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ISSUES PAPER

Energy Connectivity, ICT and Regional Power Market Pooling for Industrialization in Eastern and Southern Africa

1 Executive assessment and analytical approach

1. Eastern and Southern Africa can accelerate industrialization by connecting complementary renewable and non-renewable energy resources, production capabilities and markets. Power pooling can widen access to dependable electricity among stakeholders; digital services can coordinate production and transactions; trade and investment reforms can translate these services into regional value chains.

2. The immediate electricity supply priorities differ across the two regions. This Issues Paper covers countries belonging to the East African Community (EAC), the Common Market for Eastern and Southern Africa (COMESA) and the Southern African Development Community (SADC). Some countries belong to more than one of these communities. The Eastern African Power Pool (EAPP) and the Southern African Power Pool (SAPP) are electricity institutions in the two regions and their membership of the power pools includes utilities and independent power producers. With respect to participation in the pools, island economies can participate through digital services, procurement and decentralized productive energy even where mainland grid links are impractical. While the SAPP needs to improve delivery and market access within its established power trading arrangements and mobilize investment in the remaining interconnectors, the EAPP, on the other hand, needs to strengthen market institutions alongside useful bilateral exchanges and interconnections to enhance operability of the pool. Integrating the two power pools requires operating, network-access, and payment arrangements as well as physical links (interconnectors). Digital investment must similarly combine competitive infrastructure with affordable business services and recognized cross-border transactions.

3. The paper examines how energy connectivity, ICT and regional power market pooling and collaboration can be leveraged to support industrialization, regional value chains, regional trade, and broader economic integration in Eastern and Southern Africa. It compares the two subregions to identify what works in each, what lessons may be transferable, and where cooperation could expand trade and investment opportunities. Through a combination of the review of published statistics, market reports, institutional and regulatory documents, and firm-level research with a comparative assessment of Southern African Power Pool (SAPP) and Eastern African Power Pool (EAPP) and selected industrial, corridor, and project cases, the paper observes that the industrialisation challenge in the two regions is not simply a shortage of electricity, digital infrastructure, skills, finance, and other inputs but is also related to the limited conversion of infrastructure into dependable, affordable, and commercially usable services at production sites and across borders. The study shows that connectivity contributes to industrialisation when network performance, market rules, institutional coordination and productive demand reinforce one another and that industrial requirements differ across sectors. While agro-processing needs dependable electricity for processing, refrigeration and logistics, alongside usable digital systems for traceability and distribution, mineral beneficiation requires a consistent supply of large volumes of electricity, credible commercial arrangements and access to regional inputs and markets. On the other hand, the manufacturing sector requires predictable service quality, transaction processing and coordination across locations. *This paper investigates the constraints that prevent the realization of stronger collaboration across the pools, what investment and reforms are needed to address the challenges, and who should act.* The assessment follows the value chain from energy resources and connectivity to delivered services, industrial production, and regional sales of electricity. In the analysis, it

distinguishes existing demand, suppressed demand and prospective industries, which require different evidence and financing assumptions.

4. The recommended first decision is joint preparation of a small opportunity portfolio through existing institutions, with named leads and reviewable outputs within six months of agreement. This paper proposes a selective portfolio centred on the Tanzania–Zambia power bridge, Copperbelt processing and industrial suppliers, connected agro-processing and manufacturing clusters, and interoperable trading routes. These are proposals for appraisal rather than funded programmes. If appraisal confirms their viability, these proposals could generate electricity export revenue, improve the reliability of industrial power supply, create contracting opportunities for regional suppliers and widen market access for producers. In the case of ICT, similar evidence emerges on the distinction between infrastructure availability and productive use. Internet access, mobile coverage and national digitisation measures cannot establish whether a factory, logistics operator or border agency has the service quality and interoperability required for its transactions. In digital trade, Mozambique's 2025 implementation scores were 96.3 per cent for domestic paperless trade and 33.3 per cent for cross-border paperless trade. These scores measure implementation of assessed procedures and illustrate why domestic digitalisation should not be equated with regional interoperability. The study also highlights the operational interdependence of electricity and ICT. Telecommunications facilities, data services and digital border systems require reliable electricity, while electricity networks and regional trading depend on communications, dispatch, metering, forecasting and settlement systems. Regional cooperation offers opportunities to combine complementary generation resources, improve the use of existing interconnections and strengthen cross-border digital interoperability. These opportunities could support more reliable electricity supply and smoother trade for industrial users, if planning, commercial arrangements and project financing are coordinated. Investment planning should distinguish observed consumption, evidenced suppressed demand and prospective demand, then assess load profiles, willingness and ability to pay, contractual arrangements, alternative supply options and complementary conditions for industrial production. The study recommends that SAPP, EAPP and participating system operators should use records to identify persistent constraints on electricity exchanges and report consistently on transfer capability, scheduled and traded electricity and constraint-related non-delivery. They should prioritise operational improvements and, where constraints persist, jointly assess corridor-level investment options linked to verified industrial demand. It calls on national energy authorities, regulators and utilities to align cross-border access, wheeling, contracting, system operation and investment approvals with verified industrial demand, while retaining the distinctions between each jurisdiction's legal and market arrangements. In addition, the study calls for industrial development agencies, investment-promotion bodies and major users to identify priority production clusters and document electricity and digital-service requirements, existing interruptions and credible anchor demand and use this information to mobilize investment resources. ICT regulators, network operators and customs or trade-facilitation authorities should measure business-grade service at productive locations and prioritise the legal, procedural and technical interoperability required to complete cross-border transactions. In addition, development finance institutions and project sponsors should support project preparation, coordinated risk allocation and suitable financing for justified interventions; payment security and commercial demand should be demonstrated rather than presumed. Furthermore, a focused evidence and monitoring framework linking network performance, cross-border service delivery and observable industrial outcomes should be established.

