectric projects face implementation challenges.

► Case Study: ZIZABONA Interconnector Project (Zimbabwe, Zambia, Botswana, Namibia)

The ZIZABONA Interconnector Project is a significant infrastructure initiative aimed at enhancing the power transmission network across four Southern African countries: Zimbabwe, Zambia, Botswana, and Namibia. The project involves the development, financing, construction, and operation of new transmission facilities to create a western transmission corridor within the Southern African Power Pool (SAPP). This corridor is intended to decongest the existing central transmission corridor, thereby boosting electricity trading among Member States.



Key Highlights

- Transmission Line Length: 422 km total
- Line Components:
  - Zimbabwe (Hwange) – Zambia (Livingstone/ Mukuni): 115 km
  - Zimbabwe (Victoria Falls) – Botswana (Pandamatenga): 76 km
  - Zambia (Mukuni) – Namibia (Zambezi): 231 km
- Voltage: To be constructed at 400 kV, with initial operation at 330 kV
- Transfer Capacity: Initially targeting 300 MW
- Estimated Cost: USD 240 million
- Current Status: Project Structuring stage (S3A).

Project Objectives

1. Provide an alternative electrical power transmission route in the region.
2. Decongest the existing central transmission corridor through Zimbabwe.
3. Boost electricity trading among Member States.
4. Create an alternative wheeling path between North and South.
5. Enhance power trade among SADC countries.

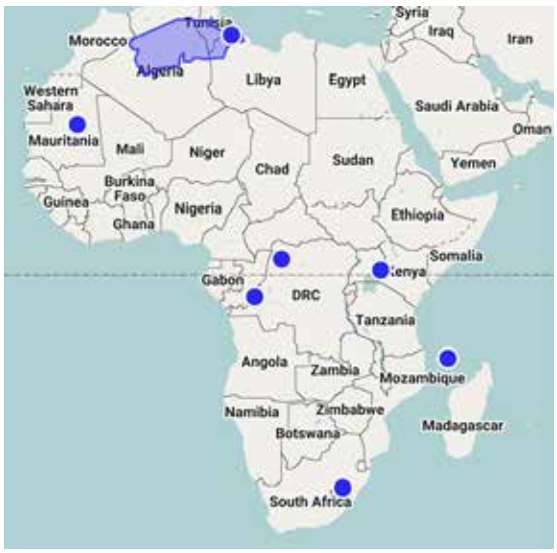
The project will boost tourism sectors in the border towns of Victoria Falls and Kazungula through increased and reliable power supply, a sector which favours women's participation. It will also create an alternative path for electricity trading in the region. The project has experienced good progress, but is still in the resource mobilisation phase for the next steps of implementation.

PIDA WATER

3.3. Transboundary Water Projects

3.3.1. Overview of the PIDA Transboundary Water Sector

PIDA's Water vision is to promote and enhance integrated water resource management through the development of transboundary water infrastructure to service the growing water demand and strengthen institutions for efficient cooperation on shared water resources. There are fifteen prioritized projects, all at varying stages across the project preparation cycle, with the majority being in the early preparation stage, that is, the project definition, pre-feasibility, and feasibility stages.



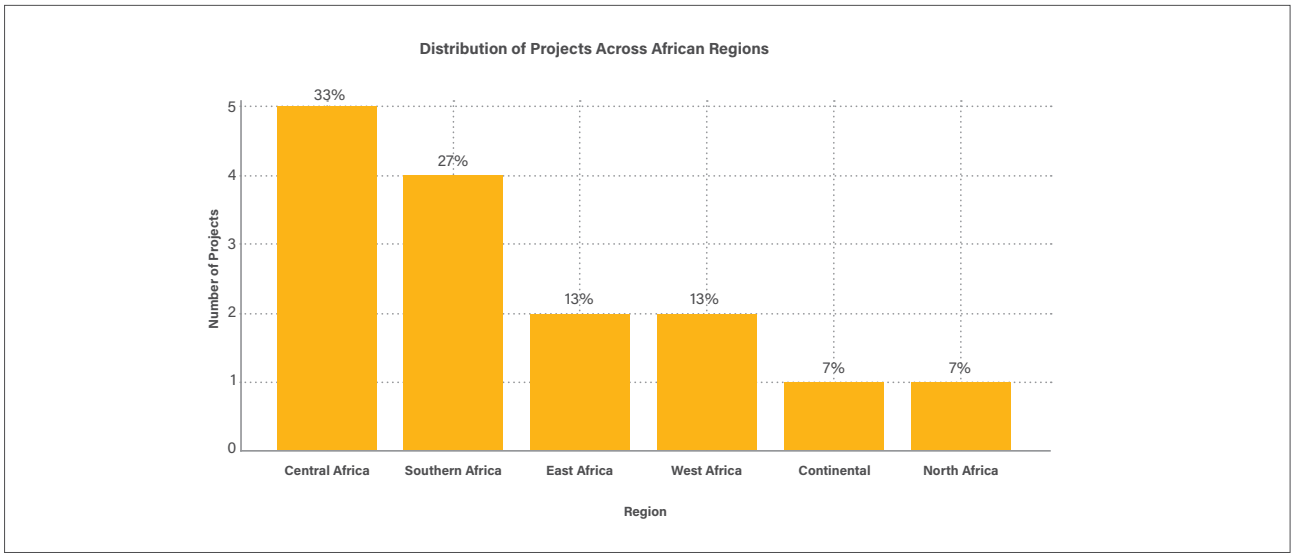
The current portfolio encompasses 15 transformative water projects strategically positioned across Africa. These investments address critical water challenges while unlocking economic potential. The 2023-2024 assessment reveals compelling progress: 6 projects (40%) have accelerated to more advanced development stages, 8 projects (53.33%) have maintained steady momentum, and only 1 project (6.67%) has experienced setbacks. This translates to a net advancement rate of 33.33% and a 13.3% implementation stage growth demonstrating a clear indicator of the portfolio's positive trajectory. The Continental Africa Water Investment Support Programme (AIP) stands out with a remarkable 100% advancement, while East Africa, Southern Africa, and West Africa regions all demonstrate robust progress with 50% net advancement rates.

The portfolio strikes a strategic balance between multipurpose dams (40%) and diverse complementary infrastructure including water transfer schemes (13%) and integrated investment programs (7%) which reflects Africa's commitment to maximizing returns on water investments through multifunctional approaches, transboundary water cooperation, agreement preparation, and structuring public-private partnerships. PIDA PAP 2 transboundary water projects have pushed the boundaries further by championing cross-border water projects that simultaneously enhance water security and forge stronger regional bonds.

15	53%	40%	7%	+33%
TOTAL PROJECTS	MAINTAINED STATUS	ADVANCED	REGRESSED	NET MOVEMENT

Project Distribution

The geographic footprint of PIDA water transboundary projects reveals strategic prioritisation across the continent:



This distribution highlights the concentrated focus on Central and Southern Africa which together host 60% of all water projects. This strategic emphasis addresses critical basin management challenges in regions with complex transboundary water dynamics.

Project Type Distribution

The portfolio's technical composition reflects a sophisticated understanding of Africa's diverse water needs:

Technology Type	Number of Projects	Percentage
Multipurpose Dam	6	40%
Water Transfer	3	20%
Other Water Infrastructure	1	7%
Investment Programme	1	7%
Inland Waterways	1	7%
Lake Development	1	7%
Groundwater Extraction	1	7%
Hydrometric Stations	1	7%
Total	**15**	**100%**

The strategic emphasis on multipurpose dams (40%) represents a sophisticated approach to infrastructure investment by creating assets that simultaneously address water supply, irrigation, hydropower generation, and flood management. This integrated strategy delivers maximum return on investment while tackling multiple development challenges through single infrastructure solutions.

Development Stage Distribution

Analysis of the portfolio's maturity profile reveals a nuanced picture of development progression:

Technology Type	Number of Projects	Percentage
S0 - Enabling Environment	1	7%
S1 - Project Definition	3	20%
S2A - Pre-Feasibility	4	27%
S2B - Feasibility	4	27%
S3B - Transaction Support	2	13%
S4 - Implementation	1	7%

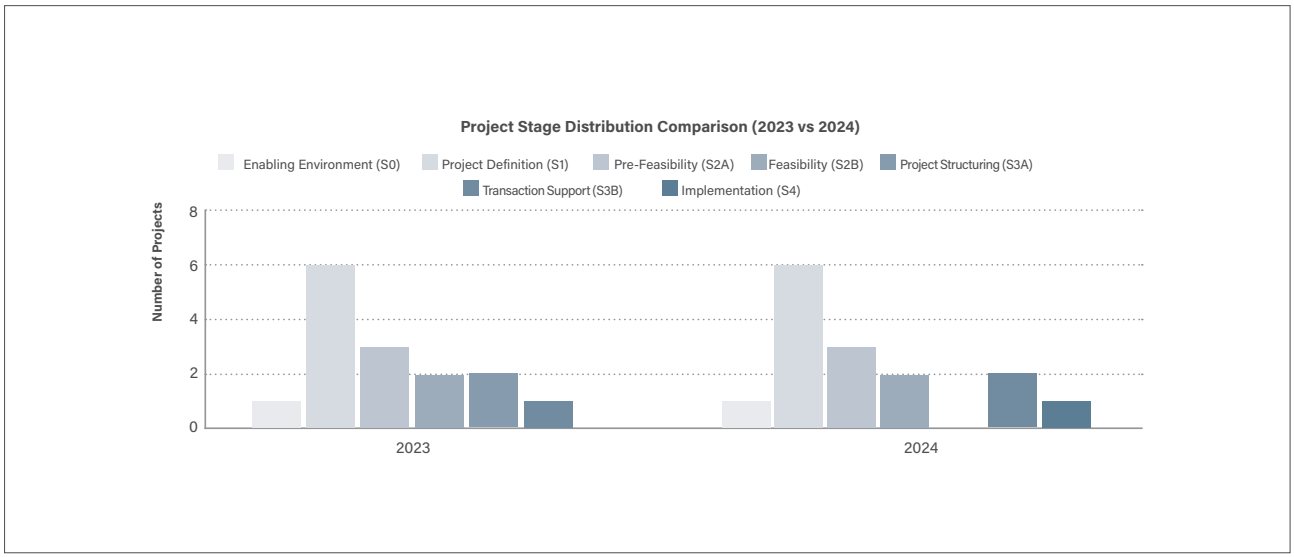
With 80% of initiatives still in pre-implementation phases (S0-S2B), the portfolio demonstrates a strong pipeline of developing projects. This concentration in early and middle development stages signals both the ambitious scale of Africa's water infrastructure agenda and the significant preparatory groundwork required to transform these concepts into physical assets.

