

Key Messages from the GTF Africa Report

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Introduction

Geographical region has less impact on energy supply and demand patterns = exception may be North Africa



- Eastern
- Western
- Southern
- Central

Income category of countries more relevant and should be focus of analysis

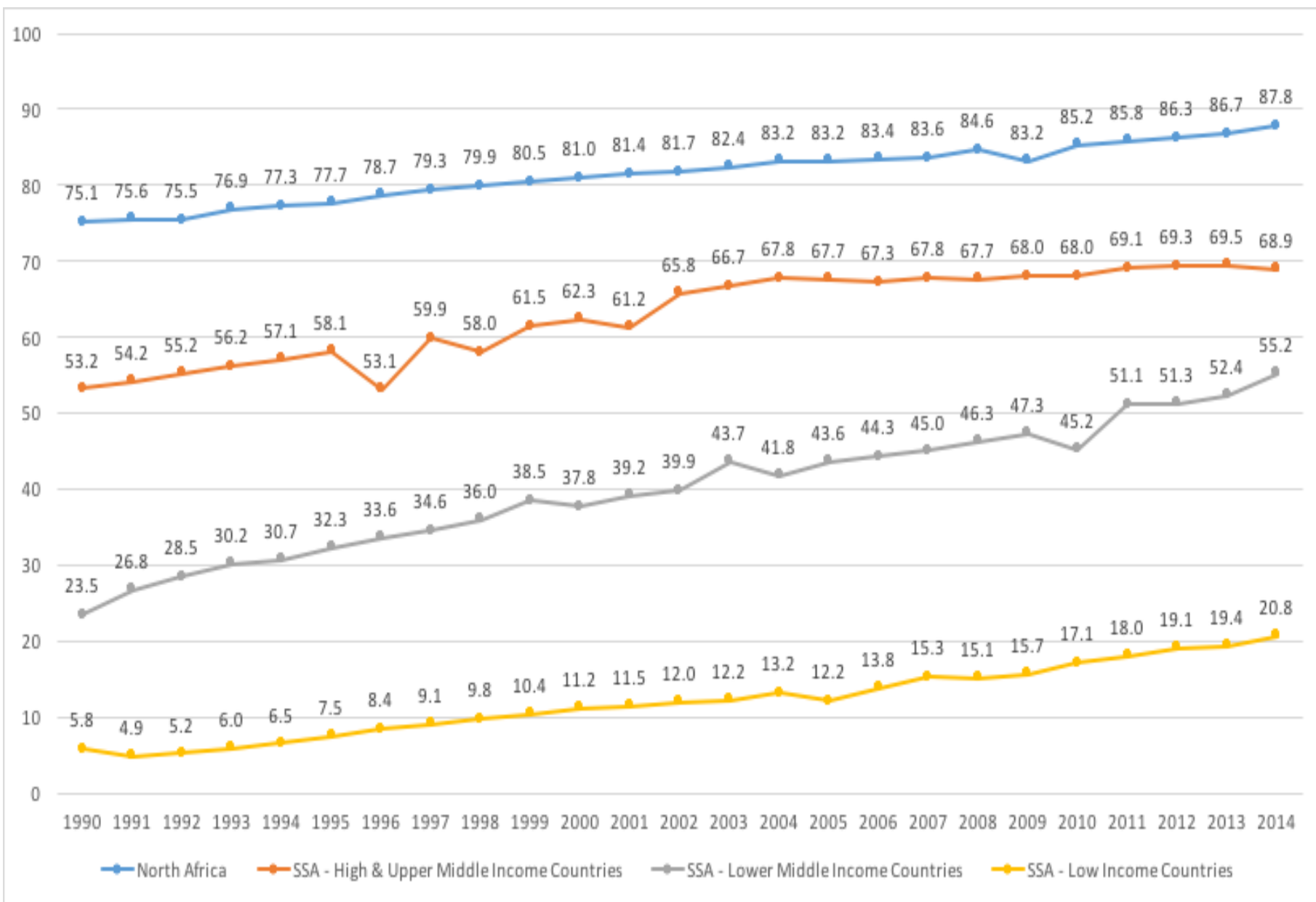


1. North Africa (7)
2. Upper & High Income Countries (8)
3. Low Middle Income Countries (13)
4. **Low Income Countries (26)**

