Turning Points: Enabling Sustainable Transport in Africa

Strategic Leadership, Investments, and Innovation Levers for Africa's Transport Transformation



Project Background

The Rethinking Transport project supports the development of positions and strategies for the sustainable transformation of the transport sector across Africa. Through workshops, development labs and a fellowship programme, the project brings together stakeholders from academia, civil society and the private sector to facilitate an exchange on the most pressing issues surrounding sustainable mobility in Africa.

This is a self-initiated project by Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH, funded by GIZ's own resources and implemented in cooperation with the German think tank Agora Verkehrswende.

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CHANGING TRANSPORT

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Table of Contents

Foreword 4

Executive Summary 5

Introduction 7

1. Leadership and Policy Reform for Sustainable Transport 9

1.1 Making Sustainable Transport a National Priority 10

1.2 Developing Action Plans for Popular Transport at all Levels 12

1.3 Strengthening and Integrating Green Economic Corridor Networks 14

2. Strategic Foundations for Africa's Energy Transition in Transport . . 17

2.1 Adopting an African Charter on Electric Mobility 18

2.2 Establishing an Independent Advisory Board for E-Mobility Policy and Trade 20

2.3 Developing a Masterplan on Renewable Energy for E-Mobility 22

3. Sustainable and Inclusive Financing Systems 24

3.1 Securing Long-term Financing for Sustainable Transport 25

3.2 Pooling Regional Funding for Climate-Resilient Transport Infrastructure 27

3.3 Scaling Domestic Financing for Electric Mobility 30

4. Flagship Initiatives for Scaling and Acceleration 32

4.1 Establishing an Academy for African Sustainable Urban Mobility Plans (SUMPs) 33

4.2 Creating Investment and Innovation Hubs 35

4.3 Founding Regional Project Preparation Platforms 38

Conclusion 40

References 42

Annex | Acronyms 45

Imprint 48

Foreword

Transport is one of the greatest enablers of Africa's economic development. It connects farmers to markets, workers to jobs, children to schools, businesses to customers, and countries to one another. It is also one of the foundations of regional integration, industrialisation and shared prosperity under the African Union Agenda 2063 and the African Continental Free Trade Area.

In recent years, Africa's transport sector has been transforming in an exciting and promising way. Electric buses, motorcycles and three-wheelers are entering the market, corresponding laws have been passed or are in the pipeline in many countries. Governments are increasingly linking mobility, energy, trade and industrial policy. Cities are rethinking streets and public transport. Regional corridors are becoming more digital and better coordinated. On 12 August 2025, a new era for African maritime transport was set following the entry into force of the Revised African Maritime Transport Charter upon deposit of the fifteenth instrument of ratification by the Republic of Uganda, and likewise, a new historic forward step was made on 12 March 2026, upon the African Union announcement of the entry into force of the African Road Safety Charter, following the deposit of the fifteenth instrument of ratification by the Republic of Mozambique, and furthermore, in April 2026, the African Transport and Energy Ministers endorsed the Continental Framework for Electric Mobility.

The task now is to accelerate this momentum, align it with continental priorities, and ensure that the benefits reach people and communities across the continent. This paper speaks directly to that opportunity. To realise the vision of sustainable transport in Africa, twelve strategic turning points – critical decisions, interventions, and policy shifts have been identified to accelerate change and set transport systems in Africa on a new trajectory.

The turning points treat sustainable transport as a fundamental development agenda: they offer a way to improve access, reduce inequality strengthen regional trade and international cooperation, build green industries, improve public health, increase energy security and create decent jobs. They also recognise the realities of African mobility systems, where walking, cycling, public transport, popular transport services, rural roads, regional corridors and emerging electric mobility markets must all be part of the solution.

I am convinced: These turning points have the potential to trigger a broader process of change – for a sustainable future with diverse benefits for our continent.

The ideas presented in this paper are the result of fruitful collaboration between African experts working on sustainable transport and the policy analysis of the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) and the think tank Agora Verkehrswende. The outcomes reflect both evidence and lived experience. I am very grateful for this valuable example of international cooperation and extend my sincere congratulations to all participants.

The coming decade can become a decade of implementation. With political leadership, African ownership and committed partnership, sustainable transport can become a driver of integration, resilience and prosperity for Africa. I am excited about the steps to come.

H.E. Ms. Lerato Dorothy Mataboge
Commissioner for Infrastructure and Energy
African Union Commission

Executive Summary

This publication presents "turning points" – critical moments, decisions and events that could significantly influence the progress of Africa's transport systems towards a more sustainable trajectory within this decade. The central insight: incremental progress, fragmented pilots and isolated projects will not deliver the scale of change required. Rather, effective strategic interventions will need to be implemented simultaneously at different political levels in order to enable coordinated adoption of sustainable transport at the continental scale.

The report's recommendations were developed in a two-step process: First, the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) and the think tank Agora Verkehrswende together with researchers from the University of Cape Coast (Ghana) and the University of Cape Town (South Africa) examined policy debates, current evidence and emerging practice across African countries. Second, the initial conclusions were then discussed in depth and refined together with around 50 decision-makers, experts, researchers, private-sector representatives and regional organisations across Africa.

This process yielded twelve areas for strategic intervention – these "turning points" for sustainable transport in Africa represent opportunities to shape a transport future in which electric mobility supports green industrialisation, freight corridors move goods more efficiently, cities offer safer and more inclusive mobility, and infrastructure is planned for resilience and long-term value. They represent an invitation to governments, cities, businesses, development partners and civil society to work together towards the realization of a shared vision for sustainable transport. Some turning points are already in motion; the potential offered by others has yet to be tapped. The twelve turning points are structured around four priorities:

(1) Leadership and Policy Reform focusing on transport planning; (2) Strategic Foundations for Africa's Energy Transition in Transport, focusing on electric mobility; (3) Sustainable and Inclusive Investment Systems, focusing on funding sustainable transport; and (4) Flagship Initiatives for Scaling and Acceleration, focusing on implementation support.

These turning points show that this transformation is a practical agenda that can be advanced through coordinated policy, financing, institutional collaboration and partnerships. The report sets out where these shifts can begin, how they can be accelerated, and why acting on them now can help make Africa's transport systems efficient, just and climate neutral for decades to come.

- **Making Sustainable Transport a National Priority**
  Sustainable transport gains momentum when political leaders champion it as a national development priority. Ministers, governors and mayors can turn policy into visible change through flagship reforms and pioneer projects.

- **Strengthening and Integrating Green Economic Corridor Networks**
  Africa's trade and logistics corridors can become testbeds for cleaner, more efficient transport. Digital trade systems, cleaner vehicles, interoperable data and coordinated border management can first be piloted, then scaled across regions.

- **Developing Action Plans for Popular Transport at All Levels**
  Popular transport needs clear, practical road-maps that work across national, regional and local levels of government. These plans can define roles, standards of service, safety measures, financing pathways and inclusive implementation steps.

- **Adopting an African Charter on Electric Mobility**
  Africa's shift to electric mobility begins with a shared continental vision. With the African Union's Continental Framework for E-Mobility now adopted, a foundation is in place to accelerate implementation across the continent.

- **Establishing an Independent Advisory Board for E-Mobility Policy and Trade**
  A continental advisory board can turn broad ambition into practical guidance. By bringing together experts from trade, industry, government, research and civil society, it can help align standards, investment and regional value-chain development.

- **Developing a Continental Masterplan on Renewable Energy for E-Mobility**
  Africa's renewable energy potential can become a powerful driver of transport electrification. A continental masterplan would connect clean power development with charging infrastructure, grid upgrades and priority investments.

- **Pooling Funding Regionally for Climate-Resilient Transport Infrastructure**
  Regional funding pools can help countries invest at greater scale and over longer time horizons. With strong African ownership and predictable capital flows, they can prioritize resilient cross-border corridors and shared infrastructure.

- **Securing Long-Term Financing for Sustainable Transport**
  Sustainable transport requires stable funding beyond the time horizons of individual projects. Protected or earmarked budget lines can help governments maintain assets, improve resilience and align transport investment with development goals.

- **Scaling Domestic Financing for Electric Mobility**
  Domestic financing can move electric mobility from pilot projects to the mass market scale. Coordinated credit systems can support households, operators, municipalities, businesses, charging infrastructure and renewable power supply at the same time.

- **Establishing an African Academy for Sustainable Urban Mobility Plans**
  Cities need lasting capacity to plan and deliver sustainable mobility. An African Academy can provide training, peer learning, and data-driven tools while building a stronger community of practice across municipalities.

- **Creating Investment and Innovation Hubs**
  Investment and innovation hubs can connect industrial policy, skills development, research and capital. By linking Special Economic Zones with Centres of Excellence, they can strengthen regional value chains and create skilled jobs.

- **Founding Regional Project Preparation Platforms**
  Many promising sustainable transport initiatives fail because they are not yet investment ready. Regional project preparation platforms can help governments and cities turn early concepts into bankable, climate-resilient and implementable projects.

Introduction

The UN Decade of Sustainable Transport (2026–2035) provides renewed momentum for accelerating the transformation of global transport systems to promote climate action and sustainable development. For Africa, this decade represents a window of opportunity to shape transport pathways that are not only clean, but also equitable, resilient and economically enabling. By the close of the decade, transport systems across Africa have the potential to look fundamentally different.

