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BRIEFING

Catalysing Africa's Renewable Energy Transformation and Green Industrialisation

Toward Stronger Alignment between APRA, Mission 300, and AGII

Summary for German Policy Makers:

Germany, as a global climate leader and trusted development partner, is in a unique position to accelerate Africa's Green Transformation by providing financial support, facilitating technology transfer, sharing policy expertise, and aligning with African-led initiatives.

A key opportunity lies in strengthening coordination between APRA, Mission 300, and AGII to unlock Africa's potential for driving the Green Transition. In addition, Germany can align these efforts with its bilateral programmes, multilateral frameworks such as the Compact with Africa, EU instruments like AE-GEI, and complementary programmes including GET.pro, supported by implementing agencies such as KfW and GIZ. Achieving coherence requires a whole-of-government strategy to map existing initiatives, harmonise planning and funding cycles, and develop shared country engagement frameworks.

A just and inclusive transition must guide all efforts – ensuring that industrialisation creates decent jobs, expands energy access, addresses social and environmental risks from resource exploitation, and advances circular economy solutions such as local recycling of end-of-life solar PV modules.

Credibility also depends on a robust post-2025 climate finance plan, scaling public finance to €12 billion annually by 2030 while leveraging innovative instruments.

Finally, Germany should promote participatory governance, embedding citizen panels, open hearings, and civil society engagement across all initiatives.

The Africa Climate Summit 2.0 offers a pivotal opportunity for Germany to reaffirm its leadership – committing to coordinated, equitable, and African-led solutions that deliver green growth, social equity, and long-term resilience for Africa and Europe alike.

Why Now: A Defining Moment for Africa and the World

Despite possessing 60% of the world's solar resources and abundant wind, hydro, and geothermal potential, Africa generates only 20% of its electricity from renewable sources, mostly hydropower. Meanwhile, over 600 million Africans still lack access to electricity, and nearly 1 billion people rely on traditional biomass (e.g. firewood, charcoal) for cooking, which has serious consequences for health, gender equality, and the environment. This paradox of abundance and scarcity is not only a development emergency; it is a historic chance. Africa's limited legacy energy infrastructure creates a unique window to leapfrog into a clean, decentralised, and resilient energy future – a future that aligns energy access, green industrialisation, and climate goals. The African Green Industrialization Initiative (AGII)[1], Accelerated Partnership for Renewables in Africa (APRA)[2], and Mission 300[3] all reflect a continental vision to build modern, low-carbon economies powered by renewables and driven by inclusive growth.

This ambition aligns with the Africa Leaders Nairobi Declaration, adopted at the first Africa Climate Summit in 2023, which set a target of 300 gigawatt of new renewable energy capacity by 2030. It also echoes the COP28 Dubai Consensus, which established global goals to triple renewable energy capacity and double energy efficiency by 2030, confirming that Africa's energy transformation is central to global climate success.

This transformation is not only essential for Africa – it is of global relevance. Africa can demonstrate that inclusive development and industrialisation are possible through renewables. With its innovation potential and market scale, Africa has the potential to become a strategic partner in the global energy transition all while avoiding the lock-in of outdated fossil infrastructure. Germany, as a global climate leader and development partner, has a unique role to play in enabling this shift. It can do so not only through bilateral finance, technology transfer, and policy expertise, but also via multilateral platforms such as the G20 Compact with Africa (CwA), European initiatives like Global Gateway and the Africa-EU Green Energy Initiative (AE-GEI), Germany's key implementing institutions such as GIZ and KfW as well as initiatives like GET.pro. Ensuring greater coherence across these efforts will be key to supporting African-led initiatives and maximising their global impact.

