

State of the Private Infrastructure in Africa 2021

Final Survey Results

15 November 2021

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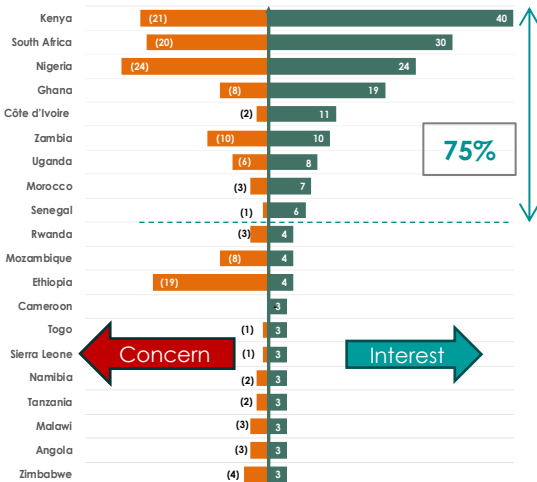


Respondents

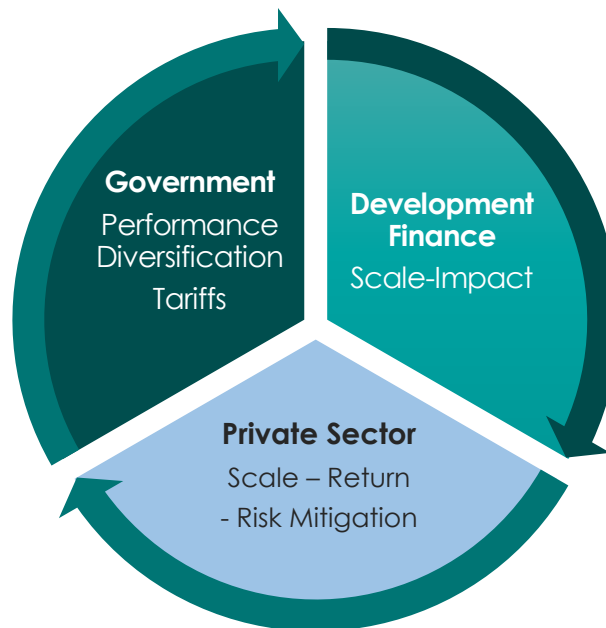
77 Respondents from 48 Institutions including 10 public sector and Government respondents, dominated by **Energy & Transport, Digital** sectors

\$ 43.8 billion allocated capital (**\$56.5 billion** including anonymous),

INVESTOR INTEREST AND CONCERN



The PPP Proposition



Long Development Timelines

Demand-Supply mismatch

Lost Learning

Institutions

Frame-works
Transparency

Master Plan

Local Content

(people, good, capital)

Risk Mitigation

Aggregation

Revenue Certainty

Innovation

(Insurance & Liquidity)

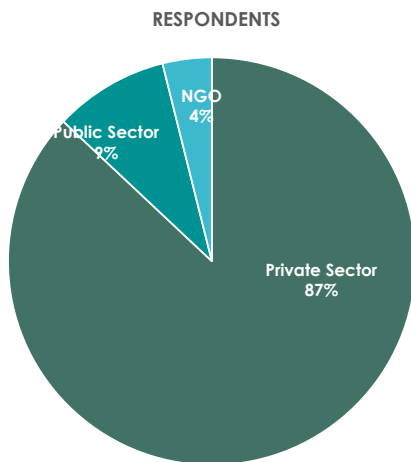
Sustainability 2.0

doing-good vs.