In a forward-looking vision for Africa's transport systems, people-centred transport planning becomes the norm. Walking and cycling are established as safe, comfortable, and viable transport options. Electric mobility initiatives are built out beyond pilot phases and implemented at scale. Renewable energy systems support the ramp-up. Public transport systems are expanded and evolve by integrating local paratransit services with modern solutions to continue to serve millions of people every day. Rural and regional corridors are better connected through efficient logistics and multimodal transport systems, strengthening trade and economies by making access to jobs, education, and services easier and more reliable.

As part of this vision, sustainable transport becomes a core priority for political decision-making at multiple levels, from cities to national governments, thus helping to shape budgets, policies, and long-term planning. The benefits of prioritising and investing in sustainable transport become evident over the decade thanks to greater energy independence, stronger economic growth, improved air quality and public health, and a higher quality of life across the continent.

Across many African countries, momentum for this vision has been growing. Sustainable transport initiatives focused on the mobility transition are already underway; actors in various locales are working to improve public transport with Bus Rapid Transit (BRT) systems, renewing city bus fleets, and carrying out associated infrastructure development. The energy transition in transport has also accelerated; an increasing number of countries are adopting EV policies, with electric motorcycles and buses leading the electrification of transport across the continent.

However, rapid urbanization and growing transport demand continue to outpace planning and infrastructure development across the continent. Informal and semi-formal transport systems perform an essential service yet often lack policy support. Long-distance transport networks remain fragmented, increasing the cost of moving goods and limiting trade. Road safety continues to be a major concern. Imported used vehicles not only dominate country fleets but also make up the vast majority of market sales, despite often being inefficient and unsafe. Financing gaps, limited data and institutional capacity constraints further complicate implementation. The question, therefore, is how to address these challenges and thereby accelerate the transition to more sustainable transport systems.

Strategic turning points – critical moments, decisions and events – will be key to accelerating change and setting transport systems on a new trajectory. These turning points may take the form of enabling policy frameworks, the adoption of new technologies, significant investments, shifts in market dynamics or new forms of collaboration. Such turning points have the potential to trigger broader processes of change. They can shift how transport is

planned, financed, and implemented. They can also unlock new partnerships, reshape incentives, and accelerate transitions that might otherwise take decades. In this sense, they are not isolated interventions, but catalysts for systemic transformation.

Joint collaboration and co-creation of turning points

The turning points elaborated in this report were developed in a two-step process, combining analytical work with collective expertise. First, extensive research was undertaken to establish a knowledge base. This included a review of current evidence, policy discussions and emerging practices across Africa and globally by the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) and the think tank Agora Verkehrswende together with researchers from the University of Cape Coast (Ghana) and the University of Cape Town (South Africa). The findings of this effort, synthesised in two key publications,[1] identified three priority areas for action: (1) electric mobility, (2) just and inclusive mobility systems, and (3) infrastructure and financing. These priorities guided subsequent work.

Second, the process built on the knowledge and experience of decision-makers and practitioners working on transport transformation across the continent. Through a series of co-creative workshops held in Ghana, Rwanda, and Kenya, diverse groups of about 50 experts across Africa from government, academia, the private sector and regional organisations came together to reflect upon the three priority areas and identify the potential critical shifts (turning points) for transforming transport in Africa.

Across these workshops, participants explored barriers and opportunities, drawing on their different perspectives, contexts and lived experiences. The aim was not only to generate ideas, but to identify the contexts in which change could be most impactful. This report therefore brings together these insights from both work streams (i.e. research and co-creation) and consolidates them into twelve turning points that can guide collective action in Africa's transport transformation. These turning points acknowledge the diversity of contexts and lived experiences across the continent. The unique realities proper to each country cannot fit a single narrative. The pan-African approach of this report rather holds that turning points will be implemented, or will manifest, in accordance with the varying needs, priorities, and starting conditions of each country.

The turning points are organised into four levers for change, where the potential for meaningful impact is particularly promising. These levers are leadership and policy reform; strategic foundations for energy transition in transport; sustainable and inclusive financing systems; and flagship initiatives for scaling and accelerating change.

Box 1: What is Sustainable Transport?

UNDP defines sustainable transport as mobility systems that ensure universal access, safety, affordability and minimise greenhouse gas emissions and other environmental impacts through energy-efficient and low carbon options. This includes modes such as walking and cycling, electric transport and public transport, supported by integrated land use planning, policy, infrastructure, technology and behavioural change, not only for environmental protection, but also to support health and create economic opportunity.[2, 3]

1 (Agora Verkehrswende & GIZ, 2023), (GIZ et al., 2025)

2 (UNDP, 2025)

3 This definition reflects a global climate-policy framing, therefore, the report's African-specific priorities may differ in emphasis.

01

Leadership and Policy Reform for Sustainable Transport

Leadership and policy reforms will be critical enablers of transport transformation in Africa. Deliberate policy choices, coordinated institutions and proactive leadership will be essential to translate ambition into action and navigate the ongoing rapid urbanisation, economic development, regional integration and the energy transition across the continent.

African governments are already demonstrating a growing recognition of the benefits of prioritising decarbonisation and transport sector reforms. An increasing number of countries are actively prioritising sustainable transport within their policy frameworks, a trend that is rapidly gaining momentum across the continent. For instance, 10 of the 28 African countries that submitted Nationally Determined Contributions (NDCs) by January 2026 have set targets for mitigating transport greenhouse gas (GHG) emissions.[4] In April 2026, African Transport and Energy ministers endorsed the Pan African Action Plan for Active Mobility (PAAPAM) – a framework for African nations to have a shared commitment to prioritize and invest in walking and cycling.[5] Meanwhile, cities such as Dar es Salaam in Tanzania and Dakar in Senegal are translating these commitments into action by introducing Bus Rapid Transit (BRT) systems as part of broader efforts to modernise and decarbonise public transport.[6]

These examples point to a continent in which the political will for transport reform is present. The challenge now is to translate this will into coherent plans and implement them consistently, particularly across sectors and between countries, where coordination is more challenging and integration is most essential. This section outlines three turning points that could lay the groundwork for this to occur.

4 (GIZ & SLOCAT, 2026)
5 (UNEP, 2026)
6 (SLOCAT, 2025)



A dedicated pedestrian path in Kisumu City, Kenya

1.1 Making Sustainable Transport a National Priority

Transport is a crucial backbone of the economy and society at large. It provides access to essential services, enables the free movement of goods and people, supports jobs and livelihoods, and drives economic growth. Functioning and inclusive transport systems are therefore a cross-cutting priority, with impacts that reverberate across sectors and social groups.

Yet transport often remains overlooked in policy areas that it directly affects, including climate, health, employment, economic development and social inclusion. At the same time, transport systems continue to exacerbate existing inequalities where access is limited, services are unaffordable, or the needs of certain users are not adequately considered. This can perpetuate the exclusion of disadvantaged groups and restrict their access to markets, services, education, jobs, and other economic opportunities. Transport also continues to impose significant costs on urban areas through air pollution, congestion and road fatalities.

Addressing transport upfront by setting sustainable transport as a national priority would represent a turning point, by enabling countries to harness its broad environmental and socio-economic benefits. Acknowledging the importance of sustainable transport and the prospective impacts of action at the national level would create awareness amongst implementing authorities and the broader public, thereby facilitating implementation, in part thanks to political pressure to deliver. National initiatives undertaken in various countries demonstrate the impact of setting sustainable transport as a priority. Yet championing the cause of sustainable transport at the local level can also have an impact beyond national borders. Amongst various potential benefits, it can foster a regional dynamic in which neighbouring governments feel compelled to emulate the successes of their peers.

Box 2: National Initiatives to Champion Sustainable Transport

The **Presidential Infrastructure Champion Initiative (PICI)** emerged from South Africa's 2011 proposal to accelerate regional infrastructure development through high-level political leadership. This initiative consists of 12 members who champion accelerated infrastructure development, with a focus on transport, energy, and information and communications technology. The PICI provides an arena for high-level leadership to formulate and implement infrastructure projects across the continent. Over the years, the PICI has played a crucial role in resolving key obstacles in infrastructure projects. Through strategic partnerships and consulting, PICI has secured funding for various infrastructure projects, including the Abidjan–Lagos Highway Project. The initiative aims to engage additional partners and financiers to secure funding for the implementation of further projects. In addition to demonstrating that political champions can drive meaningful regional progress, the initiative highlights the opportunities that lie in collaborative efforts.[7]

In 2024, Senegal's newly elected President convened a **National Dialogue on Public Transport** *(États Généraux des Transport Publics)* as part of the national development strategies *Sénégal 2050* and the *Plan Yooni Naataangue Horizon 2050*. The National Dialogue on Public Transport defines action areas for improving the performance of the sector.[8] Transport has become a central element of the country's policy priorities and development strategy. Public transport fleet renewal has since been addressed as a national priority, which has included the introduction of electric vehicles.[9]

As part of the broader goal of making sustainable transport a national priority, three specific action areas offer a strategic path forward. The first action area is to recognise the role of transport in mitigating and adapting to climate change. This involves addressing the transport sector in the NDCs and setting quantified, time-bound targets. To date, 10 African countries have set a quantified and time-bound target for greenhouse gas emission reductions in transport.[10] The second action area is to prioritise transport in the agendas of national governments as they relate to ministerial portfolios, to ensure implementation across ministries in a whole-of-government approach. This would enable integrated action between domains (e.g. between the energy and transport sectors, or between economic development and logistics).

