

Africa Did Not Inherit a Connectivity Gap. It Inherited a Connectivity Design.

The next phase of African integration will depend not only on building more infrastructure, but on redesigning the systems that determine how people, goods, capital, and opportunity move across the continent.

The problem with Africa's infrastructure is not only that there is too little of it. It is also what much of it was built to do, and that purpose still shapes every road, rail line, and flight path on the continent today.

Coverage: **Continental** | Focus: **Infrastructure, Trade, Policy**

Analytical Basis: Based on the Mo Ibrahim Foundation's May 2026 report, *Africa on the Move: Boosting Mobility and Connectivity*, this Panadia Intelligence piece interprets what Africa's mobility and connectivity gaps reveal about the next phase of continental integration.

When people talk about Africa's infrastructure deficit, they tend to frame it as a funding problem. Not enough capital, not enough construction, not enough roads and runways. The solution, in this framing, is investment: more money, more projects, more kilometres of rail.

That framing is not wrong. But it is incomplete. And the part it misses matters more than the part it captures.

Africa's infrastructure was not designed to connect Africans to each other. It was designed to connect African resources to the outside world. Roads ran from mines to ports. Railways

moved commodities toward coastlines. Air routes were oriented outward: to European hubs, to Gulf connectors, to anywhere but across the continent itself. That was the logic of an extraction economy, and much of the continent's infrastructure still carries that imprint.

The extraction economy is formally over. But its infrastructure is not. And Africa is now trying to build a continental single market, the AfCFTA, the most ambitious trade agreement in modern history, on top of a physical system that was never designed for the task.

Travel between Kinshasa and Marrakech, two capitals of major economies, takes up to 20 hours, costs over \$1,000, and requires layovers outside Africa entirely.

This is not only a symptom of underdevelopment. It is also the legacy of a deliberate design. Understanding that distinction changes how the solutions need to be framed and who bears responsibility for building them.

40-60% Higher cost of intra-African air travel compared to equivalent European routes	22% Of Africans travelling between two African cities must transit through a non-African hub	18% Current share of intra-African trade, against a potential 53% under full AfCFTA implementation
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Source: Mo Ibrahim Foundation, *Africa on the Move: Boosting Mobility and Connectivity*, May 2026; AFRAA African Airlines Association Annual Report 2025.

The three layers of immobility

Africa's mobility problem is not one problem. It is three problems operating simultaneously, each reinforcing the other.

The first is physical. Roads are discontinuous. Railways use incompatible gauges and were built to serve individual colonies, not continental corridors. Air routes are still predominantly outbound: flying from Lagos to Nairobi often routes through Istanbul or Dubai, adding hours and cost to a journey that should take two. At least 13 African countries, home to roughly 17% of the continent's population, have no direct rail access to a seaport at all.

The second is regulatory. Only 28% of African citizens can travel to another African country without first obtaining a visa. The African Union's Free Movement of Persons Protocol, adopted in 2018, has been ratified by just four countries. The African passport, launched at a summit in Kigali a decade ago, remains largely symbolic. Meanwhile, goods face a thicket of non-tariff barriers at every border: different standards, different certification bodies, different labelling

requirements, different sanitary rules. The physical distance between two cities is often less of a barrier than the paperwork required to cross the border between them.

WHAT THE NUMBERS OBSCURE

Africa loses approximately \$5 billion a year simply to currency conversion costs: the price of a continent whose trade still requires routing through the US dollar or euro even when two African counterparties are dealing directly with each other. The Pan-African Payment and Settlement System (PAPSS) was designed to address this. Launched in 2022, it allows transactions to settle in local currencies. It is a serious structural fix. But adoption remains uneven, and most of the loss continues.

The third layer is economic. Because connectivity is so poor, the costs of doing business across African borders remain high, and those high costs deter the investment in routes, logistics, and supply chains that would bring costs down. It is a circular constraint. Poor connectivity raises costs. High costs reduce demand. Low demand reduces investment in connectivity. The circle closes.