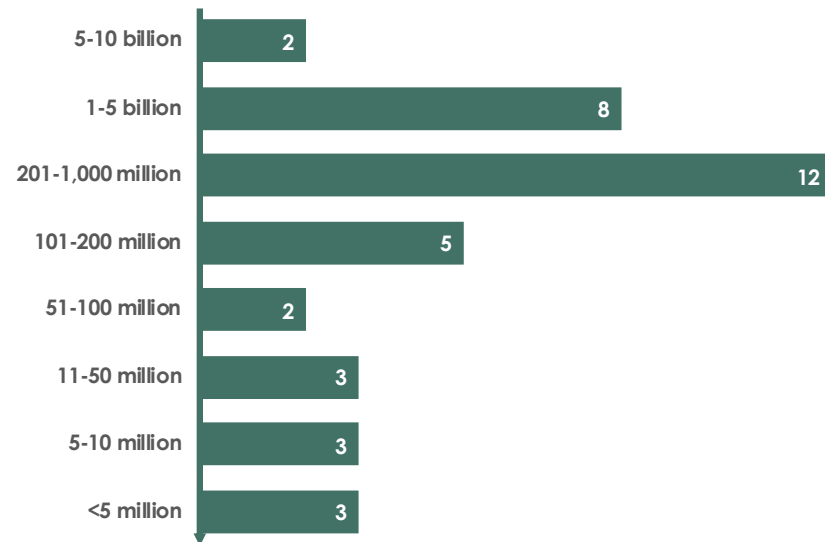
doing no-harm

\$ 43.8* billion committed to African Infrastructure by 48 institutions – dominated by larger funds and DFIs (with more than \$100 million capital for African Infrastructure)

** Committed Capital estimated at \$ 56.5 billion, including responses from anonymous respondents*



ALLOCATED CAPITAL FOR AFRICAN INFRA



Number of respondents

Overall half of respondents believe that PPP in Africa offers a good risk-reward balance to both public and private sector.

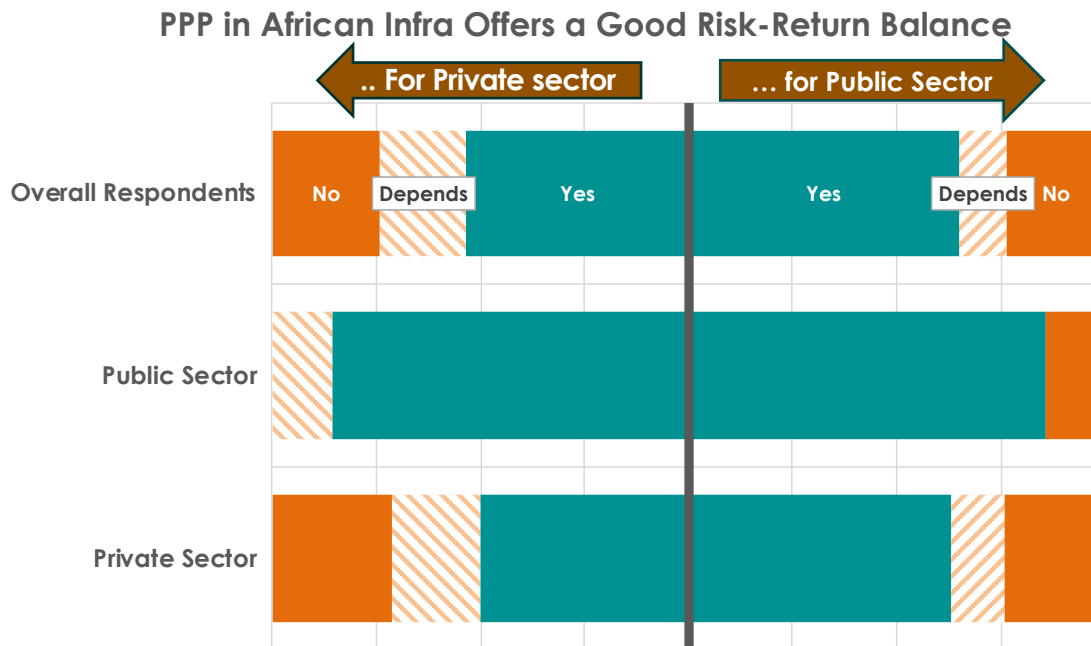
Majority of the 'No votes' were from Private Sector respondents,