The third action area is to safeguard public investment in sustainable transport and prioritize investment and policy actions for popular modes of transport. Focusing on the modes of transport used by the majority, including walking and public transport, would allow for the achievement of larger impact.

Particularly around cross-border transport, progress can be accelerated through regional coordination, which can take various forms (e.g. agreement on joint, time-bound objectives, or the collaborative launch of sustainable transport initiatives). Over time, leadership at the regional level could also build momentum for stronger national integration and for the delivery of commitments surrounding the development of sustainable transport.

7 (African Union Development Agency (AUDA-NEPAD), 2020)
8 (Ministry of Infrastructure and Land and Air Transport Senegal (MITTA), 2024)
9 (Agence Ecofin, 2026)
10 (GIZ & SLOCAT, 2026)



Minibus (taxi) in Johannesburg, South Africa

1.2 Developing Action Plans for Popular Transport at all Levels

In many African cities, popular public transport also referred to as paratransit – forms the backbone of daily mobility. In combination with walking and cycling, the sector connects about 80% to 90% of daily urban commuters to employment, education opportunities and health services. Having emerged largely to fill the void left by underfunded formal public transport, popular transport is predominantly privately owned and associated with a range of benefits and challenges. The sector is widely recognised for its flexibility in timing and routing, its ability to serve peripheral and informal areas, and its role as a major employment source for African youth particularly, due to low entry requirements. The transport sector employs around 5% of Africa's workforce (23 million people), most of these jobs are concentrated in the paratransit sector.[11] Ageing, poorly maintained fleets are dominant in the sector, contributing to traffic congestion, aggravate air pollution, and pose road safety risks. Operators face precarious labour conditions, while passengers, particularly women, and persons with disabilities, contend with inconsistent service quality and limited accessibility.[12]

Despite their integral role in urban mobility in Africa, popular transport often remains peripheral to governments' mobility strategies and planning. In some countries, government reforms have oscillated between eliminating the sector, formalizing it through regulation, or ignoring its existence altogether. However, these approaches have repeatedly failed due to persistent institutional fragmentation, weak coordination among stakeholders, punitive regulations and a lack of data, which undermines effective planning. Additionally, resistance from operators fearful of losing their livelihoods and

11 (SLOCAT, 2025)
12 (GIZ, 2026)

public concerns about the affordability of formal alternatives have further eroded trust in top–down reform processes. Even as African governments continue to incrementally roll out formal mass transit systems, popular transport systems remain indispensable. Accordingly, the only viable path forward is the structured integration of the sector in transport planning and reform processes, rather than its elimination or marginalisation.

The development of national roadmaps for popular transport reform would therefore be a critical step towards providing a clear framework for the integration of popular transport at all levels. Such roadmaps would provide a shared vision for the sector and clarify institutional mandates, define minimum quality of service and safety standards, and establish financing and regulatory pathways, phased in ways that are inclusive and feasible. In the roadmap development process, national governments set the overall policy direction, create an enabling legal and regulatory environment, and establish a dedicated coordination mechanism (such as a taskforce) to engage relevant stakeholders. Subnational governments and operators can then translate these national frameworks into locally grounded action plans that reflect route realities, user needs, and contextual institutional conditions.

Subsequent implementation at the local level can be guided by political champions for popular transport and through a structured dialogue that considers actors in the private and public sectors as well as transport users. Associated local action plans would integrate popular transport into broader urban mobility strategies and policies (e.g. Bus Rapid Transit (BRT) corridors and active mobility networks). They could also establish clear, enforceable standards for safety, service reliability, vehicle quality, and fleet renewal, with realistic enforcement timelines that prioritise reliability and inclusion. Integration measures would target the specific pain points that influence the passenger experience, such as route optimisation, customer service, coordinated stops and interchanges, and interoperable ticketing systems.

Ideally, delivery of these action plans should be grounded in a multi-stakeholder dialogue that embraces operator associations, regulators, enforcement agencies, and financiers. Associated processes can help to identify priority reform opportunities, generate consensus on performance indicators, and align budgets and responsibilities across agencies. National governments and development partners can also have a critical role in supporting delivery by providing technical assistance and targeted financing for cleaner fleets and infrastructure upgrades. With coordinated action at all governance levels, the existing patchwork of fragmented popular transport can gradually transition to a safer, more reliable, and more inclusive public transport system, one that acknowledges and builds upon what is already working for African cities and towns.



A fully electric truck by Kabisa along Mombasa Road, Kenya

1.3 Strengthening and Integrating Green Economic Corridor Networks

A functional, well-integrated transport system plays a crucial role for regional economic development, as it facilitates intra-African trade, enables links to global supply chains, and opens economic opportunities to local communities. Cross-border corridors are much more than just "infrastructure projects"; they are veritable engines of economic development, enabling access to health and education while facilitating entrepreneurial opportunity across the continent. The Cotonou–Niamey corridor, for instance links the Port of Cotonou in Benin to markets of Niger and Burkina Faso, directly impacting about 34 million people living along its 1,000 km roadway.[13]

Despite their significance, these corridors remain fragmented, inefficient and increasingly vulnerable to climate change. Ageing, high emission vehicle fleets, often operating under weak or inconsistently enforced vehicle standards, continue to dominate the corridors, driving up fuel consumption, logistics costs, air pollution and road safety risks. At the same time, paper-based procedures, inconsistent border practices, and other non-tariff barriers continue to delay trade flows. These inefficiencies represent a structural constraint on Africa's economic integration and global competitiveness.

Addressing these challenges is becoming increasingly urgent. As African economies expand, not least with the support of the African Continental Free Trade Area (AfCFTA), demand for efficient and reliable transport corridors will increase substantially. Therefore, realising the full benefits of the AfCFTA will require moving from fragmented, isolated interventions toward seamless, technology driven multi-modal networks that cut delays and costs at scale.

13 (Enabel, 2025)

Three mutually reinforcing pillars could support the strengthening and integration of these green economic corridors. The first pillar is institutional coordination and digital integration: Corridor Management Institutions (CMIs) could serve as the governance backbone of the transformation. Rather than building new structures, reforms could empower existing CMIs to coordinate various actors, including customs agencies, border agencies, port authorities and other operators, to maintain shared data systems, and to monitor performance against agreed targets. Scalable blueprints for such reforms already exist. The Northern and Central Corridor Transport Observatories are pioneering examples of real-time data dashboards that allow the monitoring metrics such as transit times, volumes and capacity; operational efficiency; and green freight. The Tripartite Transport & Transit Facilitation Programme also demonstrates what can be achieved at scale through the regional harmonisation of road transport policies, laws, regulations and standards for efficient cross-border road transport and transit networks.[14]

A second pillar of the transformation is to shift to cleaner vehicle fleets and achieve emission reductions. Ageing internal combustion engine vehicles continue to dominate most African corridors, and their replacement represents a crucial means of reducing corridor-level emissions while improving efficiency and reducing operating costs. The electrification of freight vehicles, alongside stronger fuel and emissions standards, offers a viable solution. Early-stage pilot initiatives are beginning to test electric freight and logistics vehicles, providing a proof of concept for wider corridor-level electrification. There are local and international companies that are testing the performance, sustainability, and economic viability of heavy-duty EVs on standard logistics routes within the continent's emerging EV environment such as Kabisa, DHL Supply Chain Africa, Unilever, and Volvo Trucks.[15] The lessons emerging from these early adopters could be harnessed to optimise broader roll-out and scaling.

Climate resilient infrastructure represents the third pillar that can help to establish and ensure efficient and reliable green economic corridors. Infrastructure investment and associated asset upgrading are needed as a supplement to institutional reforms and green fleet expansion to ensure reliable transport links, resilient energy supply, and well-maintained assets capable of withstanding climate shocks. Without such climate-proofing, digital systems and clean vehicles could underperform on corridors that are themselves fragile. The United Nations Economic Commission for Africa (UNECA) is already harnessing Artificial Intelligence (AI) and Satellite Imagery through the African Regional Transport Corridor Management System (ARTCOMS) to assess the conditions of regional corridors, not only to enhance operational management, but also to allow for targeted interventions and investment.

The implementation of a pilot corridor that brings these three pillars together while demonstrating measurable reductions in transit times, logistic costs, disruptions, emissions and safety risks could generate the credible evidence base needed to unlock replication at scale. Regional Economic Communities, the AfCFTA Secretariat, development finance institutions, and private logistics operators are the partners who could translate successful pilots into continent-wide reform.

