African Energy Atlas
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### Introduction

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Pilot projects win plaudits, but private energy is not yet a genuine ‘asset class’

Agencies have lined up to support privately promoted developments, suggesting IPPs and other investments may eventually pull in the tens of billions Africa needs to provide clean, sustainable energy. But most prize-winning schemes are underpinned by substantial official support, and hopes have been dampened by an emerging markets downturn that has also blighted oil and gas companies.

It has become the mantra of development finance institutions (DFIs) and cash-strapped governments that multilateral and public sector agencies cannot provide the bulk of financing needed for sub-Saharan Africa to meet the hugely ambitious but highly necessary targets to pull its populations out of energy poverty and overcome gaping infrastructure deficits.

DFIs can play a critical role in mitigating risk, allowing model projects – such as the 450MW Azura-Edo gas-to-power scheme in Nigeria, the 300MW Lake Turkana Wind Power scheme in northern Kenya and the 510MW Ouarzazate solar park in Morocco – to go ahead. After years when new independent power projects (IPPs) all but disappeared from the African electricity supply industry, guarantees and funding flows from the World Bank Group (WBG), African Development Bank (AfDB), Germany’s KfW and other leading institutions have allowed ground-breaking schemes to go ahead.

In its filing to the Infrastructure Consortium for Africa (ICA), the WBG reported commitments totalling $2.3bn to energy projects in 2014, with much more expected to come. The ICA’s 2014 annual report showed that energy again dominated commitments made by its multilateral and bilateral members, reaching $9.2bn in 2014*.

Bilateral DFIs including the Agence Française de Développement, KfW, Dutch development finance institution FMO and the UK’s CDC Group continue to play a key role in mobilising investment. This was reflected in CDC’s decision in 2015 to return to African energy investment after a decade away, joining Norfund to purchase UK developer Globaleq from private equity company Actis.

According to ICA co-ordinator Mohamed Hassan, “the private sector is increasingly playing an important role in resource mobilisation, with banks and institutional investors channelling funds for public investment in infrastructure, including roads, power plants and water facilities”. Some 88% of energy investors who responded to the ICA’s African Infrastructure Investment Survey in 2015 said they intended to increase commitments. But private sector investments continue to focus on a few large-scale projects, “while participation in regional projects appears too challenging for most private sector investors and developers”, the ICA observed.

Much more is needed than the support WBG and other public sector agencies can realistically provide if plans to lift some 500m sub-Saharan African consumers out of energy poverty by 2030 – the goal of UN secretary-general Ban Ki-moon’s...
Sudan, South Sudan

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