2 Industrial transformation and reciprocal opportunities

5. The state of industrialization gives the connectivity agenda its purpose. In 2024, manufacturing value added accounted for 10.0 per cent of GDP in the EAC, 10.1 per cent in SADC and 11.0 per cent in COMESA. It grew by 4.6 per cent in the EAC, 1.2 per cent in SADC and 1.8 per cent in COMESA (UNIDO, 2025, Table 2). These overlapping REC aggregates describe different memberships and cannot be added together. The industrial opportunity lies in complementary capabilities rather than identical national projects. Countries with competitive generation can earn electricity-export revenue. Economies with established engineering, financial and manufacturing services can supply infrastructure and processing plants. Agricultural producers can reach processors and larger consumer markets. Landlocked economies can use more efficient coastal gateways, while transit economies gain logistics, maintenance and digital-service activity.

6. Power pools become development tools when they expand the set of commercially viable production locations and enable smaller markets to participate in larger projects. Shared reserves and diversified supply can improve reliability. Regional demand can support generation too large for one national market. These gains depend on dispatch coordination, network delivery and sustainable utility finances; they do not automatically pass through to industrial tariffs. Investment should therefore be organized around transactions between identifiable participants. A processor may contract regional renewable power, source packaging and machinery from neighbouring countries, buy digital maintenance services and sell a certified product across the region. Each transaction creates a potential investment market and a policy requirement. Removing one constraint while leaving the others untouched can strand infrastructure or processing capacity.

Connecting policy ambitions to investment

7. The EAC's industrialisation framework seeks higher production and productivity; SADC Industrialization Strategy and Roadmap prioritizes agro-processing, mineral beneficiation and pharmaceuticals as industrial strategies; and COMESA's industrialization framework and trade instruments can support cross-border sourcing and sales (EAC, n.d.; SADC, n.d.; COMESA, n.d.). The practical alignment is to include approved industrial-cluster demand in power planning, identify regional suppliers in project procurement, and incorporate customs and certification requirements into corridor investment design. The focus on industrialization invariably means increased energy demand as industrialization through value chains development and value addition is energy intensive.

8. Rising electricity trade is one outcome of the pooling and so are increased processing, component supply and services trade A country exporting electricity should not be confined to that role. Joint procurement, training and investment partnerships can create opportunities in engineering, assembly and maintenance, while importing countries retain scope to develop their own generation. Distribution requires deliberate policy. Large industrial buyers can make infrastructure financeable, but smaller enterprises and communities need accessible connections and transparent prices. Regional projects should disclose who pays, who receives service and how benefits reach local suppliers.

3 Energy resources access and industrial requirements

9. The two subregions have substantial but unevenly located renewable and non-renewable energy resources. While Eastern Africa primarily combines hydropower with geothermal resources along the Rift Valley and opportunities in wind, solar and natural gas, Southern Africa combines a coal-based industrial core (an energy mix dominated by hydro-carbons, thermal power) with hydropower systems and expanding solar and wind investment. Such a resource diversity creates scope for complementary supply from renewable resources. However, water availability, rainfall. patterns, and network constraints determine what can actually be delivered (IRENA, 2021). Recent years have seen countries in both regions focus on green energy through deliberate policies. For example, Zambia's open access approach to electricity sector has seen solar plants emerge in recent years to complement hydro sourced supply from the utility.

10. However, access to electricity remains a development constraint alongside reliability of supply. The 2026 Tracking SDG 7 release reports more than 560 million people without electricity in sub-Saharan Africa, using newly available 2023 and 2024 data. Furthermore, the household connections also do not establish whether productive sites receive sufficient power at affordable prices (World Bank, 2026a).

11. Assessment of industrial service should be through available capacity, outage duration, voltage quality, delivered cost and connection lead time. A processing plant can remain uncompetitive despite national supply adequacy if distribution is weak or tariffs and backup costs are high. Grid expansion should be complemented by distributed power where distance or weak networks make a centralized solution slow or expensive. In addition, the commercial value of each technology depends on the production process. Solar can serve daytime loads; storage or other firm supply is needed for operations extending beyond those hours. Hydropower can provide flexibility but may be exposed to drought. Geothermal can contribute dependable generation where commercially developed. Regional procurement should compare complete service packages, including flexibility and network charges, rather than generation prices alone.

Electricity requirements by industrial activity

Activity	Required energy service	Investment implication
Cold chains and food processing	Continuous refrigeration and reliable motors	Reliable feeders and modular backup or storage
Smelting and refining	Large dependable loads and competitive total cost	Firm contracts and reinforced delivery routes
Component manufacturing	Power quality and predictable production schedules	Industrial substations and efficiency services
Digital infrastructure	Continuous supply and rapid recovery	Diverse power sources and secure backup

Analytical classification for this paper rather than measured regional demand estimates.

12. Connectivity planning must also address process heat. Milling and refrigeration primarily require electricity, while some food processing, cement and other industries require substantial thermal energy. Electrification,

efficient boilers, biomass residues or other fuels should be appraised by process. A power-pooling strategy cannot resolve every industrial energy constraint. The priority is to connect resource development to realistic industrial loads while protecting access objectives. Governments should pair anchor investments with local distribution plans, efficiency programmes and transparent public-service funding. Regional resource sharing can improve system adequacy; productive last-mile supply determines whether that improvement reaches manufacturers and rural processors.