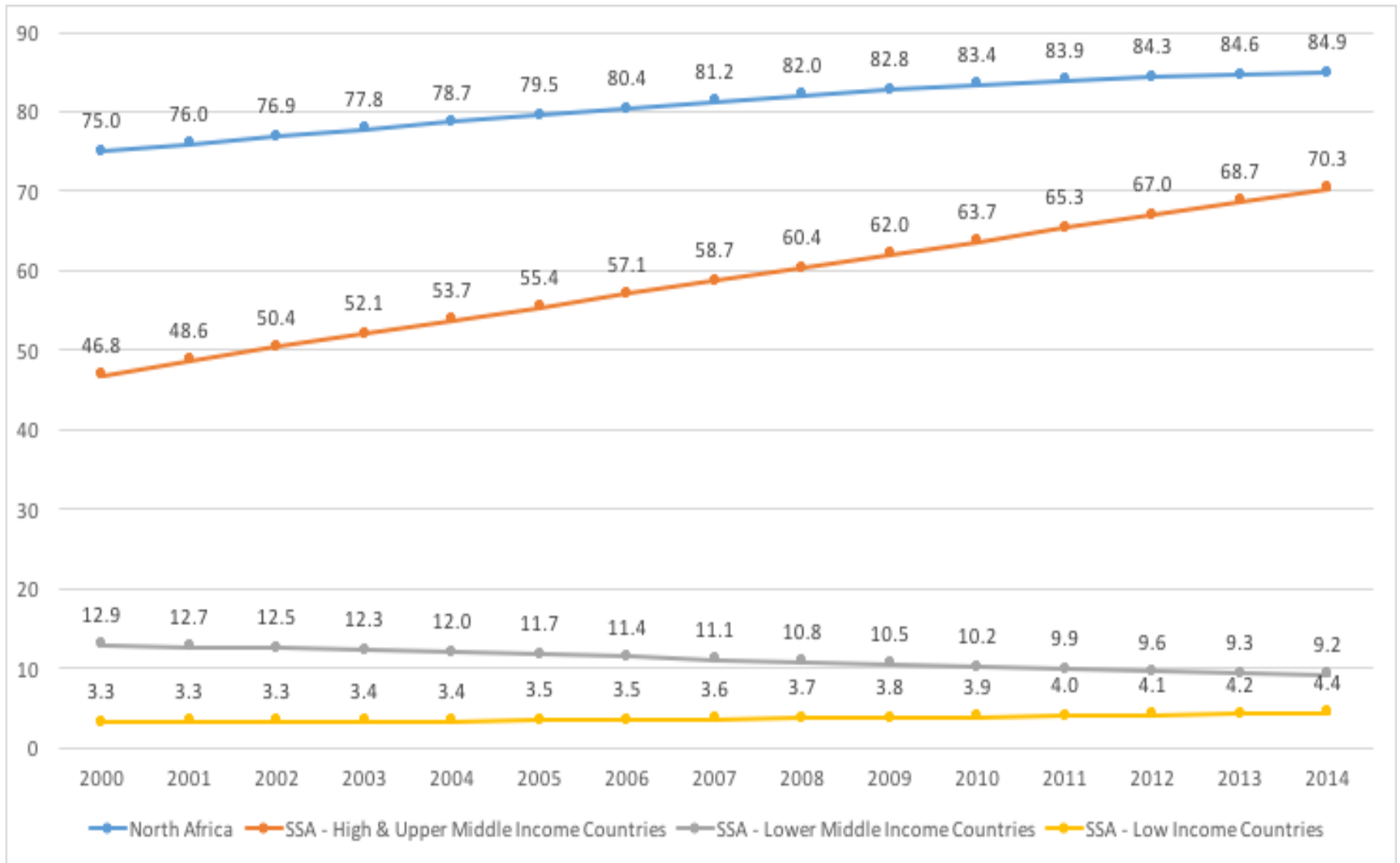
Message 1: Africa is not homogeneous

	Upper/High	Low Middle	Low
Policies	Robust policies	Uneven	Weak
Implement rate	Programmatic	Uneven urban focus	Plans but less
P/S Participation	Incentives	Less	Government strong
Technical Expertise	High	Potential	Weak institutions
Local Investment	Larger fiscus on energy	Some but different priorities	Resource constraints
Energy Access	70-100%	30-50%	<30%

Share of population (%) with access to electricity, by sub-region, 1990-2014



Share of population (%) using Clean Fuels and Technologies, by sub-region, 1990-2014



Message 2: Very few countries will reach access target by 2030