14 (TTTFP, 2019)
15 (FleetWatch, 2025)

Box 3: From Corridor Governance to Green Freight Action: The Northern Corridor

The Northern Corridor Transit and Transport Coordination Authority (NCTTCA) connects Mombasa (Kenya) to Uganda, Rwanda, DR Congo, South Sudan and Burundi. It has reduced transit times by 40% through one-stop border posts and digital cargo tracking, saving 1,200 USD per truck. Multimodal integration has shifted 40% of cargo from road to rail and expanded lake transport, resulting in freight cost reductions of up to 25%. Climate resilience efforts and strong political coordination have enabled joint investments, including the development of a Standard-Gauge Railway. As a result, Mombasa Port's throughput has increased to 1.4 million standard 20-foot containers, with 30% serving landlocked neighbours; it has also increased intra-corridor trade by 35% (2015–2023). The NCTTCA case demonstrates that regional Corridor Management Institutions (CMIs) can streamline trade through political alignment, technology adoption, and multimodal infrastructure, making a strong case for scaling up such models across the continent.[16]

Building on these governance foundations, the Green Freight Support Program, launched in 2024 by the Kuehne Climate Center and Smart Freight Centre, supports the NCTTCA and the **Central Corridor Transit Transport Facilitation Agency (CCTTFA)** in developing and implementing green freight strategies. The programme brings together freight stakeholders, promotes emissions measurement and reporting, supports fleet efficiency improvements and the transition to zero-emission trucks, and strengthens technical capacities across the sector. By leveraging established corridor coordination mechanisms, the initiative demonstrates how well-functioning Corridor Management Institutions can serve as effective platforms for advancing both trade facilitation and freight decarbonisation.[17]

16 (NCTTCA, 2024)
17 (Smart Freight Centre, 2026)

02

Strategic Foundations for Africa's Energy Transition in Transport

The preconditions for a rapid and comprehensive energy transition in transport are increasingly favourable across the African continent. Motorisation levels remain relatively low, at approximately 51 vehicles per 1,000 people. Under projected high growth scenarios, motorisation rates will likely double by 2050 but will remain low and well below the global average of around 300 vehicles per 1,000 people.[18] At the same time, Africa possesses vast renewable energy potential, holding about 60% of the world's best solar resources, which offers significant opportunities for a clean energy transition.[19]

Given these conditions, the adoption of clean powered electric transport represents a once-in-a-generation opportunity for African countries. If the energy transition in transport is achieved, it can advance climate goals, strengthen energy security by reducing dependence on fossil fuel imports and support socio-economic growth. Momentum for clean electric mobility is building across the continent, but progress remains uneven, constrained by fragmented policy frameworks, infrastructure gaps and limited coordination between the transport, energy and industrial actors. Overcoming these challenges and unlocking the full potential of this energy transition will require strategic foundations that align policies, institutions, and investment frameworks across sectors and borders.

This section therefore outlines three turning points that could provide this foundation. Together, they make the case that e-mobility is not simply a technology choice for African countries to adopt, but rather a strategic development priority requiring integrated governance and long-term planning.

18 (Johansson & Mutiso, 2025)
19 (GIZ & Agora Vekehrswende, 2023)



An electric motorbike and charging station in Nairobi, Kenya

2.1 Adopting an African Charter on Electric Mobility

At least 22 African countries have adopted or are developing policies and strategies to support the transition to electric mobility.[20] Approximately 200 private companies have also set up shop on the continent, piloting electric buses in major cities, supporting the electrification of two and three-wheelers, and exploring electric vehicle and battery assembly and recycling.[21] Countries such as Ethiopia are already demonstrating the early success of progressive policies and targeted investment in the sector, with more than 100,000 EVs now estimated to be on the country's roads.[22]

While these initiatives reflect a commendable forward-looking vision, they remain largely siloed within individual national boundaries. Countries are independently advancing strategies under localised regulatory frameworks and standards, with little to no coordination at the regional or continental level. Africa's current fragmentation risks driving inefficiencies and slowing overall progress. The absence of a shared policy direction and harmonised standards create uncertainty for investors, weakens cross-border trade and limits the growth of regional value chains. Harmonising charging and infrastructure standards would therefore for instance help reduce the additional costs and operational complexities that arise from fragmented national regulations for manufacturers and operators. Additionally, manufacturers may face barriers to scale as markets remain small and uneven, while consumers face inconsistent vehicle quality and limited interoperability, such as between charging systems.

20 (Agora Verkehrswende, 2025b)
21 (Africa E-Mobility Alliance, 2025)
22 (Tariq & Mutiso, 2025)

Without a harmonised approach, the transition is also likely to be uneven, leaving some countries lagging significantly behind while others advance.

The adoption of an African Charter on Electric Mobility – a continent-wide framework establishing shared consensus on the direction of change would be a pivotal turning point in Africa's journey towards a collective clean mobility transition. Such a Charter would guide national and regional e-mobility policy and roadmap development efforts by defining common principles and standards, and strengthen cooperation among governments, development partners and the private sector. Its implementation could be organised around core elements that support delivery: Governance and management structures for coherence and accountability; harmonised technical and safety standards for interoperability; financing and monitoring systems to sustain momentum; industrial strategies to build local value chains, skills and innovation; and communication and awareness measures that build political commitment and public support. Shared commitments and a clear strategic direction will create the certainty needed to position e-mobility as an element of Africa's green industrialisation agenda, and, in turn, further Agenda 2063 and the African Continental Free Trade Area (AfCFTA).

Box 4: The African Union Continental Framework on Electric Mobility

The co-creation process leading up to this report culminated in April 2026 with the African Union's endorsement of a Continental Framework on Electric Mobility. The Framework was formally endorsed by Ministers of Transport and Energy at the Fifth Ordinary Session of the African Union's Specialised Technical Committee on Transport and Energy (STC-T&E). The key importance of such an approach had already been conveyed to the African Union Commission in March 2025 by workshop participants. The framework, drafted with support of the **UN Economic Commission for Africa (UNECA)** and **UN Environment Programme (UNEP)**, marks an important step forward for recognising the technology's importance for Africa's economies and transport systems.[23]

23 (African Union, 2026)



Technician installs car part at a vehicle assembly plant in Johannesburg, South Africa

2.2 Establishing an Independent Advisory Board for E-Mobility Policy and Trade

Africa's transition to electric mobility is a strategic opportunity to reshape industrial development and intra-African trade. As such, the transition can be much more than a technological shift; it indeed represents an opportunity to develop and transform domestic industry. For this opportunity to be fully realised, however, transport, trade and industrial policy need to be coordinated, rather than pursued in parallel. Africa's automotive markets remain fragmented and new-vehicle demand is weak. Fragmented regulations and uneven enforcement allow continued inflows of used internal combustion vehicles, undermining local manufacturing and slowing progress toward climate and air quality goals. Without deliberate coordination, African economies risk remaining on a high-emission, low value-added pathway that limits innovation, industrial progression and regional market development.[24, 25]

The formation of an Independent Advisory Board for E-Mobility Policy and Trade would address this gap by providing credible, cross-sector guidance on standards, industrial policy, market development and trade alignment. Beyond advising national governments, the board would work with Regional Economic Communities (RECs) to reduce regulatory fragmentation and strengthen coordination on electric mobility uptake across borders, particularly with a view to aligning standards and facilitating trade in vehicles, batteries, components, and related services as regional markets for electric mobility expand.

The African Continental Free Trade Area (AfCFTA) could offer an institutional home for this mandate, particularly by linking e-mobility with the continent's broader trade and industrial policy development efforts. Since the existing AfCFTA

24 (Ayetor, Mbonigaba, Sackey, & Andoh, 2021)
25 (Mendez-Parra, 2024)

platforms do not yet address e-mobility specifically, the board could either be established as an independent advisory body to AfCFTA by Member States through AfCFTA processes or constituted independently and then formally recognised as a technical and policy advisor to AfCFTA institutions.

The board could be composed of cross-sectoral experts from trade, industry, government, research, and civil society institutions. Its core function would be to develop actionable recommendations in four priority areas: facilitating trade, coordinating investment, fostering regional value chains, and aligning technical standards. In practice, this could also include advising on the harmonisation of technical and safety standards for vehicles and batteries, clear customs and product classifications, rules of origin that reward local value creation, and predictable treatment of used EV imports. The board could also provide guidance on green public procurement and fleet programmes that can build early demand, and on coordinated approaches to charging networks and logistics corridors that enable the cross-border movement of vehicles and components.

A key output of the Advisory Board could be to develop an African EV industrialisation and manufacturing strategy. Such a strategy could set out a supply-side- and supply-chain-led plan for developing local and regional manufacturing. This could include clear localisation priorities, value chain mapping, and milestones for components, battery systems, assembly and recycling. It could also propose practical implementation tools such as harmonised homologation procedures, targeted tariff and VAT sequencing, and trade and working capital instruments that reduce investment uncertainty.

The establishment of an Independent Advisory Board for E-Mobility Policy and Trade would help to align Africa's trade and industrial ambitions with its sustainability agenda. By providing credible expert guidance to AfCFTA institutions, RECs, national governments and financing partners, the board could help shift e-mobility industry policy from fragmented national initiatives towards a more coherent continent-wide programme that attracts investment, deepens domestic value creation and strengthens Africa's position in the global mobility transition.



A wind farm supplying clean electricity in South Africa

2.3 Developing a Masterplan on Renewable Energy for E-Mobility

The success of the energy transition in transport in Africa will also depend on the ability of energy systems to supply power that is reliable, clean and affordable. Africa has substantial renewable energy potential, including solar, wind, hydro, geothermal and bioenergy, yet much of this potential remains untapped. While several countries have nearly 100% renewable electricity generation, the share of renewables in transport remains below 1% across the continent. At the same time, countries with the highest transport emissions were found to have particularly low shares of renewable energy in their transport energy mix.[26]

In most African countries, power systems face constraints related to generation capacity, grid coverage, quality of supply, and cross-border interconnectivity. These weaknesses could slow electric mobility uptake, limiting access to dependable power infrastructure, reducing reliability, and/or increasing charging costs. Linking transport planning with power sector development could address this gap. This is particularly important against the backdrop of Africa's continued reliance on imported fossil fuels, which has exposed many African economies to significant price volatility and associated inflation of energy costs.