4 Power pooling and the present scale of trade

13. The Eastern African Power Pool and the Southern African Power pool are the two power pooling arrangements in the two regions. The SAPP evolved from intergovernmental cooperation established in 1995 to a day-ahead market in December 2009. Its market architecture accommodates bilateral contracts and competitive trading. The bilateral contracts can provide price and revenue certainty for investment; shorter-term markets allow participants to rebalance positions and use available supply. Neither instrument can overcome a physically constrained network (SAPP, n.d.-a, n.d.-b). The SAPP lists 24 member organisations (SAPP, n.d.-a). In the first quarter of 2024, the nine countries with utilities classified as operating members of the SAPP had a combined installed generation capacity of 70,869 MW (SADC, Table 5).

14. The EAPP was established in 2005 and has developed interconnections and bilateral exchanges while strengthening common market institutions. The June 2026 RETRADE-EA announcement supports its day-ahead market, planning, operations and regulatory harmonization. The EAPP has 13 member countries (EAPP, n.d.).

15. The evidence establishes meaningful trade but requires careful comparison. SAPP's April 2025 report records 776 GWh of competitive-market trade and 9,961 GWh of bilateral trade in FY2024/25. These total 10,737 GWh, of which bilateral transactions account for approximately 92.8 per cent. They do not measure industrial consumption (SAPP, 2025, p. 4).

16. For Eastern Africa, the independent evaluation of the Ethiopia–Kenya Electricity Highway records 1,008 GWh exported in FY2024. At that stage transfers were restricted to 200 MW pending network stabilization, despite a 2,000 MW design rating (AfDB, 2012). The documented case demonstrates the importance of receiving-system readiness. It is a dated project observation, not a claim about the current transfer limit or total EAPP trade (World Bank IEG, 2025, p. 7).

17. In August 2026 SAPP reported 191.20 GWh traded through its competitive markets and said central-corridor constraints prevented 33 per cent of matched bids from trading. The latter is a bid-based measure and cannot be restated as 33 per cent of traded energy or industrial demand (SAPP, 2026). These observations justify a differentiated agenda. SAPP should increase deliverability, access and market liquidity within an existing trading system. EAPP should complete the operational, commercial and regulatory foundations for broader multilateral exchange while expanding useful bilateral trade. Both need utility payment discipline, credible metering and enforceable transmission access.

18. Cross-pool integration remains a development opportunity rather than a quantified result established here. The sources reviewed do not provide a harmonized ledger of actual transfers between EAPP and SAPP. National

imports, bilateral line flows and pool-market totals cannot be combined into one regional trade figure. The pools should publish consistent annual balances identifying intra-pool and inter-pool exchanges, market category and reporting period. The World Bank projects that annual cross-border electricity trade will exceed 5,000 GWh by 2031 under the Regional Power Trade and Market Project, part of RETRADE-EA (World Bank, 2026b).

5 Linking the two pools through Tanzania and Zambia

19. The Tanzania–Zambia interface offers a practical bridge between Eastern and Southern African electricity systems and their industrial markets. Its value is reciprocal. Southern African buyers could diversify supply during shortages, while Eastern African producers could gain larger markets for their electricity. When conditions reverse, trading arrangements should permit flows in the opposite direction where technically and commercially feasible. Transit countries can earn transparent network revenues and attract processing and logistics activity.

20. The Zambia–Tanzania Interconnector Project on the Zambian side has a total project cost of US$292 million, comprising US$282 million for transmission lines and associated substations and US$10 million for technical assistance and project management support (World Bank, 2024). This operation is financed through grants from IDA, the United Kingdom and the European Union; the amount does not cover the separate investments on the Tanzanian side. The project aims to increase electricity transmission capacity between Zambia and Tanzania and strengthen the connection between the two regional power pools. This is committed project financing described by the financier; it does not establish that cross-pool commercial operation has commenced (World Bank, 2025).

21. Within Eastern Africa, the Ethiopia–Kenya interconnector is operational, and KETRACO reported in December 2024 that the 400 kV Kenya–Tanzania interconnector had been energised (KETRACO, 2024). RETRADE-EA includes the Uganda–Tanzania interconnector and regional institutional support. The World Bank's June 2026 announcement specifies US$250 million in concessional financing for the Ugandan project and an expected 1,000 MW transfer capability. These are approved financing and prospective capacity, rather than observed flows (World Bank, 2026b).

A commercial bridge alongside the physical bridge

22. The relevant system operators and regulators should prepare an inter-pool operating and trading agreement before relying on a seamless market. The system should define secure transfer limits, dispatch coordination, outage information, losses, metering, imbalance responsibility and settlement. In addition, engineering studies should be the basis of synchronization and control requirements; political agreement.

23. Furthermore, transmission pricing should be understandable to stakeholders across jurisdictions. In addition, regulators should publish a method for allocating costs and losses, minimizing duplicate charges and establish rules for firm and interruptible access. Network owners still require adequate cost recovery. Transparent congestion allocation and dispute procedures would reduce the risk that contracted electricity cannot be delivered.

24. The first commercial demonstration should use a manageable number of creditworthy buyers and sellers under existing lawful contracting arrangements. An industrial buyer or utility could procure a defined block of power with agreed delivery hours, transmission rights, payment security and fallback supply. Dispatch and settlement trials should precede wider participation. Results would reveal whether the binding obstacle is physical, operational or contractual. Industrial investment promotion should accompany this initiative to attract other buyers. Tanzania and Zambia could assess processing and logistics locations along their shared corridor, connecting potential investors to firm power offers, fibre providers and customs authorities. Coastal access and larger regional markets improve the proposition, but project appraisal must establish buyers, input supply and transport competitiveness. Infrastructure should follow credible production opportunities while preserving flexibility for future users.