Overall Portfolio Performance

Year-over-year assessment reveals compelling performance dynamics:

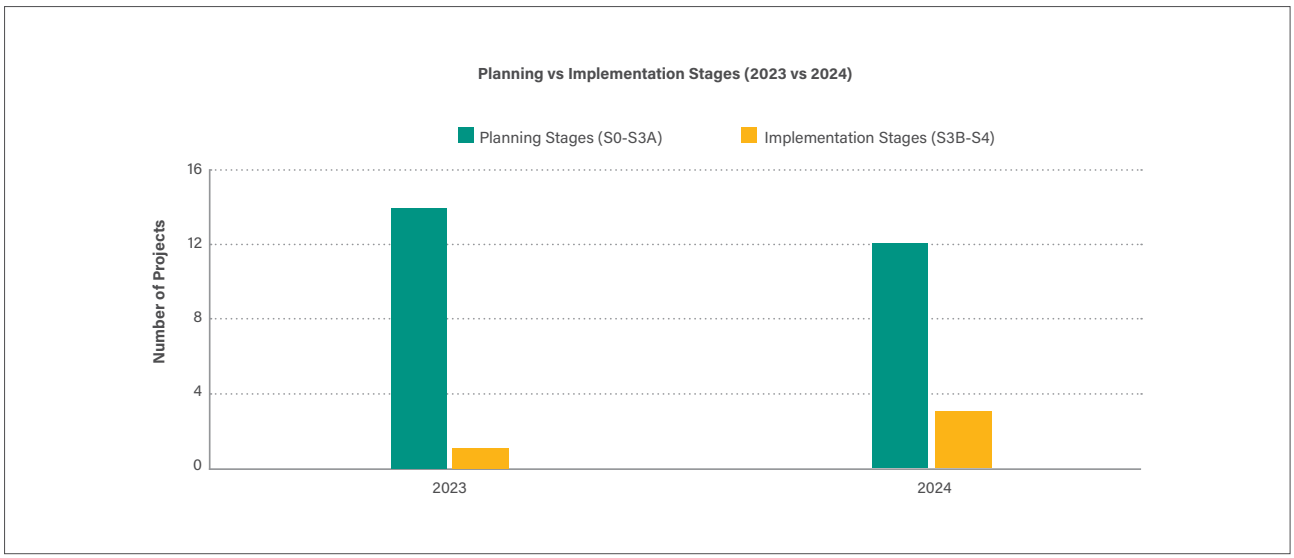
Status Change	Number of Projects	Percentage
Advanced	6	40.00%
Maintained	8	53.33%
Regressed	1	6.67%
Net Movement Rate		**33.33%**
Implementation Growth Rate[16]		**13.3%**

This positive trend outpaces regression by a factor of six demonstrating the portfolio's robust developmental momentum.



Between 2023 and 2024, the portfolio's maturity profile has evolved with implementation-stage projects increasing from 1 (7%) to 3 (20%), while planning-stage initiatives decreased proportionally from 14 (93%) to 12 (80%). This 13% shift toward implementation represents tangible progress in transforming concepts into physical infrastructure delivering actual benefits. This is best represented in the following chart:

16 Implementation Growth (%) = Implementation % in 2024 - Implementation % in 2023 (in S3B-S4 stages)

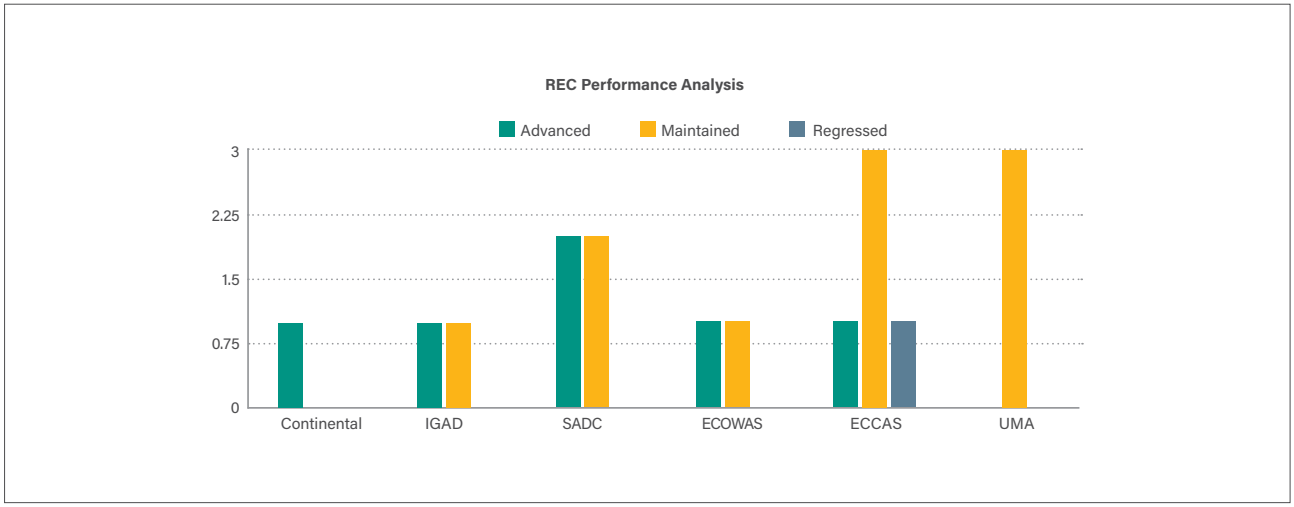


Regional Economic Community (REC)

The collaborative backbone of Africa's water vision is evident through robust REC engagement as demonstrated in the following performance metrics table across RECs which reveal instructive patterns of progress:

REC	Advanced	Maintained	Regressed	Net Movement
Continental	1	0	0	+100%
IGAD	1	1	0	+50%
SADC	2	2	0	+50%
ECOWAS	1	1	0	+50%
ECCAS	1	3	1	0%
UMA	0	1	0	0%

The following chart demonstrates the REC performance across different regional economic communities. SADC leads in both advanced and maintained projects. Continental and IGAD show positive advancement with no regression. ECCAS displays mixed results with advancement, maintenance, and regression. ECOWAS maintains steady performance. UMA uniquely shows only maintained projects with no advancement or regression.



Regional Performance Analysis

The collaborative backbone of Africa's water vision is evident through robust REC engagement as demonstrated in the following performance metrics table across RECs which reveal instructive patterns of progress:

Region	Advanced	Maintained	Regressed	Net Movement
Continental	1	0	0	+100
East Africa	1	1	0	+50
Southern Africa	2	2	0	+50
West Africa	1	1	0	+50
Central Africa	1	3	1	0
North Africa	0	1	0	0

3.3.2. Detailed Project Progress

Continental Region

Project Name	Countries	Stage	Status	Key Issues
Continental Africa Water Investment Support Programme (AIP) on Transboundary Water Investment Projects	Continental	S4	Advanced	Exceptional leap from Project Definition (S1) to Implementation (S4); exemplary continental coordination

The Continental portfolio features a single transformative initiative that has demonstrated remarkable acceleration, advancing directly from conceptual definition to on-the-ground implementation within a single year. This achievement showcases how high-level political support combined with effective coordination mechanisms can dramatically compress development timelines.

East Africa Region

Project Name	Countries	Stage	Status	Key Issues
Angololo Multipurpose Water Resources Development Project	Kenya; Uganda	S3B	Advanced	Successfully advanced to transaction and financial close stage; exemplary bilateral cooperation framework
Dawa River Multipurpose Dam	Kenya; Ethiopia; Somalia	S1	Maintained	Remains in definition phase; navigating complex trilateral coordination dynamics

East Africa presents a study in contrasts, with one project demonstrating successful advancement while another navigates more complex stakeholder dynamics. The Angololo project showcases effective bilateral cooperation, while the Dawa River initiative faces the more intricate challenge of coordinating three nations with complex historical relations.

Central Africa Region

Project Name	Countries	Stage	Status	Key Issues
Construction of the Palambo Dam	Central African Republic	S2A	Maintained	Stable at Pre-Feasibility stage; progress influenced by broader regional stability considerations
Support Programme for the Facilitation of Transport by Inland Waterways	Congo; Gabon	S0	Maintained	Remains at foundational enabling environment stage; addressing complex river basin governance frameworks
Feasibility and In-depth Studies on the Development of Lake Chad	ECCAS Region	S1	Maintained	Continuing in definition phase; requires strengthened regional coordination mechanisms
Operationalisation of the São Tomé & Príncipe Hydrometric Stations	São Tomé & Príncipe	S2A	Regressed	Stepped back from Project Structuring (S3A) to Pre-Feasibility (S2A); confronting implementation barriers
Mobilisation and Transfer of Water from Bria Dam to Lake Chad	ECCAS Region	S2A	Advanced	Successfully progressed from Definition (S1) to Pre-Feasibility (S2A), outpacing related Lake Chad initiative

Central Africa presents a mixed performance landscape, with advancement, regression and maintenance all represented. The region grapples with particularly complex transboundary water governance challenges and broader stability considerations that influence project progression.

Southern Africa Region

Project Name	Countries	Stage	Status	Key Issues
Lesotho–Botswana Water Transfer Project	Lesotho; Botswana; South Africa	S2B	Maintained	Steady at Feasibility stage; managing tri-national coordination complexities
Lesotho Highlands Water Project Phase II	Lesotho; South Africa	S2B	Advanced	Successfully progressed to Feasibility (S2B), leveraging institutional knowledge from successful Phase I
Noordoewer/Vioolsdrift Dam	Namibia; South Africa	S2B	Maintained	Consistent at Feasibility stage; benefiting from structured bilateral cooperation
Water Supply Project in Antanambao Manampotsy	Madagascar	S2A	Advanced	Progressed from Definition (S1) to Pre-Feasibility (S2A), demonstrating effective national implementation capacity

Southern Africa demonstrates robust performance with two advancing projects and none regressing. The region benefits from mature institutional frameworks and established mechanisms for transboundary water cooperation that provide a solid foundation for project implementation.

West Africa Region

Project Name	Countries	Stage	Status	Key Issues
Noumbiel Multipurpose Dam	Burkina Faso; Côte d'Ivoire; Ghana	S2B	Advanced	Successfully advanced to Feasibility (S2B); showcasing effective tri-lateral coordination
Fomi Multipurpose Dam Development Project	Guinea	S3B	Maintained	Stable at Transaction Support and Financial Close stage; addressing financing mobilisation challenges

West Africa demonstrates positive momentum with one advancing project and none regressing. The region's established transboundary water cooperation mechanisms provide a conducive environment for project implementation.

North Africa Region

Project Name	Countries	Stage	Status	Key Issues
Using Solar and Wind Energy to Extract Groundwater in the Pastoral Wells in the Western Region of the Jafara Plain	Libya; Tunisia	S1	Maintained	Consistent at Definition stage; pioneering integration of renewable energy with water resource management

North Africa's single project maintains steady development status while demonstrating innovative thinking through the integration of renewable energy technologies with groundwater extraction.

► Case Study: Continental Africa Water Investment Support Programme (AIP)

The African Union Commission, alongside the International High-Level Panel on Water Investments for Africa, launched the AU-AIP Africa Water Investment Platform and Blended Facility during the 9th African Water Week. The online platform connects AU Member States seeking finance with investors, featuring an initial pipeline of climate-resilient water projects valued at USD 37 billion. It builds on the November 2023 Africa Water Investment Action Plan, which aims to mobilize an additional USD 30 billion annually for water security and climate-resilient sanitation. More than 50 projects meeting the AU High-Level Panel's criteria—such as promoting political leadership, innovative finance, and accountability—are now searchable, reviewable, and match-make with technical assistance. The Platform and Blended Facility will be showcased at the 2025 AU Water Investment Summit under South Africa's G20 Presidency. Supported by the African Development Bank, Green Climate Fund, and European Commission, and leveraging the EU Global Gateway's €300 billion investment target (2021–2027), it aims to close Africa's water investment gap through public-private partnerships.