Accordingly, the development of a Masterplan on Renewable Energy for electric mobility could represent a turning point for EV adoption, power sector integration, and ultimately sustainable transport in Africa. Such a masterplan would provide an integrated framework for renewable energy generation, efficient transmission, and regional power pool integration. In addition to enhancing grid stability and facilitating cross-border electricity trading, it could align

26 (REN21, 2024)

renewable energy deployment with growing e-mobility demand, ensuring that transport electrification strengthens power systems rather than burdening them. By linking transport and power planning at the national and regional levels, the masterplan could direct clean energy investment, grid modernisation, and the regional power trade to locations where charging demand is expected to grow, such as urban transport hubs and strategic economic corridors.

The Masterplan on Renewable Energy for E-mobility would have a continental scope and would complement the development of a Continental Master Plan (CMP) for electricity generation and transmission. As such, it would build on Africa's five regional power pools: the Southern African Power Pool (SAPP), West African Power Pool (WAPP), Eastern Africa Power Pool (EAPP), Central African Power Pool (CAPP), and Northern African Power Pool (COMELEC).

Using these pools as a backbone for coordination, the Masterplan could focus on three priorities: The first would be to align e-mobility demand with renewable energy deployment, using regional power pools to match supply and demand and reduce reliance on fossil generation. The second priority would be to strengthen grid infrastructure through generation capacity expansion, transmission and distribution grid upgrades, demand management, and cross-border power exchange to improve reliability and lower system costs. This would include planning for new EV loads through managed charging, vehicle-to-grid systems and dynamic pricing to maintain stability. The third priority would be to mobilize private capital for the generation capacity expansion, grids upgrading, and charging infrastructure development. This could be supported with public–private risk sharing, not only to reduce cost of capital while increasing capital availability, but also to accelerate the rollout.

Box 5: Existing Intra-African Power System Integration

The **Southern African Power Pool (SAPP)** is Africa's first formal international power pool. It was established in 1995 with a memorandum by the 12 member governments of the Southern African Development Community (SADC). The SAPP oversees the planning and operation of the electric power system across its member utilities, with the goal of creating an integrated, competitive energy market and delivering sustainable energy solutions for the SADC region and beyond.[27]

The **Africa Clean Energy Corridor (ACEC)** initiative, which is guided by the Ministerial Communiqué of 2014, has been working to accelerate the development of renewable energy potential and cross-border trade of renewable power within the SAPP and EAPP. Key pillars of the initiative include renewable energy zoning and resource assessment; regional and national energy planning; investment support frameworks; capacity building for the planning, operation, and maintenance of power grids and markets; and raising awareness for large-scale renewable power generation in the corridor.[28]

The **Continental Master Plan (CMP)** for electricity generation and transmission is a roadmap for connecting Africa's five power pools, in view of the establishment of the African Single Electricity Market (AfSEM). In 2019, African energy ministers tasked the African Union Development Agency (AUDA-NEPAD) to lead its development. AUDA-NEPAD implementation is supported by the European Union's Global Technical Assistance Facility (EU-GTAF), the International Atomic Energy Agency (IAEA) and the International Renewable Energy Agency (IRENA).[29]

27 (SAPP, n.d.)
28 (IRENA, n.d.)
29 (AUDA-NEPAD, n.d.)

03

Sustainable and Inclusive Financing Systems

The successful transformation of transport in Africa will depend not only on a political commitment to sustainable transport, but also on the mobilisation and channelling of investment capital at the scale required to realise change. Ambitious visions for sustainable transport advance furthest when they are backed by adequate, predictable and long-term financing. Across the continent, financing remains constrained by public budgets, shallow domestic capital markets, limited opportunities for local- currency borrowing and restricted access to international capital markets, which inflates borrowing costs. The result is an investment gap that is both large and persistent. In 2022, for instance, annual infrastructure investment on the continent averaged USD 80 billion, roughly half of the USD 130–170 billion required.[30] Transport infrastructure alone requires annual investment of USD 35–47 billion.[31]Alongside the challenge of mobilising sufficient financing volumes, there are various challenges related to effective allocation and oversight. Despite growing commitments to sustainable transport by governments, investment continues to flow disproportionately towards carbon-intensive infrastructure and projects prioritising short-term returns over long-term sustainability. Closing the financing gap will therefore require more than just mobilising additional capital. It will demand financing systems capable of directing resources towards clean, people-centred, and climate-resilient transport solutions, while providing bankable revenue models and clear mechanisms for sharing risks between public and private actors.

This section therefore identifies three critical turning points for building sustainable financing systems in Africa's transport sector. Together, these turning points offer pathways to mobilise greater investment, align financial flows with sustainability objectives, and build transport systems that are inclusive and fit for a net-zero future in Africa.

30 (UNECA, 2025)
31 (AEF, AUDA-NEPAD & ACF, 2025)



The Red Line Rail Mass Transit in Lagos, Nigeria

3.1 Securing Long-term Financing for Sustainable Transport

Africa's transport infrastructure faces a two-fold challenge: (1) to expand in order to keep up with growing mobility demand and meet development goals, and (2) to reinforce and increase resilience in the face of intensifying climate shocks. At the same time, fiscal space is limited and government spending is squeezed between competing priorities. Therefore, in addition to expanding access to financing and improving financing conditions, the efficient and parsimonious management of available funds is essential.

Such management should seek to enhance accessibility and inclusivity while furthering economic and industrial development. Here, the challenge is not just that budgets are constrained, but that investment systems tend to favour projects that are politically visible, institutionally familiar and easier to deliver. This helps explain why road-based infrastructure often continues to attract capital, while rail, public transport and integrated mobility systems face higher barriers in terms of upfront costs, coordination and long-term operating finance.

Establishing a priority for sustainable transport in existing budgets would represent a turning point for the efficient use of funds, the promotion of long-term infrastructure resilience, and the achievement of development goals. This would primarily entail shifting existing transport budgets to more sustainable investments. Sustainable transport should be recognised as a public priority due to its critical role in enabling access to mobility, facilitating trade and supporting economic development. Budget reform initiatives in this area could be supported by a taxonomy that defines sustainable transport investment to ensure proper resource use. The benefits of such reform would extend far beyond the transport sector, creating a positive ripple effect for economic and social development.

The associated initiatives would be implemented by treasury departments, by creating earmarked or protected funding lines for sustainable transport within national and subnational budget systems. Earmarking could take the form of an absolute number or a relative share within the

total annual or transport-specific budget. Spending should be prioritised according to feasibility and expectable impacts. In this context, governments could decide to create dedicated allocations in long-term financial planning, including for walking and cycling infrastructure, public transport operations and fleet renewal, road safety upgrades, rural access, and corridor reliability measures. Governments could also explore hypothecated revenue sources, such as payroll-based mobility levies, fuel-related charges, parking revenues, or other transport-related taxes and fees that are politically and institutionally feasible. International experience shows that dedicated revenue instruments can enhance funding stability for sustainable transport. However, their design must be adapted to local fiscal capacity, labour market conditions, and governance arrangements.

A key distinction must be drawn between short-term funding programmes and institutionalised financing mechanisms. Dedicated allocations for sustainable mobility could help, but they often remain temporary, competitive and vulnerable to annual budget compromises or shifting ministerial priorities. Greater predictability is provided by rules-based mechanisms that are anchored in relevant law whenever possible. This ensures stable funding beyond individual projects or political cycles. In this way, the objective should not only be to create new budget lines, but to institutionalise sustainable transport finance as a permanent aspect of public infrastructure and service delivery. Budget reform should also include dedicated resources for project preparation and project staff, so that sustainable mobility priorities are backed by a pipeline of well-prepared projects capable of absorbing finance. Ultimately, sustainable mobility should be funded as a core element of public service and infrastructure delivery, not as pilot activity.

In parallel, institutional capacity could be strengthened and data systems could be made more robust to enable effective implementation and evaluation and ensure allocation is tied to measurable outcomes. Budget lines and financing windows for sustainable mobility can be tied to a range of indicators, including fatality and serious injury reduction, accessibility gains (particularly for low-income areas), service reliability improvements, travel-time savings for public transport, emissions reductions, and, where relevant, electric vehicle adoption rates and charging infrastructure coverage. This would strengthen accountability while shifting decision-making criteria from inputs to outcomes, which is essential when fiscal space is tight.

Oversight can be strengthened through continental and regional bodies that support transparency, standardisation, and cross-country knowledge sharing. Common reporting templates, agreed performance indicators, and regular peer review would help countries to compare outcomes and highlight effective solutions, thus building confidence in scaling. Regional Economic Communities, the African Union and its agencies, and African finance institutions could support activities in this area by issuing guidance on eligible investments, minimum safeguards and reporting standards, and by convening knowledge platforms that interconnect finance ministries, transport authorities and cities.

Prioritising sustainable mobility in national budgets begins with directing and protecting public resources for inclusive, low-carbon systems at an early stage in planning and budgeting. It also requires linking allocations to measurable outcomes, strengthening project preparation, and using regional oversight to improve transparency and learning. Complementary financing facilities can support this effort, but they cannot substitute for a strong domestic budget commitment.