More than half of Africa will not reach 50% by 2030 for both electrification and clean cooking fuels

- Electrification lags behind population growth and urbanisation rate in many countries
- Slowing of electrification in 2012-2014 – growing deficits & power shortages in South Africa
- The rural electrification challenge -- access is 27.3% (14.6% in 1990)
- The urban bias of energy policy and discourse
- Biomass-based rural energy economy & focus on clean burning cooking fuels
- Donor-driven rural “energization” programme and lack of sustainability

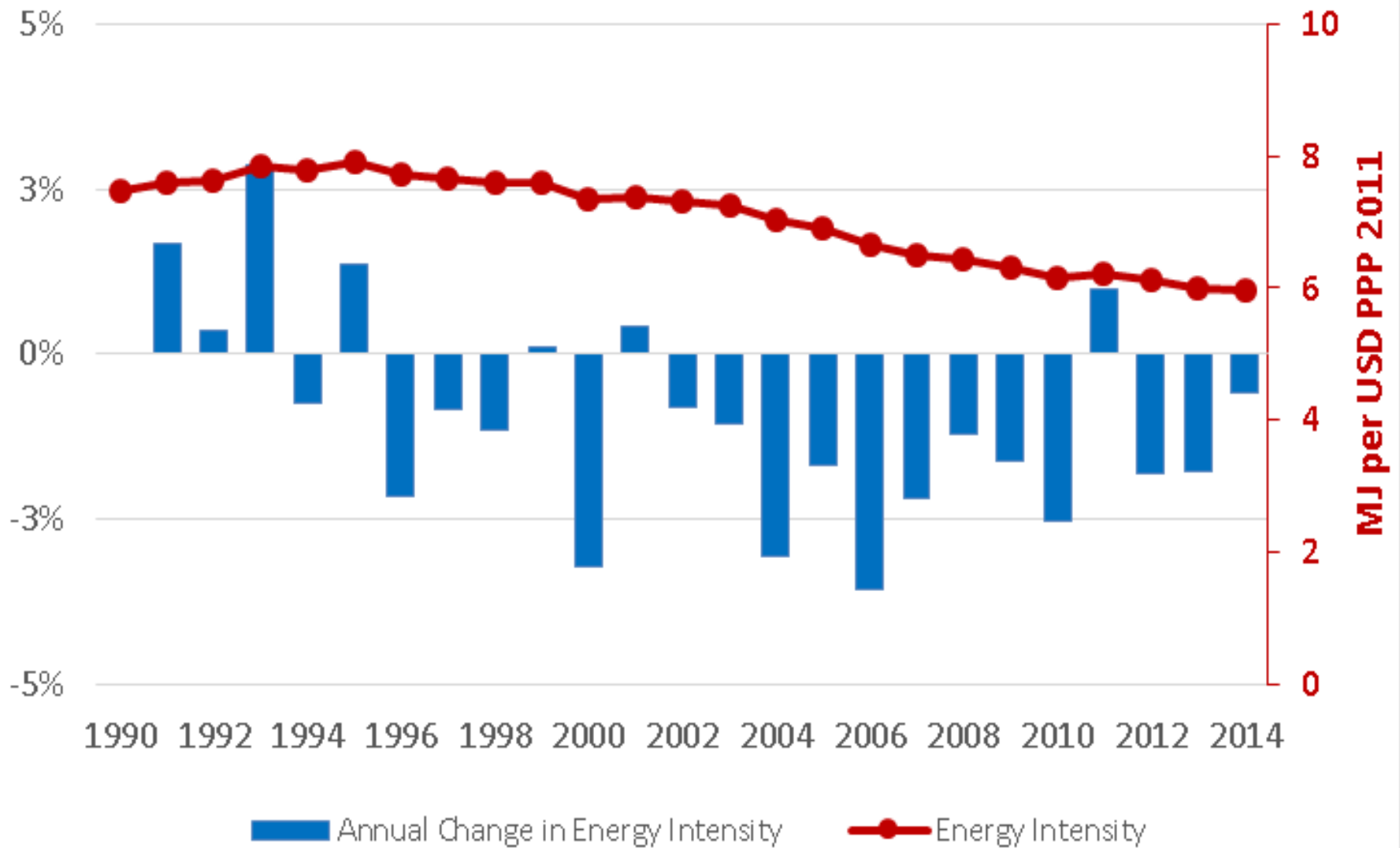
Message 3: Focus on energy efficiency is not a major priority