Key Highlights

- Pan-African scope with multi-stakeholder engagement architecture
- Innovative integration of water, health, energy and food security in a holistic nexus approach
- Current Status: Active implementation (S4)
- Development Velocity: Unprecedented acceleration from conceptual definition to implementation within 12 months
- Coordination Framework: Led by African Ministers' Council on Water (AMCOW) with African Union Commission (AUC) oversight

Strategic Objectives

1. Catalyse project preparation and financing mobilisation for transboundary water investments
2. Transform the enabling environment for gender-responsive transboundary water governance
3. Enhance interconnected water, health, energy and food security through integrated investment approaches
4. Build climate resilience through collaborative water resource management frameworks
5. Mobilise USD 30 billion in targeted water investments across Africa by 2030

This flagship initiative serves as both proof-of-concept and blueprint for accelerated transboundary water development. Its extraordinary progression from conceptual definition to active implementation within a single year demonstrates what's possible when political will, institutional alignment, and effective coordination converge. The AIP represents not just a water project, but a new model for how Africa can rapidly advance its infrastructure agenda.

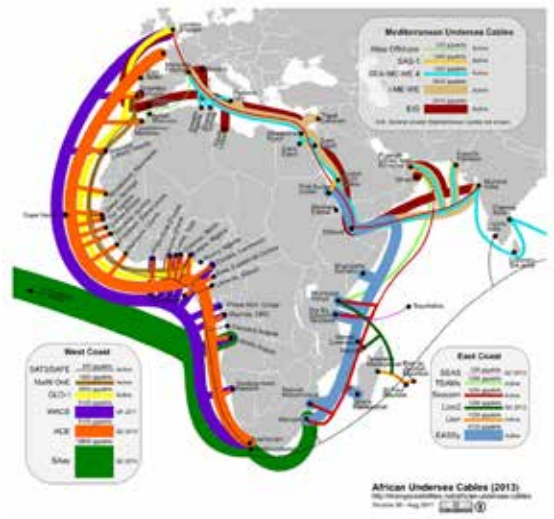
PIDA ICT

$10.555.99
Week
Month
Global Statistics
Global Statistics
70%
40%

3.4. PIDA ICT Projects

3.4.1. Overview of the PIDA ICT Sector 2023–2024

PIDA ICT projects are meant to enhance connectivity and foster economic growth and regional integration in achieving the African Union's Agenda 2063. The PIDA ICT projects aim to bridge the digital divide on the continent. The PIDA PAP II pipelines are mainly distributed across data centres, terrestrial connectivity, fibre optic cable and internet exchange points. The projects are at various stages of development, with the more mature ones at the project structuring phase. The data centre projects are crucial for data sovereignty, reducing latency, and supporting local content creation and data localisation. This sector will enhance the domestication of the African Union Data Policy Framework.



The fibre optic projects are essential for increasing digital infrastructure, which will be crucial for supporting e-governance, e-commerce, and other digital services.

The portfolio consists of 11 strategic ICT projects distributed across the continent which represent critical investments to address Africa's connectivity challenges. During the 2023-2024 reporting period, the portfolio demonstrated positive momentum with 5 projects (45.45%) advancing to more mature development stages, while 5 projects (45.45%) maintained their status, and only 1 project (9.09%) regressed. This resulted in an overall advancement rate of 36.36%.

The most significant movement occurred in West Africa, where both projects showed advancement, resulting in a 100% advancement rate for the region. Central Africa also demonstrated positive momentum with one project advancing and none regressing. The portfolio's technology diversity reflects Africa's focus on fibre optic infrastructure (36% of projects) while acknowledging the critical need for diversified digital infrastructure including data centres (18%) and internet exchange points (9%).

11	45%	45%	9%	+36%
TOTAL PROJECTS	MAINTAINED STATUS	ADVANCED	REGRESSED	NET MOVEMENT

3.4.2. Project Distribution

PIDA ICT projects are distributed across regions with the following distribution:

Region	Number of Projects	Percentage
Central Africa	3	27%
East Africa	3	27%
Multiregional	1	9%
Southern Africa	2	18%
West Africa	2	18%

This regional spread highlights the continental approach to addressing Africa's digital connectivity challenges as demonstrated in the above table, with a particular concentration of projects in Central and East Africa representing more than half of the total portfolio.

3.4.3. Technology Distribution

The portfolio demonstrates technological diversity across several ICT subsectors as presented in the following table:

Technology Type	Number of Projects	Percentage
Fiber Optic Infrastructure	4	36%
Broadband Network	2	18%
Data Centre	2	18%
Submarine Cable	1	9%
Internet Exchange Point	1	9%
Other ICT Infrastructure	1	9%

The predominance of fibre optic infrastructure projects (36%) reflects Africa's focus on establishing the backbone of digital connectivity, while the significant proportion of data centre projects (18%) emphasises the growing importance of local content hosting and cloud services.

3.4.4. Development Stage Distribution

The current development stages reflect a portfolio at various maturity levels as shown in the following table:

Development Stage	Number of Projects	Percentage
S1 - Project Definition	3	27%
S2A - Pre-Feasibility	2	18%
S2B - Feasibility	3	27%
S3A - Project Structuring	1	9%
S3B - Transaction Support	1	9%
S4B - Construction	1	9%

With 72% of projects at the pre-feasibility, feasibility, and project definition stages, the portfolio shows a concentration in the early to middle phases of project development which indicates significant preparatory work that needs to be undertaken to move the projects forward.

3.4.5. Regional Economic Community (REC) Involvement

The projects benefit from engagement with multiple RECs, these include:

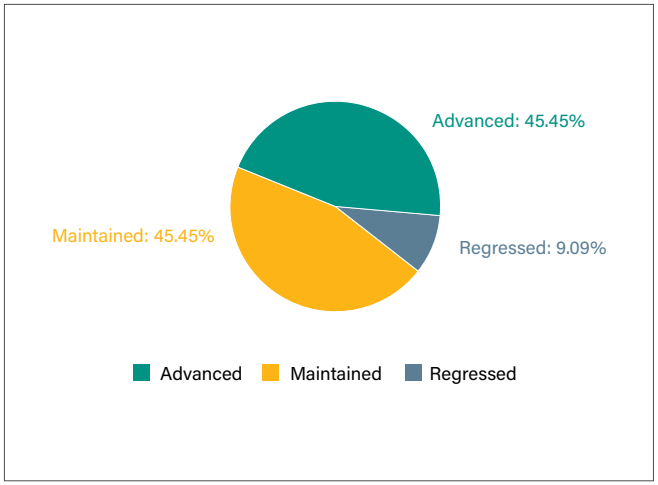
Regional Economic Community	Number of Projects
SADC	3
ECOWAS	3
EAC	2
ECCAS	2
COMESA	1
IGAD	1
CEN-SAD	1

Several projects involve multiple RECs which highlights the cross-border and collaborative nature of ICT development in Africa. SADC and ECOWAS have the highest involvement with 3 projects each, followed by EAC and ECCAS with 2 projects each.

3.4.6. Overall Portfolio Performance

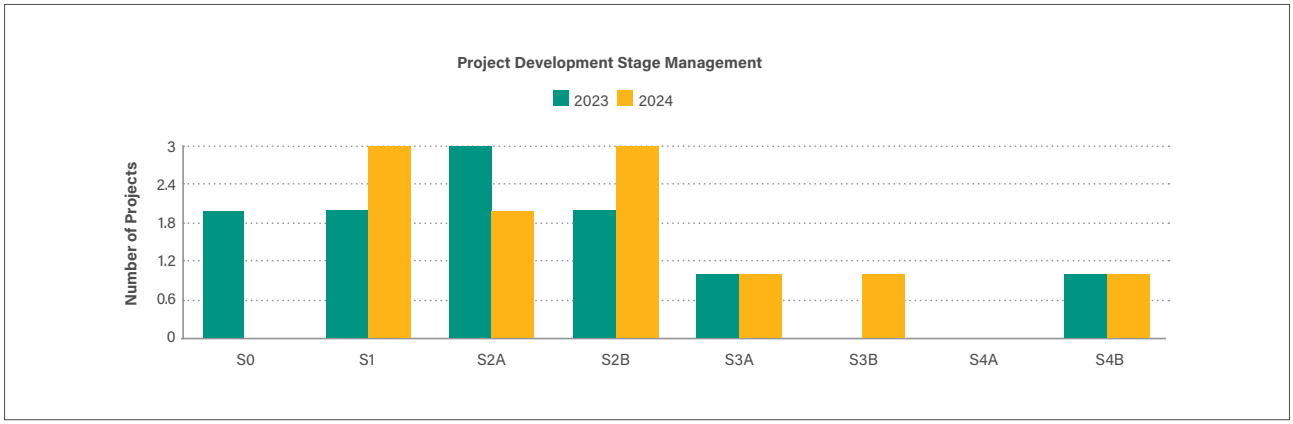
The year-over-year assessment reveals important trends as demonstrated in the following table:

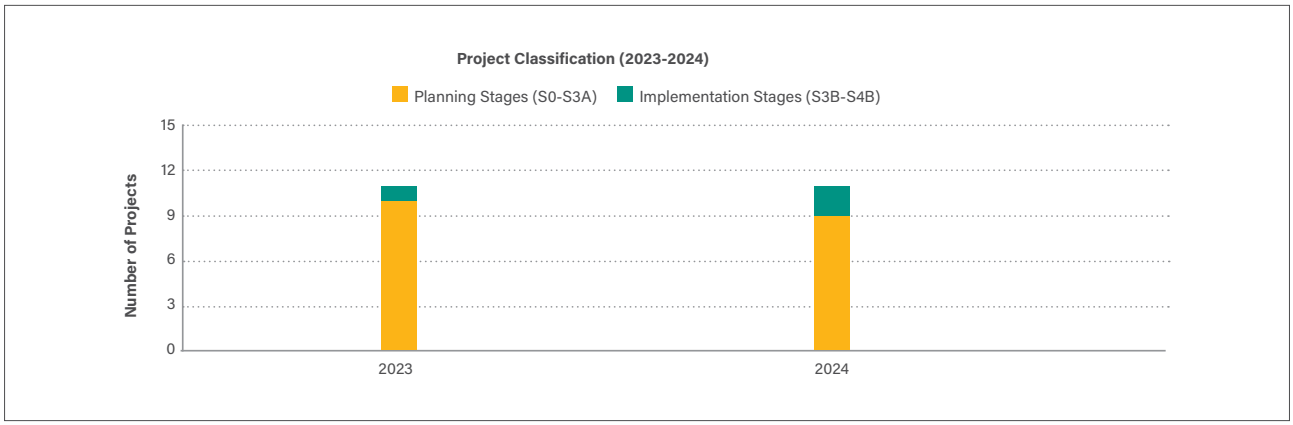
Status Change	Number of Projects	Percentage
Advanced	5	45.45%
Maintained	5	45.45%
Regressed	1	9.09%
Net Movement Rate		**36.36%**



This chart reflects an overall positive movement in the portfolio with advancement significantly outweighing regression during the assessment period.