6 Renewable energy integration and resilient industrial supply

25. Clean energy integration presents a commercial opportunity in generation, flexibility and industrial services. Both Eastern and Southern Africa can leverage their vast renewable resources to complement supply. The East African Centre for Renewable Energy and Energy Efficiency (EACREEE) and the SADC Centre for Renewable Energy and Energy Efficiency (SACREEE) could support cooperation between the two subregions on renewable energy and energy efficiency. A larger interconnected system can draw on a wider resource portfolio, share reserves and reduce some balancing needs. IRENA's regional planning work supports coordinated development of renewable resources and transmission; it does not imply that every renewable project will be deliverable or that geographical diversity eliminates common climate risks (IRENA, 2021).

26. Remy and Chattopadhyay (2020) model alternative levels of Eastern African electricity integration and find economic and environmental advantages from stronger coordination. The relevance is methodological: planning generation and trade jointly can produce different investment choices from isolated national planning. Model results depend on assumptions about costs, demand and policy; they should inform updated appraisals rather than be treated as realized savings. The investment opportunity extends beyond additional megawatts. Storage providers, demand-response aggregators, forecasting firms, metering businesses and energy-service companies can help convert variable renewable output into useful industrial supply. Procurement should specify the service required, such as dependable delivery during production hours, reserves or voltage support. Paying separately for justified flexibility can make market signals more useful to investors.

27. Joint planning should stress-test drought affecting multiple hydro systems, extreme weather damaging lines, fuel-price shocks and loss of major interconnectors. Portfolio design should reflect actual resource correlations and network redundancy. Solar and wind can reduce reliance on hydropower, but their contribution to firm supply requires hourly assessment with storage, dispatchable resources and demand flexibility.

28. Digital systems are central to this transition. Weather forecasts and generation forecasts support scheduling; secure telemetry gives operators visibility; supervisory control and data acquisition supports grid operation; advanced meters and settlement systems enable new commercial products. Cybersecurity, time synchronization, backup communications and incident recovery must be included in procurement and operating budgets.

29. Industrial buyers need both price predictability and credible environmental information. Long-term renewable contracts may reduce exposure to some market-price risks, but buyers should assess balancing charges, curtailment, network availability and foreign-currency commitments. Verified electricity attributes and process-emissions data can support customer requirements for lower-carbon products. No automatic price premium should be assumed.

30. The regional supply chain for this investment offers additional industrial opportunities. Utilities and project sponsors should identify items that regional firms can competitively supply, including structural fabrication, cables, maintenance and selected assembly activities. Supplier qualification, testing and predictable procurement pipelines are more useful than unsupported localization targets. Training in protection systems, power electronics and digital operations can expand technical employment. Public support should prioritize measurable additional benefits: more reliable electricity supply, avoided costly backup generation, expanded access or lower emissions. It should not transfer unlimited commercial risk to governments. Transparent procurement and independent appraisal are necessary to keep the clean-energy transition compatible with affordable industrialization.

7 Digital connectivity and investment opportunities

31. The digital infrastructure challenge spans international capacity, national backbones, cross-border fibre, local access, Internet exchange facilities, data services and reliable power. Industrial users require affordability, uptime and redundancy as well as bandwidth. A connection at a border or capital city does not establish adequate service at a processing cluster or rural aggregation centre. Existing private investment demonstrates the potential for regional infrastructure partnerships. In September 2023 Liquid Intelligent Technologies announced Kenya–Ethiopia and Zambia–Malawi fibre routes. The Kenya–Ethiopia link involved cooperation with KETRACO and Ethiopian Electric Power. This provides an example of electricity-sector infrastructure relationships supporting telecommunications connectivity; the operator’s announcement is not an independent measure of industrial impact (Liquid Intelligent Technologies, 2023).

32. The first investment opportunity is competitively supplied regional wholesale capacity. Governments and utilities should assess commercially available fiber and infrastructure-sharing options before subsidizing duplicate construction. Shared ducts, rights of way and optical ground wire on transmission lines can reduce civil-works costs where technically suitable. Contracts need clear access, maintenance, outage and revenue-sharing provisions.

33. The second opportunity is reliable connectivity for productive clusters. Telecommunications operators can aggregate demand from factories, warehouses, border agencies and logistics firms to support commercially viable access networks. Service contracts should specify uptime, restoration times and backup routes. Public co-financing is most defensible where a documented market failure prevents service and a competitive process identifies the minimum support required.

34. The third opportunity is regional data and managed services. Cloud applications, cybersecurity, industrial software and local content caching can serve multiple markets. Data-centre projects require credible customer demand, competitive power and appropriate cooling and water arrangements. Smaller shared or edge facilities

may be more viable than a hyperscale data centre. Investment promotion should compare these options transparently.

35. A fourth investment opportunity is to connect digital trade and payment systems. For a manufacturer selling across borders, reliable connectivity should make it possible to submit shipment documents electronically, track customs clearance and match the buyer's payment to the invoice. On selected trade corridors, customs authorities, banks and technology providers could assess where firms still must re-enter data or reconcile payments manually. This would help identify where investment in links between business software, customs platforms and payment services would be most useful. Section 8 discusses regional initiatives and proposes a pilot to test the process from shipment to payment.