Countries' policies and strategies on increasing energy (power) – increasing generation capacity and grid networks

- Little generation capacity vs abundant resource, e.g. hydro & geothermal – $\frac{3}{4}$ of generated capacity in few countries
- Demand-side management by utilities to deal with power shortages & grid stability than strategic choice
- Large use of traditional biomass (70%) not amendable to efficiency gains & may not fall under ministries responsible for energy
- Energy intensity reaction to external drivers, such as commodities use, available electricity, etc.,
- Difficult to track intensity as poorly recorded or no specific policies and actions to accurately measure

Energy Intensity



Message 4: RE in energy mix is complex: Share of RE in TFEC highest at 57%



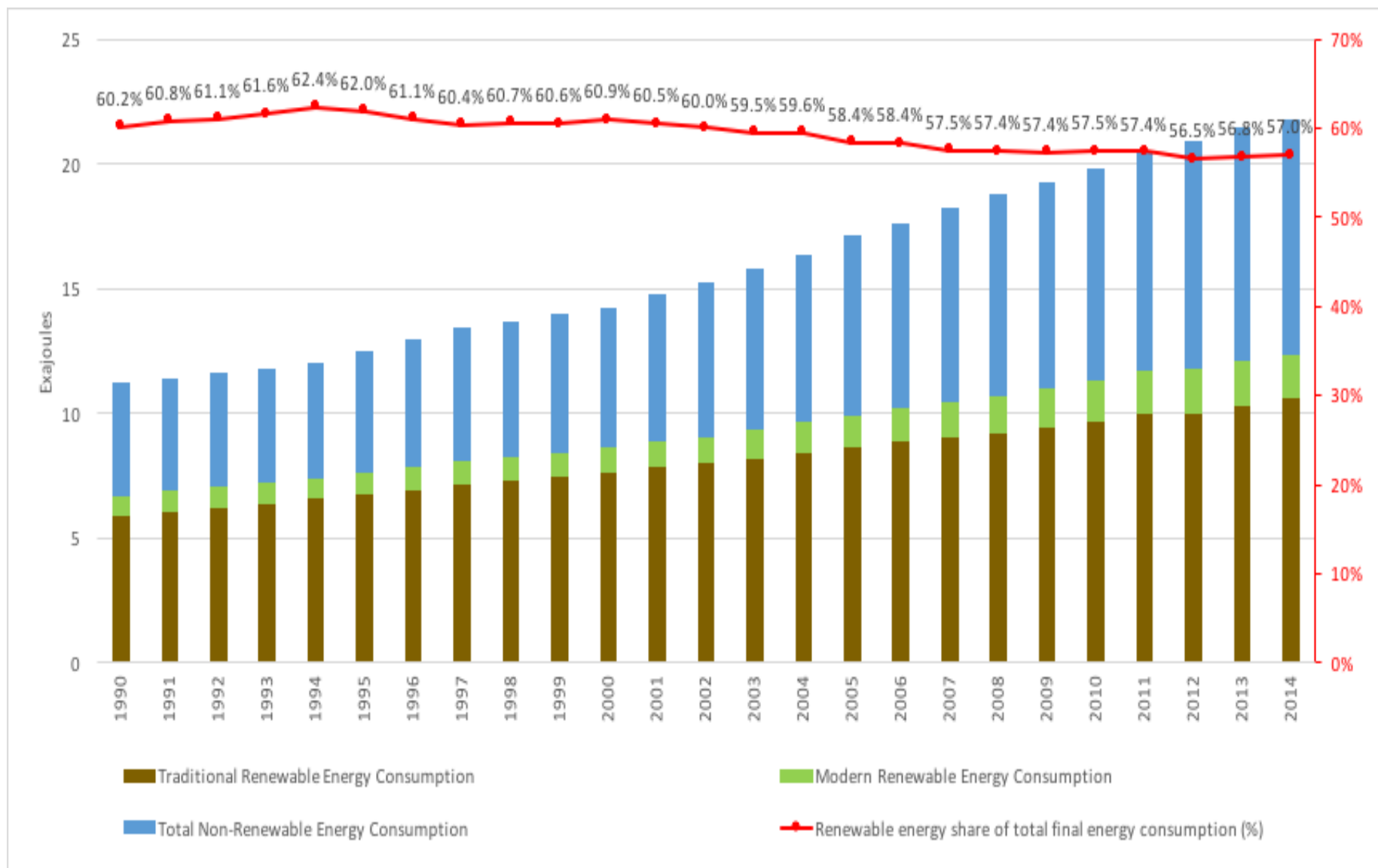
Major driver of RE is traditional biomass for household and commercial sectors

- Income status of countries play a huge role – LMICs & LICs have the greatest share (60-70%)
- UHICs investing in modern renewables e.g. solar and wind
- Many hydropower schemes currently in development across sub-regions – may have impact in future tracking periods



Is traditional biomass a renewable source, especially in its current use?
Are large hydropower projects renewable?

Share of renewable energy consumption in TREC in the Africa region, 1990-2014



Message 5: There are enabling policies & institutions emerging



Policy environment is conducive for increase energy access in all countries in the context of centrality of energy for Africa structural transformation and led by continental institutions

- Programme for Infrastructure Development in Africa (PIDA)
- Dedicated regional institutions for RE and EE set up
- Country Action Agendas and Investment Prospectus to eat the goals of SE4All
- **>70% countries have dedicated rural electrification agencies/units**
- **60% have energy regulators**
- **70% have energy access targets**
- **60% have RE targets**

The way forward

GTF reporting provided critical information since 1990, but crucial energy data is incomplete and may be unreliable

- Agree on data collection tools/templates & mobilize necessary resources for training
- Conduct baseline studies per agreed frequency
- Data verification and validation
- Credible data platforms as sources of data for future tracking

Revision of certain indicators needed

- ✓ For elec. Include min levels of consumption & reliability of supply
- ✓ EE to contain improvements in supply losses, reliability of supply & DSM

Tracking to provide recommendations than to POLICE progress



more info: www.uneca.org