The performance of the portfolio between 2023–2024 shows that the number of projects in the implementation stages increased from 1 (9%) to 2 (18%), while the number of projects in planning stages decreased from 10 (91%) to 9 (82%), signalling a 9% shift towards implementation. This positive trend indicates progress in project development across the portfolio.

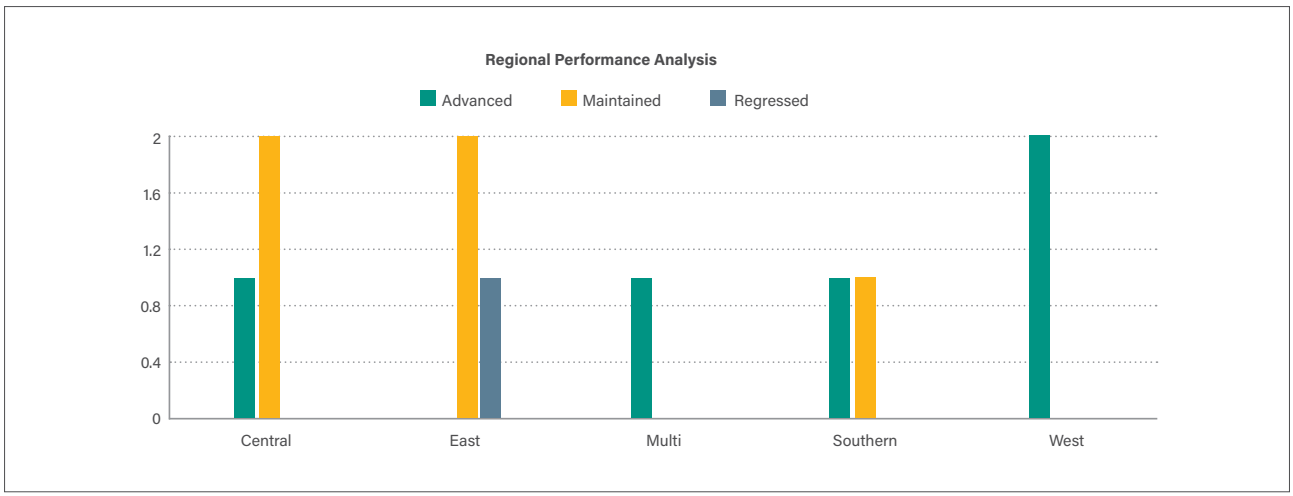


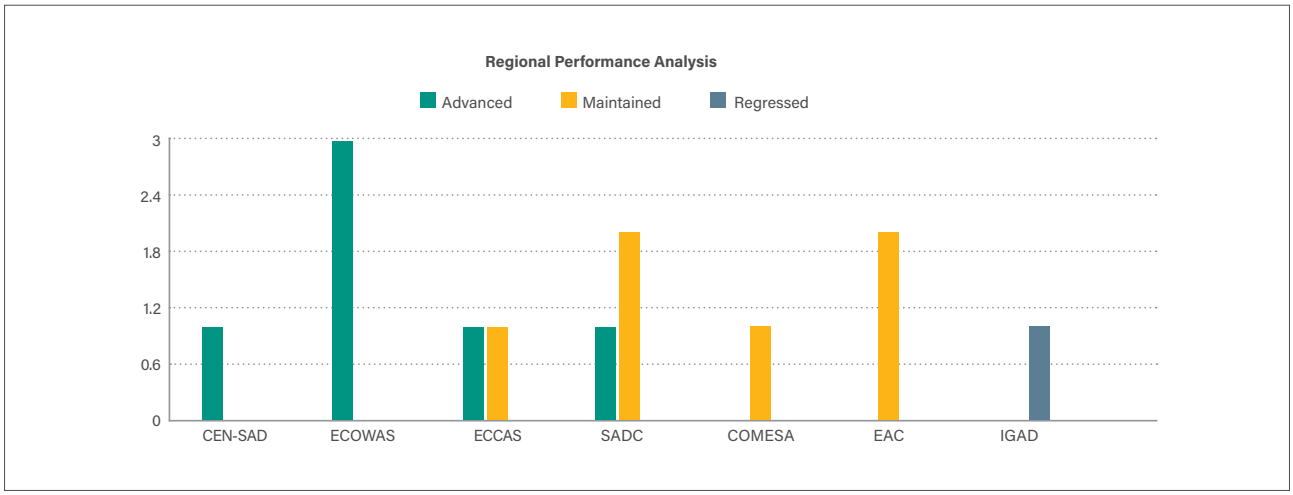


3.4.7. Regional and REC Perfromance Analysis

Regional performance varied significantly across the continent as demonstrated in the following table:

Region	Advanced	Maintained	Regressed	Net Movement
Central Africa	1	2	0	+33%
East Africa	0	2	1	-33%
Multiregional	1	0	0	+100%
Southern Africa	1	1	0	+50%
West Africa	2	0	0	+100%





Detailed Project Progress

West Africa Region

Project Name	Technology	Stage	Status	Key Issues
Construction of Amilcar Cabral submarine cable system	Submarine Cable	S3B	Advanced	Strong implementation progress; regional cooperation effective
Implementation of a Regional Internet Exchange Point	Internet Exchange Point	S2B	Advanced	Completing feasibility studies soon; regional coordination proceeding well

West Africa shows the strongest performance in the portfolio with both projects advancing. The Amilcar Cabral submarine cable project demonstrates the region's commitment to coastal connectivity, while the Regional Internet Exchange Point will enhance local traffic exchange and reduce international bandwidth costs.

Central Africa Region

Project Name	Technology	Stage	Status	Key Issues
Extension of National ICT Broadband Backbone to DRC	Broadband Network	S2A	Maintained	Tanzania side under construction; cross-border coordination challenges
Interconnexion des réseaux Large Bande des États membres	Other ICT Infrastructure	S1	Maintained	Project still at definition stage; governance challenges
Développement des Infrastructures des Data Center	Data Centre	S1	Advanced	Project advancing from enabling environment to definition stage; coordination across multiple countries

Central Africa's ICT portfolio demonstrates moderate progress with one project advancing and none regressing. The region's focus on both connectivity and content hosting infrastructure demonstrates a comprehensive approach to digital development.

East Africa Region

Project Name	Technology	Stage	Status	Key Issues
Sudan section of the Fiber optic connectivity	Fiber Optic Infrastructure	S2A	Maintained	Project still at pre-feasibility stage; regional stability concerns
Transborder Submarine Fiber PoPs and Regional Smart Hub	Fiber Optic Infrastructure	S3A	Maintained	Project suitable for PPP investment; strong coordination through EAC
Juba–Nairobi Fiber Optic Link	Fiber Optic Infrastructure	S2B	Regressed	Limited progress: Kenyan segment completed and operational, but Pre-feasibility studies completed on South Sudan side

East Africa shows mixed performance with one project regressing and no projects advancing. The region faces implementation challenges, particularly with cross-border projects involving fragile states. However, the Transborder Submarine Fiber PoPs project remains at an advanced stage and offers potential for private sector involvement.

Southern Africa Region

Project Name	Technology	Stage	Status	Key Issues
Extension of National ICT Broadband Backbone to Mozambique	Broadband Network	S2B	Maintained	Tanzania has approved tender document; steady progress
SATA Regional Carrier-Neutral Data Center	Data Centre	S1	Advanced	Project still in early definition phase but advancing from enabling environment

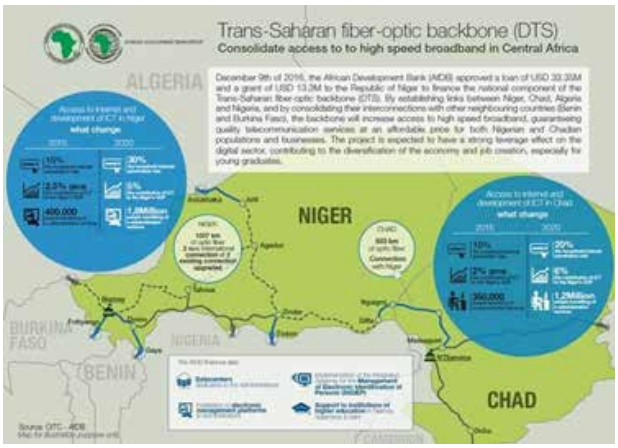
Southern Africa's portfolio demonstrates positive momentum with one project advancing and none regressing. The region benefits from relatively strong institutional frameworks and effective coordination through SADC.

Multiregional

Project Name	Technology	Stage	Status	Key Issues
Trans-Saharan Optic Fibre Broadband Project	Fiber Optic Infrastructure	S4B	Advanced	Major advancement: most countries constructing or completed

This continent-spanning fiber optic project has shown remarkable progress, advancing from pre-feasibility (S2A) to construction (S4B) during the assessment period. As a flagship project connecting North Africa with Sub-Saharan nations, it demonstrates the potential for successful implementation of complex cross-border infrastructure.

► Case Study: Trans-Saharan Optic Fibre Broadband Project



The Trans-Saharan Optic Fibre Broadband Project is a landmark infrastructure initiative spanning multiple regions of Africa. The project involves the deployment of terrestrial fiber optic infrastructure across the Saharan region, connecting North Africa with Sub-Saharan nations through Algeria, Niger, Nigeria, Chad, Mauritania, and Mali. This digital corridor is intended to provide critical connectivity across a historically underserved region.

Key Highlights

- Fiber Optic Route Length: Over 4,500 km
- Connecting 6 nations across the Sahara
- Current Status: Construction stage (S4B)
- Implementation Progress: Most countries are in construction phase or have completed their segments
- Estimated Cost: USD 150 million
- RECs Involved: CEN-SAD, ECOWAS

Project Objectives

- Provide an alternative backbone route for digital connectivity in the region
- Connect landlocked countries to coastal submarine cable landing stations
- Boost digital services and economic integration among Member States
- Create opportunities for local content development and hosting
- Enhance internet penetration in rural and underserved areas

The project will boost digital inclusion in the Saharan region by providing high-speed connectivity to previously isolated communities. It will establish a critical digital highway between North Africa and Sub-Saharan Africa, facilitating digital trade and services. The project has experienced exceptional progress, advancing from pre-feasibility to construction within the assessment period, demonstrating effective regional coordination and commitment.

Challenges and Strategic Recommendations

Challenges

The PIDA portfolio continues to encounter challenges that hinder project advancement. Chief among these is the need for sustainable financing for projects preparation which remains a major bottleneck. Without sufficient financial resources to conduct in-depth studies and reach agreements with investors, many projects struggle to gain the necessary momentum for successful execution. Additionally, the cross-border nature of many PIDA projects further complicates efforts to coordinate stakeholders and secure adequate funding as different countries may have varying priorities, regulations, and levels of commitment.