And

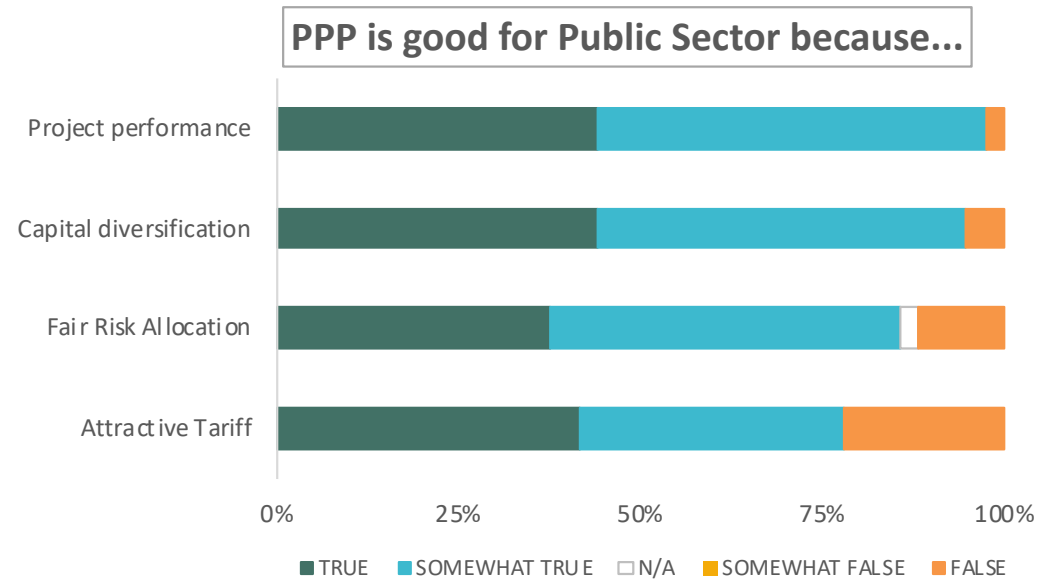
Private sector respondents feel that the risk-reward balance is better for the Public Sector

43% respondents voted that Both Public and Private Sector have a fair risk-reward balance, and 14% voted that neither of them have a fair risk-reward balance!

