



Large Infrastructure

Progress and Challenges with Infrastructure in Africa

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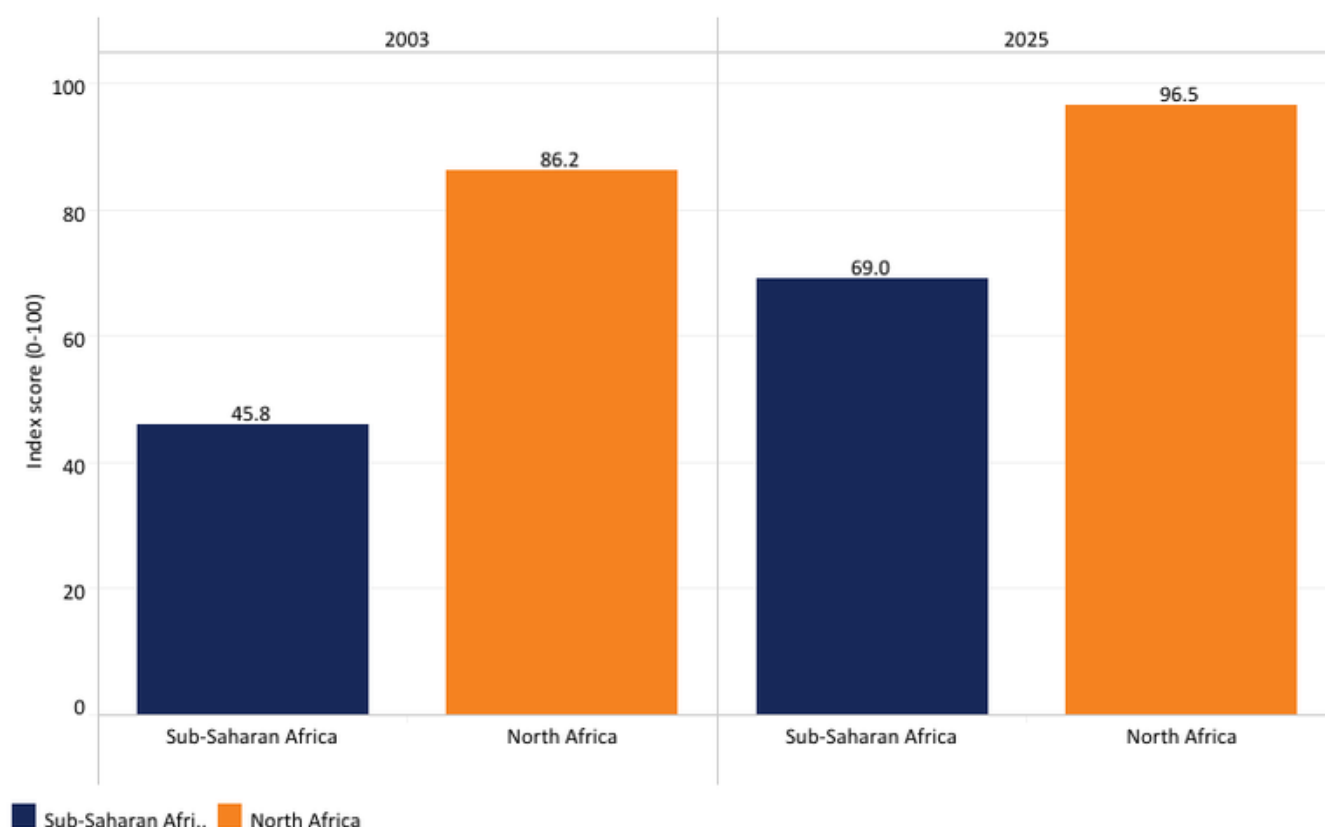
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Progress and Challenges with Infrastructure in Africa

Africa's infrastructure landscape is shaped by a growing imbalance between rapidly expanding demand and persistent financing constraints. Population growth, accelerating urbanisation, ambitions for economic diversification and the deepening of regional and global trade are driving an unprecedented surge in infrastructure needs. Transport networks, energy systems, water and sanitation services, digital connectivity and urban mobility are under increasing pressure to serve populations that are larger, younger and more urban than ever before. Yet investment levels have not kept pace with these dynamics, resulting in widening infrastructure demand-supply gaps across much of the continent.