The Lekki-Ikoyi Link Bridge in Lagos, Nigeria

3.2 Pooling Regional Funding for Climate-Resilient Transport Infrastructure

Africa's ability to deliver sustainable transport depends on its ability to invest in more climate-resilient infrastructure. Despite Africa's modest contribution to global GHG emissions, climate shocks across the region are intensifying in both frequency and severity, and transport assets are bearing a significant share of the costs. Estimates show that the region loses about USD 7–15 billion annually due to climate change, a figure projected to reach USD 50 billion by 2030, equivalent to roughly 7% of the continent's GDP.[32] These extreme weather events not only affect the movement of people and goods, but they also drive up the costs of infrastructure repair and reconstruction. Economic losses and rising recovery costs can create a vicious cycle that limits governments' ability to invest in the resilient infrastructure needed to reduce future climate risks.

This fiscal strain further aggravates a broader financing challenge. As transport infrastructure faces growing exposure to extreme weather, the business case for new investments weakens. The uncertainty over long-term asset sustainability raises risk premiums and inflates total project costs. Higher upfront investment in resilience does generate significant direct returns; these returns primarily take the form of avoided costs from fewer disruptions, lower reconstruction expenses. Such payoffs remain difficult to measure within fragmented, donor-dependent financing structures. Additionally, with funding spread across disconnected projects and agencies, long-term planning is constrained, maintenance deprioritised, and resilience upgrades are consistently deferred until after shocks occur, even though prior upgrading could have yielded higher benefits.

32 (AfDB, 2023)

The regional pooling of funding for climate-resilient transport infrastructure could therefore represent a key lever for shifting how Africa finances infrastructure preparedness and recovery from growing climate threats. Where financing remains fragmented and donor dependent, countries are locked in a cycle of short-term planning that makes it difficult to incorporate resilience requirements into budgeting processes from the outset. A coordinated funding model could help to break this cycle by enabling countries to invest at greater scale and over longer timeframes, thus solidifying resilience as a design condition rather than an afterthought. It is important to recognise that, financing structures explicitly designed for the purpose of promoting resilience are essential if the associated benefits in terms of avoided disruptions and lower reconstruction costs are to be realised. Resilient infrastructure, in other words, begins with resilient financing that is based on African ownership, predictable long-term capital flows, and institutional credibility.

This pooling of resources could draw inspiration from African community-based financial systems that are rooted in trust and collective accountability, such as Kenya's chamas, Ghana's susu, and Southern Africa's stokvels. These systems demonstrate the power of rotational, pooled investment models that prioritise transparency, shared risk and local agency. However, harnessing these community-level practices for resource pooling at the state and inter-state level will require the institutionalisation of governance, oversight and evaluation mechanisms.

Box 6: Africa's Collective Savings Traditions

Stokvels, or chamas, are unique community crowd-funding strategies practised in various African localities. Worldwide, stokvels are commonly known as "rotating savings and credit associations" (ROSCAs). The term stokvel is unique to the South African context, while chamas is used in East Africa. A stokvel is an informal group savings scheme in which members voluntarily agree to contribute a fixed amount to a common pool on a regular basis.[33] Contributions can be made weekly, fortnightly, or monthly. The Orange Farm case in South Africa is a good example of a stokvel: members make regular contributions to a common pool and then used the money to support one another's household needs. Stokvels are not only a way of saving money. They are also an informal social security system, helping members pay for necessities, create opportunities for investment, support asset accumulation, and strengthen women's economic role in the household and community.[34]

33 (Lukhele, 1990)
34 (Matuku & Edwell Kaseke, 2014)

In practice, a small group of frontrunner countries within a Regional Economic Community (REC) could establish a stokvel-like pool and agree on its contribution structure, eligibility criteria and governance arrangements. Funded through regular contributions from participating governments or national development banks, the mechanism could be operated on a balanced-budget basis; accordingly, it would not be permitted to incur debt.

Participating countries would then need to agree on whether disbursements are made as grants allocated on a rotating schedule or current-needs basis, or as preferential loans available given justified demand. In either case, access to funding and financing could be limited to projects that meet predefined eligibility criteria, ensuring that the mechanism supports priority investments in climate-resilient transport infrastructure. To ensure credibility and fairness, the mechanism could apply equity and climate-resilience criteria with transparent governance safeguards. Cross-border corridors and shared infrastructure among member states would also be a natural priority, since their resilience value accrues across national boundaries and cannot be adequately captured through purely national financing instruments.

Once the mechanism has demonstrated its ability to mobilise and deploy regional capital effectively, thus reducing reliance on external financing and exposure to international lending conditions – it could be expanded to additional REC programmes. Over time, the model could finance a larger portfolio of resilient transport corridors and urban mobility infrastructure, while attracting private capital through greater scale, predictability and credible governance safeguards.

Over the long term, the pool could be established at a regional level and integrated in institutions such as RECs and existing continental financial institutions with proven balance sheets and structuring capacity, such as the African Development Bank and Africa Finance Cooperation. Governments could also decide to allocate direct funding streams to the pool, such as road funds, corridor user charges or climate-linked levies. As a result, the pool would shift climate-resilient infrastructure finance away from fragmented projects, establishing a coordinated continental approach that strengthens resilience and improves investor confidence.



Electric buses and minibus in Nairobi, Kenya

3.3 Scaling Domestic Financing for Electric Mobility

Electric mobility requires specific attention because, unlike many other sustainable transport measures, it demands simultaneous investment in vehicles, charging infrastructure, enterprise growth and underlying power systems. Without such targeted support, electric mobility is likely to remain confined to pilot projects and will have trouble achieving mass adoption. At the same time, economic conditions are favourable for electric vehicle adoption across Africa as demonstrated by start-ups and initiatives across the continent.

Much more efficient drivetrains combined with competitive electricity prices create a significant cost advantage in operations. Realising this advantage, requires overcoming higher vehicle upfront costs, building charging infrastructure, and developing an industry ecosystem, all which demand significant investment. Financing remains constrained; prohibitively high cost of capital threatens to undermine the transition while public budgets are limited and better reserved for priorities that cannot attract private investment.

The scaling of financing for e-mobility would therefore represent a turning point for EV adoption and the continent-wide development of an e-mobility industry and ecosystem. Establishing national financing mechanisms would improve capital availability and help to channel funding to households, operators, municipalities, and businesses. The clear early definition of financing priorities with a focus on demand aggregation mechanisms such as fleet-based procurement (e.g. buses, boda bodas, logistics fleets) would help to achieve scale and improve bankability.

National financing strategies could support the initial rollout of charging infrastructure, including depot, corridor, and public networks, while private investments are needed for the purchase or lease of electric buses, two- and three-wheelers, municipal fleets, and logistics vehicles. In addition, e-mobility companies could be given preferential loans to develop and expand business and support the growth of a rising industry. Clearly defined eligibility criteria, focused particularly on start-ups and small and

medium-sized enterprises (SMEs), as well as transparent agreements on public-private risk sharing, would need to be established. Efforts to optimise market conditions, including public investments in upskilling and infrastructure, would complement the development of an industry ecosystem.

Faced with shallow domestic capital markets, high premiums to account for real or perceived country-level risks, and the limited exposure of international investors to African markets, national financing platforms can provide for public-sector risk sharing, including in particular through the targeted use of guarantees. Over time, this approach can shift electric mobility finance from fragmented initiatives to a more coordinated domestic system that supports adoption beyond pilots while strengthening the conditions for scale.

Box 7: Climate Finance Facilities

Green Fund Rwanda (FONERWA)

One of the first national environmental and climate change investment funds in Africa, Green Fund Rwanda has raised approximately USD 270 million since its founding in 2012. The Fund provides access to a credit line at an interest rate more than a third below market levels.[35] The Fund has been a precursor for green financing in Africa. However, while FONERWA has demonstrated strong governance and catalytic grant financing, its impact has been constrained by relatively small ticket sizes, limited private capital mobilization, and a predominantly grant-based model. A targeted fund for e-mobility, spearheaded by a group of countries and regionally coordinated, could maximize the model's potential.

Green Mobility Financing Facility for Africa (GMFA)

Co-financed by the Global Environment Facility (GEF) and World Bank, the Green Mobility Financing Facility for Africa was approved in 2024. It aims to catalyse private investment to electrify public transport in Africa. The Facility will address financing barriers through blended finance and credit enhancement instruments, combined with technical assistance. Endowed with a total of close to USD 200 million, the Facility helps to finance electric buses, two- and three-wheelers, associated renewable energy charging infrastructure and EV manufacturing.[36]

35 (FONERWA, n.d.)
36 (GEF, n.d.)

04

Flagship Initiatives for Scaling and Acceleration

For planning and investment in sustainable transport to matter, tangible outcomes are essential. Africa's transport transformation cannot be realised through pilot projects alone, and while such projects demonstrate what is possible, they rarely create the conditions needed for widespread adoption and long-term impact. Flagship initiatives are therefore required to deliver necessary change at a larger scale. Such initiatives can help to make ideas bankable, replicable, and institutionally embedded while building the skills, networks and investment pipelines required to develop mobility solutions that address African realities.

Africa is the world's youngest continent, with an immense reservoir of creativity, and entrepreneurial energy. The challenge is therefore not a shortage of innovative approaches, but rather limited capacity to develop, test, refine and scale up promising concepts. Across the continent, national innovation systems continue to face common constraints, including skills shortages exacerbated by the outward migration of top talent, policy and governance frameworks that do not yet fully support innovation, and limited access to the finance needed to grow solutions. For sustainable transport, this presents both a challenge and an opportunity. Flagship initiatives can overcome these constraints by creating platforms for collaboration, learning, project development, and investment, allowing successful approaches to spread across cities and countries.

