

**2018 EDITION**

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# Investment and Market Opportunities in African Infrastructure

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Currently, Africa's infrastructure is a mixed bag. While considerable progress has been made in the area of telecommunications, power and transport infrastructure is still lacking. Meeting Africa's infrastructure needs and developing cost-effective modes of infrastructure service delivery require a massive investment programme in the continent. It is estimated that Africa will require an investment of about \$130-\$170 billion in new infrastructure every year to meet its infrastructure gap. While new platforms of investment such as public-private partnerships (PPPs) have emerged in recent years to meet the infrastructure deficit, there is still an enormous potential that exists for both private and foreign investors. There is a strong pipeline of infrastructure projects with many countries announcing some big-ticket projects and programmes. **Going forward, the continent needs to overcome some of the key challenges to develop its infrastructure and attract investments. These include ensuring a sound revenue regime, having a more balanced risk sharing between the public and the private players, and strengthening financial regulations.**

## 1. Executive Summary

- ❖ Emerging Sources of Finance
- ❖ Investment Requirement and Projections
- ❖ Key Risks and Challenges
- ❖ The Way Forward

## SECTION I: AFRICAN MARKET OVERVIEW

### 2. Sector Overview

- ❖ Macroeconomic Scenario
- ❖ Infrastructure Growth in the Past Five Years
- ❖ Current Infrastructure Deficit
- ❖ Competitive Landscape
- ❖ Growth Drivers
- ❖ Technology Trends
- ❖ Key Issues and Challenges
- ❖ Upcoming Opportunities
- ❖ Future Outlook

### 3. Financing and PPP Experience

- ❖ Trends in Infrastructure Spending
- ❖ Funding Sources
  - Government Funding
  - Multilateral Funding
  - Bilateral Funding
  - Bank Lending
  - Bond Financing
  - Other Key Funding Sources
- ❖ Private Sector Participation
  - Experience So Far
  - Sector-wise Private Investments
  - Equity Funding
  - PE Exits
  - Historical and Expected Returns

### 4. Foreign Investment Trends

- ❖ Size and Growth
- ❖ FDI Analysis
  - By Source
  - By Destination
  - By Sector
- ❖ Initiatives to Encourage Foreign Investment
- ❖ Proposed Foreign Investments
- ❖ Participation of Overseas Equipment Manufacturers and Service Providers

### 5. Project Pipeline and Market Opportunities

- ❖ Overall Project Pipeline
- ❖ Project Pipeline Analysis
  - By Sector
  - By Country
  - By Stage
- ❖ Market Opportunities
  - Developers
  - Contractors
  - Financiers/Long-term Investors
  - Technology and Equipment Providers
  - Material Suppliers
  - Other Stakeholders
- ❖ Future Outlook

## 6. Top 100 Upcoming Projects

- ❖ By Sector
- ❖ By Country
- ❖ By Type (Brownfield/Greenfield)
- ❖ By Stage of Implementation (Recently awarded/approved/announced)

## SECTION II: COUNTRY-WISE ANALYSIS

Chapters 7 and 8 will cover an analysis of key countries including Nigeria, Egypt, South Africa, Algeria, Morocco, Sudan, Angola, Kenya, Ethiopia, Tanzania, Libya, Tunisia, Ghana, Congo DR, Côte d'Ivoire, Uganda, Cameroon, Zambia, South Sudan, Mozambique, Botswana, Senegal, Mali, Gabon, Mauritius, Burkina Faso, Chad, Equatorial Guinea, Namibia, Madagascar, Benin, Congo, Rwanda, Niger, Guinea, Mauritania, Malawi.

## 7. Snapshot of Key African Countries

- ❖ Economic Scenario
- ❖ Infrastructure Growth Indicators
- ❖ Ease-of-Doing Business Indicators
- ❖ Recent Policy Developments
- ❖ Key Commissioned Projects

## 8. Capacity Addition Plans and Projections

- ❖ Budgetary Allocations and Outlays
- ❖ Planned Capacity Additions
- ❖ Proposed Investments
- ❖ Sector-wise Capacity and Investment Targets

## 9. Top 10-15 Investment Destinations (Based on Upcoming Opportunities)

- ❖ Infrastructure Sector Overview
- ❖ Private Investment Mobilised
- ❖ Project Pipeline
- ❖ Upcoming Big-ticket Projects
- ❖ Key Successes and Failures
- ❖ Challenges and Lessons Learnt
- ❖ Market Opportunities
- ❖ Country Outlook

## SECTION III: SECTOR-WISE ANALYSIS

- ❖ Electricity
- ❖ Renewable Energy
- ❖ Mining
- ❖ Oil and Gas
- ❖ Roads
- ❖ Railways
- ❖ Urban Transport
- ❖ Seaports
- ❖ Airports
- ❖ ICT
- ❖ Water and Sanitation

### Each of the sectors will cover:

- Size and Growth
- Emerging Trends and Recent Developments
- Proposed Investments
- Upcoming Projects
- Market Opportunities
- Issues and Challenges
- Future Outlook

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