Despite these challenges, Africa has made notable progress in infrastructure development over the past two decades. According to the Africa Infrastructure Development Index (AIDI), established by the African Development Bank (AfDB), outcomes have improved across all sub-regions. The index tracks nine indicators grouped into four core components (transportation, energy, information and communication technologies (ICT), and water and sanitation), providing a comprehensive picture of infrastructure development trends across countries and regions. Chart 1 depicts the average infrastructure development score for North Africa and sub-Saharan Africa between 2003 and 2025. Starting from a low base, sub-Saharan Africa increased its average score by around 50% in that period, reflecting substantial relative progress. By contrast, North Africa, which began from a much higher baseline, recorded a more modest improvement of about 12% over the same period.

Chart 1: Average infrastructure development score, North Africa vs Sub-Saharan Africa, 2003-2025



Source: African Development Bank

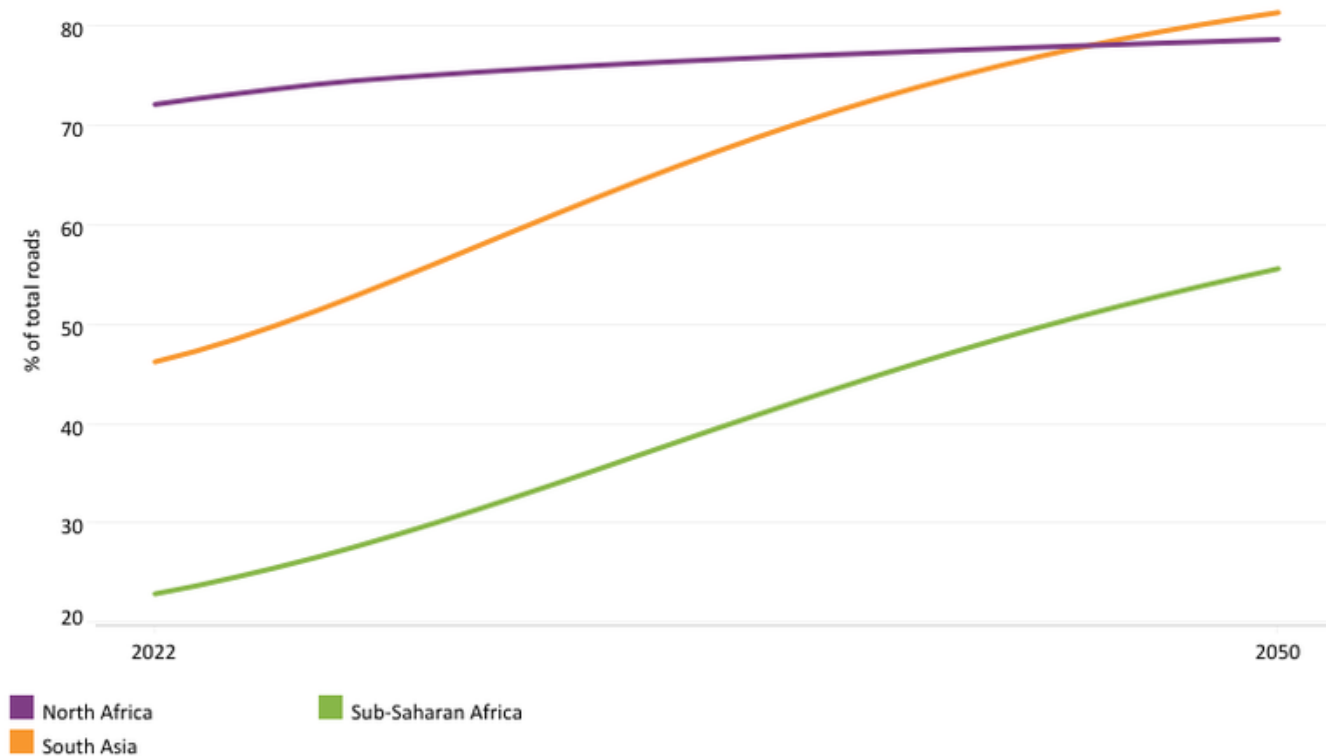
Nonetheless, the overall improvement in infrastructure has not been sufficient to close Africa's substantial deficit. Meeting current and future needs will require large-scale, sustained investment to expand access, improve service quality and maintain existing assets. Public financing remains constrained by limited fiscal space, rising debt burdens and competing

priorities, especially in education and health. While private investment has grown—particularly in telecommunications and energy—it remains uneven, concentrated in a small number of countries and commercially viable projects. As a result, infrastructure development continues to fall short of what is needed to support structural transformation and inclusive growth.