36. Regulatory fragmentation can increase the cost of each opportunity. Authorities should simplify cross-border licensing coordination, publish rights-of-way charges, permit appropriate infrastructure sharing and enforce competition in wholesale access. Spectrum policy should support efficient coverage. Rules on data protection, cybersecurity and cross-border transfers should provide trusted, lawful exchange while avoiding requirements that unnecessarily duplicate facilities.

37. Infrastructure alone will not create productive digitalization. IFC's 2024 study identifies large gaps in firms' use of available technologies and barriers involving cost, skills and finance. South African manufacturing research likewise associates adoption with complementary firm capabilities (IFC, 2024; Avenyo et al., 2024). Policies should support practical applications, such as stock control or quality management, with vendor choice and measurable business benefits. The priority regional offer is therefore a dependable service package: electricity, connectivity, secure applications and cross-border operability. Its commercial success should be tested through firms' willingness to subscribe and continued usage, alongside service quality and changes in transaction or production costs.

8 Digital trade logistics and cross-border payments

38. Digital connectivity creates regional value when transactions can cross borders without being repeatedly reconstructed on paper. The critical functions include customs data exchange, recognized origin and sanitary certificates, cargo tracking, electronic signatures, payments and accessible trade information. Each needs legal recognition, compatible processes and functioning infrastructure at both ends.

39. The 2025 UN Global Survey illustrates the gap between domestic automation and cross-border usability. Mozambique's domestic paperless score of 96.30 per cent contrasts with 33.33 per cent for cross-border paperless measures. Ethiopia records 66.67 and 16.67 per cent. The table below includes Kenya and Zambia for comparison. These are implementation scores, not the share of consignments processed digitally or measured trade-cost reductions (UN Regional Commissions & UNCTAD, 2025).

40. Existing regional programmes provide foundations. In March 2025, SADC listed eight member States that had moved to electronic processing of certificates of origin. As of April 2026, COMESA reported that five member States were implementing its electronic certificate of origin. These are distinct schemes and dates. Their existence does not establish universal recognition between all countries or trade regimes (SADC, 2025; COMESA, n.d.).

41. The AfCFTA Digital Trade Protocol was adopted in February 2024. It provides a continental policy reference, but adoption must be distinguished from entry into force, national implementation and operational arrangements. Participating authorities should use relevant regional and continental instruments to agree document recognition, authentication, data standards, confidentiality and dispute procedures on selected trading routes (African Union, 2024). Commercial opportunities include accredited document-exchange services, shipment visibility, freight matching, trade-compliance software and receivables finance. Public agencies should define interoperable interfaces and allow competitive providers. Shared data should reduce duplicate submissions; it should not require firms to buy access to an exclusive platform.

Economy	**Domestic paperless % (**Paperless trade implementation (%))	**Cross-border paperless % (**Cross-border paperless trade implementation (%))
Ethiopia	66.67	16.67
Kenya	88.89	66.67
Mozambique	96.30	33.33
Zambia	74.07	66.67

Source: UN Global Survey economy profiles for 2025. Categories measure assessed policy implementation.

42. Payments deserve a parallel workstream. PAPSS provides a mechanism for cross-border payments in local currencies through participating institutions. Its use for a corridor depends on actual bank coverage, currency availability, compliance and total transaction cost. It does not remove exchange-rate risk or eliminate all underlying hard-currency settlement needs (PAPSS, n.d.). A practical pilot should follow a complete shipment from order to payment and identify every remaining manual step. Customs, standards and sanitary agencies, banks and traders should jointly test electronic recognition, release and settlement. Measure end-to-end time and rejected documents; digitizing a certificate offers little benefit if another agency still requires the same information on paper. Agencies from Eastern and Southern Africa could jointly review the pilot results to identify which procedures can be replicated and which require adaptation to national legal and technical settings.

9 Mineral processing, batteries and industrial suppliers

43. The Copperbelt offers a concrete case for linking regional electricity procurement to industrial investment. Ivanhoe Mines reported that imported hydropower at Kamoa-Kakula increased from 50 MW in early March 2025 to 100 MW in April through the Zambia–DRC interconnector. Management linked improved power stability to the decision to proceed with smelter commissioning. This is company-reported evidence of an investment-enabling mechanism, rather than a causal estimate of the output attributable to imports (Ivanhoe Mines, 2025).

44. The proposed Kalumbila–Kolwezi interconnector is a possible private investment model. Gridworks announced agreements in October 2026 signalling its intention to become lead equity investor in a roughly 200 km line with capacity of up to 700 MW. Its statement identifies mining demand as an anchor. The

announcement does not establish financial close, construction completion or operating deliveries (Gridworks, 2026).

45. The near-term opportunity is to make existing mineral operations more reliable and competitively extend processing where buyers and production economics justify it. This requires firm delivered power, water, reagents, logistics, maintenance and environmental compliance. Regional supply arrangements can reduce an individual plant's exposure to domestic shortages while creating demand for generation and network investment elsewhere.

46. A second opportunity is industrial supply to the mining and power sectors. Pumps, cables, fabricated structures, protective equipment, repair services, software and selected components offer potential entry points. Industrial agencies and anchor buyers should disclose procurement needs, identify regional suppliers and fund qualification, certification and technical upgrading. Contracts and prompt payment are necessary if smaller firms are to invest.

47. Battery value chains require a staged commercial approach. Mineral extraction, chemical processing, precursor manufacture, cells, packs and recycling are distinct markets. Access to minerals does not confer competitiveness at every stage. Regional studies should compare scale, technology licensing, customer qualification, logistics, power, environmental requirements and long-term purchase commitments before recommending facilities. The reciprocal opportunity is for the Democratic Republic of the Congo (DRC) and Zambia to combine mineral and processing capabilities with engineering, capital, logistics and manufacturing services from other economies. Eastern African firms could compete in services and selected intermediate products where demand is established. Other participating countries could supply equipment, packaging and maintenance. Such opportunities should be tested through procurement data and buyer discussions rather than assumed to be existing trade.