Strategic Opportunity: Aligning APRA, Mission 300, and AGII

Placing Renewable Energy at the Heart of Africa's Development and Green Industrial Transformation

The launch of APRA, Mission 300, and AGII signals growing momentum for an ambitious, Africa-led clean energy and industrial transformation. While each initiative has its own focus and entry point, they share a common ambition: to unlock Africa's full potential as a leader in renewable-powered, inclusive, and climate-resilient development. All three initiatives seek to bridge the structural gap between energy access and productive use, placing renewable energy at the heart of Africa's development narrative:

- **African ownership and regional cooperation as cornerstones of alignment:** All three initiatives share a commitment to African-led green transitions, anchored in nationally owned frameworks that reflect each country's development priorities. Whether through APRA Action Plans, Mission 300 Energy Compacts, or AGII industrial cluster strategies, countries have tools to guide implementation tailored to their contexts. Regional cooperation is equally central to address challenges like power integration and cross-border supply chains. Several countries – such as Ethiopia, Ghana, Namibia, Rwanda, and Sierra Leone – participate in multiple initiatives, offering opportunities for aligned planning. This combination of national

[1] Established at COP28 in December 2023 and adopted by the African Union under the guidance of African Heads of State, AGII promotes green industrialisation powered by renewables. It strengthens climate-compatible industrialisation, regional value chain integration, and economic sovereignty by attracting, structuring, and de-risking green industrial investments.
[2] Launched at COP28 in December 2023 and led by African countries at the highest political level, APRA drives renewable energy deployment by mobilising public and private investment and providing targeted technical support. It supports national action plans that position renewables as enablers of inclusive development and green industrial growth.
[3] Launched in April 2024 by the World Bank Group and African Development Bank, Mission 300 seeks to connect 300 million Africans to electricity by 2030. It combines large-scale finance, national energy compacts, and a mix of grid expansion and distributed renewable solutions to drive transformative access and clean energy transitions.

leadership and regional collaboration creates a strong basis for coordinated, mutually reinforcing action across energy access, industrial development, and utility reform.

- **Leveraging renewable energy as a foundation for green growth:** Africa's abundant renewable resources can drive a new wave of sustainable development by creating jobs, enabling value addition, and reducing reliance on fossil fuels and commodity exports. All three initiatives tap into this shared vision by positioning renewable energy not only as a climate solution but as the critical infrastructure underpinning Africa's economic transformation.

- **Focus on private-sector engagement and catalytic finance:** Recognising the scale of investment required for Africa's green transformation, all three initiatives prioritise the mobilisation of private capital. While the instruments and institutional approaches vary, the shared premise is clear: the private sector is seen as a key engine for delivering infrastructure, innovation, and services.

Key Gaps and Risks: Towards More Coherent and Inclusive Implementation

While APRA, Mission 300, and AGII reflect a shared ambition for Africa's green transformation, meaningful alignment will require confronting several critical gaps. Without a more deliberate focus on equity, coherence, and long-term sustainability, there is a risk that these efforts could fall short of their transformational promise. The following issues warrant particular attention:

1. A focus on green industrialisation risks undermining universal energy access

The shared emphasis on green industrialisation across the initiatives marks a positive and long-overdue shift. At the same time, there is a risk that large-scale industrial priorities could overshadow the urgent need to provide energy access for the millions of people still living without reliable electricity supply. This challenge manifests itself in very different ways across African countries and requires careful, context-specific approaches in dialogue with the respective governments. Industrial hubs and energy-intensive value chains can only thrive if they are embedded in inclusive energy systems that reflect demand-side needs, ensuring that households, schools, and health centres are connected alongside industrial users. Energy access remains foundational to human development, as it enables education, healthcare, and economic participation, particularly for women, youth, and rural communities who have long been excluded.

At the same time, local innovation, small and medium-sized enterprises (SMEs), and community-led projects face major constraints due to limited access to technical capacity, manufacturing, and domestic supply chains. Without targeted investments in skills development, technology transfer, and local manufacturing capabilities, Africa runs the risk of remaining a mere importer of clean technologies rather than a producer, missing out on vital jobs, resilience, and long-term competitiveness. This challenge is compounded by the dominance of external interests from the Global North, which often prioritise extraction of Africa's critical minerals over local value addition. Africa possesses abundant resources essential for clean technologies, yet most are exported unprocessed, fuelling a trade imbalance that limits structural transformation. In many contexts, these external pressures are exacerbated by vested interests among segments of African elites, which can reinforce extractive patterns and make efforts toward local value creation more difficult.