These challenges are not uniform across the continent. North Africa stands out as a relative exception, benefiting from comparatively advanced infrastructure in terms of both coverage and quality. By contrast, many countries in sub-Saharan Africa continue to face acute and persistent infrastructure deficits, highlighting the need for differentiated approaches that take into account regional and country-specific realities.

Nevertheless, there are reasons for optimism. Under the Current Path, infrastructure development in sub-Saharan Africa is expected to improve, although it is likely to continue lagging behind other developing regions. Chart 2 illustrates this comparative picture, providing a snapshot of infrastructure performance in sub-Saharan Africa relative to other developing regions to 2050.

Chart 2: Comparison of infrastructure access in SSA, North Africa, South Asia and South America in the Current Path forecast



Source: IFs 8.50 initialising from WDI data

In recent years, Africa’s infrastructure development has been increasingly shaped by China’s economic and strategic engagement, crystallised in the Belt and Road Initiative. Through this framework, China has become Africa’s largest bilateral trading partner and a major source of infrastructure finance, particularly for trade-enabling assets such as ports, railways, roads and power generation. Chinese-financed projects have been especially prominent along the eastern seaboard and key regional corridors, helping to link landlocked countries to ports and integrate African economies more

deeply into global value chains. The scale and speed of delivery have filled critical financing gaps left by traditional partners and addressed long-standing infrastructure deficits, making China a central actor in Africa's contemporary development landscape.

At the same time, Chinese state lending practices differ markedly from those of Western multilateral institutions, such as the World Bank and the International Monetary Fund. While Chinese loans are often presented as “no-strings-attached,” in practice they frequently resemble commercial or quasi-commercial financing, with relatively higher interest rates, shorter maturities, collateral requirements and limited public disclosure of terms. This opacity complicates debt sustainability analysis and can constrain fiscal space in borrowing countries. By contrast, World Bank and IMF financing—especially for low-income countries—tends to be more concessional, transparent and embedded in multilateral debt-sustainability frameworks, albeit with policy and governance conditionalities. As a result, the growing reliance on Chinese infrastructure finance has intensified debates in Africa around cost, transparency and long-term debt sustainability, underscoring the need for more strategic debt management and better coordination among all development partners.

Also, the African Union Development Agency New Partnership for Africa's Development (AUDA-NEPAD) and its flagship Programme for Infrastructure Development in Africa (PIDA) aim to mobilise foreign public and private financing while anchoring infrastructure development in pan-African priorities. PIDA has already supported the preparation and implementation of several strategic projects across the continent. This momentum was reinforced at the Africa Infrastructure Financing Summit co-hosted by AUDA-NEPAD and the African Union Commission (AUC) in Luanda in October 2025, where investors committed **US\$18 billion** to African infrastructure. These resources are expected to finance 38 bankable projects and 11 additional projects aligned with the African Union's continental blueprint for regional and continental infrastructure integration under PIDA.

At the same time, Africa's infrastructure agenda is being **reshaped** by a broader global shift that places sustainability, climate resilience and the Sustainable Development Goals (SDG) at the centre of planning and financing. In line with SDG 9, infrastructure investments are increasingly oriented toward low-carbon pathways, climate resilience and innovation, with multilateral development banks, regional institutions and donors embedding environmental standards and green financing instruments into their portfolios. This shift is most visible in key sectors: energy infrastructure is moving toward renewables; urban transport policies increasingly prioritise electric mobility and mass transit. In Senegal, the **Dakar Bus Rapid Transit (BRT)** system, launched in 2024, became the first large-scale, fully electric BRT network in Africa, marking a significant milestone in the continent's green urban transport transition. Digital infrastructure, such as the BRT, supports smarter, more resilient logistics. Water and industrial infrastructure emphasise efficiency and reduced environmental footprints through approaches such as eco-industrial parks, often supported by the World Bank, UN agencies and bilateral partners.

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About the authors

Dr Kouassi Yeboua previously worked as a Senior Researcher at AFI, where he led significant ISS studies on the long-term development prospects of the Democratic Republic of Congo, the Horn of Africa, Nigeria, Malawi, and Mozambique. His research focuses on development economics, macroeconomics, gender, and economic modeling. He holds a PhD in Economics.

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