This section suggests three such initiatives that could transform sustainable transport, turning it from a series of isolated successes into a continent-wide process of systemic change.



Open Streets Exchange by Mik Makala toolkit Workshop

4.1 Establishing an Academy for African Sustainable Urban Mobility Plans (SUMPs)

African cities are rapidly expanding at a pace that existing transport systems must be designed to absorb. The continent's urban population is projected to double to 1.4 billion by 2050,[37] a scale of growth that will significantly reshape land use, spatial development patterns, and mobility demand. Current planning frameworks in most African cities continue to perpetuate car centric development patterns that deepen spatial inequalities, often leaving millions without access to safe and affordable transport systems. Unplanned settlements continue to emerge at the urban periphery, largely without supporting transport infrastructure, while formal planning instruments fail to anticipate or respond to these dynamics of urban expansion.[38] The consequences of these traditional planning approaches are already visible. Most African cities are contending with worsening congestion, unsafe streets, and long travel times that place a disproportionate toll on lower-income residents who depend on walking, cycling and public transport.

Reversing these trajectories requires a paradigm shift from car-centric planning to integrated transport planning that focuses on people and low-carbon mobility solutions. Sustainable Urban Mobility Plans (SUMPs) offer a proven framework to address these challenges in a holistic approach. A SUMP is a strategic plan developed in a participatory and integrated way to meet the mobility needs of people and businesses in cities, and to harmonise existing planning approaches.[39] However, local governments across the continent often lack the expertise to effectively plan, regulate, and monitor urban mobility effectively, which can lead them to rely on external support, creating missed opportunities for local ownership and capacity building within local governments.

37 (OECD, 2025)
38 (ICLEI, 2024)
39 (MYC, n.d.)

Establishing an African SUMP Academy that builds the expertise and institutional capacity to design and implement sustainable urban mobility plans represents a promising catalyst for the transformation of mobility in African cities. A continental-wide capacity building programme would equip African cities to take charge of their own planning processes. By focusing on technical training, peer learning and data use, the Academy would enable local governments to conduct evidence-based planning, mobilise funding, and monitor progress. Technical training could encompass various aspects, including travel-data collection and management, street design and safety planning, public transport network planning, and the integration of land-use and mobility plans. By building a community of practice across cities, an African SUMP Academy would improve knowledge sharing between city governments and help promote peer-to-peer learning between cities.

Box 8: Existing Capacity Building Initiatives for SUMPs

Since its inception in 2015, **MobiliseYourCity (MYC)** has become a leading global partnership for sustainable urban mobility across 38 countries, bringing together 82 member cities and 16 member countries. Through technical assistance, capacity building and project preparation support, the Partnership helps national and local governments to strengthen mobility governance and develop integrated transport strategies.

Between 2015 and 2025, MYC supported the preparation of 33 Sustainable Urban Mobility Plans (SUMPs) and 11 National Urban Mobility Policies and Investment Programmes (NUMPs). By the end of 2025, 16 SUMPs and 9 NUMPs had already entered implementation. The Partnership has also helped identify more than EUR 30 billion in sustainable mobility investment needs and mobilise EUR 4.4 billion for implementation, thus demonstrating a transition from planning to investment and delivery.[40]

Partnerships between municipalities, Regional Economic Communities, and development partners would offer a further multiplier for sustainable urban mobility planning in Africa. RECs are well placed to support the African SUMP Academy in sharing tools, aligning training and guidance, and strengthening cross-country learning. Development partners could provide the technical assistance and co-financing support needed for the sustained delivery of SUMPs.

Results-based funding could also act as an incentive to reward effective SUMP delivery. National governments and development partners could link budget support to measurable milestones such as SUMP adoption, the delivery of priority corridors or safety upgrades, improvements in public transport performance, and the transparent reporting of key indicators. By anchoring disbursements to outcomes, this approach could close the persistent gap between planning and implementation, pushing cities beyond strategy documents toward sustained, accountable delivery.

With stronger capacity, clearer incentives, and better partnerships, African cities can deliver mobility systems that reduce inequality and support safe, low-carbon urban growth. Establishing an African SUMP Academy would be an investment in the capacity of African cities to plan and govern their own mobility futures by deepening technical expertise and helping cities sustain inclusive transport improvements over the long term.

40 (MYC, 2026)



Engineers checking machinery in industrial plant

4.2 Creating Investment and Innovation Hubs

Africa's transformation to sustainable transport depends on building industrial ecosystems that can scale electric mobility industries, strengthen innovation, and create skilled jobs. Currently, the continent's electric mobility sector is largely organised around consumption rather than production. Vehicles, batteries, components and technologies are predominantly imported, meaning that much of the value generated by a rapidly growing market accrues outside Africa rather than strengthening domestic and regional value chains. Limited research capacity, skill gaps, weak industrial capability and fragmented policy frameworks have continued to constrain Africa's role in the global electric mobility market.[41] In instances where African universities and research institutions generate knowledge and technical expertise, the infrastructure needed to translate research into commercial ventures remains weak. As a result, a self-reinforcing cycle is created, where promising innovations fail to reach the market, limiting the creation of businesses, jobs, tax revenues, and industrial capabilities that could, in turn, have supported further investment in innovation.

The consequences are particularly significant for Africa's young population. The continent faces an urgent employment challenge, with young people accounting for 60% of Africa's unemployment.[42] Green industries, including electric mobility, therefore offer significant potential to generate decent and future-oriented employment opportunities, with estimates showing the green transition has the potential to create about 3 million direct jobs by 2030.[43] Realising this potential requires a deliberate shift in policy

41 (AfDB, 2023)
42 (ILO, 2022)
43 (fsdafrica, 2024)

and investment in the domains of skills development, entrepreneurship, technology development and industrial capacity.

Establishing investment and innovation hubs across the continent, thus connecting Special Economic Zones (SEZs) with Centres of Excellence (CoEs), would be a turning point for strategically positioning Africa within global electric mobility value chains. This framework would build on existing initiatives: regional corridor and local development strategies such as the AfCFTA, SEZs with underutilised potential for higher-value manufacturing, and CoEs with applied research capacity that currently lack industrial demand to absorb it.

SEZs and CoEs would play complementary roles in supporting manufacturing, training, testing, and enterprise development, aligned with market opportunities and investor needs. Without workforce pipelines, SEZs may attract low-value assembly operations and investment or depend on imported skills and technology, whereas CoEs without industrial anchors produce graduates and research outputs that find no local application, accelerating the brain drain they were designed to prevent. Connected within a shared strategy, these institutions could change each other's incentive structure by allowing SEZs to gain access to locally trained technicians, quality assurance systems, and applied research capacity; CoEs, for their part, would gain access to industrial demand that orients their training and research to manufacturing, maintenance, and innovation at scale. Linking human capital development to industrial growth in this way would reduce skill mismatches, increase the likelihood that investments translate into local jobs, and build cumulative capacities that attract higher-value activity over time.

Electric mobility value chains will also require cross-border scale to be economically viable and sustain global competitiveness. Already, existing regional corridors provide the infrastructure, logistics networks, and intergovernmental coordination mechanisms that the investment and innovation hubs would need to function at a regional scale. Therefore, embedding hubs within corridor strategies, rather than treating them as standalone national projects, would enable transforming them into nodes within a continent-wide value chain.

Box 9: The uYilo eMobility Cluster

uYilo provides a practical example of how coordinated investment in research, testing infrastructure, skills, and enterprise development can support the emergence of a domestic electric mobility ecosystem. Established in 2013 through South Africa's **Technology Innovation Agency (TIA)**, the uYilo eMobility Programme was created to accelerate the country's transition to electric mobility by fostering an enabling environment for the adoption and growth of electric vehicles. The programme acts as a national platform that brings together government, industry, academia and innovators to address barriers to e-mobility deployment.

uYilo's activities span policy advocacy, industry engagement, pilot and demonstration projects, capacity building, and enterprise development across the e-mobility ecosystem. The programme has facilities and expertise such as nationally accredited battery testing, materials testing, electric vehicle systems and a smart grid ecosystem. Through skills development, technology innovation and business support programmes, the program helps build the human capital and innovation ecosystem needed to grow South Africa's electric mobility industry.[44]

44 (UYILO, n.d.)

National governments and Regional Economic Communities could harmonise training standards and certification systems across CoEs and align these with the skill profiles and technical requirements of firms operating within SEZs. This alignment would require ongoing dialogue between industry and training institutions as technologies evolve and manufacturing processes mature. Providing stable and predictable investment conditions in the areas of taxation, custom processes, access to land and infrastructure provision would be equally foundational, as they would allow firms to make long-term commitments that support productive industrial ecosystems. Development finance institutions and regional bodies could use the hubs as platforms for coordinating technical and financial assistance, and for policy alignment that reduces investment risk.

Delivery will also require strong governance and coordinated financing. SEZs require clear mandates and performance metrics linked to investment volumes, jobs created, skills imparted and local value addition, to create accountability and allow for continuous improvement. CoEs need sustained funding to deliver training, applied research and industry services that directly support manufacturing ecosystems. Cooperation between governments, industry players, finance institutions, academia and development partners will be pivotal mechanism the hubs will generate value that no single actor could produce alone.