The three initiatives could bridge these gaps by explicitly linking industrial strategies with last-mile electrification plans and by creating targeted support for local manufacturing, skills training, and technology partnerships. This would ensure that industrialisation not only powers factories but also lights homes, builds domestic industries, and strengthens Africa's position in global clean energy supply chains.

2. Overreliance on debt and private-sector finance limits flexible, context-sensitive support for both industrial and community needs

Africa's fiscal space is severely constrained – external private, public, and publicly guaranteed debt rose by approximately 240% between 2008 and 2022[4], limiting investment in energy access, climate adaptation, and green industry. A fragmented, risk-averse finance system, high interest rates, lack of domestic capital, cumbersome procedures, and a debt-heavy mix of instruments inflate the cost of capital, especially for SMEs and community projects; trade barriers, geopolitical conditionalities, and opaque terms deepen the strain.

All three initiatives aim to mobilise finance, with a strong reliance on debt instruments paired with equity and guarantees for private investors. The focus on the private sector aligns with the industrialisation priorities of many African governments – as outlined in AGII. Equity and guarantees, particularly in blended finance structures, can play a constructive role in mobilising private capital for large-scale industrial and energy projects, sharing risk while protecting public balance sheets. However, private-sector finance alone cannot fill every gap. It is least effective in last-mile energy access and community-level projects, where returns are modest, risks are perceived as high, and commercial investment is scarce. Here, sustainable progress requires country-tailored, debt-sensitive finance that prioritises non-debt options (e.g. grants, debt relief, swaps) and directly addresses unsustainable debt levels. This should include transparent audits to identify and cancel illegitimate debt burdens, particularly those tied to corruption or harmful projects – using the 'odious debt' doctrine where applicable – and structural reforms to tackle the roots of debt dependency, including unsustainable borrowing practices and unfair trade relationships.

Equally, financing is not only about 'mobilising a pot of money' but about creating a finance-able environment through stronger African domestic finance. Initiatives like APRA, AGII, and M300 could work more closely with regional development banks and support local bond issuance to strengthen African financial institutions. Such partners can also absorb resource risks – for example, the risk that renewable energy projects underperform due to variable local conditions, such as geothermal output or solar irradiation – and offer finance-in-kind (e.g. equipment, technical expertise, or development services), as demonstrated by the Menengai Geothermal Project in Kenya[5].

Recognising the diversity of African contexts requires innovative, locally anchored solutions that blend international capital with regional capacity. By differentiating between private-sector support for industrialisation and non-debt approaches for community energy access, the three initiatives can help ensure that financial mechanisms serve both large-scale industrial growth and inclusive energy access objectives.

3. Fossil fuel ambiguities risk locking countries into high-carbon pathways

Some African governments, particularly major oil and gas exporters, continue to frame fossil gas as a 'transitional fuel' to support industrialisation and energy security. However, evidence shows that large-scale gas infrastructure can lock countries into long-term high-carbon pathways, create financial and operational inflexibilities, and divert resources from faster, more cost-effective renewable solutions. Framing the choice in terms of opportunity costs, energy resilience, and industrial competitiveness – rather than simply carbon emissions – can make the risks of gas investments more tangible, while highlighting that renewables, flexible grids, and energy efficiency offer scalable, affordable, and locally adaptable alternatives that better align with Africa's long-term development goals.

Building on this, a just and sustainable transition requires transparent, time-bound fossil phase-out strategies that clearly prioritise these clean alternatives. While APRA, AGII, and Mission 300 all promote renewables, none of the initiatives provide explicit roadmaps for phasing out fossil fuels. In several cases, fossil gas remains

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[4] Kenewendo, B., Njoroge, P., Dryden, A., 2024, Giving Voice to The Silent Debt Crisis: How Debt Relief Can Unlock Green Growth Pathways for Africa, https://drgr.org/research-2/policy-briefs/giving-voice-to-the-silent-debt-crisis-how-debt-relief-can-unlock-green-growth-pathways-for-africa/ [accessed 26 August 2025].