87% of the 77 submissions are from the Private Sector

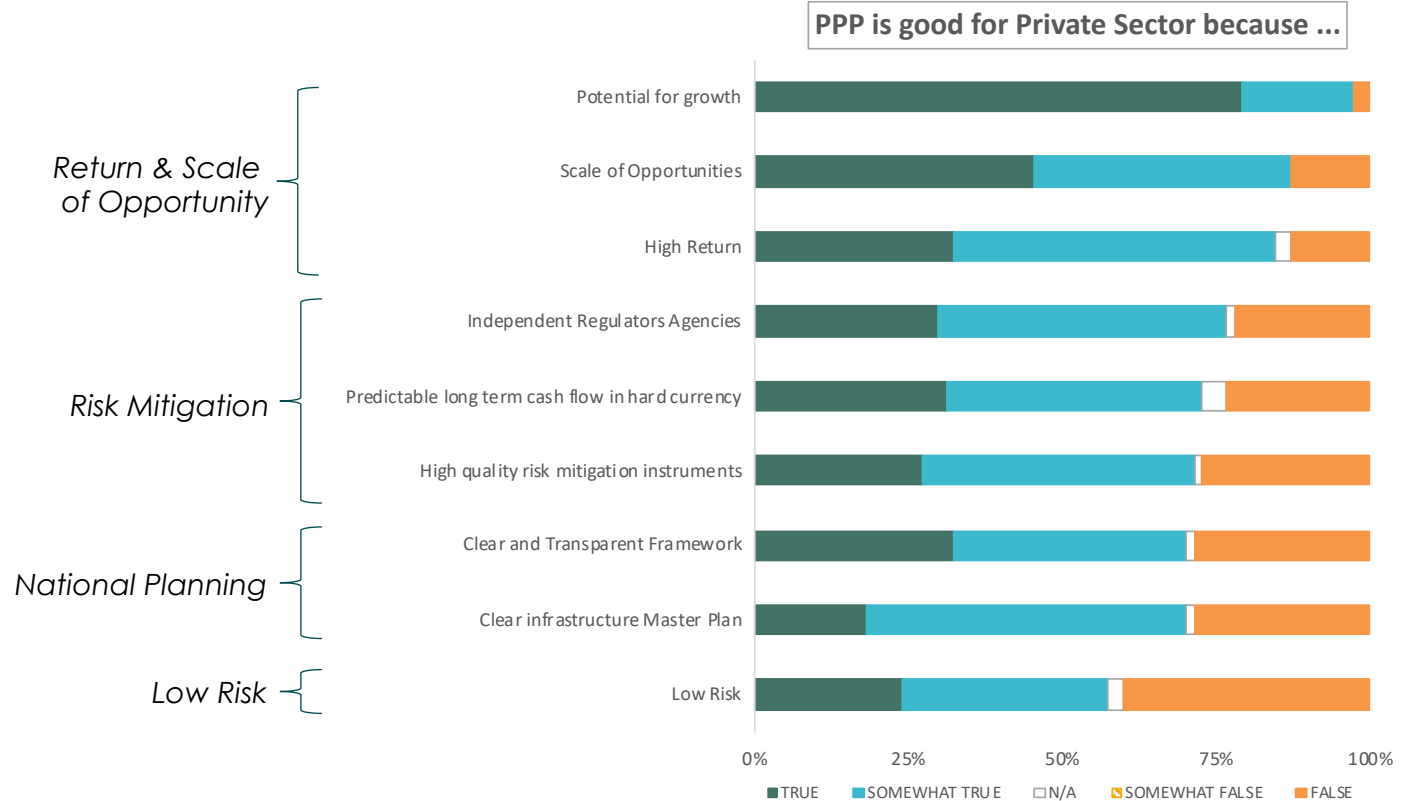


For the Public Sector, *project performance and capital diversification* are deemed more important than *Tariffs and Risk-Reward balance*.