ICT Sector
Lack of financing for regional project preparation (Data Centers Projects)
Cross-border coordination complexity in varying priorities, lack of or low communication from project sponsors,
Security concerns (NICTBB, southwest part)
Solution Pathway
High level advocacy to maintain project priority and political will
Enhanced regional collaboration
Innovative funding mechanisms need to be explored
Capacity Building to maintain communication with projects' stakeholders, project sponsors
Strategic partnership for technical and transactional advisory

Transport Sector	Energy Sector	Cross-Sector Challenges
Inadequate funding for feasibility studies and financial closure	Insufficient resources for project preparation and long-term sustainability	Limited capacity of key stakeholders placing burden on AUDA-NEPAD
Cross-border coordination complexity with varying priorities and regulations	Changes in funding eligibility during project development	Need for specialised technical expertise (legal, financial, etc.)
Security concerns in West and North Africa determining investment	Low efficiency in project preparation process	Inconsistent engagement and slow response from project owners
Solution Pathway: Enhanced regional collaboration, stronger political will, and innovative funding mechanisms	Prohibitive climate finance requirements and capacity limitations	**Solution Pathway:** Strategic partnerships for technical advisory services and comprehensive capacity-building programs
	Solution Pathway: Portfolio approach to mobilise upfront resources, standardised preparation process, and capacity building for climate finance access	

Security concerns are also posing a significant threat to the progress of certain projects, particularly in regions of West and North Africa. Political instability, insurgencies, and other safety issues create an environment of uncertainty thereby discouraging both investors and contractors from participating in critical infrastructure projects. These security risks delay the implementation process and inflate the costs of investment.

To overcome these challenges, strategic partnerships for technical advisory services are crucial. These partnerships can mobilize additional resources, thus increasing the capacity to support project owners more effectively. Additionally, investing in comprehensive capacity-building programs—focusing on project preparation, transboundary water cooperation, Public-Private Partnerships (PPPs), project structuring, and grant writing—will strengthen the ability of RECs and Member States to manage and execute projects. By doing so, the number of project proposals submitted for financing could increase annually, boosting overall progress and ensuring timelier implementation of critical infrastructure projects across Africa.

Service Delivery Mechanism (SDM)

The **Service Delivery Mechanism (SDM)** plays a pivotal role in accelerating project preparation to bankable stages. As PIDA's dedicated early-stage project instrument, the SDM addresses the critical capacity gaps that often stall infrastructure projects they can attract financing.

Through its Expert Service Pool and PIDA Quality Label certification, the SDM ensures projects receive tailored support and meet international standards for bankability, sustainability reducing the time required to reach financial close.

- Accelerated project preparation timelines
- Enhanced project quality and bankability
- Standardised preparation processes
- Specialised technical expertise on demand

Comprehensive Capacity Building Programs

Investing comprehensive capacity-building programs is essential for long-term sustainable implementation of PIDA projects. These programs focus on Critical skills development in:

Key Capacity Focus Areas

- Project preparation - Enhancing technical skills for feasibility studies and project structuring
- Transboundary water cooperation - Strengthening cross-border coordination mechanisms
- Public-Private Partnerships (PPPs) - Developing expertise in structuring viable PPP arrangements
- Project structuring - Building capabilities to create bankable project structures
- Grant willing - Improving skills to access international financing opportunities

By strengthening these capabilities within Regional Economic Communities (RECs) and Member States, PIDA can significantly increase the number of well-prepared project proposals submitted for financing annually, boosting overall implementation progress.

Expected Outcomes

The combined approach of strategic partnerships, SDM implementation, and capacity building is expected to yield significant improvements in PIDA project delivery in the following means:

1. Increased transition rate from project preparation to implementation phases.
2. Enhanced quality and sustainability of infrastructure projects.
3. Improved access to diverse funding sources including that of climate finance.
4. Strengthened regional integration through coordinated infrastructure development.
5. Faster implementation of critical infrastructure projects across Africa.

These improvements will contribute to Africa's broader development goals, including economic integration, job creation, and sustainable growth aligned with Agenda 2063.

4. PIDA Financing – Highlights in 2023–2024

4.1. Overview of Resource Mobilisation for PIDA projects

During the reporting period AUDA-NEPAD continued to support the Member States and RECs to mobilise funding for both early-stage project preparation and construction. In 2023, the resource mobilisation activities were kick-started with the Second Dakar Financing Summit (DFS 2) which also served as the main resource mobilisation activity of the year for PIDA. As a result of the summit USD 175 million for five of the 22 projects that were promoted during the summit was mobilised. The event did not only create resource mobilisation opportunities but also guided the implementation during and beyond the reporting period.

In summary, the total PIDA PAP 2 is estimated to be $ 151.54 billion across the 4 sectors as presented in the following table:

Sector	Number of Projects	Total Investment	% of PIDA Portfolio
Transport	25	$104.56 billion	69.0%
Energy	18	$33.12 billion	21.9%
Water	15	$8.95 billion	5.9%
ICT	11	$4.91 billion	3.2%
TOTAL	69	$151.54 billion	100%

Resource mobilisation during the year was particularly done according to the guidance in the declaration of the Heads of State and Government to strengthen risk mitigation mechanisms, attract private sector participation, broadening the scope of investment in PIDA to sovereign wealth funds and pension funds, climate finance, non-traditionally utilised financial instruments such as green and diaspora bonds and other innovative sources of finance, increasing financial institution participation in PIDA financing and strengthen mutual cooperation to promote and support infrastructures for intra-African trade.

The resource mobilisation activities leveraged on the existing partnerships and ongoing initiatives supporting the resource mobilisation functions. The efforts and outcomes of PIDA financial resource mobilisation activities are discussed in this Chapter according to the allocated budget and expenditures on PIDA implementation, activities that followed the Dakar financing summit, project specific resource mobilisation initiatives and sector specific outcomes.

4.2. Financing initiatives following the Second Dakar Financing Summit

Following the guidance of the Heads of State and Government outlined in the Dakar declaration on synergies of action for infrastructure financing in Africa, AUDA-NEPAD entered into an agreement with the African Import and Export Bank (Afreximbank) to establish the Africa Project Preparation Facility (AfPPF). The facility was launched at the Intra African Trade Fair in Cairo, Egypt on 14th November 2023. The facility will provide both funding and technical and financial advisory services for early-stage project preparation. The draft business plan for the facility was prepared before the launch that took place on 14th November 2024.

4.3. Promotion and market sounding of PIDA projects

With the aim of mobilising funding or technical assistance support towards PIDA projects, several project promotion activities were undertaken during the reporting period. The specific details of the events and outcomes of the resource mobilisation activities are tabulated below.

Event name and date	Description of resource mobilisation activity	Commitment confirmed	Nature of commitment	Funding commitment
Intra African Trade Fair	Presentation of selected projects to potential financiers	No	N/A	-
28th Conference of Parties (COP 28)	Promotion of the Continental Power Systems Masterplan and Africa Single Electricity Market, Identification and seeking out opportunities	Yes	Programme commitment to the establishment of Alliance for Green infrastructure in Africa (AGIA) - a window of the AfDB that will be available to PIDA	USD 100 million
African Investment Forum	Deal room presentation of the Continental Power Systems Master Plan			

4.4. Highlights of PIDA PAP 2 Sector and project specific financing

In view of some of the funder priorities that are sector and thematic focused a sectoral and project specific resource mobilisation approach was undertaken during the reporting period. The outcomes of the resource mobilisation activities that were conducted in 2023–2024 are presented in the following sections of this chapter.

4.4.1. Transport Sector Financing

Activities in the transport sector were restricted to the Central Corridor as part of the Green Infrastructure Corridors for Intra African Trade Programme. Similarly, resource mobilisation activities were limited to the Central Corridor relating to *Akagera river transport project and Construction of Central Corridor Standard Gauge Rail (SGR) of the Dar es Salaam–Isaka–Mwanza and Isaka–Kigali/Keza–Gitega–Musongati/Tabora–Kigoma/Uvinza–Musongati–*Gitega. The African Development Bank after being appointed as the mandated lead arranger for Tanzania committed USD 597.79 million loans and guarantees for Tanzania and USD 98.62 million grant for Burundi.

Overall, total PIDA Transport Sector Projects Value is approximately **USD 104.56 billion**, the funding requirements for each project is presented in the following table, with some cost estimates subject to change following completion of feasibility studies. We first start with the summary per REC:

Notes on Total Calculation:

- *For cost ranges (e.g., USD 8.5-11.7 million for VICMED), the midpoint value was used for calculations.*
- *All values are based on estimates provided in the PIDA Priority Action Plan (2021-2030) Projects Prospectus and may be subject to change as projects progress.*
- *The Continental Seamless Airspace project was allocated equally across all regions/RECs as it benefits the entire continent.*