48. Investment promotion should package a complete offer to a prospective processor: a credible supply contract, verified power-delivery route, industrial land and water, trade treatment, standards support and a transparent approval process. Finance should be conditional on a credible buyer and an economically defensible processing stage. Public funding should focus on shared infrastructure and supplier capabilities with wider benefits. Industrial development and investment promotion agencies in the DRC and Zambia, working with mining companies and regional supplier associations, should prepare a Copperbelt investment and procurement prospectus distinguishing operating demand, committed expansions and speculative projects.

10 Agro processing, manufacturing and meaningful access

49. Agro-processing offers a route to regional industrial participation beyond capital-intensive minerals. Dependable electricity can support milling, irrigation equipment, packaging and refrigeration; digital services can coordinate aggregation, traceability, stock management and payment. The investment opportunity is a chain of viable services from producers to regional buyers. Processing capacity without reliable inputs or a market may remain idle. Candidate investments include shared cold stores, modular processing facilities, packaging businesses, efficient equipment leasing and logistics platforms. Their location should reflect crop or livestock supply, demand and transport economics. Renewable mini-grids or captive systems may serve remote clusters sooner than grid extension, subject to national rules and a clear approach to future grid arrival.

50. Connected clusters can link food and agricultural producers in Eastern and Southern Africa with processors, packaging suppliers and distribution networks elsewhere in the region. Product selection should follow market evidence and sanitary requirements. Digital traceability can assist compliance, but recognized laboratory testing, inspection capacity and dependable cold-chain operation remain essential.

51. Regional manufacturing offers additional opportunities in textiles, pharmaceuticals, construction inputs, electrical equipment and components. The practical objective is reliable repeat orders for intermediate products. Industrial agencies should identify specific purchasing opportunities and match suppliers across borders. Common technical specifications and predictable delivery can be more important to a buyer than a general investment incentive.

Making connectivity commercially useful to MSMEs

52. Meaningful connectivity means that smaller firms can afford, understand and safely use services relevant to their businesses. IFC's work on microenterprises finds that availability alone does not explain limited digital use; finance, skills and perceived business value also matter. The study draws on a survey of 3,325 microenterprises across seven African countries, including Kenya, Mozambique, South Africa and Tanzania. Its findings should not be generalised to all countries in the two subregions (IFC, 2023). Industrial and MSME support agencies, working with telecommunications operators, financial service providers and trade authorities, should develop support packages combining shared connectivity, application training, assistance with rules of origin and product standards, access to reliable payments and suitable working capital.

53. Universal-service funds and public access programmes should connect underserved productive locations where commercial rollout is insufficient. Competitive selection, transparent support per beneficiary and independent verification can improve value for money. Assisted channels and offline options should remain available where mandatory digital procedures would otherwise exclude small traders. Women-led enterprises, young entrepreneurs and rural businesses should participate in programme design and monitoring. Indicators should capture actual subscriptions, transaction completion, supplier contracts and retained earnings, disaggregated where feasible. The purpose is sustained participation in regional production and trade. Counting training attendees or network coverage alone would miss that result.

11 A proposed portfolio of productive corridors

54. A manageable portfolio can turn a broad integration ambition into investable opportunities. The proposals below are analytical priorities derived from the resource, market and industrial evidence in this paper. They are not feasibility conclusions or a ranking based on comparable benefit–cost studies. Selection should start with willing countries and identifiable industrial buyers, then expand when delivery is demonstrated.

55. The Tanzania–Zambia bridge should be the central cross-subregional electricity workstream. Industrial demand and logistics around the connected systems should inform reinforcement and digital-service planning. The Copperbelt programme should focus on dependable power and competitive processing, with supplier contracts extending benefits beyond mines and smelters. Trade pilots should connect these investments to real sales and procurement.

56. Within Eastern Africa, Ethiopia–Kenya and the wider links through Tanzania offer opportunities to align power trading with processing and manufacturing demand. Within Southern Africa, existing SAPP routes and industrial supplier networks provide a basis for targeted delivery improvements. Cross-subregional cooperation should connect these programmes through common operating arrangements and compatible trade services.

57. Each proposal should produce a short investment dossier identifying customers, current service constraints, preferred and alternative solutions, required permits, prospective revenue, public benefits and responsible authorities. Expressions of interest can justify initial screening. Project preparation should then assess demand, technical feasibility and commercial viability before construction financing is sought. Industrial promotion agencies should coordinate with infrastructure sponsors before marketing sites to investors. An agreed appraisal should compare an integrated intervention with electricity-only, digital-only and procedural alternatives. Joint construction can reduce some costs, but packaging unrelated investments can obscure weak economics. Projects should be coordinated where services interact while retaining clear accounts and procurement responsibilities.

Proposed programme	Commercial opportunity	First preparation output
Tanzania–Zambia bridge	Regional power contracts and corridor services	Operating and trading framework plus buyer pipeline
Copperbelt production and supply	Processing, power delivery and industrial procurement	Demand prospectus and supplier qualification plan
Connected food and manufacturing clusters	Processing, storage, packaging and logistics	Buyer-led cluster appraisal and service tender
Interoperable trading routes	Document exchange, payment and finance services	End-to-end shipment and payment pilot

Proposals developed for this paper. Country participation and funding require agreement and appraisal.