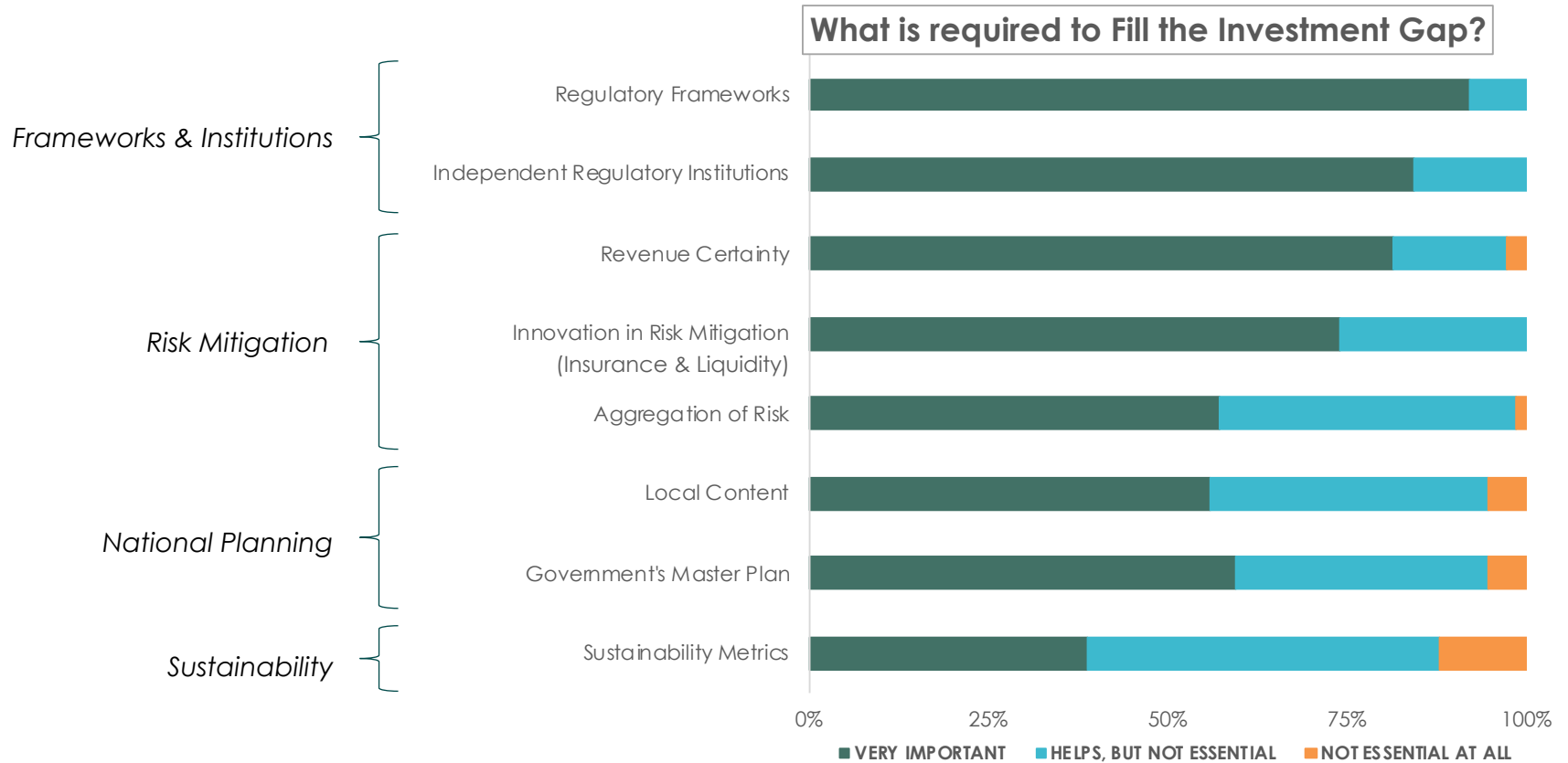


The Private Sector values the *Scale of the African opportunity, and Risk Mitigation* available (to counter the higher perceived Risk of PPP).

National Planning, clear frameworks and independent institutions are deemed to be less effective for private investment in infrastructure.

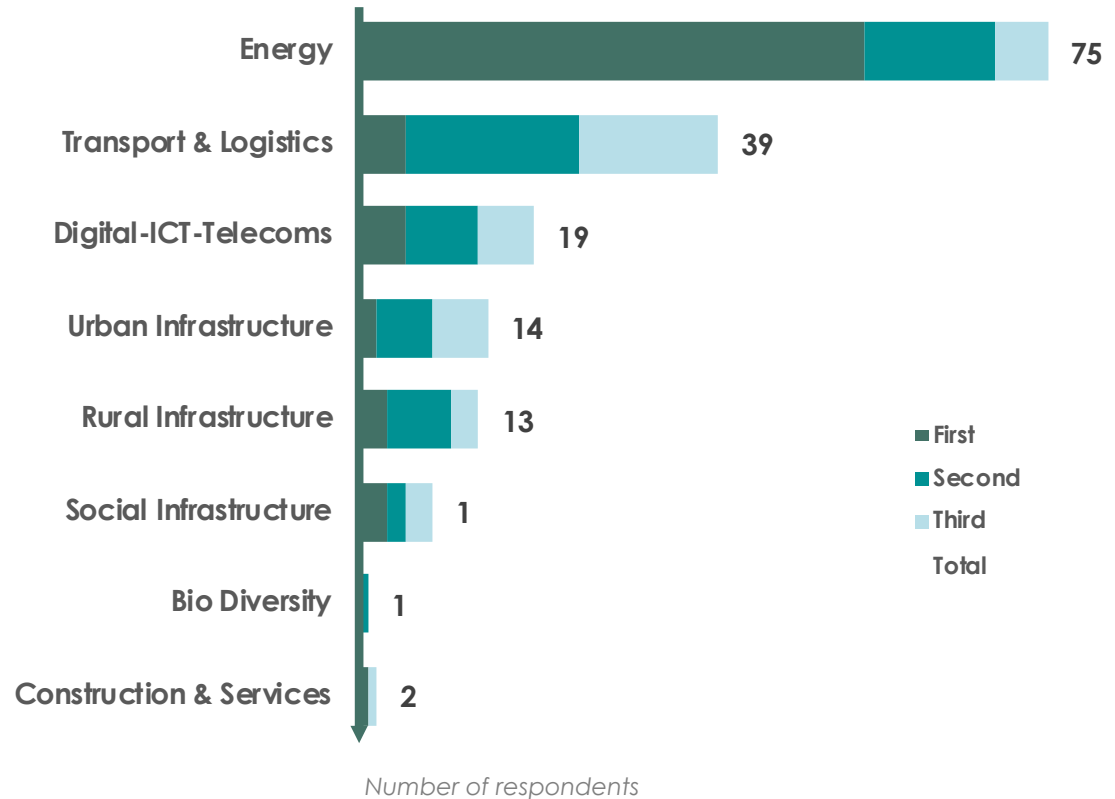


What is required to fill the Investment Gap



Eight sectors (including 31 sub-sectors) form the core of sectoral focus, with Energy and Transport & Logistics accounting for 67% of interest