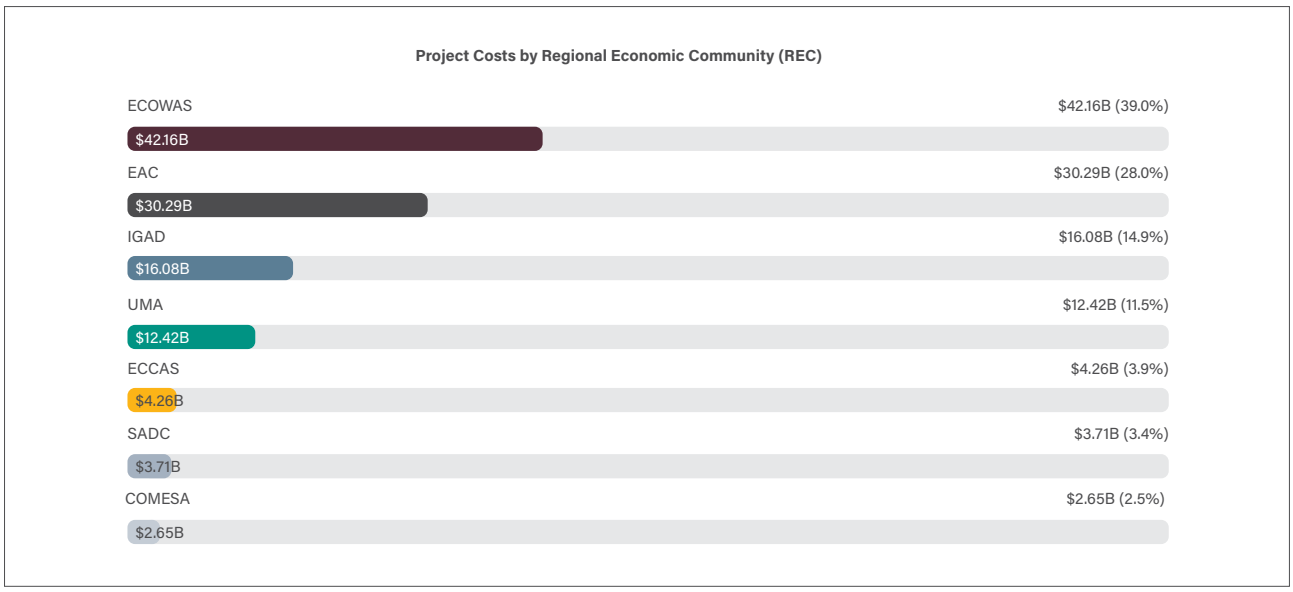


Figure 9: Project Costs by REC

No.	Project Name	Countries	REC	Region	Total Cost (USD)	Financing Notes
1	**Beira Port Development**	Mozambique	SADC	Southern Africa	88.9 million	More accurate estimates to be determined after feasibility studies completion
2	**LAPSSET Railway Project**	Kenya, South Sudan, Ethiopia	EAC, IGAD	East Africa	12.0 billion	Funds sought for feasibility studies, detailed engineering design, and PPP models
3	**Abidjan-Lagos Corridor Highway Plans on Promoting Trade along the Corridor and Integrating the Economies in West Africa**	Côte d'Ivoire, Ghana, Togo, Benin, Nigeria	ECOWAS	West Africa	15.6 billion	AfDB announced mobilisation of USD 15.6 billion for the project during the AIF
4	**Praia-Dakar Shipping and Maritime Services Project**	Cape Verde, Senegal	ECOWAS	West Africa	57.2 million	Initial estimates; more precise figures pending feasibility study completion
5	**Establishment of a Navigational Line Between Lake Victoria and the Mediterranean Sea–Feasibility Study Phase 2 (VICMED)**	Egypt, Sudan, Tanzania, Kenya, DRC, South Sudan, Ethiopia, Uganda, Rwanda, Burundi	COMESA, EAC, IGAD	Multi-regional	8.5-11.7 million	For feasibility studies only
6	**Akagera River Transport**	Rwanda, Tanzania, Uganda	EAC	East Africa	298.0 million	-
7	**Bousalemn Highway in Tunisia at the Algerian Border**	Tunisia, Algeria	UMA	North Africa	81.47 million	-

No.	Project Name	Countries	REC	Region	Total Cost (USD)	Financing Notes
8	**Highway Linking the Terminal Part of the Fez-Oujda Highway to the Algerian East-West Highway**	Algeria, Morocco	UMA	North Africa	140.0 million	-
9	**Maritime Link between the Comoros Islands**	Comoros	COMESA	East Africa	56.0 million	-
10	**Construction of a Bridge over the Oubangui River, Development of Missing Links in the Bangui-Kisangani-Kampala and Kisangani-Bujumbura Road Corridors**	Burundi, DRC, CAR, Uganda	ECCAS, EAC	Central Africa	3.492 billion	-
11	**Construction of Central Corridor Standard Gauge Rail (SGR) of the Dar es Salaam–Isaka–Mwanza and Isaka–Kigali/Keza –Gitega–Musongati**	Burundi, Rwanda, Tanzania	EAC	East Africa	3.24 billion	Broken down as: Tabora–Kigoma (USD 1.5B), Uvinza–Musongati (USD 1.5B), Musongati–Gitega (USD 235M)
12	**Construction of Standard Gauge Railway (SGR) from Mtwara/ Mbamba–Liganga to Mchuchuma**	Malawi, Mozambique, Tanzania, Zimbabwe	SADC, EAC	Southern Africa	5.5 billion	Excludes VAT; project period is 2 years construction (2020-2021) and 35 years operations
13	**Construction of Standard Gauge Railway (SGR): Mombasa–Nairobi –Malaba–Kampala– Kigali line with Malaba –Nimule–Juba**	Kenya, Uganda, Rwanda, South Sudan	EAC, IGAD	East Africa	19.2 billion	-
14	**Doubling of the RN06 between Mascara and Bechar and the RN50 between Béchar and the Algeria-Mauritania Border**	Algeria, Mauritania, Senegal	UMA, ECOWAS	North Africa	5.121 billion	-
15	**Continental Seamless Airspace in Africa in the Context of SAATM**	Continental (all regions)	All RECs	Multi-regional	20.0 million	USD 1.2 million estimated for continental aviation infrastructure Master Plan
16	**El Fasher–Kabkabiya– El Geneina–Adri**	Sudan, Chad	ECCAS, IGAD	North Africa	262.4 million	-
17	**Libyan Alternative Freeway**	Libya, Egypt, Algeria, Mauritania, Morocco, Tunisia	UMA, COMESA	North Africa	7.0 billion	-
18	**Modernisation of the RN01 (Trans-Saharan) between Ghardaia and Tamenrasset**	Algeria, Chad, Libya, Mali, Niger, Nigeria, Tunisia	UMA, ECCAS, ECOWAS	North Africa	500.0 million	-

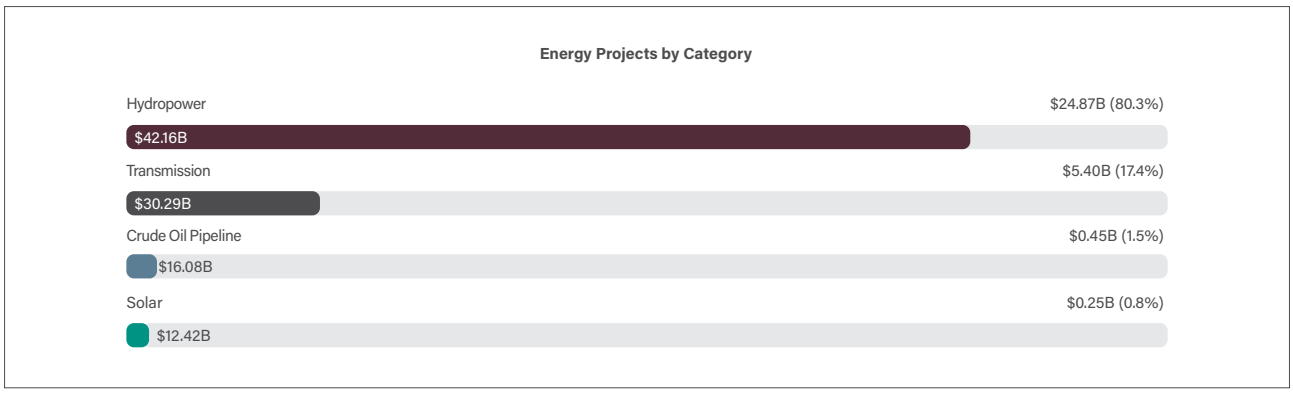
No.	Project Name	Countries	REC	Region	Total Cost (USD)	Financing Notes
19	**Praia–Dakar–Abidjan Multimodal Transport Corridor**	Côte d'Ivoire, Senegal, Burkina Faso	ECOWAS	West Africa	21.1 billion	-
20	**Project for the Construction of the Bridge Over the Ntem River Located on the Kribi-Campo-Bata Transnational Road**	Cameroon, Equatorial Guinea	ECCAS	Central Africa	447.3 million	Costs established based on technical, social and environmental studies (2019)
21	**Abidjan–Ouagadougou –Niamey–Cotonou– Lomé Regional Rail Loop Project**	Benin, Burkina Faso, Côte d'Ivoire, Niger, Togo	ECOWAS	West Africa	5.402 billion	-
22	**Rehabilitation and Creation of Cross-border Centres as Multi-service Logistics Zones, within the Framework of the Trans-Maghreb Corridor Development**	Algeria, Libya, Mauritania, Morocco, Tunisia	UMA	North Africa	0.70 million	For project preparation costs only
23	**Rehabilitation, Modernisation and Improvement of the Services of the Trans-Maghreb Railway Line**	Algeria, Morocco, Tunisia	UMA	North Africa	4.0 billion	-
24	**Rihaid El Birdi–Om Dafug**	Central African Republic, Sudan	ECCAS, IGAD	North/ Central Africa	102.64 million	-
25	**Construction of Petroleum Jetty and Associated Storage Facilities at Albion, Mauritius**	Mauritius	COMESA, SADC	Southern Africa	840.0 million	-

4.4.2. Energy Sector Financing

The distribution of 18 PIDA Energy Sector project costs across different project types and regions in Africa is approximately **USD 33.12 billion**. The total investment values are based on cost estimates provided in the 2023 Projects Prospectus and may be subject to refinement as projects progress through feasibility studies and detailed design.

Notes on Total Projects Costs:

- The total energy portfolio comprises 18 projects with a combined estimated cost of USD 30.98 billion.
- Hydropower projects dominate the portfolio, accounting for approximately 80.3% of total investments, primarily due to the Grand INGA Phase 1 (USD 12 billion) and Mambilla Hydroelectric Power Project (USD 5.8 billion).
- For projects spanning multiple RECs, costs were allocated proportionally among the participating RECs.
- All project costs were carefully verified against the figures provided in the PIDA Priority Action Plan (2021-2030) Projects Prospectus.
- Several projects are still in early stages (feasibility or pre-feasibility), suggesting that cost estimates may be refined as these projects progress.



Regional Analysis of Energy Investments

REC	Investment Amount (USD Billion)	Number of Projects	% of Energy Portfolio
ECCAS	14.84	9	47.9%
SADC	8.82	5	28.5%
ECOWAS	6.66	2	21.5%
IGAD	1.66	3	5.4%
EAC	0.86	3	2.8%
COMESA	1.15	2	3.7%
UMA	0.15	1	0.5%

PIDA Energy Financing Details

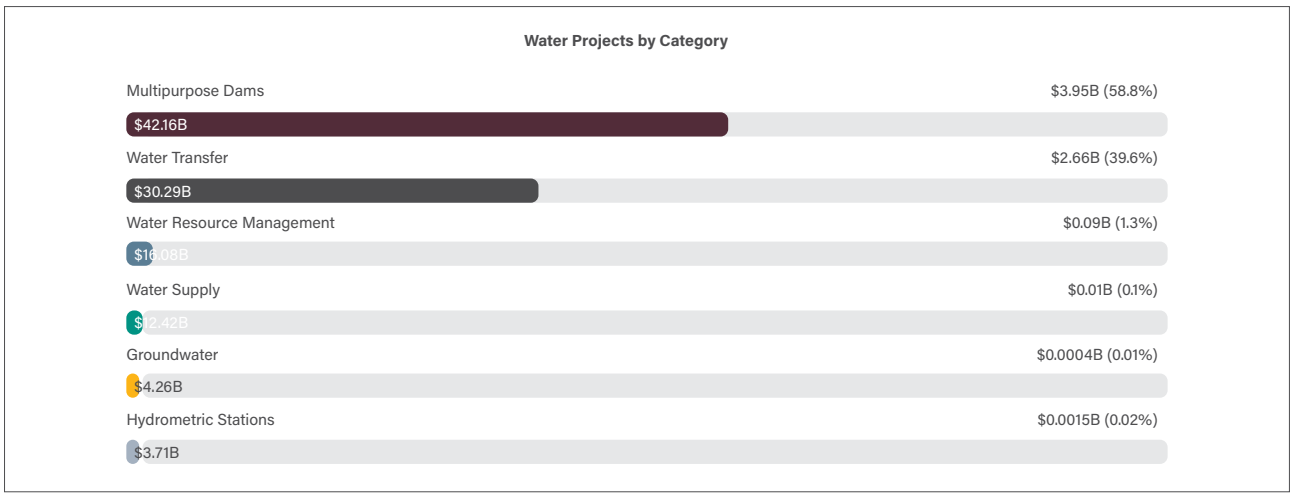
No.	Project Name	Countries	REC	Type	Total Cost (USD)	Financing Notes
1	**Masaka-Mwanza Transmission Line Project**	Uganda, Tanzania	EAC	Transmission	325 million	The ESIA and RAP financing will be required. The amount has not been determined yet
2	**Construction of 287 MW Ruzizi IV Hydropower Project**	DRC, Burundi, Rwanda	EAC, ECCAS	Hydropower	712 million	Main project funding requirements will be determined once the feasibility studies are completed
3	**LAPSSET Crude Oil Pipeline Plans on Transport the Crude Oil Produced in South Sudan and Lokichar (Kenya) Oil Fields to Lamu Port in Kenya**	Kenya, South Sudan	EAC, IGAD	Crude Oil Pipeline	450 million	The sponsor is seeking funding for feasibility studies encompassing the Kenyan and South Sudanese segments
4	**Luapula Hydropower Project**	DRC, Zambia	ECCAS, SADC	Hydropower	540 million	Feasibility: USD 7.5 million; Project Structuring: USD 1 million; Transaction Support and Financial Close: USD 1 million
5	**Zimbabwe Zambia Botswana Namibia (ZIZABONA) Interconnector Project**	Zimbabwe, Zambia, Botswana, Namibia	SADC	Transmission	240 million	No specific financing notes available