[5] Van den Akker, J., 2018, Geothermal Energy Powering Kenya's Future: Menengai Geothermal Field Development Facilitated by Public-Private Partnerships, https://www.effectivecooperation.org/system/files/2021-06/GDI%20CIF%20Case%20Study%20Menengai%20Kenya.pdf [accessed 26 August 2025].

central to national plans: Mission 300 Energy Compacts from Nigeria, Senegal, and Tanzania all rely on it; Senegal and Nigeria are advancing new gas projects without ambitious renewable targets; and Tanzania positions gas as a means to reduce import dependence and boost exports. Without decisive phase-out commitments, these choices risk undermining the very green industrialisation that Africa seeks, locking economies into fossil-based systems just as global energy markets pivot toward low-carbon solutions.

4. Lack of civil society participation and community ownership

Social inclusion remains one of the weakest operational pillars across the three initiatives. Mechanisms for genuine participation and community ownership are largely absent, and youth – who make up the majority of Africa's population, have the highest unemployment rates, and will live with the consequences of today's energy decisions for the longest time – are often excluded from decision-making processes. For these initiatives to deliver durable and just outcomes, civil society – particularly marginalised, frontline, and youth-led groups – must be treated as active co-creators, not passive beneficiaries.

5. Fragmented implementation, policy misalignment, and weak regional and international coordination

Despite high-level alignment, coordination across the three initiatives remains fragmented at national, regional, and international levels. Domestically, many development, energy, and industrial strategies remain disconnected or outdated, lacking long-term planning frameworks that link renewable deployment with broader goals such as job creation, poverty reduction, and universal energy access. This misalignment limits renewables' potential to drive structural transformation and reduces the impact of international support. Ministries often implement overlapping plans and strategies with limited technical capacity, leading to duplication and overburdened institutions.

Regionally, limited cross-border infrastructure, inconsistent regulatory frameworks, and lingering political divisions continue to slow integration efforts, including the African Union's Africa Single Electricity Market (AfSEM) and regional power pools. The East Africa Power Pool provides a promising example, where progress on interconnections and preparation for a day-ahead market is expanding energy access and fostering regional electricity trade, demonstrating the economic and energy benefits of coordinated infrastructure. Without similar initiatives across the continent, Africa risks losing revenue, curtailing renewable energy generation, and facing persistent energy insecurity.

Internationally, major initiatives often operate in silos, duplicating efforts rather than aligning timelines and pooling resources. The three initiatives could address these risks by embedding integrated planning requirements, supporting regional transmission and regulatory harmonisation, and coordinating programmes to reduce duplication. A more streamlined approach would be far more resource-efficient, enabling governments to focus capacity on impact rather than managing overlap. Without such deliberate alignment, strategic coherence will remain more aspirational than operational.

6. Shrinking German climate finance and the risk of extractive partnerships

Germany's evolving international strategy increasingly emphasises national interests, in particular securing access to critical raw materials and green hydrogen. While these objectives are understandable, they risk overshadowing the broader imperative of forging equitable, long-term partnerships based on mutual benefit and respect. Pursuing short-term resource access should not come at the expense of inclusive development or reinforce extractive patterns that African nations are striving to overcome.

At the same time, Germany's climate finance commitments are fraught with uncertainty. Although the government has pledged €6 billion in international climate finance for 2025, no commitment has been made to sustain this level in subsequent years. Due to budget pressures on the German Ministry of Economic Cooperation and Development (BMZ) – the main channel for Germany's climate finance – it is likely that these targets will be missed again in 2025 and 2026. This unpredictability undermines Germany's credibility, reduces the effectiveness of global climate cooperation, and threatens the success of initiatives such as APRA, Mission 300, and AGII.

Without sustained public finance, these initiatives risk overreliance on private capital, which historically struggles to deliver last-mile energy access, social inclusion, and equitable outcomes. To safeguard progress, international partners must provide predictable and multi-year finance that complements domestic resources, supports African financial institutions, and reinforces just and inclusive implementation. Only with this reliable support can initiatives translate high-level ambition into concrete, transformative action on the ground.