What the numbers actually show

A journey between Johannesburg and Mombasa, roughly 2,700 kilometres, takes between 4 and 12 hours by air, costs up to \$750 return, and typically requires a connection. A comparable distance in Europe, say London to Athens, costs around \$200 and takes under four hours direct. The gap is not a matter of geography. It is a matter of infrastructure architecture and market structure.

	Johannesburg to Mombasa (~2,700 km)	London to Athens (~2,400 km)
Air time	4 to 12 hours	3.5 to 4 hours
Return cost	\$450 to \$750	\$80 to \$200
Rail option	None	2 to 3 days (continuous network)
Layovers	Nairobi, Addis Ababa	None

Source: Mo Ibrahim Foundation, Africa on the Move: Boosting Mobility and Connectivity, May 2026. Route pricing based on publicly available fare data, April 2026.

African air traffic is growing fast. Passenger numbers rose 15% in 2024, and the market is projected to double by 2044. Ethiopian Airlines has become a genuine continental success story, carrying more than 17 million passengers and operating 170 aircraft while generating \$4.4 billion in revenue in the first half of the 2025-2026 financial year. These are not small numbers. The sector has real momentum.

But momentum is not the same as transformation. Intra-African flights still account for only around 2% of global air traffic, while the continent holds nearly 18% of the world's population. The Single African Air Transport Market, meant to liberalise continental aviation, has been agreed in principle by all 54 AU member states but fully ratified by only 38. The gap between agreement and implementation is itself a structural problem.

The geopolitics of who is building what

External actors have noticed Africa's infrastructure gap, and they are moving to fill it. But they are doing so on their own terms and toward their own ends.

China has financed or built roughly one in five infrastructure projects on the continent over the past two decades, delivering 30,000 kilometres of roads, 2,000 kilometres of railways, and around 20,000 megawatts of power capacity. Fifty-three of 54 African countries have signed memoranda of understanding with Beijing under the Belt and Road Initiative. The scale is extraordinary.

But the design logic of much of that investment echoes an older pattern: outbound infrastructure, connecting extraction points to ports, optimised for moving critical minerals toward Chinese manufacturers rather than connecting African cities to each other. The Mombasa-Nairobi Standard Gauge Railway is a genuine piece of modern transport infrastructure. It also services a corridor from a port toward an interior, the same directional logic that has governed African infrastructure for over a century.

The European Union's Global Gateway initiative represents a different approach, at least in stated intent. Its 55 strategic corridors across the continent, 12 identified as priority corridors, are designed with what the EU calls an integrated approach, combining hard infrastructure investment with support for value chains, trade facilitation, and renewable energy. The Lobito Corridor, connecting Angola's Atlantic coast to the copper-rich Katanga province in the DRC and the Zambian Copperbelt, is the clearest example: a genuinely transformative piece of logistics infrastructure that has attracted US, EU, and multilateral financing simultaneously.

THE LOBITO SIGNAL

The Lobito Corridor is the most strategically watched infrastructure project on the continent right now, not because of its engineering, but because of what it represents geopolitically. The US Development Finance Corporation has committed \$553 million. The EU has mobilised over 2 billion euros. It is, in effect, a Western counter-move to Chinese infrastructure dominance, executed through a project that also happens to make genuine economic sense for the region. Whether it becomes a template or a one-off will say a great deal about how external actors engage with African infrastructure over the next decade.

The deeper risk is that Africa's infrastructure future continues to be shaped primarily by what external powers need from the continent rather than what Africans need from each other. African policymakers understand this tension. The AfCFTA is in part a structural response to it: an attempt to build the institutional architecture for intra-African trade before external dependencies become permanent. The question is whether the physical infrastructure can catch up fast enough to make that architecture meaningful.

What actually needs to change

The solutions to Africa's mobility problem are not mysterious. They are known, they are documented, and in many cases they are already being pursued. The challenge is speed, sequencing, and political will.

On physical infrastructure, the AU's PIDA-PAP2 programme identifies 69 ongoing projects worth approximately \$125 billion, with transport accounting for the largest share. The Lobito Corridor, the Standard Gauge Railway extensions in East Africa, and the planned rail loops in West Africa represent genuine progress. But 25 of those 69 projects are still in the feasibility stage. Only three are in active construction. The gap between plan and implementation is measured in years, sometimes decades.