No.	Project Name	Countries	REC	Type	Total Cost (USD)	Financing Notes
6	**Eastern Africa Green Power Transmission Network Project 6 – Guba (Ethiopia) – Khartoum (Sudan)**	Ethiopia, Sudan	IGAD	Transmission	670 million	No specific financing notes available
7	**Integration of Electrical Networks between: Inga - Cabinda and Pointe Noire**	Angola, Republic of Congo, DRC	ECCAS, SADC	Transmission	160 million	Costs distributed as follows: Angola €46,954,500; DR Congo: €89,683,410; Republic of Congo: €14,297,400
8	**3,050 MW Mambillla Hydroelectric Power Project**	Nigeria	ECOWAS	Hydropower	5,800 million	The project is estimated to generate up to 50,000 local jobs during the construction phase
9	**Development of the Booue and Tsengue-Leledi Hydroelectric Sites, and Construction of the Associated Transmission Lines**	Cameroon, Republic of Congo, Equatorial Guinea, Gabon	ECCAS	Hydropower	1,784 million	Project preparation costs will be about USD 17.84 million
10	**Development of the Chollet Hydroelectric Site and Associated Transmission Lines**	Cameroon, Central African Republic, Republic of Congo	ECCAS	Hydropower	2,000 million	No specific financing notes available
11	**Baynes Hydropower Project**	Angola, Namibia	SADC	Hydropower	1,300 million	Civil: USD 880 million; electro-mechanical: USD 310 million; environmental cost: USD 7.5 million; Indirect costs: USD 108 million; total project cost exclude interest during construction (reference date 2014)
12	**Louga Hydroelectric Power Plants 1 and 2 (246 MW)**	Côte d'Ivoire	ECOWAS	Hydropower	613 million	No specific financing notes available
13	**Egypt and Libya Regional Electrical Interconnection as the First Stage of Completion of the Regional Electrical Interconnection of the North African Region**	Egypt, Libya	UMA, COMESA	Transmission	300 million	Approximately USD 300 million (Transmission Lines - Converter Station – Right of Way – Extension Bays)

No.	Project Name	Countries	REC	Type	Total Cost (USD)	Financing Notes
14	**Egypt and Sudan Electrical Grid as the First Stage of the Continental Electrical Interconnection Using the Right Way of Cairo – Cape Town Road**	Egypt, Sudan	COMESA, IGAD	Transmission	2,000 million	Overall Operation and Maintenance: USD 5 million. About USD 2.2 billion approximately (Transmission Lines – Transformer Stations)
15	**INGA 3 Transmission Interconnector**	DRC	ECCAS, SADC	Transmission	3,564 million	No specific financing notes available
16	**Grand INGA Phase 1**	DRC	ECCAS, SADC	Hydropower	12,000 million	The estimated cost of the Inga 3 project is USD 12 billion for production and infrastructure and USD 2 to 3 billion to transport infrastructure
17	**Development of the BAC and LOTEMO Hydroelectric Sites on the Lobaye River, and Related Works in CAR**	Central African Republic, Chad, Republic of Congo, DRC	ECCAS	Hydropower	408 million	USD 2 million for studies. CAPEX USD 406.5 million if BAC and LOTEMO sites are developed sequentially. USD 358.4 million if the 2 sites are developed at the same time
18	**WAPP Regional Solar Power Park Project in Mali**	Mali	ECOWAS	Solar	250 million	-

4.4.3. Water Sector Financing

The PIDA water projects with a total investment of **USD 8.95 billion** are actively progressing with diverse sources of financing. At the same time, other projects are seemingly stalling due to the unavailability of financing for the stage of development. Ongoing project visibility, bilateral meetings particularly with project preparation funds, and technical assistance are critical in securing the necessary resources and ensuring traction. That said, highlighted here some PIDA Water projects that have mobilised financing. The Angololo Multipurpose Water Resources Development Project supported by NEPAD-IPPF completed its feasibility studies and efforts to mobilize further resources for project structuring are in place. The Fomi Multipurpose Dam Development Project is advancing with funding from the African Development Fund for its feasibility study. The Lesotho-Botswana Water Transfer Project receives support from the Africa Water Facility, NEPAD-IPPF, and country contributions. The Noumbiel Multipurpose Dam is financed by the African Development Bank, while the construction of the Lesotho Highlands Water Project Phase II is funded by the African Development Bank (AfDB) and the New Development Bank (NDB). Additionally, feasibility and in-depth studies on the Development of Lake Chad are being financed by the African Development Bank, with co-financing from the Lake Chad Basin Commission and a grant from the African Water Facility.



Regional Analysis of Water Investments

REC	Investment Amount (USD Million)	Number of Projects	% of Water Portfolio
SADC	3,055.0	4	45.5%
ECCAS	71.4	6	1.1%
ECOWAS	130.3	4	1.9%
Multiple/Continental	3,007.7	3	44.8%
IGAD	603.5	1	9.0%
EAC	0.85	1	0.01%
UMA	0.4	1	0.01%
COMESA	4.4	1	0.07%

4.4.4. ICT Sector Financing

The ICT sector has an investment opportunity of USD 4.91 billion through which resource mobilisation related support was done specifically for the *Construction of Amilcar Cabral Submarine Cable System, Juba–Nairobi fiber optic link and the Transborder submarine fiber PoPs, regional smart hub facility and data centre*. The actual funding amounts with the final commitments that are yet to be confirmed because the respective discussions are still ongoing are tabulated below.

Project name	Financial institution	Activity to be funded	Instruments	Indicative commitment to be confirmed (million USD)
Construction of Amilcar Cabral Submarine Cable System, Juba-Nairobi fiber optic link	Development Bank of Southern Africa	Project preparation	Reimbursable grant	2
Juba-Nairobi fiber optic link	World Bank	Feasibility study	Grant	5
Transborder submarine fiber PoPs, regional smart hub facility and data centre	Africa Import and Export Bank	Transaction advisory services	Debt	3
Total				**12**

The following tables present the funding requirements of the ICT sector, please note of the following:

- All project costs have been meticulously verified against the PIDA Priority Action Plan (2021-2030) Projects Prospectus.
- The Trans-Saharan Optic Fibre Broadband Project constitutes 91.6% of the total ICT sector investments at USD 4.5 billion. This reflects the project's strategic importance in connecting multiple regions across the Sahel and North Africa along the Trans-Saharan highway corridor.
- When considering the distribution without adjustments, ECOWAS, UMA and CEN-SAD are the dominant RECs in ICT investments primarily due to the Trans-Saharan fiber project that spans these regions.
- ICT investments appear focused on creating regional digital backbones and interconnection points that follow major transport corridors, with a clear emphasis on cross-border connectivity to support continental integration.

Within the overall PIDA portfolio of approximately USD 151.5 billion across all sectors, the ICT sector represents approximately 3.2% of total investments, positioning it as the smallest of the four sectors but with strategic significance for enabling development in other sectors.

ICT Project Type Analysis

Project Type	Investment Amount (USD Million)	Number of Projects	% of ICT Portfolio
Fiber Optic	4,664.0	5	94.8%
Data Centres & PoPs	172.5	3	3.5%
Submarine Cable	74.5	1	1.5%
Internet Exchange	0.3	1	0.01%
Broadband Network	0.3	1	0.01%

PIDA ICT Sector Projects (2021-2030)

No.	Project Name	Countries	REC	Type	Total Cost (USD)	Financing Notes
1	**Trans-Saharan Optic Fibre Broadband Project**	Nigeria, Niger, Algeria	ECOWAS, CEN-SAD, UMA	Fiber Optic	4.5 billion	Serves the existing Trans-Sahara Highway and the proposed Trans-Sahara Gas pipeline as well as providing broadband access to the benefiting countries and Nigerian Communities and States
2	**Development of Data Centre Infrastructures Underpinning the Digital Economy**	Angola, Burundi, Cameroon, Central African Republic, Chad, Republic of Congo, DRC, Equatorial Guinea, Gabon, Rwanda, São Tomé and Príncipe	ECCAS	Data Centres	92.5 million	Securing funding for Pre-Feasibility studies is needed for this project to move forward
3	**Construction of Amilcar Cabral Submarine Cable System**	Cape Verde, Liberia, Guinea, Guinea-Bissau, The Gambia, Sierra Leone	ECOWAS	Submarine Cable	74.5 million	The project is likely to be partially financed by private investors combined with financial support from international and public institutions
4	**Transborder Submarine Fiber PoPs, Regional Smart Hub Facility and Data Centre**	Ethiopia, Kenya, Somalia, South Sudan, Tanzania, Uganda	EAC, IGAD	Submarine PoPs, Data Centre	70.0 million	The Private Sector is normally ready to invest in the ICT projects subject to an attractive enabling environment

No.	Project Name	Countries	REC	Type	Total Cost (USD)	Financing Notes
5	**Extension of National ICT Broadband Backbone (NICTBB) to Mozambique by Construction of Optical Fibre Cable and Points of Presence (PoPs)**	Mozambique, Tanzania	SADC	Fiber Optic	60.0 million	The Private Sector is normally ready to invest in the ICT projects subject to an attractive enabling environment
6	**Sudan Section of the Fiber Optic Connectivity Component of the Port Sudan to Douala Corridor**	Central African Republic, Chad, Ethiopia, South Sudan, Sudan	ECCAS, IGAD	Fiber Optic	55.0 million	Laying of high-quality fibre optic cables that are characterised with ducted 130 – 170 cm depth, multi-mode, high capacity and fitted with distributed open access points
7	**Juba - Nairobi Fiber Optic Link**	Kenya, South Sudan	EAC, IGAD	Fiber Optic	45.0 million	The current appraisal shows that the project may have the potential to be structured under a PPP agreement
8	**SADC Regional Carrier-Neutral Data Centre**	SADC Member States	SADC	Data Centre	10.0 million	The Private Sector is normally ready to invest in the ICT projects subject to an attractive enabling environment
9	**Extension of National ICT Broadband Backbone (NICTBB) to DRC by construction of optical fibre cable across Lake Tanganyika and point of presences (PoPs)**	Tanzania, DRC	EAC, SADC, ECCAS	Fiber Optic	4.0 million	-
10	**Implementation of an ECOWAS Regional Internet Exchange Points**	ECOWAS Member Countries	ECOWAS	Internet Exchange	0.3 million	-
11	**Interconnection of Member States' Broadband Networks**	Angola, Burundi, Cameroon, Central African Republic, Chad, Republic of Congo, Democratic Republic of Congo, Equatorial Guinea, Gabon, Rwanda, São Tomé and Príncipe	ECCAS	Broadband Network	0.3 million	-

5. Partnerships and Collaborations

PIDA First 10-Year Implementation Report Launch (15 September 2023, Zanzibar, Tanzania)

Under the leadership of AUDA-NEPAD CEO H.E. Mrs Nardos Bekele-Thomas, AUDA-NEPAD and stakeholders launched "A Decade of Transforming Africa's Infrastructure," PIDA's first Decade Progress Report. The event reviewed PIDA PAP I (2012–2020) achievements across transport, energy, ICT, and transboundary water—highlighting thousands of kilometres of roads and rail, OSBP rollouts, and expanded electricity networks. Discussions focused on mobilising USD 30 billion annually, strengthening regional integration, enhancing governance frameworks, and leveraging blended finance to accelerate PIDA PAP II implementation. Participants agreed on actionable strategies to improve bankability, stakeholder coordination, and sustainable financing for continental infrastructure.