Recommendations for the German Government to Enhance Alignment and Impact

As a key development partner, the German government is uniquely positioned to support stronger coordination and a more effective implementation across APRA, Mission 300, AGII, and other related initiatives. To maximise their collective impact, several strategic actions can be pursued:

1) Adopt a whole-of-government Germany strategy for Africa's green industrialisation and just energy transition

Germany should adopt a whole-of-government strategy to support Africa's green industrialisation and just energy transition, moving beyond fragmented initiatives toward a coherent and strategically aligned approach. A first step is a comprehensive mapping of the landscape of actors and Germany's role within it. This should cover German-supported initiatives – from bilateral programs such as BMZ's climate and development partnerships to multilateral frameworks like the Compact with Africa, EU initiatives such as AEGEI, and programs including GET.pro – alongside the activities of implementing institutions like KfW and GIZ. Each initiative has unique strengths that must be coordinated to provide consistent support for green industrial strategies and energy access plans in alignment with AGII, APRA, and Mission 300. This mapping would provide an evidence base to identify overlaps, gaps, and opportunities for synergies, enabling strategic engagement with African partners.

Building on this foundation, Germany should strive to synchronise planning and funding cycles and develop shared country engagement frameworks – one 'country sheet' per partner country – outlining priorities for energy access, value creation, industrial competitiveness, and just transition pathways. These frameworks would serve as a common reference for all ministries and agencies, ensuring a unified approach. To achieve this, greater coordination across ministries, implementing agencies, financial institutions, and German embassies is required. While embassies already play a vital coordinating role on the ground, their mandate and resources should be reinforced to prevent siloed approaches and inter-ministerial competition.

Germany's strategy should also clarify its role within EU instruments like AEGEI. As an EU Member State, Germany must ensure that Global Gateway financing and technical assistance, particularly under AEGEI, support, rather than compete with, African-led platforms such as APRA, Mission 300, and AGII. This involves aligning investment criteria, coordinating country engagement, and leveraging AEGEI to reinforce integrated, African-owned planning. AEGEI should avoid siloed programming and act as a strategic vehicle to accelerate implementation of country priorities already defined in APRA Action Plans, Mission 300 Compacts, and AGII clusters.

2) Support country-level coordination to strengthen coherence across APRA, Mission 300, and AGII

Germany should strengthen country-level coordination mechanisms to connect APRA, Mission 300, AGII, and related initiatives, ensuring they complement each other instead of operating in parallel. While Germany already supports coordination processes in many countries, these efforts are not systematically linked across initiatives and therefore risk perpetuating fragmentation.

A first step is to increase transparency: all three initiatives should publish clear information on their national-level implementing partners. This openness would enable African governments, local stakeholders, and German actors to identify overlaps, gaps, and opportunities for collaboration. Germany can use its convening power to advocate for and support this transparency as part of its broader push for coherence.

At the country level, Germany should work with governments to strengthen existing technical working groups or coordination platforms –

many of which it already supports through bilateral and multilateral channels – while ensuring that APRA, Mission 300, and AGII are systematically integrated into these forums. Such platforms should remain country-led, light-touch, and tailored to local contexts, but they provide a practical vehicle to align processes, sequence interventions, and jointly address financing gaps.

At regional and continental levels, Germany should build on existing dialogues such as GET.pro, Compact with Africa, and Mission 300 processes, and encourage them to evolve into cross-initiative governance spaces rather than remain siloed. The Joint APRA–AGII High-Level Meeting at COP29 in Baku provides a valuable example of how formalised engagement can define shared priorities and coordinate financing and investment strategies. The aim should not be to create new forums, but to better connect and streamline those that already exist, fostering shared priorities, mutual learning, and joint advocacy in international arenas.