58. Island and remote economies should participate through trade services, data connectivity, equipment supply and decentralized productive energy where relevant. They should not be assigned mainland transmission solutions simply to achieve geographical coverage. The portfolio should remain open to additional locations that meet the same industrial and commercial criteria.

12 Regulatory and institutional reforms

59. A key institutional challenge is the gap between regional objectives and enforceable national decisions. Power pools coordinate markets and systems, but governments and regulators control important licensing, tariff and access rules. Trade and ICT functions involve other authorities. Implementation should therefore assign specific decisions to existing institutions and use REC mechanisms to resolve cross-border disagreements.

60. National electricity regulators should publish eligibility and approval processes for cross-border contracting and network access, subject to their laws. Transparent wheeling tariffs, loss treatment, capacity allocation and connection timelines can reduce transaction uncertainty. Utility financial recovery requires collection

improvements, loss reduction and credible tariffs, with targeted social support where needed. Industrial competitiveness should be assessed on the complete delivered service.

61. SAPP and EAPP should develop compatible operating arrangements without assuming identical market maturity. Initial priorities are dispatch coordination, metering, settlement, outage planning and emergency protocols. Transmission access rights should be clarified alongside these initial arrangements, while market coupling and balancing arrangements can be developed progressively. Independent oversight and transparent dispute resolution should protect market participants from discriminatory treatment.

62. Emergency rules are particularly important. Governments should agree how scarcity, drought or system failure affects exports, domestic supply and compensation. Credible domestic adequacy planning can reduce the political risk of abrupt restrictions. Contracts should specify curtailment rights and obligations instead of leaving buyers to assume imports will always be available. ICT regulators should coordinate licensing, infrastructure-sharing and cross-border access, while competition authorities address exclusionary practices. Customs and trade authorities should recognize valid electronic records and use compatible data formats. Data-protection and cybersecurity authorities should establish lawful exchange and proportionate safeguards. Digital trust requires enforceable responsibilities as well as technology.

Regional alignment with industrial and continental priorities

63. EAC, COMESA and SADC should connect their industrial priorities to a shared list of productive demands, trading routes and required approvals. Each selected corridor needs one agreed coordination lead and a record of who can authorize each decision. Existing regional structures should be used before creating new bodies. Overlapping membership can support cooperation if agencies agree mutual recognition and avoid duplicate reporting. The initial step should include the harmonization of industrial policies and strategies which invariably also implies cooperation under the AfCFTA.

64. AfSEM offers the continental direction for interconnected electricity markets, while the AfCFTA provides a framework for expanding trade and production opportunities. Neither replaces national energy regulation or automatically grants a firm transmission rights. Electricity-market integration and preferential trade treatment require their own operational and legal instruments (African Union, 2021, 2024). For goods trade, agencies should verify the applicable tariff concession and product-specific rule of origin for each proposed value chain. Regional sourcing does not automatically confer origin, and benefits under different agreements cannot simply be combined. Investment promotion should explain these conditions accurately. Priority reforms should reduce uncertainty for an actual transaction and have an institution accountable for completion.

13 Financing and allocation of investment risk

65. Connectivity investment is constrained by project preparation and risk as well as capital availability. A sound financing strategy distinguishes assets with commercial revenues from shared infrastructure with wider regional benefits and institutional systems that require public budgets. Blended finance should address a defined barrier and demonstrate additionality. For generation and industrial connections, sponsors should establish credible load profiles, secure purchase commitments from buyers and put payment security arrangements in place. Transmission requires clarity on regulated or contractual revenue, access rights,

maintenance and availability. Digital infrastructure needs a competitive market and evidence of customer demand. Institutional investments, including customs interoperability and market supervision, need recurrent funding after initial technical assistance ends.

66. The announced Kalumbila–Kolwezi investor arrangements illustrate a different route involving private equity and proposed debt supported by industrial demand. These cases should guide financing choices without implying that one structure fits every corridor (World Bank, 2025; Gridworks, 2026). Project preparation should fund feasibility, system integration, environmental and social assessment, legal agreements, demand verification and financial modelling. Independent appraisal must compare alternatives and test whether expected industrial benefits depend on other unfunded infrastructure. A line and a processing facility should not each assume that the other will secure finance without coordinated decisions.

Risk	**Primary management route**	**Possible public or DFI role**
Construction and completion	Experienced contractor and sponsor commitments	Preparation support and defined completion conditions
Customer payment	Credit assessment and enforceable security	Targeted credit enhancement where justified
Transmission delivery	Operating agreements and network reinforcement	Shared infrastructure and regulatory coordination
Currency and convertibility	Currency matching and available hedging	Limited risk cover with transparent fiscal exposure
Regulatory and political change	Clear approvals and enforceable contracts	Political-risk cover and cross-border agreements

Recommended allocation principles rather than contractual terms of the projects cited.

67. Currency risk is another challenge in the sector. Electricity or equipment contracts may be denominated in foreign currency while customers earn local currency. Local-currency lending, appropriately priced hedging or indexed contracts may help where available. For eligible cross-border electricity payments, the Pan-African Payment and Settlement System (PAPSS) could help reduce payment-related risks by enabling buyers to pay and sellers to receive funds in their respective local currencies, reducing reliance on intermediary hard-currency conversion. PAPSS combines near-instant payment processing with pre-funding arrangements that require funds to be available before a payment is processed (PAPSS, n.d.). These mechanisms could reduce payment delays and currency-conversion frictions in electricity trade. Any proposed application would require checking the institutions and currencies covered by PAPSS and the payment arrangements applicable to the transactions concerned. Guarantees should be limited to clearly defined obligations.