Bus Rapid Transit System (BRT) in Dar es salaam, Tanzania

4.3 Founding Regional Project Preparation Platforms

Harnessing the investment opportunities that Africa's transport transformation generates will depend in part on the ability of relevant actors to design infrastructure projects that are technically sound and financially viable. Estimates show that fewer than 10% of planned infrastructure projects on the continent reach financial close.[45] While several factors contribute to this shortcoming, a key driver is the persistent lack of technical capacity and dedicated budgets to support project preparation. Transport project proposals remain fragmented, underprepared, or stalled, because public institutions lack the time, technical expertise and coordination capacity to assess the technical and financial impact and risks of projects and move project concepts toward investment readiness.

As a result, there is a chronic shortage of well-prepared projects, which raises transaction costs, slows implementation, and weakens the credibility of pipelines that financiers and development partners rely on for appraisal and disbursement decisions.

Establishing Regional Project Preparation Platforms would be a turning point for closing this gap, strengthening the capacities of public institutions in effective project preparation. Regional initiatives, such as the Service Delivery Mechanism (SDM) of the Programme for Infrastructure Development in Africa (PIDA), are already demonstrating what this could look like. The SDM supports the preparation of infrastructure projects to make them bankable and ready

45 (Lakmeeharan, Manji, Nyairo, & Poeltner, 2020)

for financing, by working alongside regional economic communities (RECs), governments and other stakeholders. The SDM also provides institutional advice, legal consulting, communication services and capacity-building support, illustrating the integrated technical assistance that is required for project preparation at scale.[46] By 2024, the SDM had evaluated more than 90 projects; some have successfully secured funding for construction.[47]

Box 10: GET.invest Support to E-mobility Start-up in Nigeria

Implemented by the **Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ)**, **GET.invest** aims to mobilise investment in clean energy by closing the gap between finance demand and supply. GET.invest offers finance access advisory by helping project developers prepare bankable, investment-ready proposals; it also provides financiers access to well-vetted investment opportunities.

SGX Mobility, an electric mobility start-up in Nigeria, is a beneficiary of GET.invest's advisory support. GET.invest helped to strengthen the company's business and financial model and assisted with early fundraising. Now part of the GET.invest Nigeria country window, SGX has received guidance on accessing climate and green grants and has benefitted from introductions to equity investors such as Persistent Energy. This added visibility has helped the company to secure an agreement with Mkobo Microfinance Bank to finance lease-to-own arrangements for two- and three-wheelers. SGX has since also secured a partnership with the ride-hailing service Bolt to deploy electric tricycles in Lagos, eventually targeting at fleet of 1,000 vehicles.[48]

Building on such existing initiatives, the regional project preparation platforms would be anchored within RECs and linked to planning institutions, universities, think tanks, and transport agencies, supporting governments and cities to move from initial concepts to well-prepared projects. Their role would be to improve feasibility assessments, project structuring, safeguards, climate-risk screening, financial analysis, and implementation readiness, while helping to align national and cross-border priorities. Critically, these platforms will not be designed to replace public institutions, but rather to reinforce them. The aim is to strengthen operational capabilities, thus allowing public bodies to prepare strong projects on an ongoing basis, reducing long-term dependence on external support.

The regional dimension of the platforms adds further value. By operating across borders rather than within single national contexts, these platforms would support the cross-border infrastructure and corridor-level coordination that many sustainable transport investments in Africa will require over the long term.

46 (PIDA, n.d.)
47 (PIDA, 2024)
48 (GET.invest, 2025)

Conclusion

The UN Decade for Sustainable Transport comes at a historical moment for a continent undergoing profound transformation as it navigates unique challenges and embraces emerging opportunities. Capitalising on the growing momentum, the realisation of sustainable transport in Africa will require committed action, not only to overcome constraints, but also to take full advantage of untapped opportunity. Fortunately, the preconditions for success are excellent. Africa is home to the world's youngest, fastest growing, and most rapidly urbanising population, thus presenting a uniquely compelling case for people-centred transport planning and infrastructure investment.

The vision for sustainable transport in Africa elaborated in this report features policy interventions whose impacts will compound and extend across borders and sectors. The scaling of electric mobility will be crucially supported by the continent's enormous renewable energy potential and critical mineral resource base. Accordingly, the decarbonisation of transport will help to grow the economy and create jobs for a rapidly growing workforce. Similarly, the integration of regional corridors involves more than infrastructure investment and the creation of new routes for freight movement. It is rather a step toward intracontinental cohesion that will have ripple effects across sectors, including trade, tourism and culture.

The twelve turning points represent an interconnected system for encouraging change, with each one creating the conditions for the others to emerge or scale. At the continental level, frameworks such as the African Charter on Electric Mobility establish a vision and policy direction for the continent, thereby legitimising the elevation of sustainable transport as a national priority. The Charter also provides a mandate for the established of the independent advisory board on electric mobility policy and trade, while guiding the development of a renewable energy master plan for e-mobility. Together, these regional foundations will provide the technical and strategic foundation on which national governments can act.. Elevating sustainable transport to a national priority will serve as a central catalyst for implementation. It will drive the development of national and local action plans for popular transport reform, which will be reinforced by the establishment of a SUMP Academy to build the institutional capacity needed to implement such strategies. This national commitment will in turn help to mobilise the financing needed to deliver on these ambitions.

Scaling up domestic financing for electric mobility will stimulate the creation of investment and innovation hubs, attract private capital while foster the development of domestic and regional industries. Alongside regional project preparation platforms, these hubs will support the development of a pipeline of bankable projects needed to access to long-term finance for sustainable transport. Securing long term and predictable financing flows will, in turn, enable regional resources to be pooled for climate-resilient infrastructure, supporting investments on a scale that individual countries would find difficult to achieve alone. Ultimately, this will help to strengthen regional economic corridors.

Beyond acting as catalysts for change, the turning points represent milestones or checkpoints that can signal progress on Africa's path to sustainable transport. This progress need not be linear; some turning points could emerge earlier, laying the foundation for subsequent turning points to develop. Notably, these turning points do not need to be fully implemented in their entirety before others begin. Rather, their initiation or partial progress are sufficient to trigger and support subsequent steps.

Lastly, the turning points also form an active framework that requires ongoing monitoring to track progress, identify where additional resources or attention is needed, and address persistent challenges. Shared indicators and transparent reporting can help make progress visible, strengthen accountability, and support mutual learning across countries and cities. Aligning this tracking with international commitments such as NDCs, Long-Term Strategies (LTS), and Sustainable Development Goals (SDGs) could assess whether political commitments are translating into formal national policy reforms, giving stakeholders ownership of the process and space to course-correct early.

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Annex

Acronyms

ACEC	Africa Clean Energy Corridor
ACF	Africa Climate Foundation
AEF	Africa Europe Foundation
AfCFTA	African Continental Free Trade Area
AfDB	African Development Bank
AfSEM	African Single Electricity Market
AI	Artificial Intelligence
ARTCOMS	African Regional Transport Corridor Management System
AU	African Union
AUDA-NEPAD	African Union Development Agency
BRT	Bus Rapid Transit
C40	C40 Cities Climate Leadership Group
CAPP	Central African Power Pool
CCTTFA	Central Corridor Transit Transport Facilitation Agency
CMIs	Corridor Management Institutions
CMP	Continental Master Plan
CoEs	Centres of Excellence
COMELEC	Northern African Power Pool
DFI	Development Finance Institution
EAPP	Eastern Africa Power Pool
EU	European Union
EU-GTAF	European Union – Global Technical Assistance Facility
EUR	Euro
EV	Electric Vehicle
FONERWA	Rwanda Green Fund
GDP	Gross Domestic Product
GEF	Global Environment Facility

GHG	Greenhouse Gas
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH
GMFA	Green Mobility Financing Facility for Africa
IAEA	International Atomic Energy Agency
ILO	International Labour Organisation
IRENA	International Renewable Energy Agency
ITDP	Institute for Transportation and Development Policy
KPIs	Key Performance Indicators
LTS	Long Term Strategies
MITTA	Ministry of Infrastructure and Land and Air Transport Senegal
MYC	MobiliseYourCity
NDC	Nationally Determined Contributions
NMT	Non-Motorized Transport
NCTTCA	Northern Corridor Transit and Transport Coordination Authority
NUMPs	National Urban Mobility Policies
OECD	Organisation for Economic Co-operation and Development
PAAPAM	Pan African Action Plan on Active Mobility
PICI	Presidential Infrastructure Champion Initiative
PIDA	African Union's Programme for Infrastructure Development in Africa
REC	Regional Economic Community
ROSCAs	Rotating Savings and Credit Associations
SAATM	Single African Air Transport Market
SADC	Southern Africa Development Community
SAPP	Southern Africa Power Pool
SDGs	Sustainable Development Goals
SDM	Service Delivery Mechanism
SEZs	Special Economic Zones
SLOCAT	Sustainable Low Carbon Transport Partnership
SMEs	Small and Medium-Sized Enterprises
SSATP	Africa Transport Policy Program
STC-T&E	Specialised Technical Committee on Transport and Energy
SUMP	Sustainable Urban Mobility Plan

TIA	Technology Innovation Agency
TUMI	Transformative Urban Mobility Initiative
TP	Turning Point
TTTFP	Tripartite Transport & Transit Facilitation Programme
UITP	International Association of Public Transport
UN	United Nations
UNECA	United Nations Economic Commission for Africa
UNEP	United Nations Environment Programme
UNDP	United Nations Development Programme
WAPP	West African Power Pool
WRI	World Resources Institute

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