3) Ensuring credibility through scaled and high-quality climate finance

Despite the adoption of a new collective quantified goal (NCQG) at COP29 in Baku, Germany has yet to present a forward-looking climate finance plan for the post-2025 period. A credible pathway must include a gradual scale-up of public climate finance – reaching €12 billion annually by 2030, with annual increases of at least €1 billion – and must be pursued in addition to development cooperation and humanitarian aid. Anything less risks breaking trust and damaging Germany's standing as a reliable international partner. In fulfilling this responsibility, Germany should maintain and strengthen its focus on grants and highly concessional finance. It should also scale up innovative approaches, including the expanded use of guarantees, special drawing rights (SDRs), and participation in solidarity levies, to mobilise additional resources. In parallel, redirecting fossil fuel subsidies toward climate action can provide further fiscal space to meet rising international obligations.

4) Advancing a just and inclusive transition as a core alignment principle

As global momentum around green industrialisation accelerates, it is essential that this transition does not come at the expense of social equity or universal energy access. While private sector engagement and economic competitiveness are critical for success, they must be balanced with the urgent need to deliver tangible benefits for all segments of society, particularly those historically left behind.

Germany is well positioned to champion this more holistic approach. As a long-standing development partner and one of the world's largest historical emitters, Germany has both influence and responsibility. The energy and industrial transition in Africa must be guided by local priorities: delivering decent jobs, empowering women- and youth-led enterprises, and ensuring clean energy reaches even the most remote communities. Supporting integrated approaches that combine industrial development with last-mile electrification and human development will be key to the credibility and effectiveness of AGII, APRA, and Mission 300.

A critical part of this strategy is addressing resource exploitation. Mining of bauxite, iron ore, and rare earths remains central to industrialisation but often comes with significant social and environmental risks. To ensure a truly sustainable transition, Germany must help design strategies that mitigate these impacts, promote responsible governance, and embed circular economy principles. Strengthening local capacities for recycling and resource recovery – for example, from end-of-life solar PV modules – can ease pressure on ecosystems while supporting green industrial growth.

Germany should take a leadership role in embedding justice, equity, and sustainability as guiding principles across all three initiatives. By ensuring that green growth strategies are locally owned, socially inclusive, and development-oriented, Germany will not only enhance the legitimacy and long-term impact of these efforts but also lay the groundwork for a stable and prosperous neighbouring continent – whose resilience and success are in Europe's long-term interest.

5) Foster inclusive and participatory governance frameworks

Green industrialisation will reshape entire economies. Without democratic ownership and consistent participation, particularly from marginalised groups, these transitions risk entrenching historical inequalities. Accordingly, all three initiatives recognise the importance of inclusivity and equity. Unfortunately, however, there is limited evidence that youth, women, indigenous communities, or civil society representatives are consistently included as key actors.

Germany can help shift this dynamic. German embassies in participating countries can play a catalytic role by convening regular dialogues between governments, civil society, and initiative representatives and by encouraging national governments to institutionalise civil society participation across all three initiatives. This could include:

- **Backing national energy dialogues** that bring together government, civil society, and private sector actors to co-develop energy strategies.
- **Supporting structured public consultation mechanisms** such as open hearings, citizen panels, or local advisory boards, particularly during the development of APRA Action Plans, Mission 300 Compacts, and AGII clusters.

At the international level, the German government should ensure dedicated civil society funding windows within mechanisms such as the International Climate Initiative (IKI) to support sustained CSO participation in APRA, Mission 300, and AGII processes.
Such efforts would not only enhance the legitimacy and effectiveness of the three initiatives, but also help ensure that they reflect the voices, priorities, and agency of the communities they ultimately aim to serve.

Conclusion

As Africa accelerates its green energy and industrial transition, the success of initiatives like APRA, Mission 300, and AGII depends on strategic alignment, inclusive governance, and sustained financing. With the upcoming Africa Climate Summit 2.0, Germany has a crucial opportunity to reaffirm its global leadership by demonstrating commitment to coordinated, just, and equitable support. To meet this moment, Germany must strengthen internal coherence, uphold and expand climate finance, and champion African-led solutions that prioritise social equity and long-term partnership. Delivering on these commitments will not only enhance Africa's transition but also reinforce Germany's role as a trusted, forward-looking partner in the global energy transformation.

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