68. Public support should include disclosure of fiscal commitments and expected beneficiaries. Industrial anchor users may underwrite infrastructure, but exclusive access can prevent wider development. Contracts should provide transparent expansion and third-party access where feasible. Community compensation, land rights and environmental obligations should be resolved early, because delays can undermine the investment schedule and social legitimacy.

14 Implementation responsibilities and milestones

69. The recommended programme should begin through an agreement among participating governments, RECs and the two power pools, supported by private-sector consultation. The timetable below runs from that agreement. It proposes responsibilities for discussion and does not create commitments on behalf of named institutions. Construction milestones must follow approved project schedules.

Within the first six months

70. SAPP, EAPP and system operators should jointly establish the inter-pool technical and commercial workstream, identify recurrent delivery bottlenecks and agree consistent trade definitions. National regulators should identify approval and access gaps. Industrial agencies and business associations should assemble existing loads, credible expansions and supplier opportunities for the proposed corridors. This should produce a short portfolio with named preparation leads.

71. EAC, COMESA and SADC should select trading routes with willing customs and standards authorities and active traders. ICT regulators and operators should assess business connectivity, redundancy and shared infrastructure. The first deliverables should be agreed electronic-document and payment trials, an industrial service baseline and clear decisions on which deficiencies require capital investment.

During months six to eighteen

72. The pools and utilities should test coordinated scheduling, metering and settlement for the initial transactions, subject to system readiness. On the selected trade routes, customs and standards authorities should test whether electronic documents are accepted on both sides of the border, while participating banks and payment providers should test whether traders can complete the corresponding cross-border payments. Private operators should tender or contract commercially viable connectivity and energy services. Industrial agencies should begin supplier qualification against anchor procurement needs.

73. DFIs and project sponsors should complete feasibility and risk allocation for priority assets. Participating governments should resolve cost sharing, permissions and public obligations. Financing decisions should follow documented appraisal and not be conditional on an unsupported forecast of new industries. UNECA can convene policy dialogue, support comparative analysis and help review whether the portfolio addresses industrial needs.

Actor	Priority responsibility	Reviewable output
Power pools and system operators	Delivery and market coordination	Operating protocol and trade-performance report
Member States and regulators	Approvals and sustainable access rules	Published decisions and agreed cost recovery
EAC, COMESA and SADC	Industrial and trade coordination	Joint corridor plan and recognition arrangements

Actor	Priority responsibility	Reviewable output
Private firms and financiers	Investment and service delivery	Offtake contracts and appraised finance proposals
UNECA and knowledge partners	Analysis and policy dialogue	Comparative progress review and lessons

During months eighteen to thirty-six and thereafter

74. Implementation should focus on financed investments, expanded participation and transparent performance reporting. Projects that fail the commercial or economic appraisal should be redesigned or removed. Operational reforms should continue even when major infrastructure takes longer. Successful pilots should expand only after service reliability, user uptake and recurrent funding are demonstrated.

15 Measuring results and decisions for regional dialogue

75. The programme should be judged by the industrial and trading services it delivers and the investments those services support. A baseline is necessary, but data collection should accompany action rather than postpone operational improvements. Indicators should distinguish asset completion, usable service and industrial response. The table identifies a limited core suitable for the proposed portfolio.

76. Measurement should follow the actual supply route. A factory can experience outages despite increased regional trade, and a shipment can face delays despite electronic certificate issuance. Utilities and agencies should combine operational records with participating-firm information, using confidentiality safeguards. Report geographic coverage, dates and sample definitions so that results can be interpreted correctly.

77. Industrial monitoring should distinguish retained production, expanded output and new investment. Reduced backup costs and more predictable deliveries can be valuable before a new factory opens. Where feasible, compare participating firms or routes with suitable non-participants and record other changes affecting results. Company statements should be identified as such; programme targets should remain distinct from measured outcomes.

Decisions proposed for expert discussion

78. The first decision is whether to pursue a joint portfolio centred on the Tanzania–Zambia power bridge, Copperbelt processing and suppliers, connected production clusters and interoperable trading routes. The second is to nominate preparation leads and secure a limited budget for feasibility, contractual design and pilot implementation. The third is to agree on common reporting indicators for electricity delivery, digital service quality, cross-border trade and payments, and industrial participation.

Result	Indicator	Suggested evidence owner
Dependable electricity	Delivered firm GWh and industrial outage hours	Utilities operators and industrial users

Result	Indicator	Suggested evidence owner
Usable digital access	Uptime restoration time and business service cost	Operators regulators and firms
Efficient regional transactions	Customs clearance time and cross-border payment completion time, measured separately for the same shipments.	Customs banks and traders
Industrial participation	Processing output supplier contracts and MSME sales	Industry agencies and business associations
Investment mobilization	Financial close and commissioned service	Sponsors and financiers

Set numerical targets only after corridor baselines and participating institutions are agreed.

79. The strategic choice is to use regional integration to make more production commercially viable across borders. Electricity-exporting economies can gain revenue and related services; industrial economies can improve supply security and supplier markets; smaller firms can gain contracts and access to buyers. *Achieving those reciprocal gains requires coordination of infrastructure, regulation and investment around identifiable production and trade opportunities.*

80. The issues paper provides a basis for that decision. Further engineering and commercial work is required before financing individual assets, but the evidence already supports stronger operating cooperation, electronic-document recognition, competitive connectivity and deliberate supplier development. Those measures can proceed while longer-term infrastructure is prepared.

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