2nd Dakar Financing Summit 2023 (2–3 February 2023, Dakar, Senegal)

Held at the CICAD conference centre, DFS-2 mobilized African governments, DFIs, private investors, and development partners to advance financing for 22 priority PIDA projects in transport, ICT, energy, and water. The summit combined high-level policy dialogues, project pitch sessions, and one-on-one matchmaking, generating early-stage funding commitments. Emphasis was placed on de-risking mechanisms, standardised procurement frameworks, and public-private partnership models. The event established a roadmap for project preparation facilities and underscored collaborative approaches to unlock capital for cross-border corridors and resilience-focused infrastructure.

4th AMCOW Partners Coordination Platform Meeting (2–3 October 2023, Addis Ababa, Ethiopia)

The African Union Commission and AMCOW co-hosted the African Water and Sanitation PCP's 4th meeting to advance PIDA-PAP II transboundary water projects. Forty partner organizations including AUDA-NEPAD, RECs, RLBOs, UN agencies, and CSOs reviewed post-2025 Water Vision roadmaps, aligned on the 2026 AU theme "Water Security and Sanitation for Peace and Development," and revitalised thematic clusters for project delivery. Discussions highlighted capacity-building by AUDA-NEPAD, harmonised knowledge agendas, and coordinated advocacy for funding PIDA water-infrastructure initiatives across river basins.

10th Roundtable on Financing Water in Africa Side Event (22–23 November 2023, Abidjan, Côte d'Ivoire)

Co-convened by OECD, AfDB, and AUDA-NEPAD, this side event "Towards the Launch of the High-Level Panel Investment Action Plan" spotlighted the Angololo Water Resources Development Project. Ministers, financiers, and water experts discussed innovative financing instruments under PIDA's Service Delivery Mechanism, strategies for bankability, and preparatory support to attract private finance. The session laid the groundwork for the Investment Action Plan to mobilize USD 30 billion annually for national and transboundary water initiatives, emphasizing blended finance and targeted capacity-building.

Spotlight on PIDA Water Projects at the 10th World Water Forum (21 May 2024, Bali, Indonesia)

On the margins of the 10th World Water Forum, AUDA-NEPAD joined UNESCO, WaterAid, and Water for People to convene "Water and Water Infrastructure for Development." Focusing on PIDA's transboundary water vision, the side event enhanced capacities for climate-proofing and project preparation. Case studies from Malawi and Ethiopia illustrated success in integrating resilience measures. African Ministers' Council on Water (AMCOW) and basin organisations set strategic priorities: equitable water access through cooperation, mobilizing investment by formalising water as an asset class, and ensuring infrastructure sustainability via integrated water resources management.

Sixth Africa Climate Resilient Investment Summit (ACRIS VI) (12–13 March 2024, Kigali, Rwanda)

ECA, AUC, and the World Bank's AFRI-RES facility convened ACRIS VI to scale climate-resilient infrastructure financing. AUDA-NEPAD highlighted five PIDA projects, including Bria Dam–Lake Chad water transfer and Antanambao Manampotsy water supply, demonstrating resilience design and preparedness. Sessions on blended finance, resilience indicators, and stakeholder engagement charted pathways to mobilize climate finance for infrastructure. The summit provided training in resilience assessment tools, facilitated developer-financier dialogues, and reinforced public-private collaboration to accelerate PIDA project bankability across water, energy, transport, and urban sectors.

SDM Workshop: Quality Assurance and Acceleration (8–10 October 2024, Sandton, South Africa)

AUDA-NEPAD's Service Delivery Mechanism workshop convened experts and practitioners to review SDM impact—over 90 project appraisals under PIDA Quality Label methodologies (Quick and Green Checks). Participants assessed the North–South Power Transmission Corridor and other cross-border initiatives, discussed TOC and feasibility study improvements, and shared innovative financing best practices. The workshop fostered partnerships with RECs and DFIs, refined criteria for high-readiness projects, and outlined AUDA-NEPAD's vision to streamline project preparation and bridge gaps between concept and bankable infrastructure execution.

PIDA Steering Committee Meeting (28 August 2024, Addis Ababa, Ethiopia)

As PIDA PAP II neared its midterm, the Steering Committee co-chaired by AU's Dr Kamugisha Kazaura convened AUC, AUDA-NEPAD, AfDB, UNECA, and RECs to evaluate implementation progress and address bottlenecks. Deliberations covered resource mobilisation, governance enhancements, and regional capacity-strengthening. The session built on the September 2023 kick-off in Kigali, aligning PIDA PAP II with Agenda 2063 and AfCFTA objectives. Commitments were made to intensify stakeholder coordination, optimize PIDA instruments, and accelerate priority corridors, OSBPs, and energy interconnectors for continental integration.

AID Training for Nile Basin Stakeholders (15 January–2 February 2024; Entebbe, Kisumu, Kigali, Addis Ababa)

In partnership with the Nile Basin Investment Programme and GIZ, AUDA-NEPAD held four in-person workshops to train basin commissions including the LVBC, NELIP, ENTRO, NR-BIP, and EAPP on the African Infrastructure Database (AID). Topics included platform navigation, new project induction, data validation, and monitoring/reporting workflows. These sessions ensured real-time, accurate tracking of PIDA projects, strengthened regional ownership of infrastructure data, and enhanced coordination for transboundary water and energy initiatives, thereby supporting evidence-based planning and financing across the Nile Basin.

8th PIDA Week (25–29 November 2024, Addis Ababa, Ethiopia)

Convened under the theme "Fostering Resilient and Inclusive Infrastructure for Africa's Sustainable Growth," PIDA Week 2024 united AU, AUDA-NEPAD, AUC, AfDB, ECA, RECs, private sector, and civil society to accelerate PIDA PAP II delivery. Five sub-themes addressed green economy, policies, digital infrastructure, financing, and civil society empowerment. Technical sessions explored climate-smart design, deal rooms matched investors with project developers, and launch events showcased CMP Phase III and OSBP status reports. The summit fostered new partnerships, spotlighted deal-ready projects, and set a continental action plan to close infrastructure gaps.

6. Conclusion

The comprehensive analysis of the Programme for Infrastructure Development in Africa (PIDA) reveals a portfolio demonstrating modest but positive momentum with an 8.7% net advancement rate across its 69 priority projects. The portfolio shows marked variation between the high-performing ICT sector (36.4% advancement) and the challenged energy sector (-16.7%), with water and transport sectors falling between these extremes at 26.6% and 4.0% respectively. Regional performance demonstrates equally significant disparities, from the exemplary track record of continental initiatives (100% advancement) and the consistent progress in West and Southern Africa (both +25%) to the implementation challenges faced by Central Africa (-12.5%). The analysis highlights a critical "feasibility bottleneck" with 43.5% of projects concentrated at this stage while decreasing at both earlier and more advanced stages.

This portfolio totalling $151.54 billion across the four sectors, highlights the capital-intensive nature of transport infrastructure (69% of the portfolio value) and the relatively smaller financial footprint of ICT projects (3.2%) despite their stronger implementation performance. The findings suggest strategic priorities including knowledge transfer from high-performing regions and sectors to those facing challenges, targeted interventions to address the feasibility-to-financing transition, and leveraging the successful approaches demonstrated by continental initiatives across the broader portfolio. With continued focus on these priorities, PIDA can accelerate its contribution to Africa's infrastructure development and regional integration objectives.

Annex Section

Distribution of Projects per Sub-Sector

Sector	Subsector	Number of Projects	Percentage of Total
Transport	**Subtotal**	**25**	**36.2%**
	Roads	13	18.8%
	Railways	6	8.7%
	Ports	2	2.9%
	Maritime/Shipping	2	2.9%
	Aviation	1	1.4%
	River Transport	1	1.4%
Energy	**Subtotal**	**18**	**26.1%**
	Hydroelectric Power	13	18.8%
	Transmission Lines	4	5.8%
	Renewable Energy (Solar)	1	1.4%
Transboundary Water	**Subtotal**	**15**	**21.7%**
	Multipurpose Dams	8	11.6%
	Water Transfer	3	4.3%
	Water Resource Management	2	2.9%
	Water Supply	1	1.4%
	Hydrometric Stations	1	1.4%
ICT	**Subtotal**	**11**	**15.9%**
	Fiber Optic Networks	6	8.7%
	Data Centres	3	4.3%
	Internet Exchange Points	1	1.4%
	Submarine Cable Systems	1	1.4%
TOTAL		**69**	**100%**

Number of Projects per Regional Economic Community (RECs)

REC Name	Transport	Energy	Transboundary Water	ICT	Total Projects
ECOWAS	**4**	**3**	**3**	**3**	**13**
SADC	2	4	4	3	13
ECCAS	3	5	2	2	12
EAC	5	2	1	2	10
AMU/UMA (Maghreb)	6	0	1	0	7
IGAD	2	0	1	1	4
COMESA	1	1	1	1	4
CEN-SAD	1	2	1	1	5
Multi-REC/Cross Regional	**1**	**1**	**1**	**0**	**3**
Total by Sector	**25**	**18**	**15**	**11**	**69**

Distribution of Transboundary and Single Country Projects

Sector	Number of Projects	Percentage	Transboundary Projects	Single-Country Projects	Transboundary %	Single-Country %
Transport	**25**	**36.2%**	**18**	**7**	**72.0%**	**28.0%**
Energy	18	26.1%	13	5	72.2%	27.8%
Water	15	21.7%	10	5	66.7%	33.3%
ICT	11	15.9%	6	5	54.5%	45.5%
Total	**69**	**100%**	**41**	**28**	**59.4%**	**40.6%**

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