SECTORS OF INTEREST

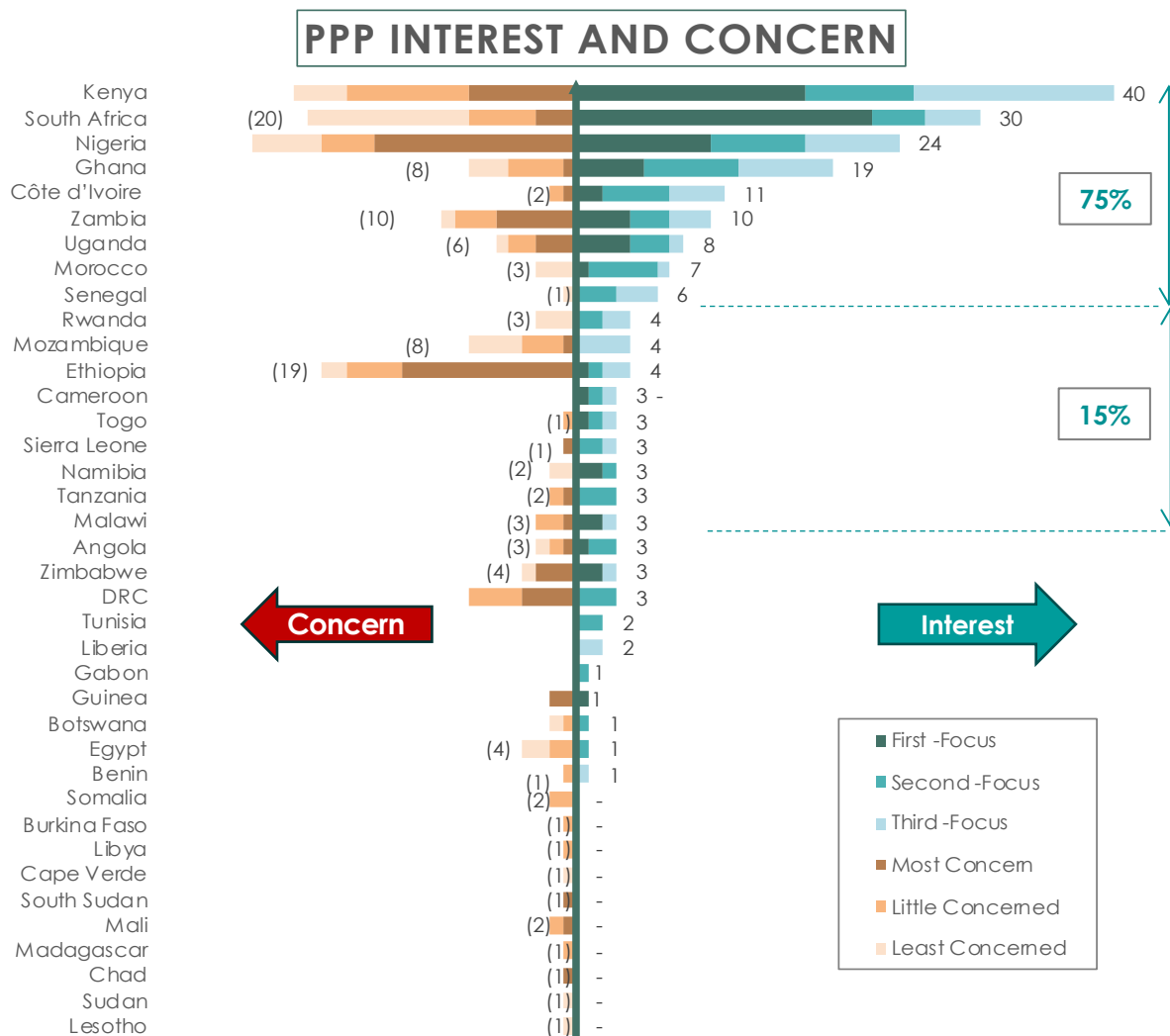


28 countries attract private capital interest

9 countries led by Kenya, South Africa, Ghana and Nigeria account for 75% of the interest amongst respondents,

The next 9 countries account for a further 15% the remaining interest.

Nigeria, Kenya, Ethiopia, South Africa, Zambia, and Mozambique lead in terms of countries of concern



Number of respondents

How may we help you?

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