On regulatory barriers, the arithmetic is simple and revealing. The Free Movement of Persons Protocol needs 15 ratifications to enter into force. It currently has four. The AU passport has been formally launched at summits three times. It remains unavailable to ordinary Africans. These are not technical failures. They are political ones, driven by security concerns, sovereignty anxieties, domestic political pressures, and the persistent fear among stronger economies that open borders benefit their neighbours more than themselves.

On financial infrastructure, PAPSS is the right instrument, but it needs adoption at scale to work. The digital payments economy across Africa is projected to reach \$1.5 trillion by 2030. The payment rails that carry that volume will matter strategically, especially if they are African-

owned, African-operated, and less dependent on external correspondent banking systems. This is achievable. It requires political commitment from central banks and finance ministries, not just technical development.

The question is not whether Africa can build the infrastructure for a continental market. It is whether Africa can build it fast enough, and on its own terms, before the window closes.

The window matters because the external pressure is real. The expiry of AGOA in September 2025 removed the preferential trade framework that had governed US-Africa commercial relations for over two decades. US tariffs under the current administration are volatile and often punitive. China's infrastructure engagement is slowing: annual lending to Africa roughly halved in 2024. The geopolitical moment is creating both pressure and opportunity for African countries to accelerate continental integration rather than continue depending on relationships with large external partners that have repeatedly proven unreliable.

What to watch

These are the indicators that will signal whether Africa's mobility and integration trajectory is moving in the right direction or stalling.

FMPP ratifications: The Free Movement of Persons Protocol requires 15 ratifications to enter into force. It currently has four. Any new ratification, particularly from a larger economy such as Nigeria, Ethiopia, or South Africa, would be a meaningful signal of political will.

PAPSS adoption: Watch the number of central banks and commercial banks joining the Pan-African Payment and Settlement System. Growth in PAPSS transaction volumes will indicate whether the continent is reducing its dependence on dollar and euro clearing for intra-African trade.

Lobito Corridor milestones: The corridor's 830-kilometre greenfield extension into the DRC and Zambia is the most strategically significant infrastructure project currently underway. Progress on cross-border land agreements, funding close, and construction timelines will indicate whether the project delivers on its potential or becomes another long-delayed headline.

SAATM implementation: The Single African Air Transport Market has 54 signatories but only 38 ratifications. New ratifications, and more importantly the opening of new direct intra-African routes, will show whether liberalisation is moving from paper to practice.

AfCFTA trade volumes: Intra-African trade currently sits at around 18% of the continent's total trade. Any sustained movement toward the AfCFTA's target of 53% will require physical infrastructure, regulatory harmonisation, and payment systems to converge. The pace of that convergence is the clearest measure of whether continental integration is real or aspirational.

The strategic read

Africa is not short of ambition on this question. The AfCFTA is a serious agreement. The PIDA programme is a serious infrastructure framework. PAPSS is a serious financial architecture. The AU passport and the Free Movement Protocol are serious legal instruments.

What is in short supply is the political discipline to implement agreements already made. The infrastructure gap is real, but it is at least being addressed with money. The regulatory and political gaps are larger, and they are not being addressed with comparable urgency.

For decision-makers tracking Africa's trajectory, the mobility deficit is the clearest indicator of where continental integration actually stands, not in its aspirations, but in its daily reality. Every flight that routes through Istanbul. Every visa queue at a border between two African neighbours. Every container delayed by paperwork standards that differ across borders reflects the practical cost of fragmentation. These are the concrete costs paid by African businesses and African people every day.

The continent that builds genuine continental connectivity, not outbound, not extractive, but lateral and integrative, will unlock an economic logic that the current infrastructure cannot support. That is the transformation that is actually at stake.

Infrastructure | Trade and Logistics | AfCFTA | Regional Integration | Geopolitics | Policy and Governance | Capital and Investment

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